



Djuzz
Mobile Gaming
Metrics

March 2010

Key Findings

1. **High Demand** - the increased number of visitors to the Djuzz portal (53%) and the increased number of games downloaded (86%), reflects the continued global demand for mobile gaming content. To effectively meet this demand and provide high quality games, it is important that the mobile gaming community focuses on improving the distribution platform
2. **Seasonal variation** - Arcade, Action & Adventure and Racing categories continue to dominate the top spots but the absence in March of the Dating & Lifestyle category suggests a seasonal variation in preferences. BuzzCity will be observing upcoming sports events such as the 2010 FIFA World Cup 2010, as well as other events with known seasonal themes, to compile a more in depth report on seasonal variation in the gaming community
3. **Nokia dominance** - Nokia continues to dominate mobile internet usage, particularly for consumption of games content. Samsung is a distant but consistent second



Overview

1. Djuzz is a free mobile games portal aimed at offering a rich variety of entertainment to the mobile user.
2. Djuzz is designed to deliver games typically built on Java, Symbian, Windows Mobile, Android, Flash and BlackBerry to all feature phones and phone brands. The portal recognizes and delivers games for more than 1,000 mobile handsets.
3. Djuzz enjoys the distribution strength of BuzzCity's portfolio of mobile services and in turn offers our partners diversified distribution.
4. This monthly summary tracks the usage of Djuzz through the download of games from the portal. Future reports will include browser based games and other applications deployed via the portal.
5. By extension this and subsequent reports will reflect the development of the free games market in the mobile internet space.
6. This monthly summary also provides insights on consumer appetite for mobile games through the listing of various performance metrics and assists developers in identifying trends and developments in user demand. Besides global trends, this report also presents country snapshots for key markets.



Key Statistics

1. In March 2010, Djuzz offered more than 2000 games spread across 28 categories from 37 mobile game publishers.
2. During this time, Djuzz delivered more than 750,000 games to 1.2 million unique users¹ globally
3. This is an increase of 86% in downloads and a 53% increase in unique visitors to the portal.
4. The following metrics are tracked and will form the basis of monthly comparisons.

Top 10 Games Downloaded

| Category | Title | Downloads |
|--------------------|-----------------------|-----------|
| Action & Adventure | 1. Fatal Fist | 33,236 |
| Arcade | 2. Tankzors | 32,913 |
| Racing | 3. 4x4 Extreme Rally | 31,797 |
| Arcade | 4. BomberXmen | 21,423 |
| Action & Adventure | 5. Dragon and Dracula | 20,780 |
| Arcade | 6. Mr. Revolver | 17,006 |
| Racing | 7. 3D Fun Racer | 16,032 |
| Racing | 8. 360 Speed | 14,759 |
| Dating & Lifestyle | 9. LoveMatch | 13,270 |
| Racing | 10. Underground Racer | 12,532 |
| | Total | 213,748 |

¹ Identified via unique IP's

5. Among the Top 10 for March are eight titles from February (*Fatal Fist, Tankzors, 4x4 Extreme Rally, BomberXmen, Dragon and Dracula, Mr. Revolver, 3D Fun Racer and Love Match*).
6. Notable among these titles are:
 - a. Fatal Fist, which remained in the number one position for the second month running, and
 - b. Tankzors, which had the highest rate of growth in downloads (367%) since February.
 - c. 360 Speed and Underground Racer are both new entrants to the charts this March. With the inclusion of these titles, there are four Racing themed titles in the Top 10.
 - d. Love Match remained in the Top 10 in 9th having shrunk in popularity by 13%. While love matching games remain an evergreen favorite, its rise in February suggests seasonal fluctuations of the theme corresponding with cultural celebrations.
7. The majority of these games are characterized by :-
 - a. Good graphics (game and screenshot)
 - b. Branded/known IP
 - c. Easy gameplay e.g. one-minute pick up
 - d. Catchy descriptions
8. The Top 10 games contributed 28% of the total downloads in March (compared to 34% in February). The remaining downloads were spread over the 2,000 games available to users in March, suggesting a broader spread of variety and quality in games.

9. Despite this, user preferences for the types of games are evident. Four categories dominated the list of downloads for this month:
 - a. Racing (40%).
 - b. Arcade (30%),
 - c. Action & Adventure (20%), and
 - d. Dating & Lifestyle (10%)

10. User preferences continue to have geographic variations.
 - a. In Kenya, racing games take 1st, 3rd, 7th and 8th place
 - b. In Nigeria, sports-centric games dominate (30%) and titles like Footballz 2009 (2nd), Footballz (9th) and Euro Football (10th) are well received.
 - c. In Spain, educational games are preferred, taking 2nd and 4th places among the Top 10.
 - d. In the USA, Online Multiplayer Texas Hold 'Em Poker retains in 2nd place and in the UK, it remains in 5th place.
 - e. While sports themes seem to have regressed in most markets, Footballz 2009 remains number one in the United Kingdom.
 - f. In most countries, arcade games with good graphics are preferred. Fatal Fist is ranked number one in US, India, Nigeria and Bangladesh while Tankzors is first in South Africa, Vietnam and Pakistan.

Top 10 Most Active Countries

11. While the portal received global visitors, the following countries accounted for the highest number of games downloaded in March.

| Country | Downloads |
|------------------|-----------|
| 1. India | 397,909 |
| 2. Malaysia | 44,134 |
| 3. South Africa | 39,353 |
| 4. Vietnam | 30,945 |
| 5. Pakistan | 21,645 |
| 6. Romania | 17,207 |
| 7. United States | 16,284 |
| 8. Kenya | 15,661 |
| 9. Bangladesh | 13,572 |
| 10. Nigeria | 11,134 |
| Total | 607,844 |

12. The Top 10 countries accounted for 80% of the total downloads in March and India alone contributed 52% of game downloads for the month.

13. A Country Spotlight with details on Vietnamese activity is presented at the end of this report.

Top 10 Handsets

| Handset | Downloads |
|------------------------|-----------|
| 1. Nokia 3110c | 43,028 |
| 2. Nokia N86 | 18,728 |
| 3. Nokia 2626 | 17,691 |
| 4. Nokia 6300 | 15,933 |
| 5. Nokia 7210Supernova | 13,670 |
| 6. Nokia 2700c | 10,964 |
| 7. Nokia 70 | 10,678 |
| 8. Nokia 7610 | 9,865 |
| 9. Samsung SGH-E250 | 9,110 |
| 10. Nokia 660 | 8,966 |

14. Nokia still leads the list of devices used by a huge margin; 90% of the top devices used to download games in March were made by Nokia. Samsung appears on the list due to relatively high usage in US, South Africa, Kenya, Bangladesh, UK, Germany, Italy and Romania.

15. These handsets run on Java and are viewed on decent-sized screens (176x208 or 240x320).

16. Notable (though not listed) is the continued rise of generic handsets utilizing 3rd party browsers such as Opera and Maui. These contribute to a combined total of 114,000 downloads or 15% of the total.

Top 10 Developers

17. The most popular games on Djuzz were published by the following developers :-

| Developer | Downloads |
|---------------------------------|-----------|
| 1. Hovr | 120,199 |
| 2. inLogic | 75,028 |
| 3. Freewares | 58,179 |
| 4. HeroCraft | 56,194 |
| 5. Da Suppa Studios | 32,913 |
| 6. Falcon Mobile | 21,423 |
| 7. mBounce (Mobile Hotdog) | 21,296 |
| 8. LunaForte (AppSnacks) | 19,241 |
| 9. MobileWeaver (YouPark) | 18,575 |
| 10. Renkmobile (Free Java Girl) | 18,663 |

Country Spotlight for March - Vietnam

1. Vietnam's strong presence in Djuzz may be attributed to the high mobile penetration rate of 74.9% since 2008² and its rapid growth (166%) of mobile internet usage³.
2. In March, Vietnamese surfers downloaded more than 30,000 mobile games, approximately 4% of the total downloads.
3. While this is a relatively low percentage, we expect this to continue to grow with increasing usage of the mobile internet in Vietnam. In the last month, Djuzz has seen a 20% increase in unique users and 40% increase in downloads from Vietnam.

Top 10 Games – Vietnam

| Category | Title | Downloads |
|--------------------|--------------------------|-----------|
| Arcade | 1. Tankzors | 4,852 |
| Action & Adventure | 2. Fatal Fist | 3,754 |
| Cards & Casino | 3. Poker Hold 'em Master | 2,709 |
| Action & Adventure | 4. Dragon and Dracula | 957 |
| Arcade | 5. BomberXmen | 941 |
| Arcade | 6. Mr. Revolver | 828 |
| Racing | 7. 4x4 Extreme Rally | 634 |
| Sports | 8. Footballz 2009 | 620 |
| Arcade | 9. Tank Assault | 485 |

² www.mobilemondayasia.com/iDA/pdf/tom.pdf

³ BuzzCity Mobile Ad Index Q1 2010.

| | | |
|--------|------------------|-----|
| Racing | 10. 3D Fun Racer | 419 |
|--------|------------------|-----|

- Users from Vietnam prefer Arcade games that are quick to pick up and which do not require much time invested to play and have fun. Quick to learn gameplay and smooth animations are the key to this market.

Top 10 Handsets – Vietnam

- The following are the most common handsets used by Vietnamese gamers to download games

| Device | Downloads |
|-------------------------|-----------|
| 1. Nokia N86 | 6,270 |
| 2. Nokia 3110c | 2,021 |
| 3. Nokia 6300 | 746 |
| 4. Nokia 7610 | 620 |
| 5. Nokia 6030 | 572 |
| 6. Nokia 2626 | 477 |
| 7. Nokia N70 | 456 |
| 8. Nokia 7210 Supernova | 410 |
| 9. Nokia 5130c | 396 |
| 10. Nokia 2700c | 388 |

- Nokia dominates and no other handset OEM can be found among the Top 10 devices.
- These phones are typically mid-range feature handsets that are on average two to four years old. The exception is the top phone (N86) which is a high-end smartphone launched in early 2009.

Top 10 Developers – Vietnam

8. The games most favoured by Vietnamese gamers are developed by:

| Developer | Downloads |
|---------------------------------|-----------|
| 1. inLogic | 7,981 |
| 2. Da Suppa Studios | 4,852 |
| 3. Hovr | 2,580 |
| 4. HeroCraft | 2,434 |
| 5. Freewares | 1,575 |
| 6. Falcon Mobile | 941 |
| 7. MobileWeaver (YouPark) | 720 |
| 8. mBounce (Mobile Hotdog) | 717 |
| 9. LunaForte (AppSnacks) | 279 |
| 10. Renkmobile (Free Java Girl) | 266 |