Chapter 18
Mobile Games in China:
Formation, Ferment, and Future

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ABSTRACT

This chapter presents a critical analysis of China's nascent but fast-evolving mobile game market. Through a penetrating examination of the historical evolution of the market from the late 1990s to the dawn of the 3G era, it offers insight on the changing dynamics of interplay as well as major trends of concentration and internationalization among key sectors of the Chinese mobile market structure. By casting findings in the comparative lenses of major global mobile markets in the United States, Japan and South Korea, the chapter contributes to an in-depth understanding of the universalizing features and the peculiarities of China's mobile games and gamers.

INTRODUCTION

China boasts the largest mobile market in the world. According to official statistic from the Ministry of Industry and Information Technology (MIIT), the number of cell phone users exceeded 756 million as of January 2010,[1] and it is expected to maintain its track of fast growth in the coming years. Meanwhile, three years after the formal announcement of TD-SCDMA as the national 3G mobile standard in 2006, and one year after the commercial trial run in over a dozen major cities

across the country, China Mobile Limited (CML) formally started its commercial 3G services to users in most areas in China in early 2009, and its competitor, China United Network Communications Group Co. Ltd (China Unicom), followed suit in October 2009. As of February 2010, MIIT reports that the 3G user base reached 160 million (with 1.5 million additions in the month of February alone).[2] Against this backdrop of the latest 3G upgrade is the much-publicized anticipation of the blossoming of a variety of 3G-based applications and platforms to the world's largest user base thereafter. One hot area of global attention is the fledgling but fast-evolving field of mobile gaming.

The Asia-Pacific region, spearheaded by powerhouses such as Japan, South Korea and China, has been the undisputable global hub of online video game production, circulation and consumption (Hjorth & Chan, 2009; McLelland, 2007). In the array of expanding mobile applications and services from text and multimedia messaging to display advertising to gaming, Asia-Pacific has been consistently projected to the world's leading market for the near future by industrial research services such as JupiterResearch[3] and BuddeComm[4] in their data-driven analysis and trend studies. Although China lags behind many countries in the rate of penetration by a variety of emerging m-services (i.e., mobile services) in the country, its absolute size of mobile population puts it far ahead of the rest of the world, and the trajectory of growth shows strong signs of accentuation in the forthcoming years. Specifically, Analysys International, a leading advisor of technology, media and telecom (TMT) industries in China, reports that China's mobile game market size reached RMB ¥383 million and ¥526 million for the first and second quarters of 2009, registering a revenue growth of 32.4% and 21.3% over the previous quarters respectively.[5]

The youth-driven cultures of mobility rendered by the widespread use of variegated cellphone-based applications and content are well on the path to (re)shape the social, cultural, and political landscapes across the globe (Castells, 2007; Goggin, 2006; Ling & Donner, 2009). At the same time, however, the "socio-cultural differences and contextual specificities" of online gaming cultures tend to be neglected by prevalent scholarships (Hjorth & Chan, 2009; p. 4). As the "next big thing" on the horizon, mobile games are destined to be a pivotal driver in China's ongoing telecommunications revolution and in redefining China's burgeoning technospaces. Nonetheless, as McLelland (2007) astutely observes, academic discussions of mobile communication have been marked by the primacy of European/North American models, and the particularities of the Asia-Pacific region tend to be elided or neglected. In a similar vein, there is an unfortunate dearth of scholarly attention to (both online and mobile) network games as well as the shifting dynamics of the gameplay culture in China. With this in mind, this chapter offers a critical, in-depth overview of the fast-changing and exploding mobile gaming industry in China in the broader context of globalization and convergence. Specifically, it analyzes the burgeoning mobile game culture as exemplified in player data, use patterns, gamer attitudes and content genres by integrating results from recent surveys and industrial reports, and then looks at the evolving gaming platforms as manifested in popular technologies and applications developed both in and outside of China. This is followed by an analysis of the evolving market structure, the official regulatory framework, and emerging trends of industry concentration as well as interplay of domestic and global corporations on multiple fronts.

BACKGROUND: THE BUSINESS AND CULTURE OF MOBILE GAMES

Proliferating mobile technologies have profoundly transformed every aspect of daily life. Many rich veins of inquiry, however, are yet to be explored among the global community of social scientists (Katz, 2006; 2007). As a "taken-for-granted aspect of everyday life" (Ling & Donner, 2009, p. 143), mobile communication has engendered a particular type of "mobile logic" enmeshed in the routine fabrics of daily socio-cultural experiences of billions of interconnected individuals. Ling and Donner (2004) note that this mobile logic has three distinct attributes: ubiquitous and widespread access, individual addressability, and the ability to interlace interactions (i.e., the intertwining and coordinating of multiple activities involving interactions with different parties at the same time). Likewise, in their comparative study of mobile media usage in Europe, North America

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