

An Overview and Future Outlook of the Murder Mystery Game Industry in China

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Abstract: Murder mystery games have experienced a notable surge in popularity, with their origins deeply rooted in storytelling traditions. This research paper delves into the reasons for their rise, emphasizing the influences of macroeconomic factors, educational trends, and digitalization. These elements not only provided a backdrop for the murder mystery game's resurgence but also played a pivotal role in shaping its contemporary form. A comparative analysis of online and offline modalities reveals distinct user experiences and commercial potentials for each. Furthermore, the research offers pragmatic suggestions for entrepreneurs interested in establishing offline murder mystery stores, underscoring the nuances of market dynamics and consumer preferences. Harnessing statistical data from past survey results and well-informed estimations, the study presents a data-driven exploration into the genre's growth and transformation. By charting the game's historical trajectory and examining its present state, this paper provides a holistic overview of murder mystery games in the modern context and their significance in the evolving entertainment industry.

Keywords: Murder Mystery Games, Macroeconomics Driver, Business Model, Digital Transformation

1. Introduction

In recent years, a unique role-playing game known as “Scripted Murder” or “Murder Mystery” board game has gained significant traction in China. The initial concept of role-playing murder mystery games can be traced back to Western countries in the 1970s and 1980s. The essence of interactive murder mystery games can be found in Western parlor games of the 20th century. Titles like “Cluedo” emerged in the 1940s. Participants would receive character descriptions and play out scenarios where they'd have to find out who among them was the murderer [1].

The introduction of Western media, including detective and crime fiction, in post-reform China had sparked a renewed interest in the genre. However, it was not until the mid-2010s that the concept of a role-playing murder mystery game began to gain traction in mainland China. Initially, it was introduced into the public's eyesight through the popular reality show “Who's the Murderer” in 2016 [2]. With such popularity, businesses in China started adapting simple but various forms of the game by including aspects of murder mystery in escape rooms, board games and more.

Murder mystery is a game that combines live action role-playing (LARP), Werewolf and some new aspects. This game reflects contemporary Chinese urban life, societal tensions, and generational changes as well as how it has been influenced by TV dramas, movies, and online culture. Players take

on the roles of various characters in a pre-written story, often revolving around a murder mystery. They engage in an elaborate role-playing game where players are assigned to be someone else, including one player as the murderer. They utilize clues, narratives, and their own intuition to solve the case, thereby merging aspects of acting, detective fiction, and board games into one interactive experience [3].

There is no official record that demonstrates when the first official Murder Mystery store was opened, but it is suspected to be around 2017 in Southern China.

As more and more audiences started to be introduced and involved in such games, it quickly gained popularity and reputation across the country. Along with such development, Murder Mystery became no longer limited to murders; it started expanding to cover various themes such as romance, horror, humor and science fiction to satisfy the preferences of its target audience. For example, successful romance scripts will touch and resonate with the players, often evoking profound emotions and culminating in tears by the game's conclusion. Despite the variety of the game, the name of “murder mystery” remains widely used today.

In 2021, the market size of the murder mystery game industry in China reached 17.02 billion Yuan, with a year-on-year increase of 45%. It is estimated that by 2025, the market size of the Chinese script murder industry will increase to 44.81 billion Yuan [4].

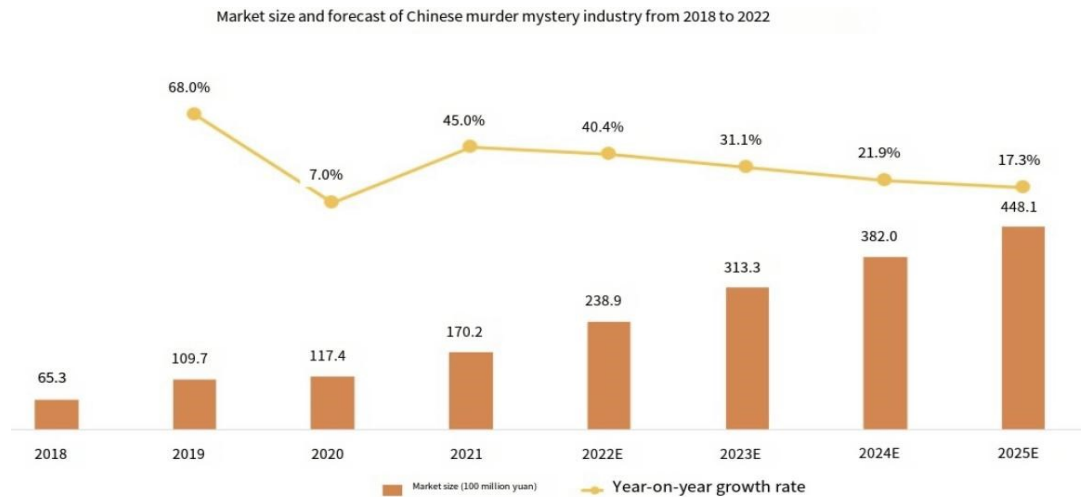


Figure 1: Murder mystery industry’s previous and predicted market size and growth [4]

2. Reasons that Account for the Rise of Murder Mystery in China

The surge in popularity of murder mystery games can be attributed to various factors. Firstly, the immense success of the show “Who is the Murderer” has catapulted murder mystery games into the limelight. The staggering tens of billions of views accumulated by all seasons of the show stand as a testament to its widespread appeal [2]. Audiences engrossed in this show might naturally be inclined to delve into similar interactive experiences themselves, thereby propelling the industry forward. One distinguishing feature of murder mystery games is their interactive nature. Rather than being passive spectators at home, players are thrust into the heart of the action, allowing for a more immersive experience.

Moreover, these games offer a unique escapade into diverse roles and settings. Depending on the specific settings of games, participants can experience the logical thinking process of a hard-nosed detective, assume the power and authority of an ancient emperor, or navigate the tumultuous emotions of a soldier in wartime. Modern murder mystery games also extend to mainstream entertainment where writers interweave themes from beloved genres like Japanese anime or magical-fantasy

literature. This provides players an unparalleled opportunity to momentarily live the life of a character they have always been fascinated by [4].

But perhaps the most compelling allure of murder mystery games lies in their inherently social nature. They serve as an interactive conduit for the younger generation in China, offering both a riveting gaming experience and a vibrant social milieu. Engaging in these games allows players to unwind, deepen existing relationships, and forge new friendships with like-minded individuals. It's not just about the thrill of the game; for many, it's a chance to connect, and perhaps even find a potential romantic interest. iiMedia Research's data demonstrates that in 2022, 58.7% of players chose to play murder mystery games out of the incentive of relaxation and distress; 52.8 % of players chose to play out of the incentive to socialize and meet other friends [4]. In essence, murder mystery games are not just games – they are social events, opportunities to bond, and avenues to live a myriad of lives.

3. How Society Trends Positively Impacted the Development of Murder Mystery Game

3.1. Macroeconomic

The popularity of murder mystery games in China can be attributed to an amalgamation of macroeconomic factors that influence consumer behavior and lifestyle choices. Diving deeper into the economic data can shed light on this phenomenon. One of the most striking indicators is the rising disposable income of the Chinese population. As reported by Statista, there is a consistent and notable uptrend in the annual average disposable income in both rural and urban settings [5]. Disposable income is the portion of an individual's income that is left for spending, saving, or investment after taxes. Higher disposable income often represents that consumers have more money at their disposal for non-essential purchases, such as entertainment.

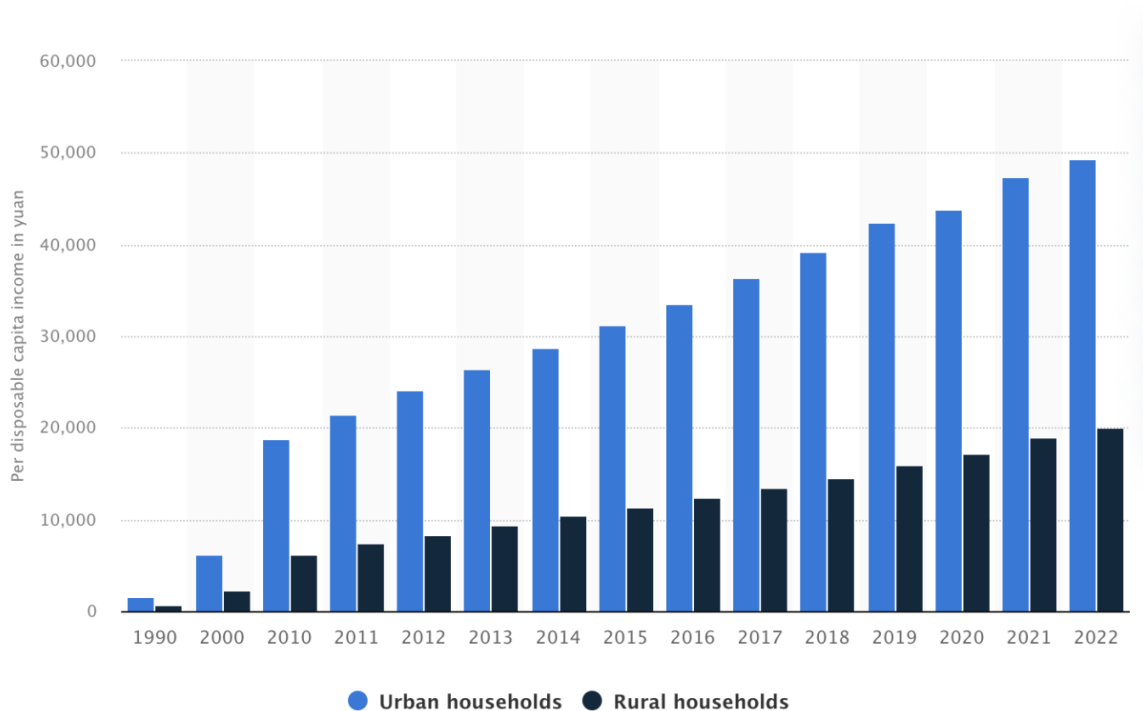


Figure 2: Trendline of Chinese citizens' per disposable capita income [5]

Furthermore, China's Gross National Income has been and is expected to increase exponentially [6]. A rising GNI indicates a flourishing economy, increased production, and, generally, a higher standard of living for its residents.

As the public finds themselves with more financial flexibility due to these positive economic trends, they are more inclined to allocate a part of their budget to leisure and entertainment. In terms of murder mystery games, individuals may be willing to join games more frequently, or willing to spend more money on a quality game. In this conducive environment, murder mystery enterprises have a great opportunity to grow and expand, capitalizing on the public's increased willingness and ability to spend on diverse entertainment avenues.

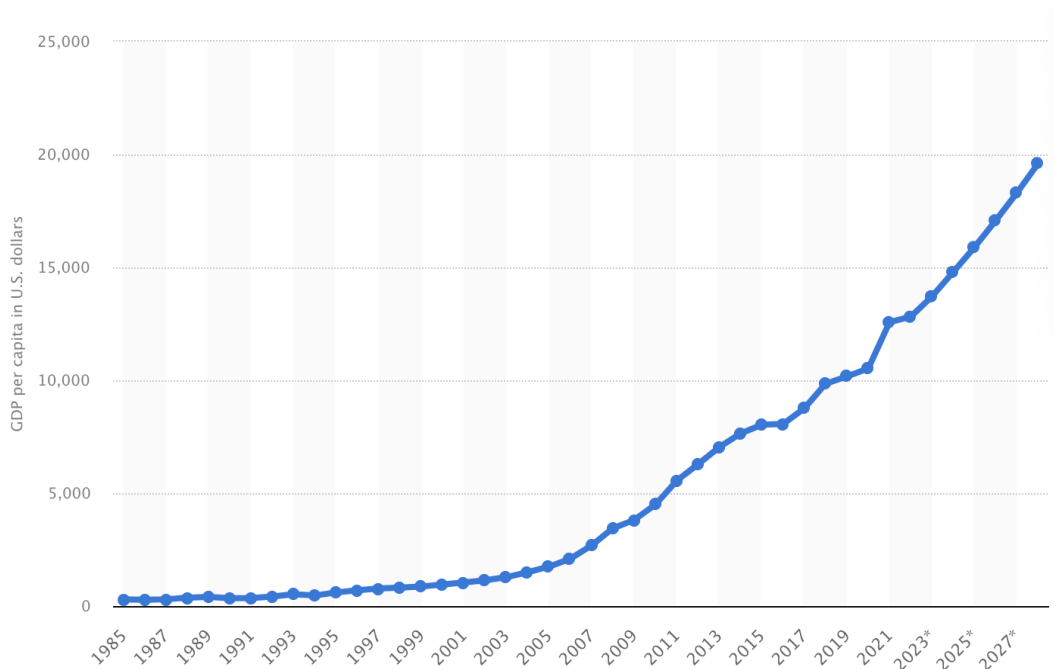


Figure 3: Trendline of China's GDP per capita [6]

3.2. Education

Murder mystery games, with their intricate narratives and deep thematic elements, require a high literacy level. The unique structure and storytelling approach of these games cater to an audience that appreciates the confluence of rich text, historical contexts, and philosophical reflections. To fully engage with and appreciate the nuanced layers of these games, players require not just adept reading skills but also an understanding of history and broader life themes. This educational prerequisite perhaps explains why urban centers like Beijing, Shanghai, and Wuhan, generally highly educated and abundant historical and cultural resources, emerge as the center for these games.

While one could argue that the sophisticated nature of murder mystery games might limit potential audience, the structure of the Chinese population shows differently. In 2022, the Chinese Ministry of Education highlighted a gross enrollment ratio in higher education of 59.6% [7]. Considering China's massive population of 1.4 billion, this signals a substantial and ever-growing cohort of college-educated individuals. Previous and predicted improvements in Chinese education help expand the target audience base for murder mystery games.

3.3. Access to Internet

With the meteoric rise of social media in China, there emerges an opportunity for the murder mystery game genre to thrive and attain widespread popularity. Platforms such as WeChat, Weibo, and others have become indispensable in the daily lives of the Chinese populace. Such platforms have given bloggers and enthusiasts an avenue to share, discuss, and endorse these games to a vast audience.

Moreover, players who have relished the experience often take to platforms like TikTok and Little Red Book to share their gameplay, provide recommendations, and recount their thrilling encounters. This not only adds a personal touch but also significantly amplifies the game's visibility, encouraging a wider audience to explore and indulge in it.

Beyond word-of-mouth and shared experiences, the power of social media lies in its capability to swiftly propagate information and advertisements. There's an increasing number of applications catering specifically to this burgeoning market. For instance, "MiQuan" is an application meticulously crafted for this niche, serving as a hub for game ratings, user reviews, and fostering a community where enthusiasts can connect and coordinate gameplay sessions. Such integrative platforms further consolidate the position of murder mystery games in the Chinese entertainment spectrum.

4. Rising Option for Online Murder Mystery

Advancements in technology and the widespread adoption of digital devices have catalyzed the shift from traditional, in-person murder mystery games to their digital counterparts. In general, online gaming style has less entrance barrier, for both customers and operators. Such development is caused by several compelling reasons that illuminate the growing traction of online gaming.

4.1. Customers

Firstly, digital platforms inherently offer greater flexibility and convenience. Geographical boundaries, which once constrained player interactions, have dissolved in the online realm. This globalization allows enthusiasts from varied cities or even countries to collaboratively engage in gameplay. In fact, it is simpler to gather six players online than to coordinate six individuals from the same geographical area. Furthermore, for players who like to stay home, they now have the option of playing murder mystery games on their comfortable bed or couch, further accentuating the appeal of online games. While traditional, offline gaming sessions can cost 200 Yuan on average, their online versions are generally priced at 10 Yuan or below, making them financially accessible to a broader audience.

4.2. Businesses

Secondly, the logistics of setting up an online murder mystery platform are significantly simpler than opening a physical store. Physical venues demand governmental permissions, administrative oversight, and high rentals in prime locales. Most importantly, the owners have to purchase varieties of scripts, ranging from 200 Yuan to well over 2000 Yuan for exclusive city-limited editions [4]. The process of accumulating favorable and good quality scripts not only requires a high budget, but also extensive networking and negotiation with sellers of scripts.

In stark contrast, online platforms bypass many of these cumbersome processes and expenses. While authentic scripts are expensive, thousands of replicated, digital scripts can be purchased together online for only 2 Yuan [8]. Indeed, replications and sellings of scripts are a violation of copyrights, yet it has been overwhelmingly common and hard to trace that individuals are not

receiving any forms of punishments for such actions. Overall, businesses have the incentive to open online as it requires far less money, time and effort.

4.3. Lasting Impact of COVID-19

During the pandemic, social gatherings in China have been prohibited or highly discouraged for almost two years, forcing offline murder mystery games to shut down and transition to online gaming styles [9]. Seeing the opportunity during pandemic, numerous murder mystery applications have been created and opened between 2020 to 2021. Data shows that as of July 2022, "I am a Mystery", a murder mystery application, has a total download count of 11.618 million times on iPhones, ranking first in total downloads for online murder mystery game apps. "Versatile Detective" has been downloaded 10.272 million times, ranking second [4]. The primary profit model for most online murder mystery game apps is based on user payments. The convenient and cheap method of relaxing has attracted a large customer base during the pandemic. Even though restrictions on social gatherings have now been removed, the possibility of playing murder mystery games online have been widely adapted, and is likely going to continue operating.

5. Comparison between Online and Offline Murder Mystery Games

Over the past decade, as the industry of murder mystery games evolved into online and offline domains. Though similar in essence, these two modalities complement rather than compete with each other, catering to varied audiences and objectives.

On the one hand, online murder mystery games have witnessed a surge, largely due to their convenience, cost-effectiveness, and wide accessibility. It is a great method to introduce potential customers who are less committed to murder mystery games. Such platforms enable players to almost jump into a game spontaneously without the need for prior bookings or negotiations. Players often have greater freedom and flexibility as online platforms offer an effortless way to explore the genre. Moreover, with the ubiquity of the internet, online games seamlessly bridge geographical divides, allowing distant friends to connect and engage in collective fun.

On the other hand, offline murder mystery games prioritize the immersive experience. Given the social nature of these games, tangible interactions often amplify the fun. The thrill of seeing and collaborating with other players is significantly enhanced during offline settings. At the same time, murder mystery stores also provide special surprises for customers. In romantic-themed games, non-player actors might enact pivotal scenes, while horror renditions might feature intricately decorated rooms filled with scary props and evocative background music. Games set in special historical periods often provide participants with period-specific attire, enhancing immersion. For instance, games set in ancient Chinese dynasties might offer traditional costumes and accessories, encouraging players to delve deeper into their roles. While offline games offer a comprehensive experience, they demand a higher level of commitment from participants.

Ultimately, neither form of gaming is explicitly better, yet collaboratively, they form a well-rounded industry that tailor to the diverse customer needs.



Figure 4: Chinese gamers' perceptions of online gaming advantages compared to offline gaming advantages [4]

6. Ideal Operation System of an Offline Murder Mystery Business

According to the New York Times, in 2021, the number of registered mystery murder enterprises in China exceeded 6,500, a more than 60 percent increase from 200 [8]. Competition between different businesses have been amped up, especially in major Chinese cities where murder mystery games are the most popular. Thus, it becomes crucial to evaluate and analyze what qualities customers value the most when choosing stores and how to profit in such a competitive market.

The allocation of budget is arguably one of the most important factors that determines the success and failure of a murder mystery store. Therefore, it is crucial to consider investments in what area most worthy and appealing to customers.

The expenses to start a murder mystery game story is relatively costly. The areas of expenses include renting stores, purchasing scripts, renovating infrastructures, advertising fees, hiring workers and much more.

Firstly, there is the rental and renovation cost. For a store measuring 150 square meters in major cities, one year of rental as well as a simple one-time upfront costs for both hard furnishings and theme specific decorations can cost 240,000 Yuan [10].

The next major cost is purchasing the murder mystery scripts themselves. At minimum, a store would need 12 city-exclusive scripts and 36 box-packed scripts to begin with, which total up to a one-time cost of 50,000 Yuan or more. However, these games have a low replayability rate; most players will only play a particular script once. Therefore, a physical store needs to maintain a substantial reserve of scripts and routinely replace them with new, famous ones in order to keep attracting customers [11].

The last significant expenditure pertains to the hiring of game hosts, also known as DM, who guide players throughout the game. These DMs stay with the players for the entirety of the gameplay and the professionalism of them directly determines the experience of players. Experienced DMs can attract compliments, good reputation and a stable customer while inexperienced DMs may harm the popularity and reputation of the store as a whole. Given the scarcity of skilled DMs, it is crucial to offer competitive salaries to retain them. A store typically requires at least three DMs, with each earning a minimum of 6,000 Yuan monthly as a full-time employee [10,12]. Annually, excluding breaks, this amounts to a staffing cost of approximately 200,000 Yuan .

Additional expenses, although smaller in scale, include marketing, costumes, and props. These costs are more adaptable and can be deferred in comparison to the three primary expenditures mentioned earlier. Notably, these expenses do not need to be settled before the store's launch phase. Over a year, these auxiliary costs might accumulate to around 10,000 Yuan.

The cumulative expenses for the first year amount to 500,000 Yuan based on the aforementioned factors. It is important to emphasize that this estimation only represents the average standards. For businesses aspiring to dominate the industry, the investments in every sector could see a substantial increase, potentially even doubling.

Customer surveys from iiMedia Research indicate that customers prioritize a store's infrastructure and the quality of its scripts when choosing murder mystery stores.

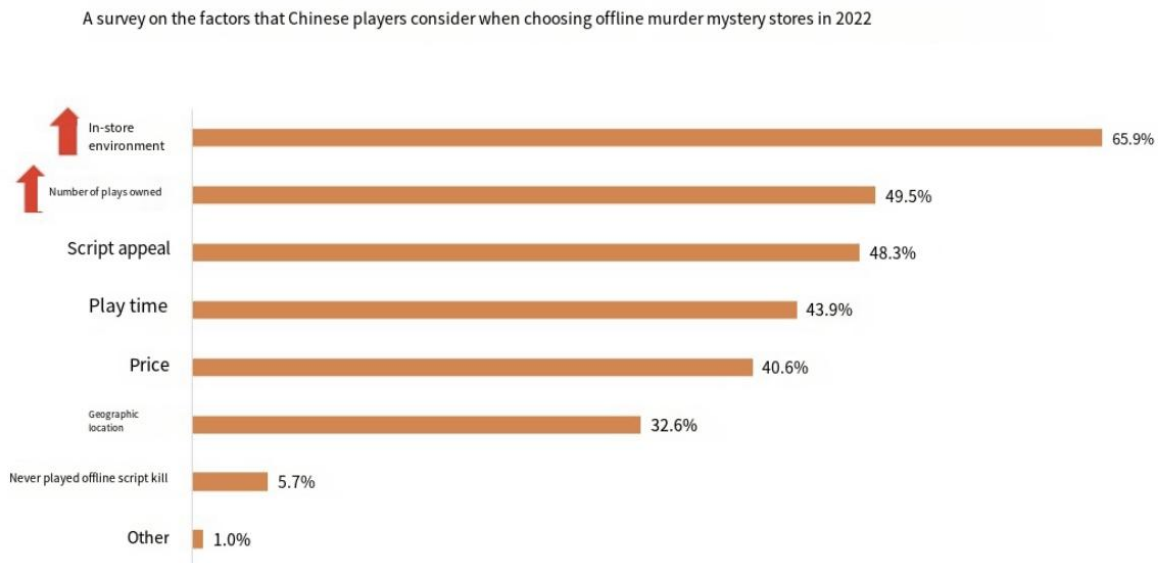


Figure 5: Most important factors when gamers select offline murder mystery stores [4]

From an infrastructure standpoint, customers expect spacious, quiet rooms, comfortable; chairs and couches; and thematic rooms, all necessitating additional funding. Regarding scripts, leading stores today often stock more than 30 famous, updated city-exclusive scripts. Each of these requires a proficient DM and a team of non-player character teams to elevate the player experience. Stores that meet these standards typically garner significant recognition and popularity. Nevertheless, the entrepreneurs behind these ventures must be prepared to invest considerably upfront and willing to take higher risks compared to others in the industry.

7. Potential Future Development of Murder Mystery Games

The potential future of murder mystery games in China appears promising, driven by a combination of technological advances, cultural embrace, and a growing need for immersive experiences. As the country's middle class continues to expand, so does the demand for diverse entertainment forms, providing an opportunity for murder mystery games to prosper. Augmented Reality (AR) and Virtual Reality (VR) are expected to be integrated, offering players heightened realism and deeper immersion into the stories.

Furthermore, collaborations with renowned Chinese writers and filmmakers may lead to games that resonate more profoundly with local cultural nuances, histories, and legends. As the lines between entertainment forms blur, there is potential for synergies between these games and popular media, such as TV series or films, further embedding them into the fabric of contemporary Chinese entertainment culture [4].

8. Conclusion

The rise and sustained popularity of murder mystery games in China signal a transformative shift in the entertainment landscape, especially among the younger generation. This innovative form of entertainment, seamlessly blending storytelling with interactive gameplay, has not only provided new ways for recreation but has also sparked lucrative business opportunities for entrepreneurs. With investments and returns running into billions of Yuan, the industry's economic magnitude is undeniable. Moreover, the cultural ramifications of these games go beyond mere numbers. They foster social interaction, critical thinking, and creativity, redefining traditional boundaries of entertainment. As the industry continues to evolve, adapting to both technological advancements and changing societal norms, its fame and impact in China's modern entertainment industries unquestionably consolidated.

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