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If you are media, please contact EEDAR PR (pr@eedar.com) for permission to publish excerpts of any material included in this .pdf.

The data here is macro trending data; individual genres, platforms, brands, etc. often perform differently than an amalgamation of all industry games. If you have questions about how games like “your game” perform, please reach out to us at EEDAR (info@eedar.com) – game industry research is what we do.

Awesome Video Game Data

EEDAR

Data | Analysis | Research | Forecasting | Diligence

GDC 14

YOUR PRESENTER

Indie Developer
1991 to 1996

Lead Designer
2003 to 2005

MONOLITH™

Geoffrey "GZ" Zatkin

Sr. / Lead Designer
1997 to 2003

VERANT

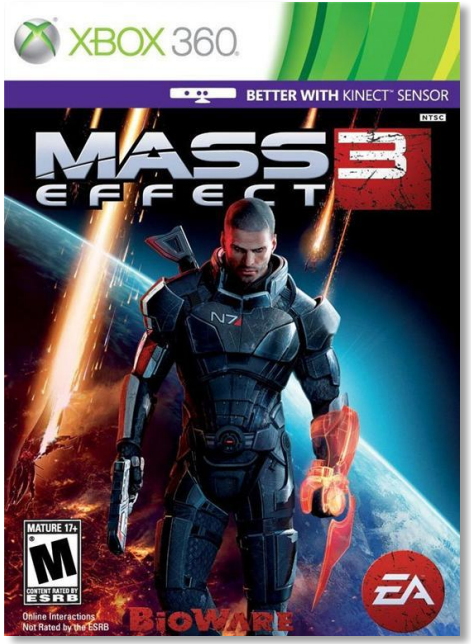
SOE
SONY ONLINE ENTERTAINMENT

Founder
2006 to Current

EEDAR

Breakdown

Title	Retail Presence	Aggregate Review	Market Spend	Release Date	MSRP	Downloadable Content	Buzz	Character Advancement	Protagonist Alignment
Platform									Game Speed
Alternate Platforms									3D Enabled
Associated Portal									HDTV Support
Franchise									Use of Celebrity
Branding									Co-Op
ESRB Rating									Multiplayer
Content Descriptors				Literary Genre	Optional Peripherals	Hardware Requirements	Combat Speed	Launch Competitors	Gender(s) Available
Edition Type	Developer	Publisher	Genre	Sub-Genre	Genre Elements	Monetization Model	Setting	Camera Perspective	Avatar(s) Used



15,000+ Objectively Quantifiable Attributes of Video Games

(Retail and Digital)

About EEDAR

- Founded in 2006
- Based in Carlsbad w/ 60 Employees
- Exclusively Servicing the Video Game Industry
- Over a Dozen Industry Data Partners
- Servicing 20 of the top 20 Publishers and >50 Development Studios

EEDAR Data

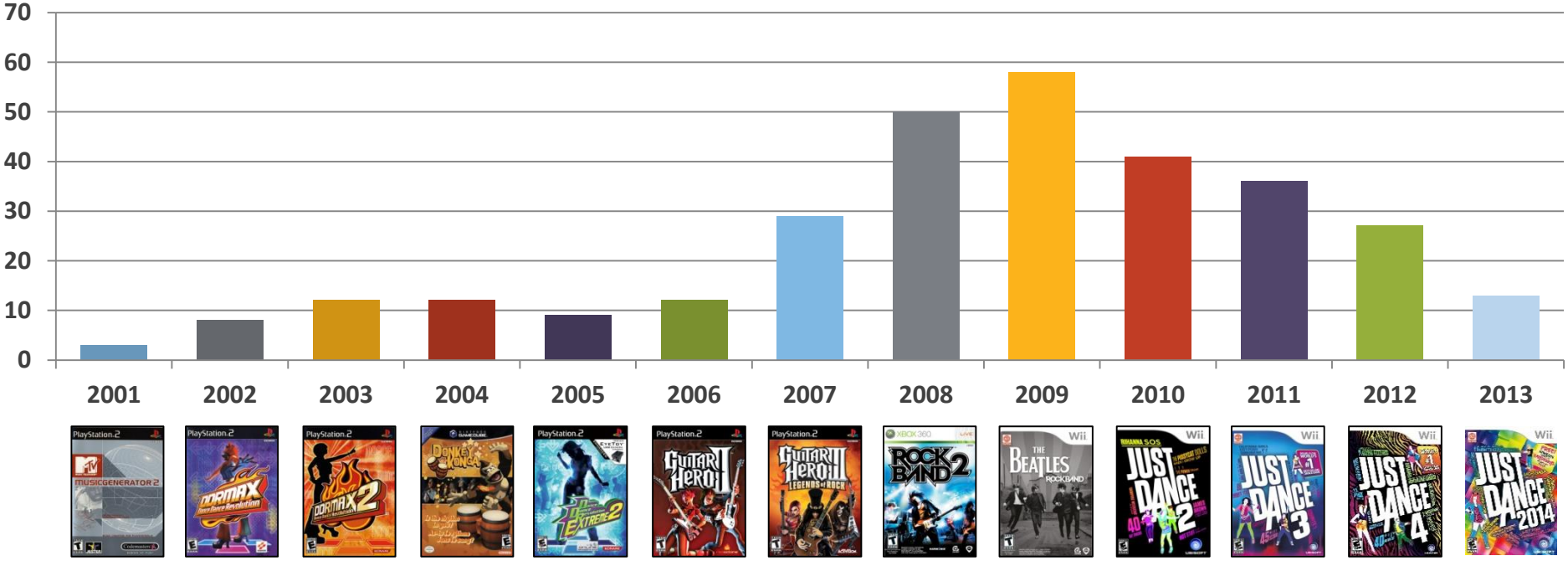
- 119,000+ Products (Games, Accessories, Hardware) Observed To Date
- 135,000,000+ Data Points

Franchise	Distinct Game	Platform	SKU
ROCK BAND	ROCK BAND	PS3 PlayStation 3	XBOX 360 ROCK BAND — Standard Edition SKU
	ROCK BAND 2	PlayStation 2	
	THE BEATLES ROCK BAND	XBOX 360	ROCK BAND SPECIAL EDITION — Peripheral Edition SKU
	ROCK BAND 3	Wii	

Fads: Music & Rhythm Games

Music & Rhythm Genre Games Released by Year

All 6th, 7th and 8th Generation Console, Handheld and PC Distinct Titles in the U.S.A.

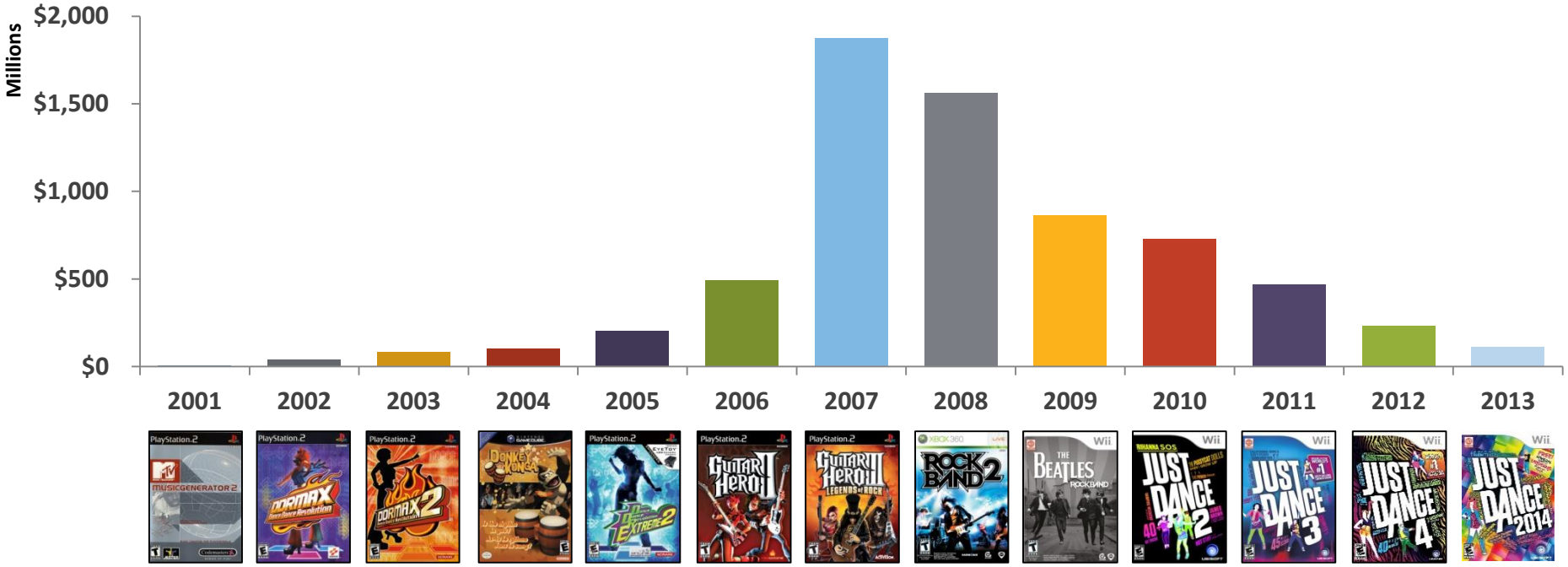


Source: EEDAR

Fads: Music & Rhythm Games

Revenue from Music & Rhythm Genre Games

All 6th, 7th and 8th Generation Console, Handheld and PC Distinct Titles in the U.S.A.

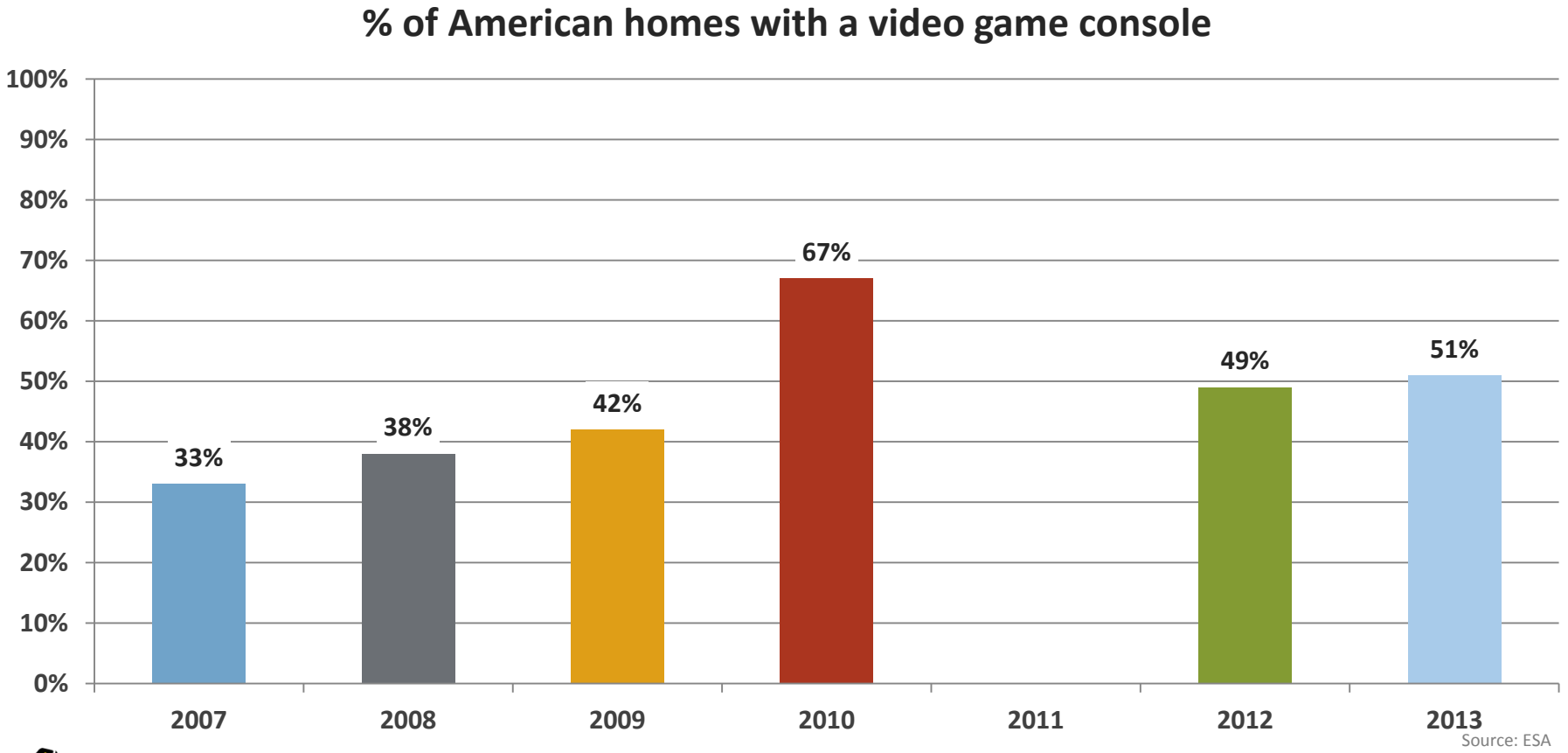


Source: EEDAR & The NPD Group

8TH GENERATION

We are at the **start** of the **8th generation** of game consoles and the beginning of what could be the **last** generation of **dedicated** gaming hardware as well as the **middle** of a **grand experiment** in new **business models** and **monetization** methodologies

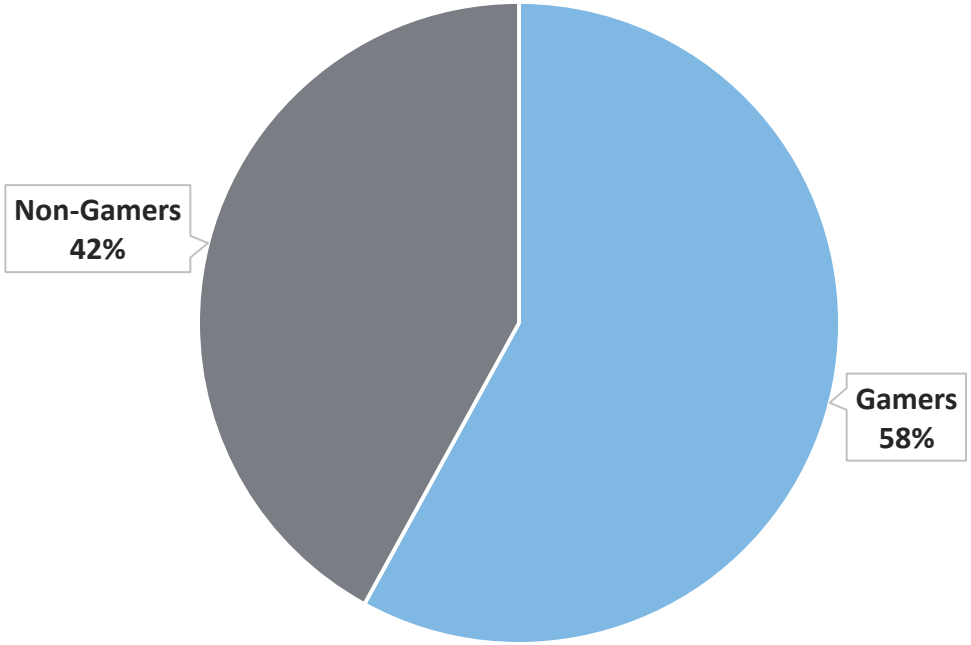
Who Games?



Source: ESA

Who Games?

Gaming Population in the USA

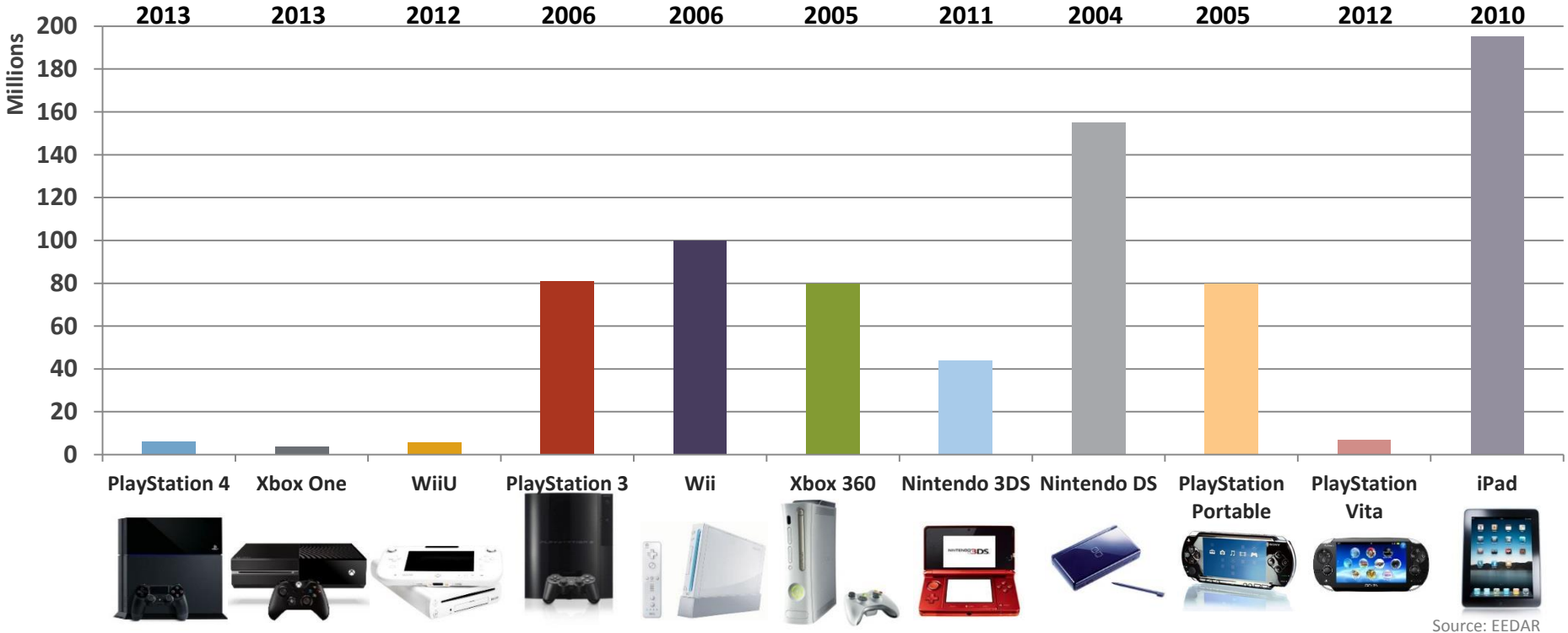


Source: ESA

Hardware Sales

Platform Sales Worldwide

Through December, 2013



Source: EEDAR

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Platform Sales Worldwide

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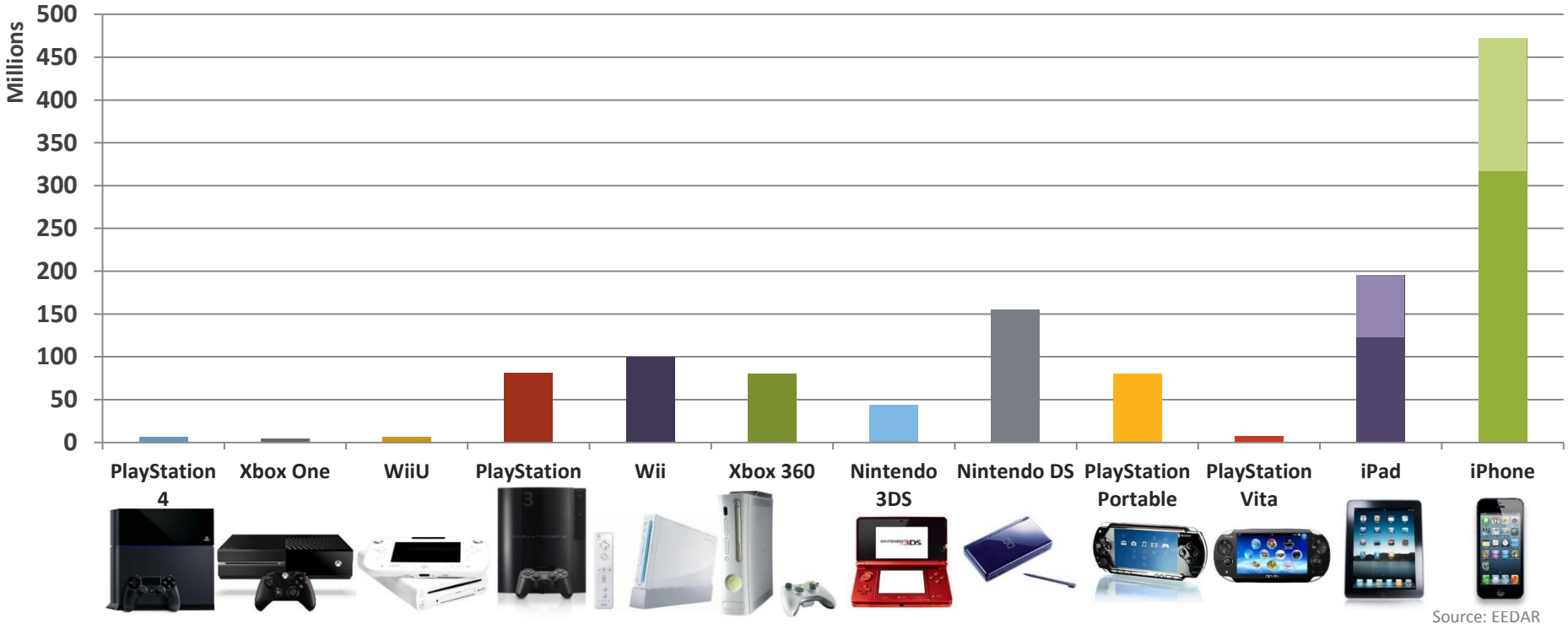
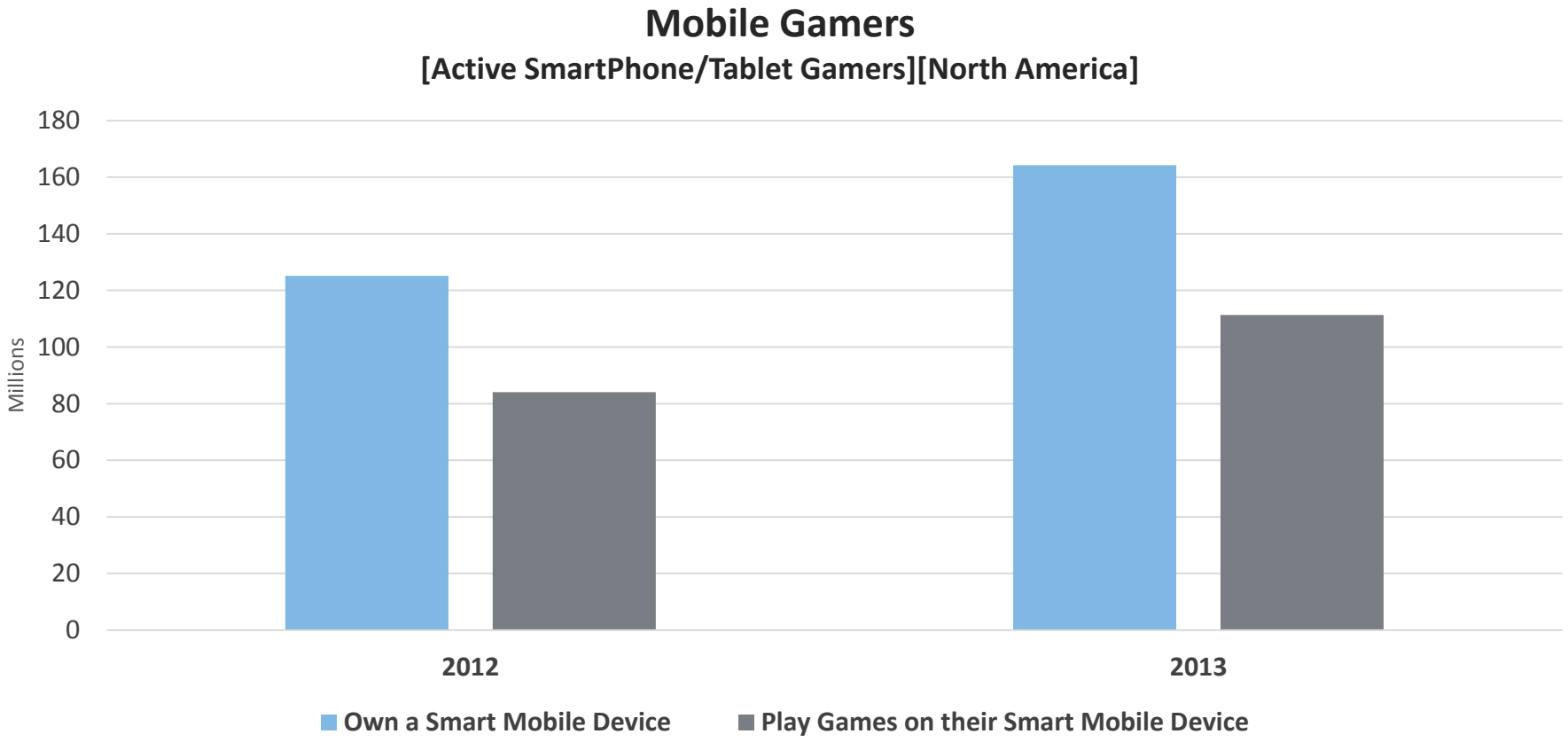


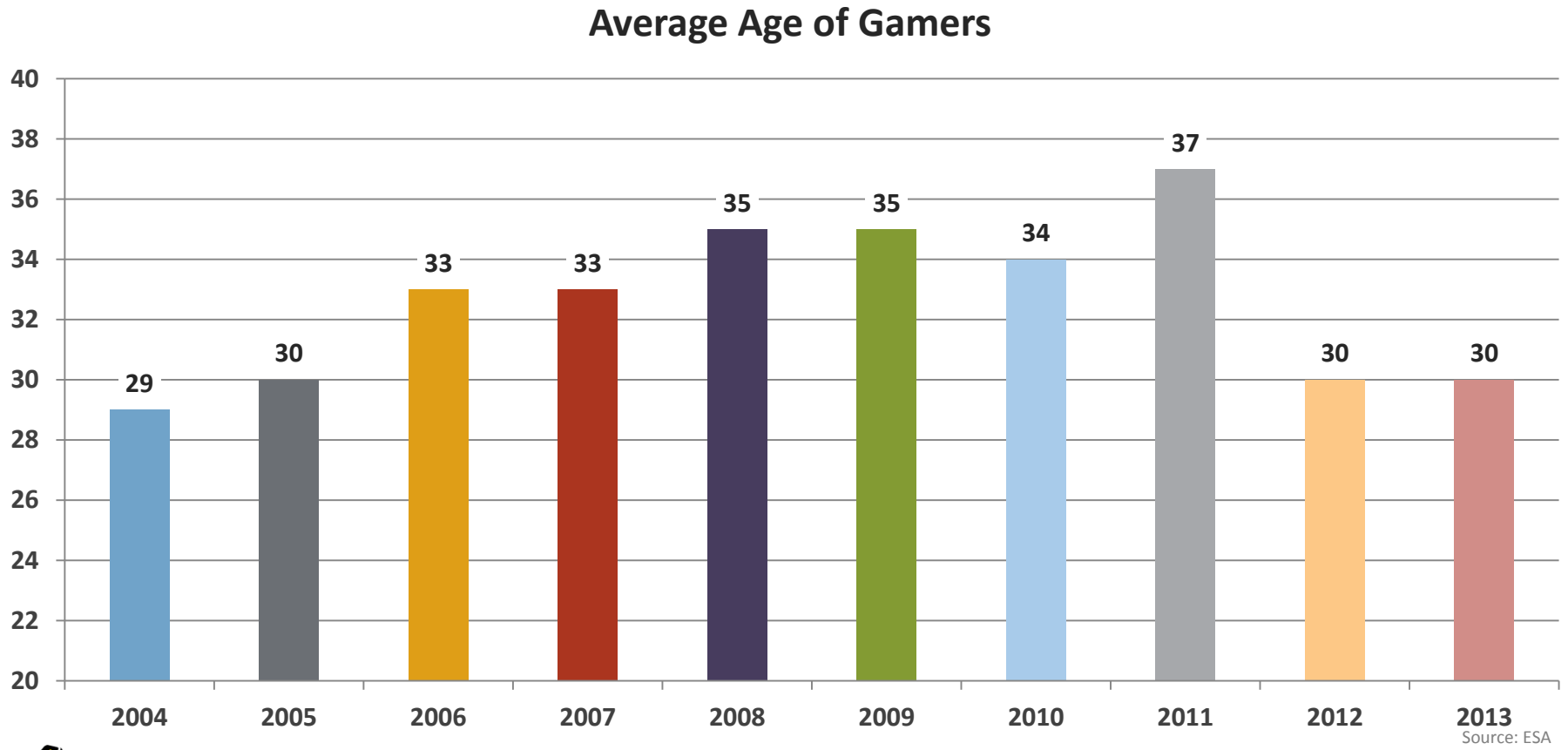
Source: EEDAR

Mobile Gamers



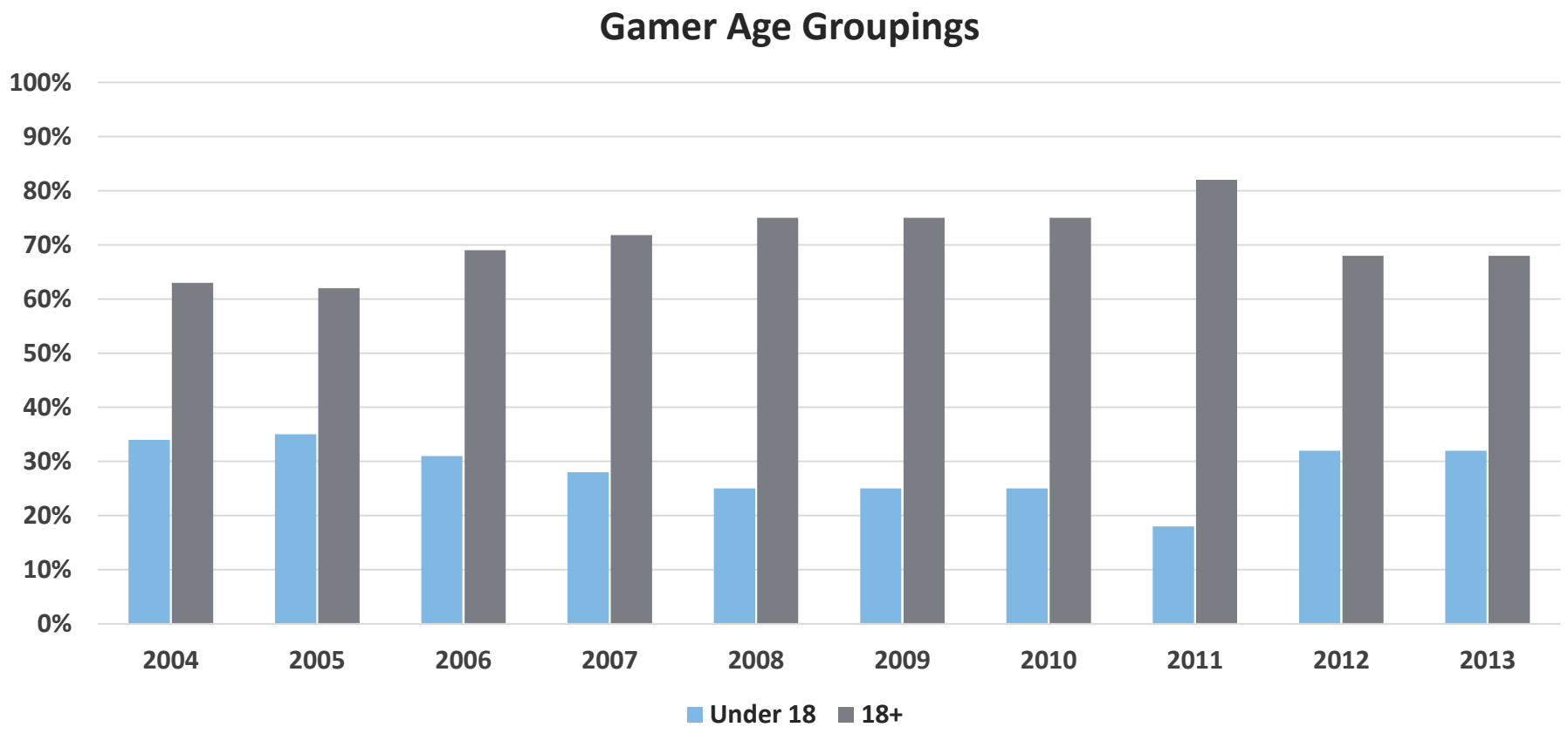
Source: EEDAR Mobile Report 2013

Who Games?



Source: ESA

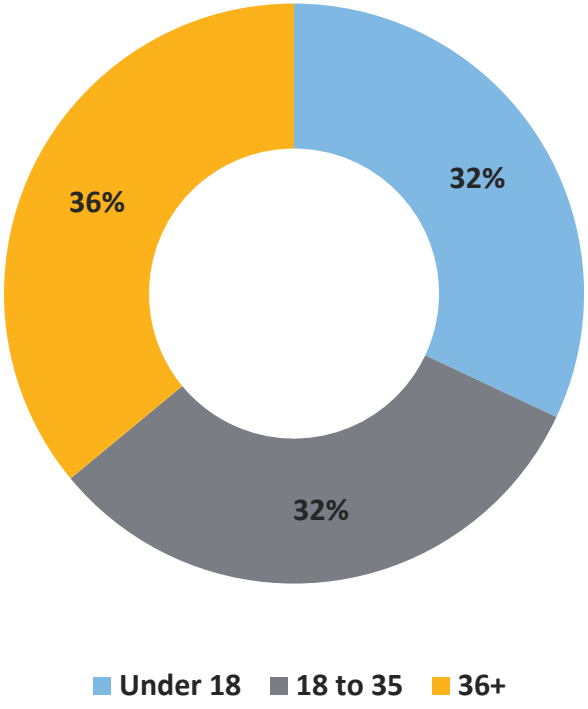
Who Games?



Source: ESA

Who Games?

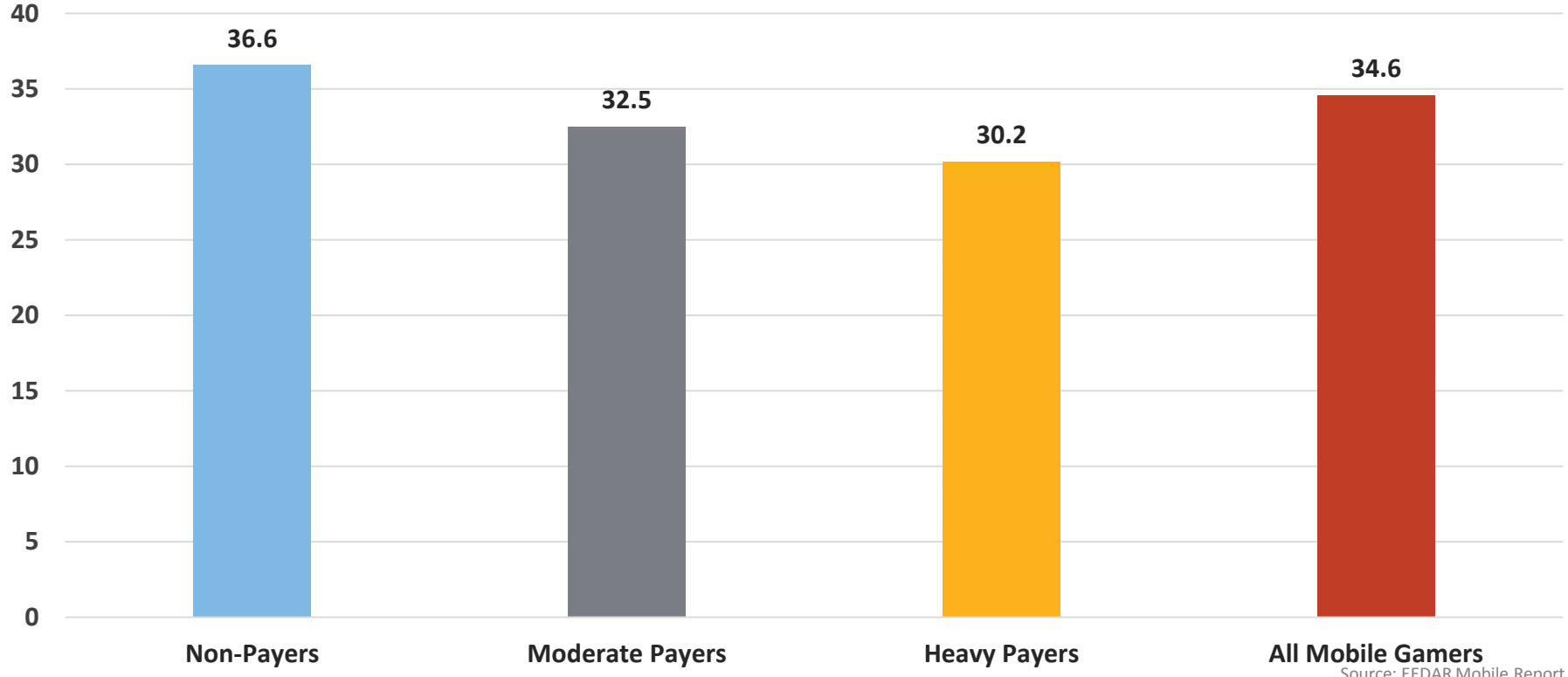
Age of Gamers



Source: ESA

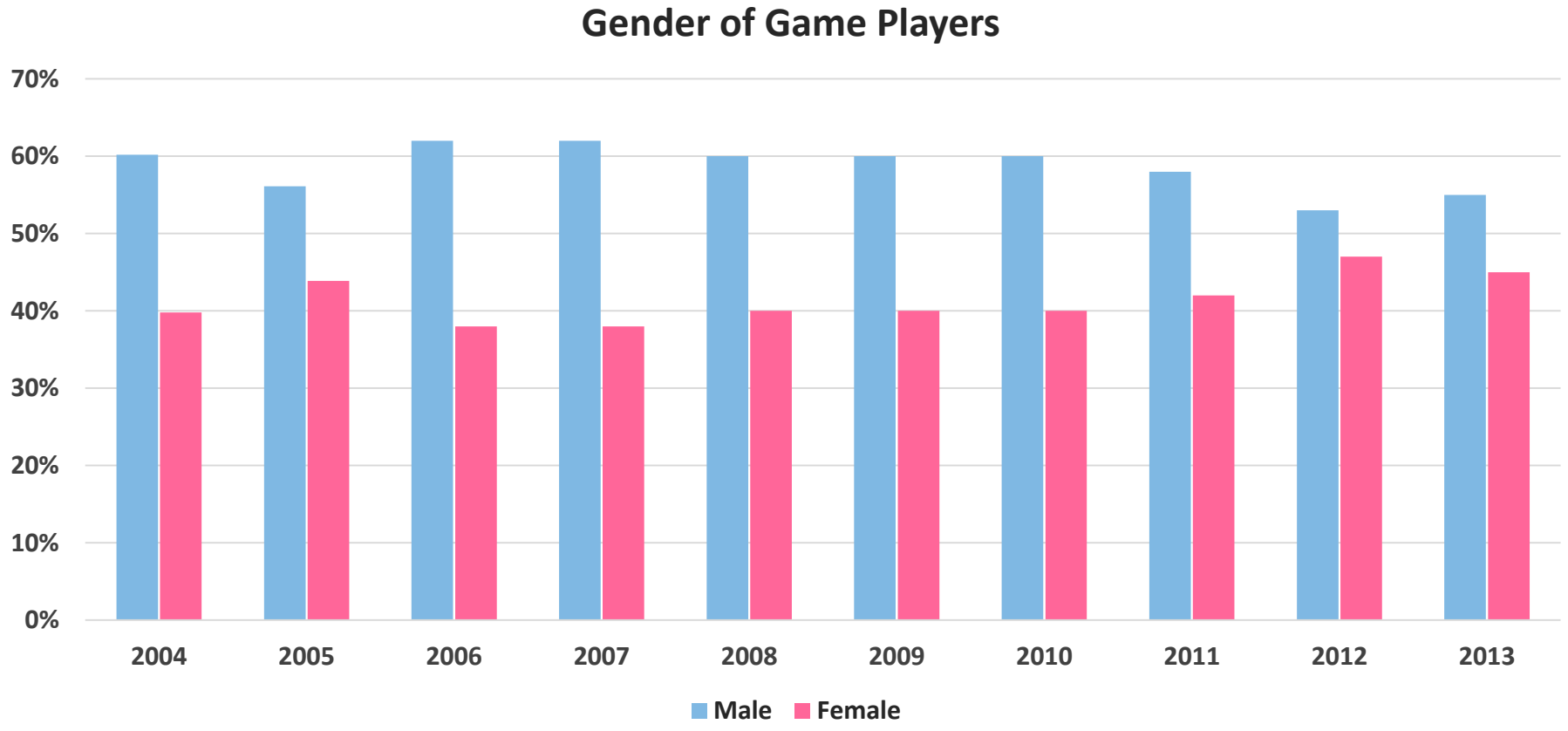
Who Games?

Age by Mobile Spending Segment in North America



Source: EEDAR Mobile Report 2013

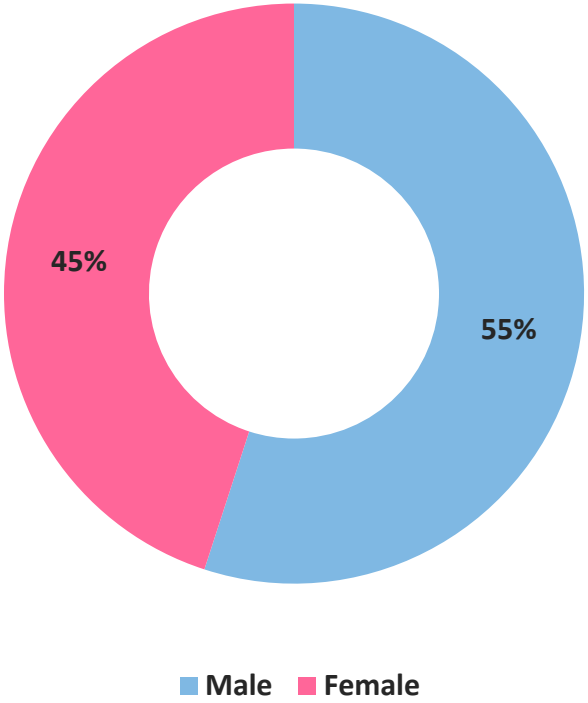
Who Games?



Source: ESA

Who Games?

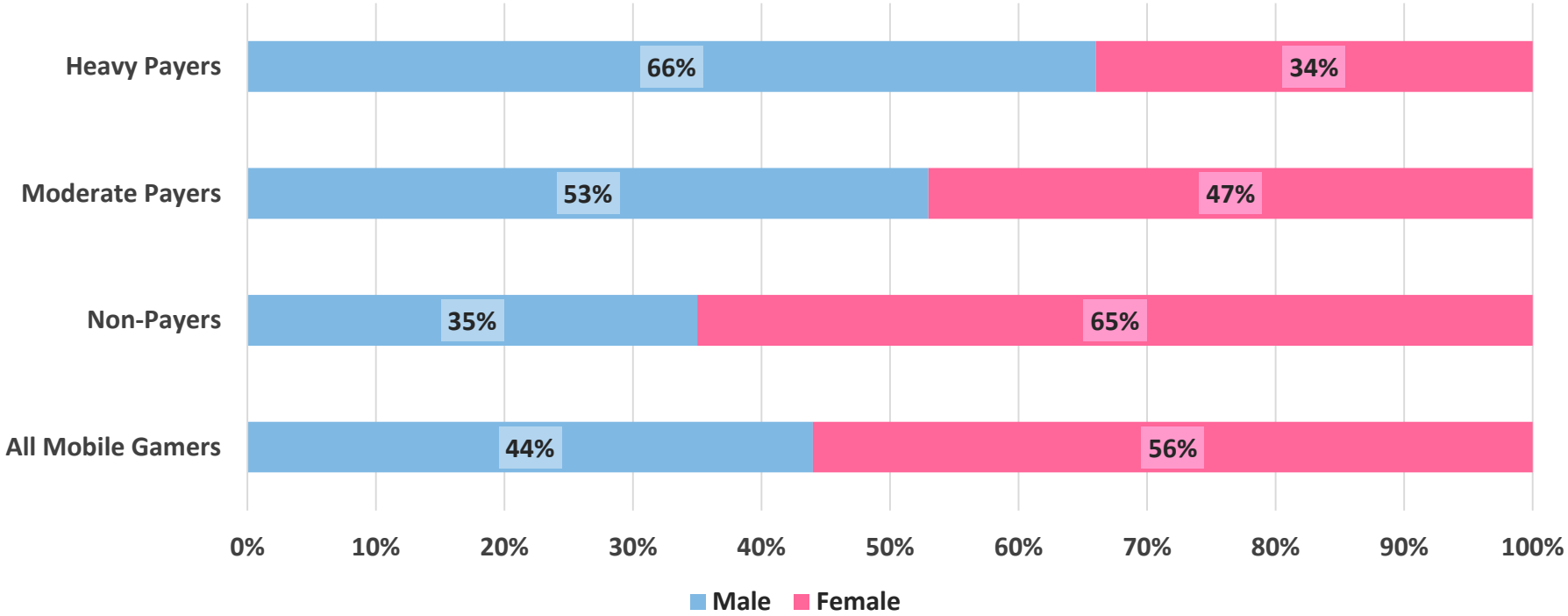
Gender of Gamers



Source: ESA

Gender by Mobile Spending Segment in North America

Of users that indicated they engage in daily mobile gaming activities



Source: EEDAR Mobile Report 2013

Adult women

now represent a **greater** portion

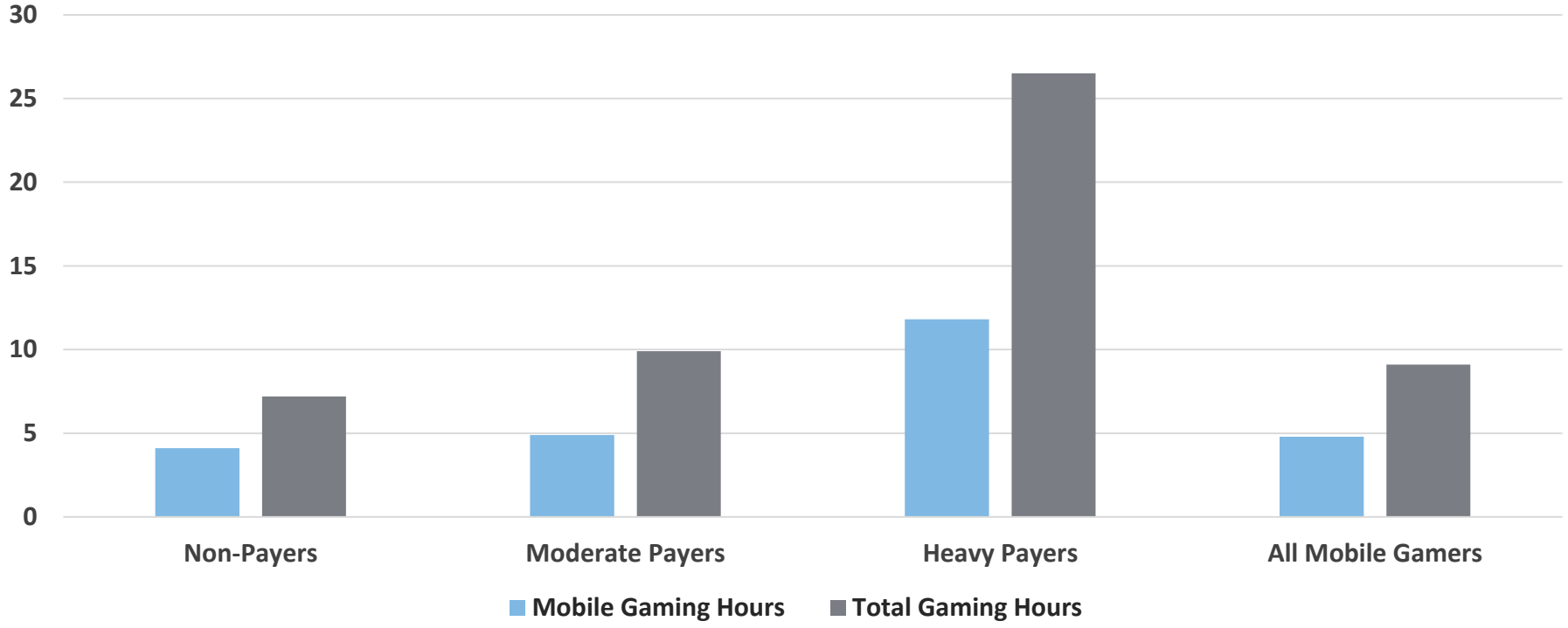
of the game-playing population (31%)

than **boys age 17 or younger** (19%).

THE ‘GAMERS’ OF TODAY ARE ENTERTAINMENT CONSUMERS

Total Gaming Hours Per Week by Mobile Spending Segment

[NA Mobile Gamers][North America]

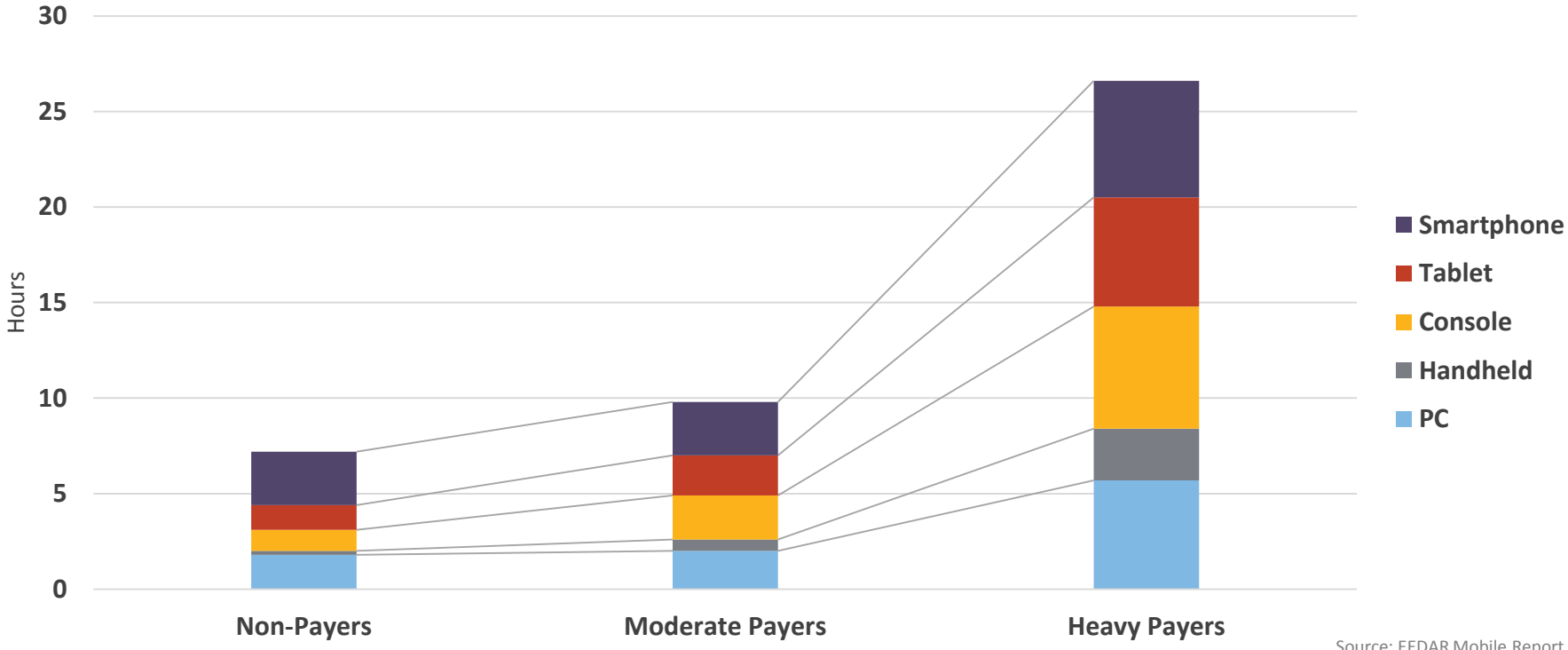


Source: EEDAR Mobile Report 2013

Gaming Time

Weekly Gaming Timeshare by Mobile Spending Segment

[NA Mobile Gamers][Hours Per Week]

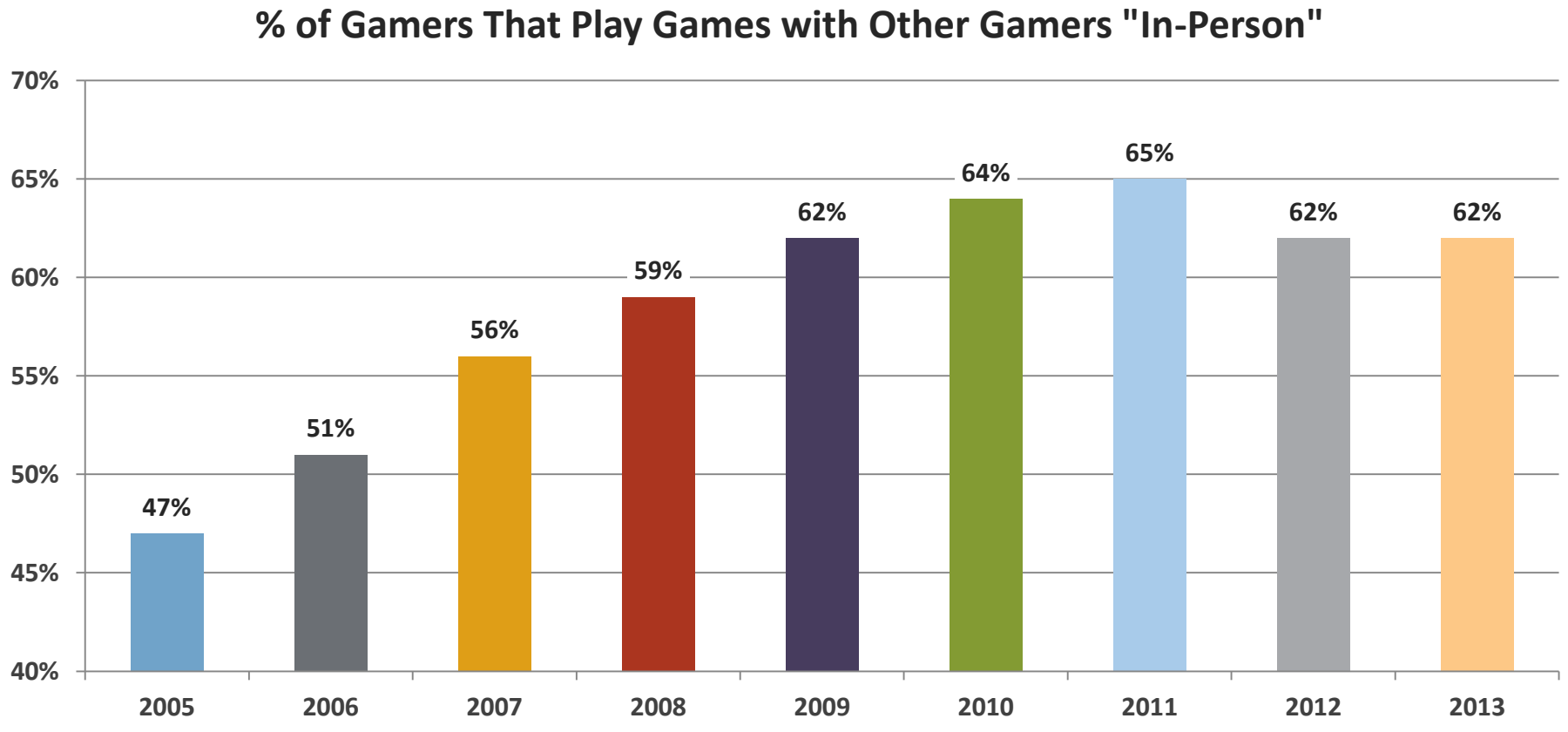


Source: EEDAR Mobile Report 2013

The “whales” of mobile
consist primarily of people
who are **already**
used to paying money for games

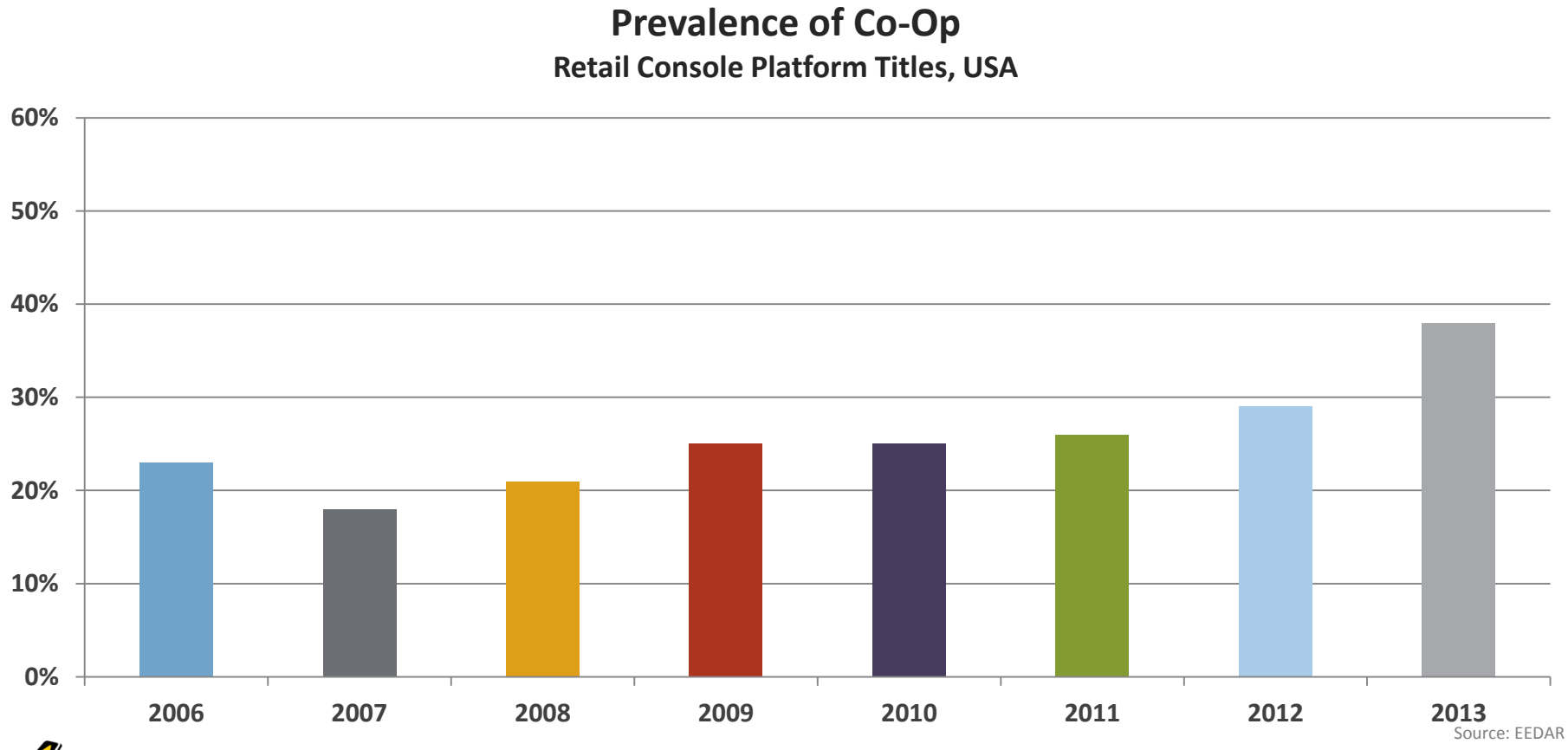
Source: EEDAR Mobile Report 2013

Who Games?



Source: ESA

Cooperative Play

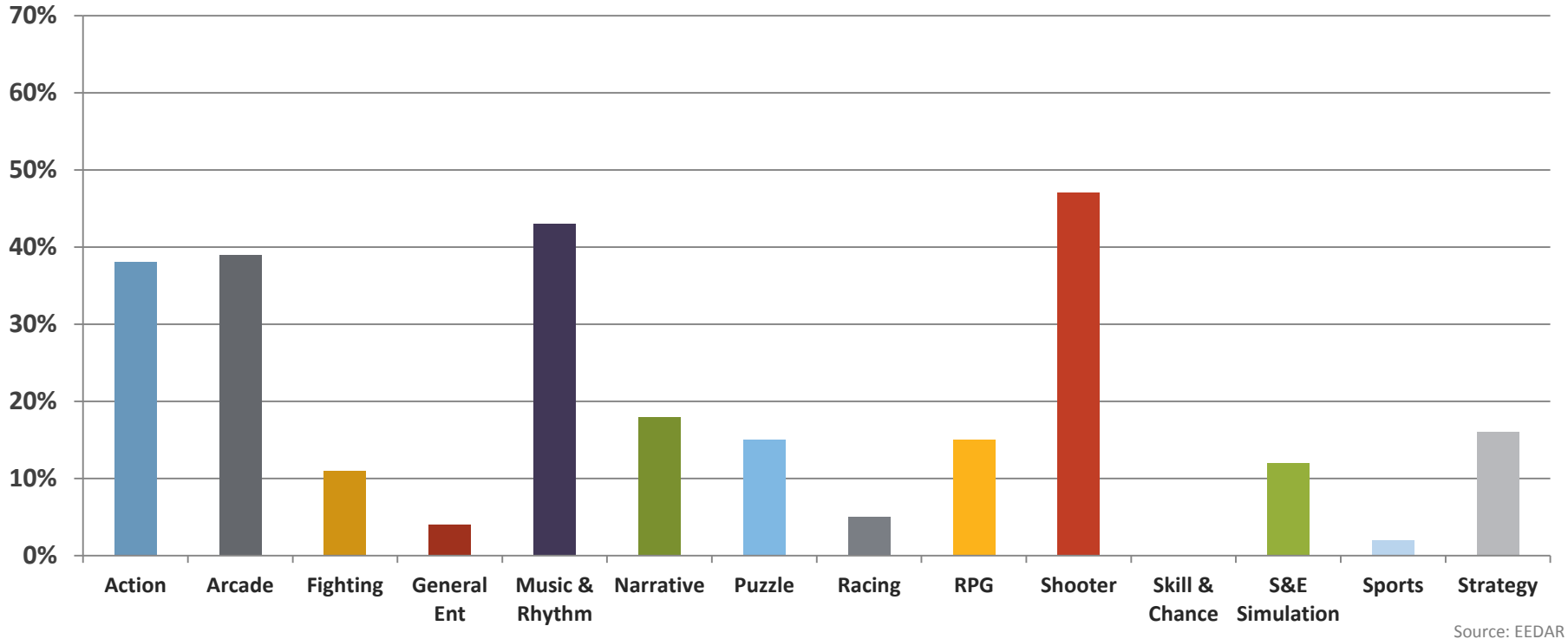


Source: EEDAR

Cooperative Play

Prevalence of Co-Op by Genre

[PS3, Wii & 360][Retail Titles][USA]

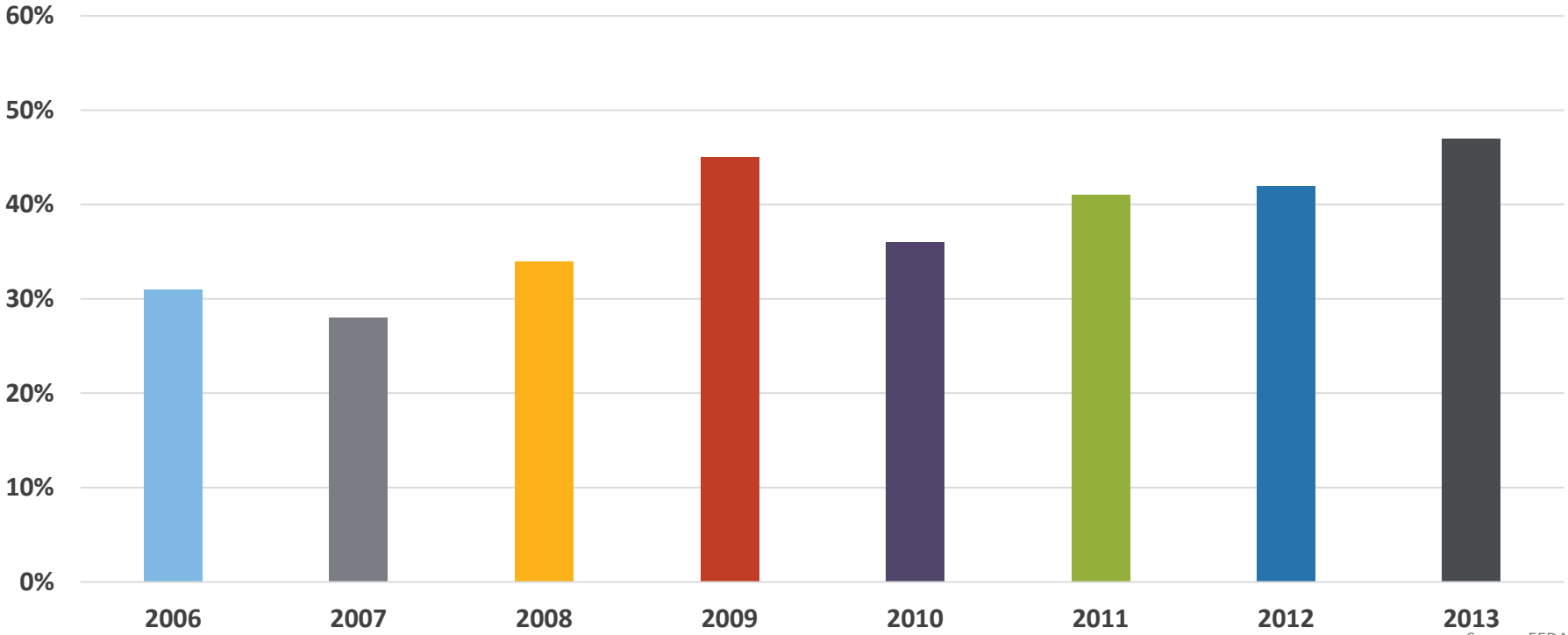


Source: EEDAR

Multiplayer Support

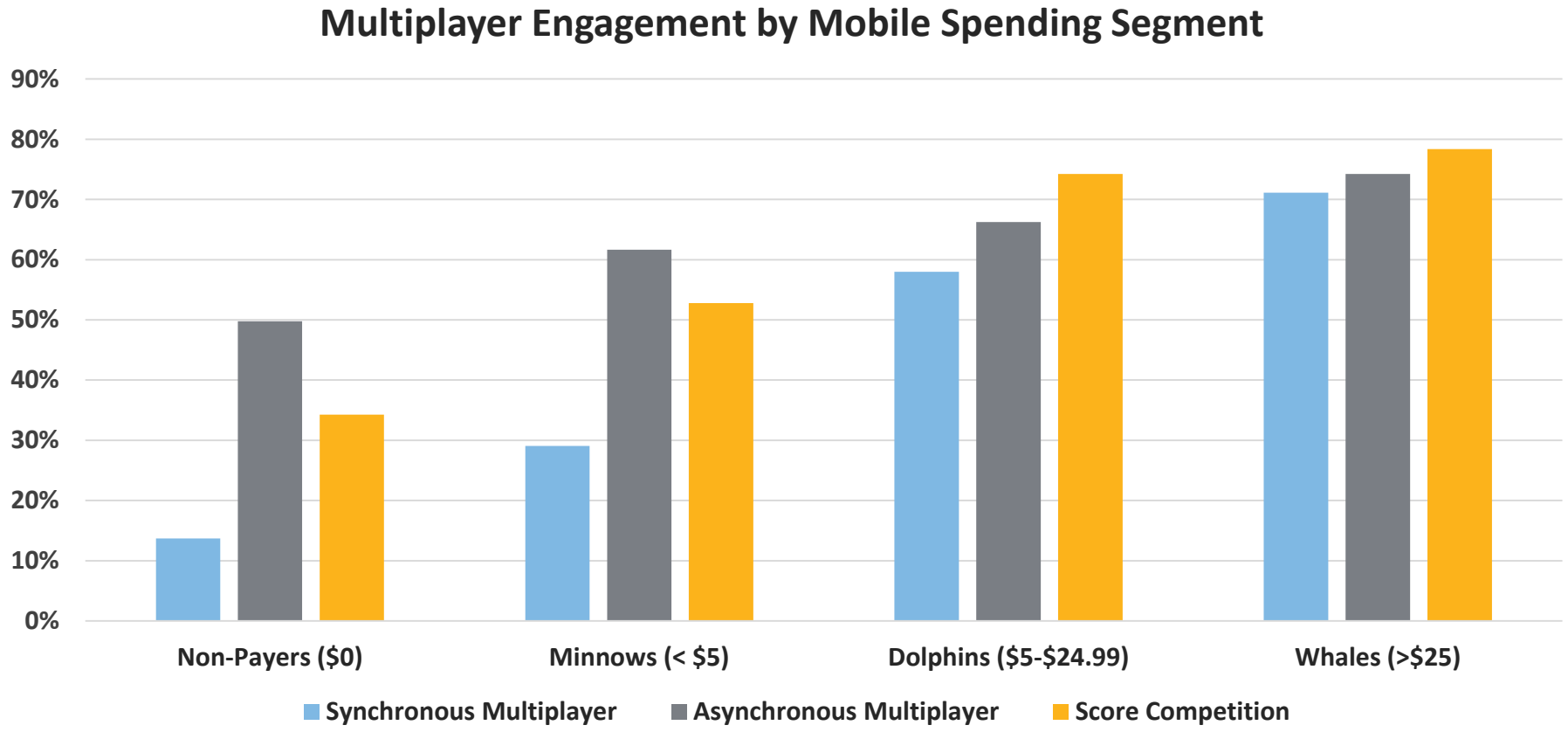
Games with No Multiplayer Support

[Xbox 360 & PS3] [Retail Titles] in the [USA]



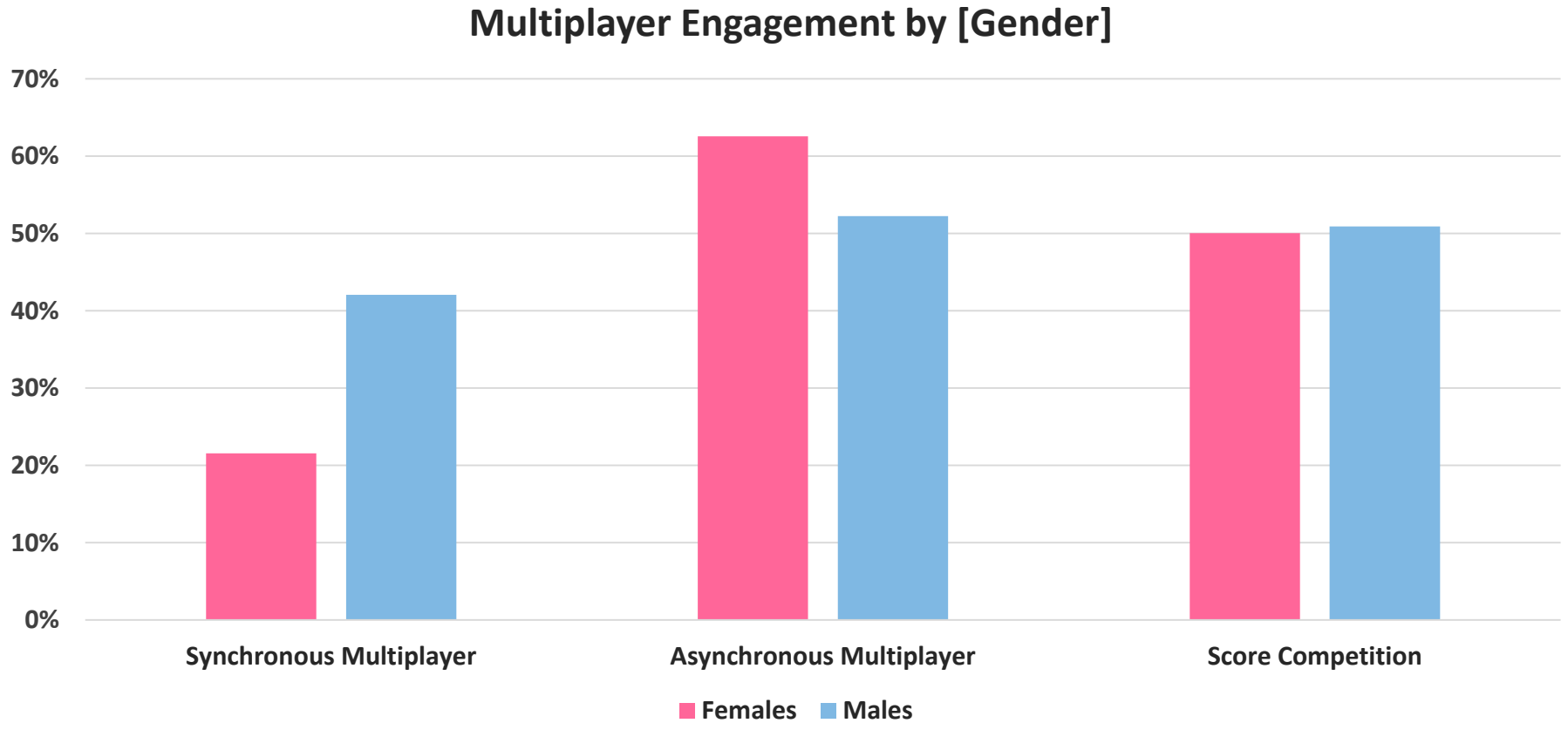
Source: EEDAR

Multiplayer: Mobile



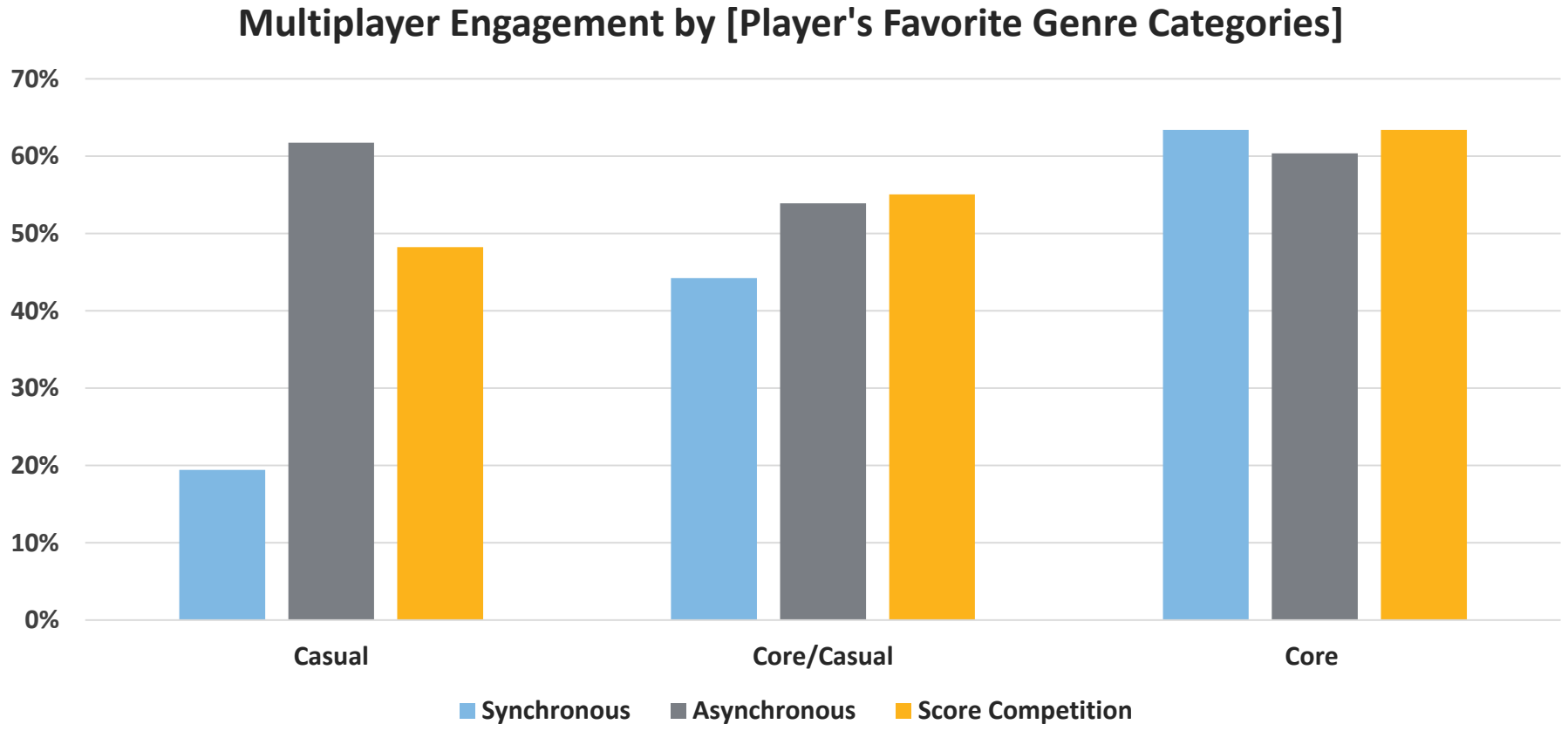
Source: EEDAR Mobile Report 2013

Multiplayer: Mobile



Source: EEDAR Mobile Report 2013

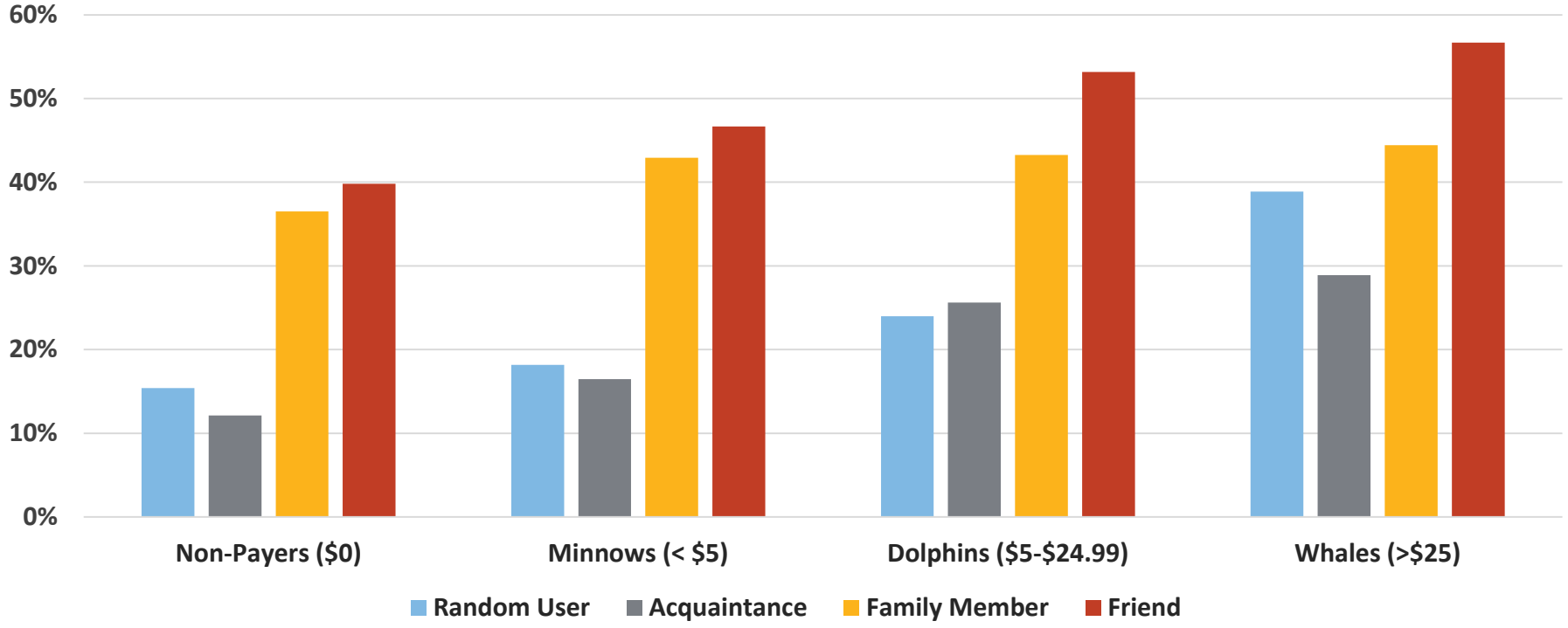
Multiplayer: Mobile



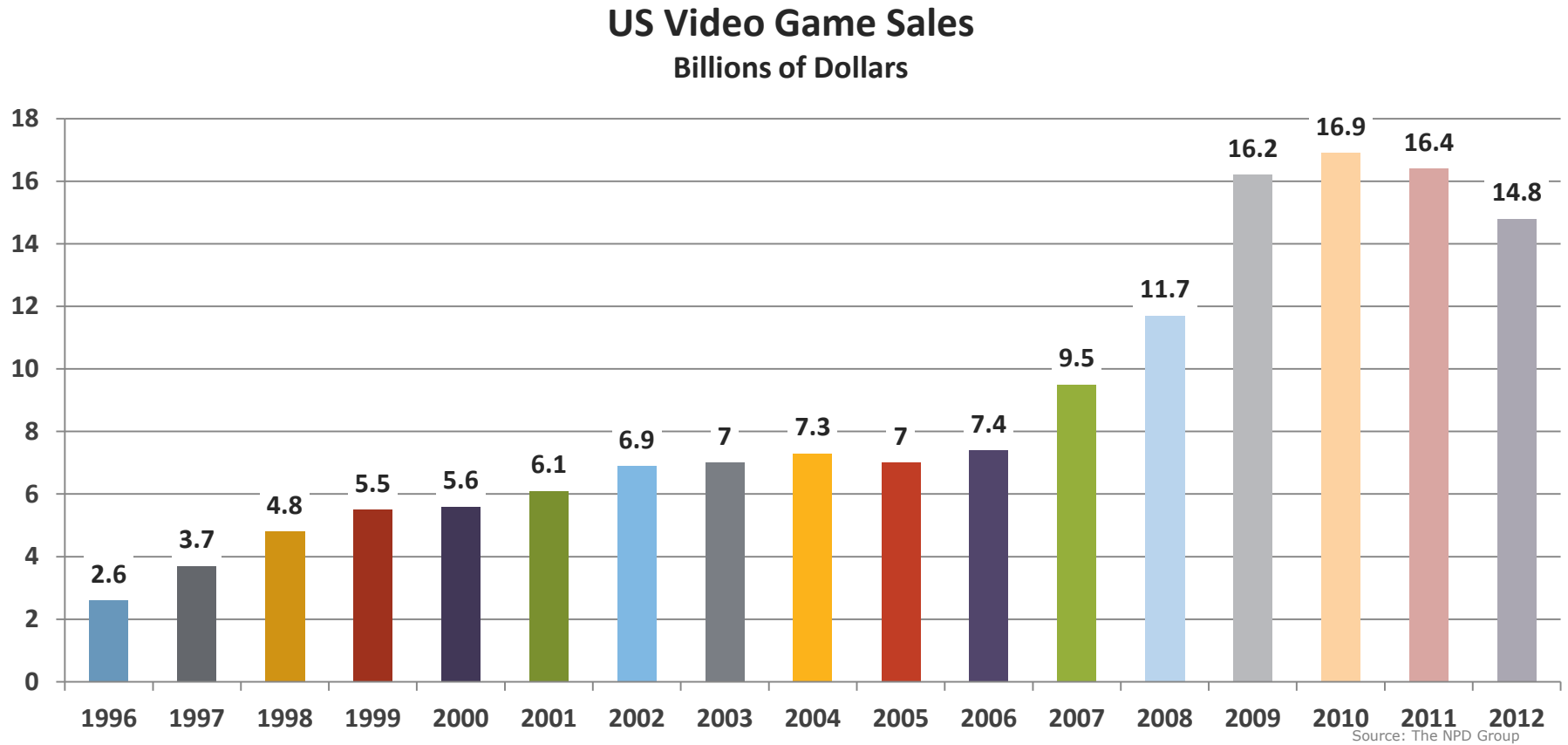
Source: EEDAR Mobile Report 2013

Multiplayer: Mobile

Preferred Multiplayer Partner/Opponents for Mobile Gamers
by [Mobile Spending Segment]



Source: EEDAR Mobile Report 2013


US Video Game Sales
Billions of Dollars
18
16
14
12
10
8
6
4
2
0
2.6
3.7
4.8
5.5
5.6
6.1
6.9
7
7.3
7
7.4
9.5
11.7
16.2
16.9
16.4
14.8
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
Source: The NPD Group

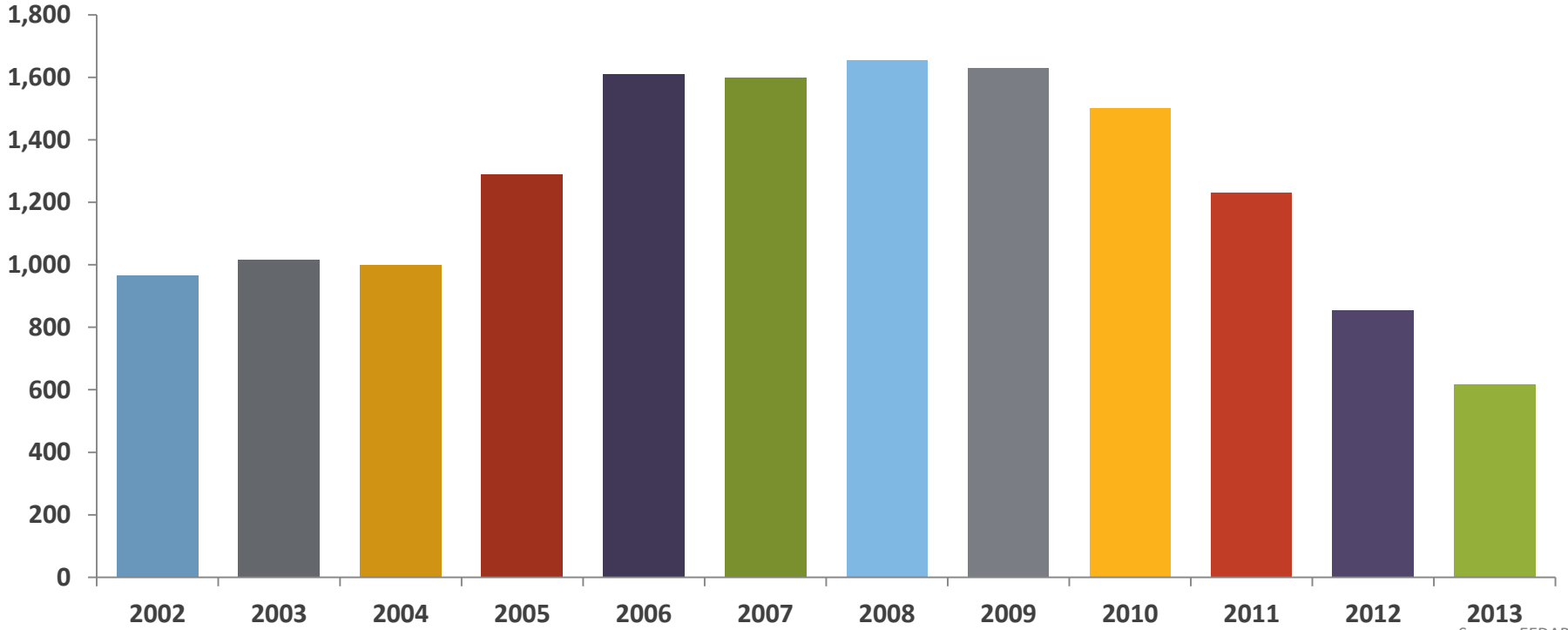
A Renaissance

This has led to a Renaissance in game creation…

Game Releases

Release Quantities

Retail Console, Handheld & PC Platform Title Releases in the USA



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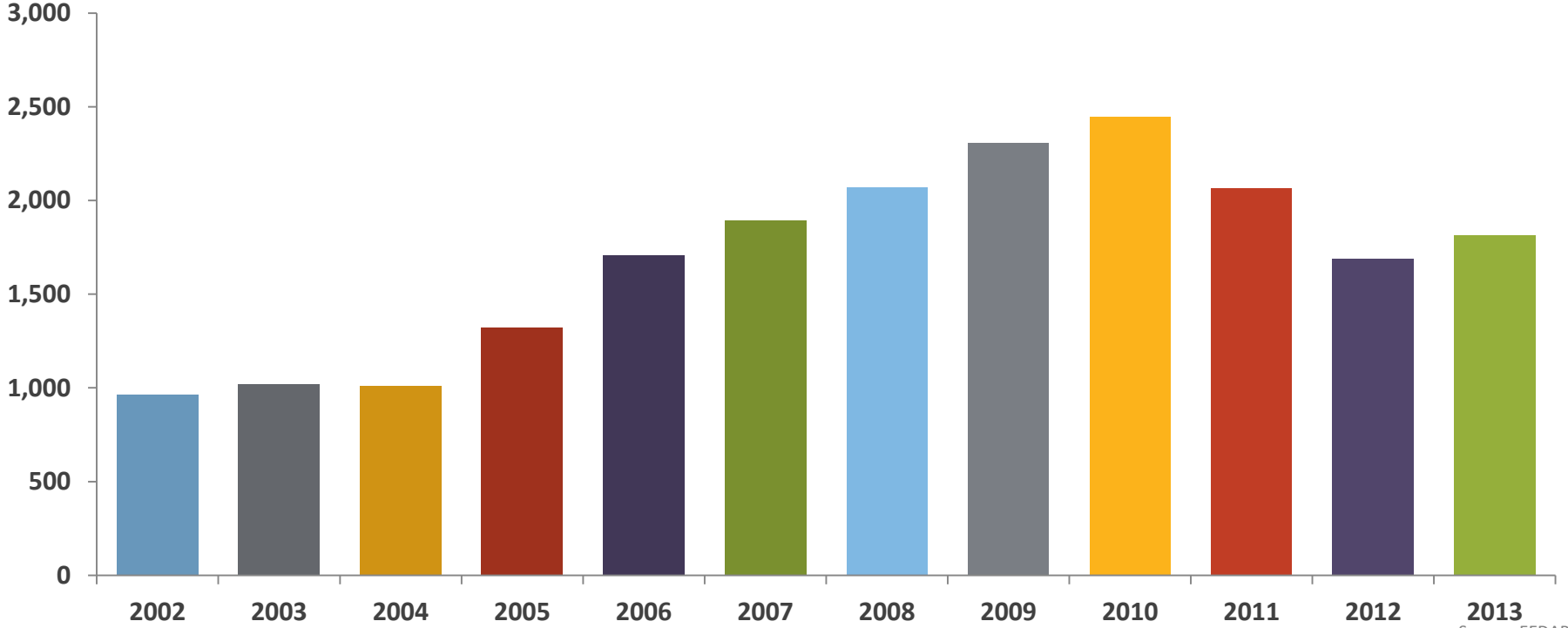
Game Releases

Release Quantities

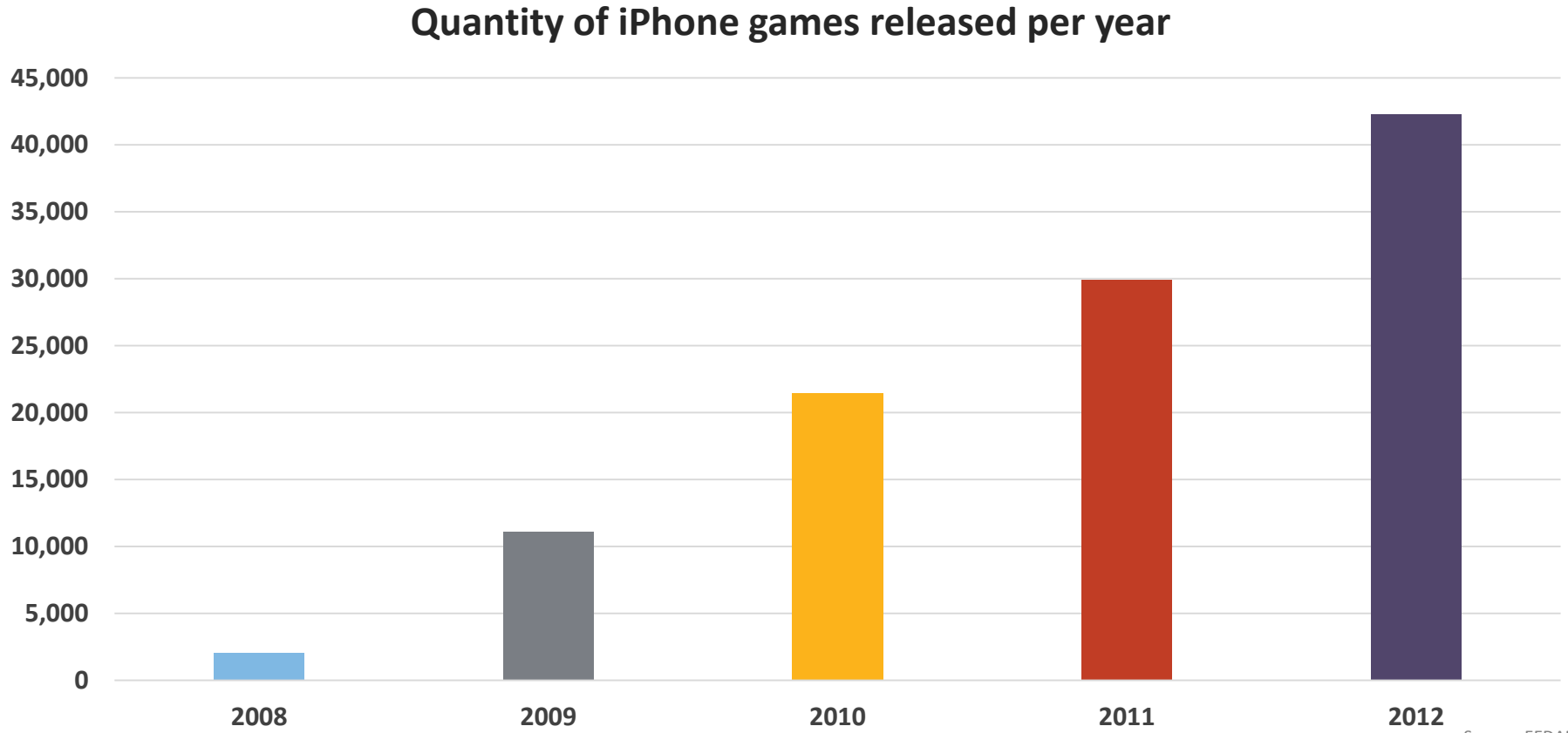
Retail & Digital Console, Handheld & PC Platform Title Releases in the USA



Source: EEDAR

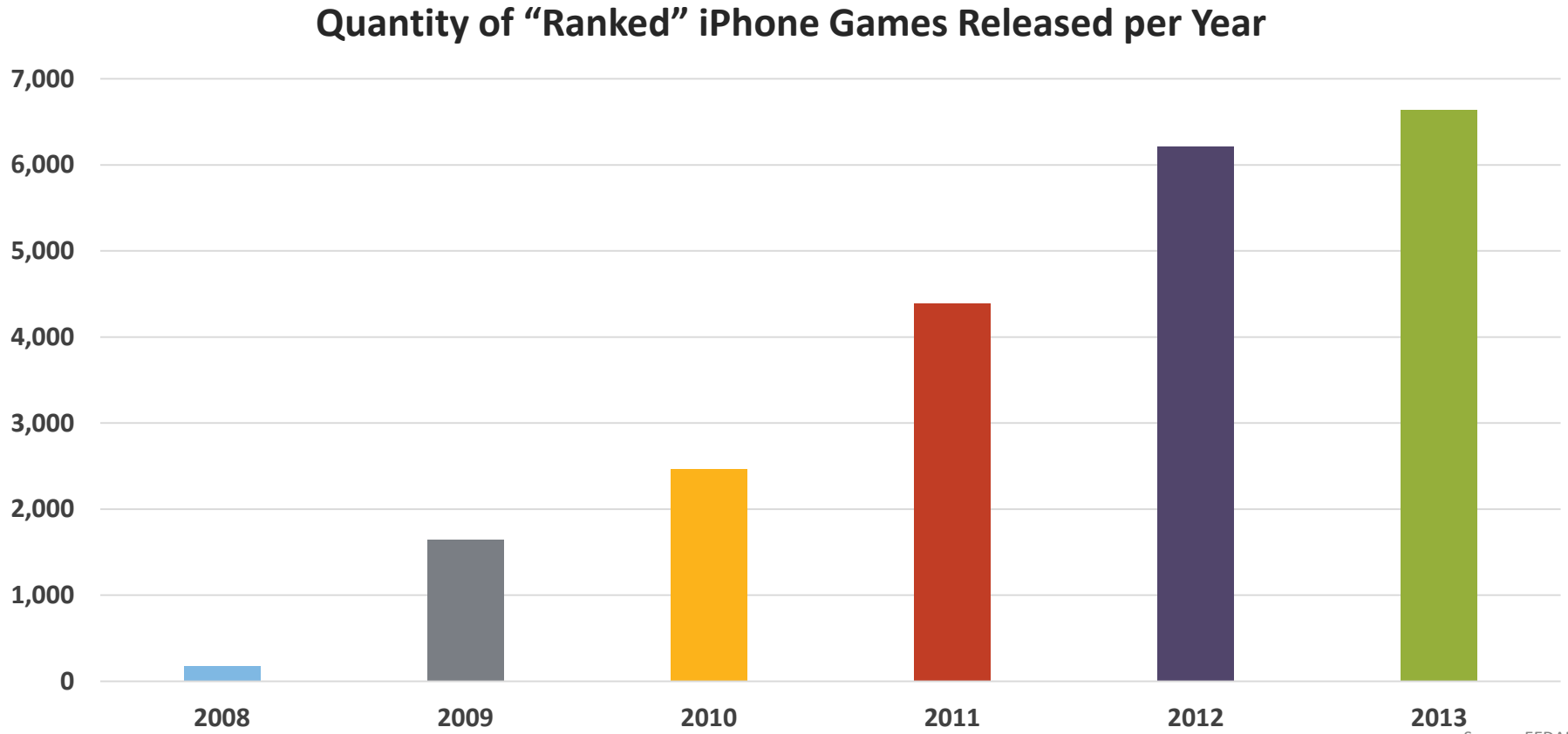
Changes

Game Releases



Source: EEDAR

Game Releases

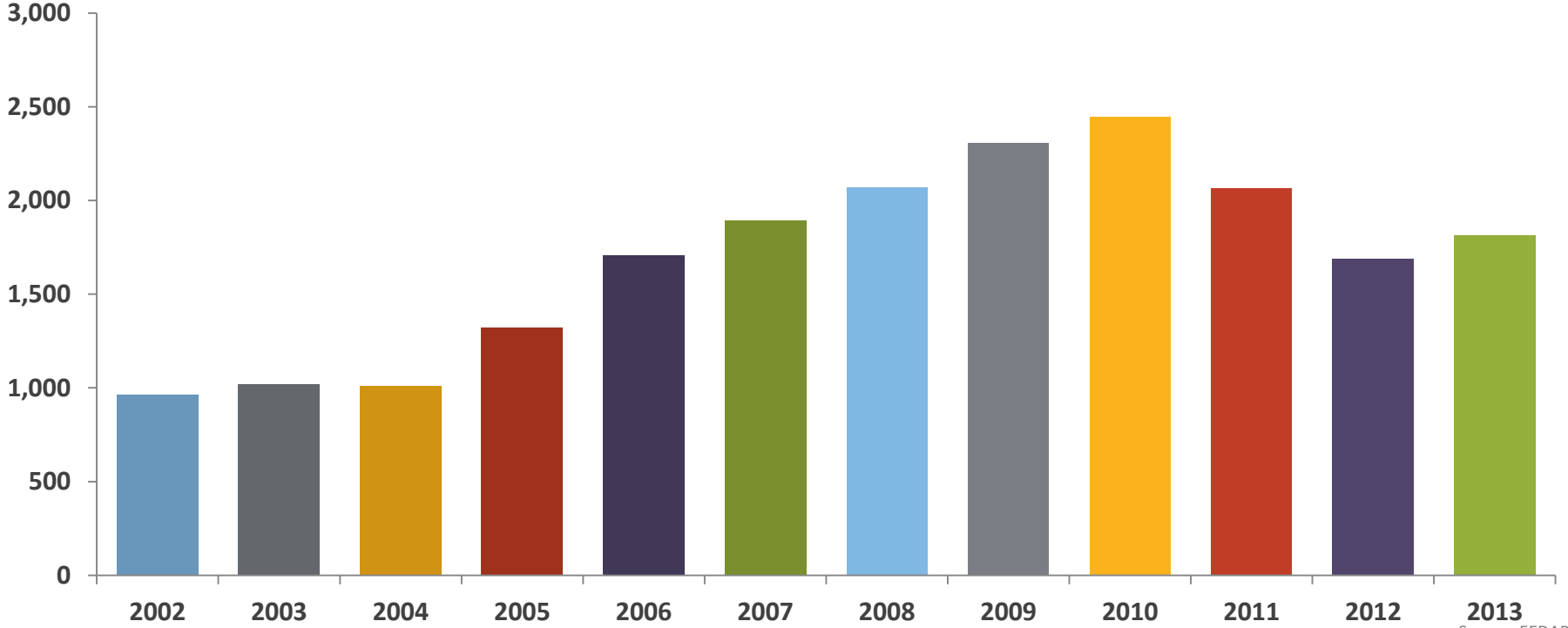


Source: EEDAR

Game Releases

Release Quantities

Retail & Digital Console, Handheld & PC Platform Title Releases in the USA

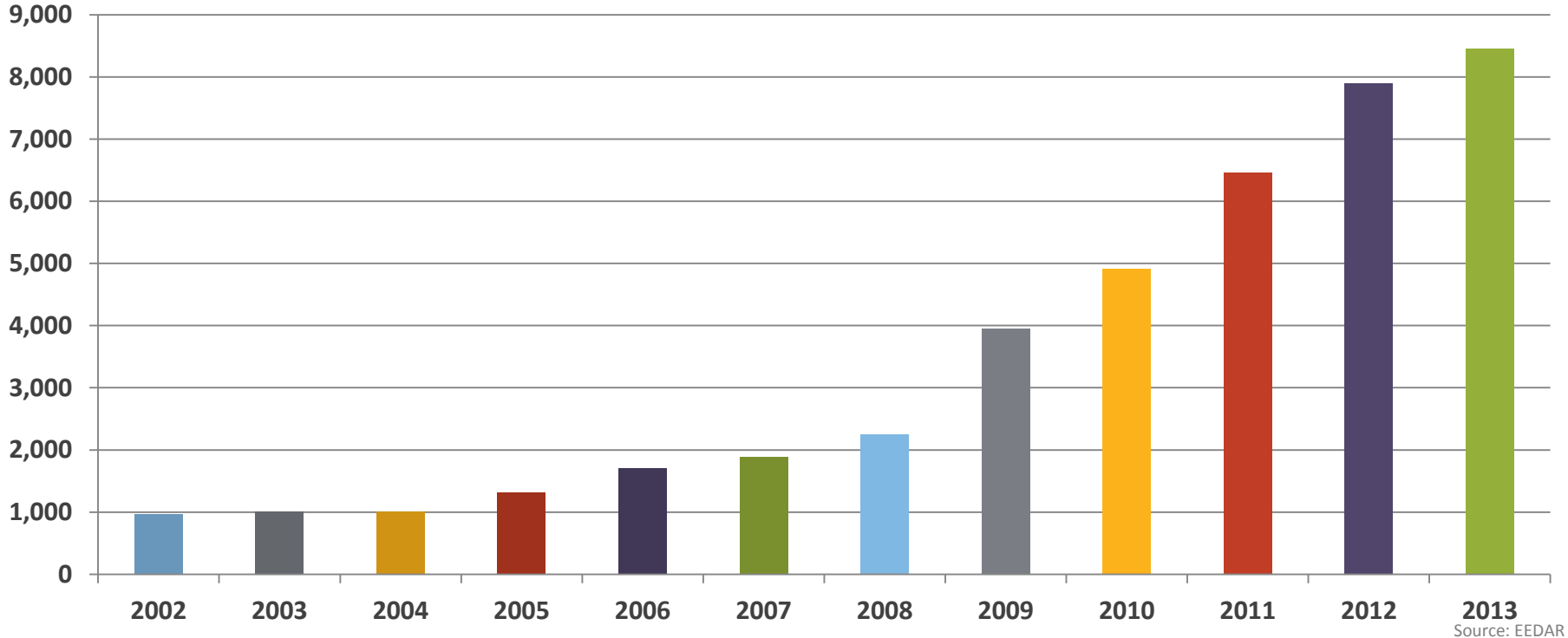


Source: EEDAR

Game Releases

Release Quantities

Retail & Digital Console, Handheld, PC & iOS Platform Title Releases in the USA

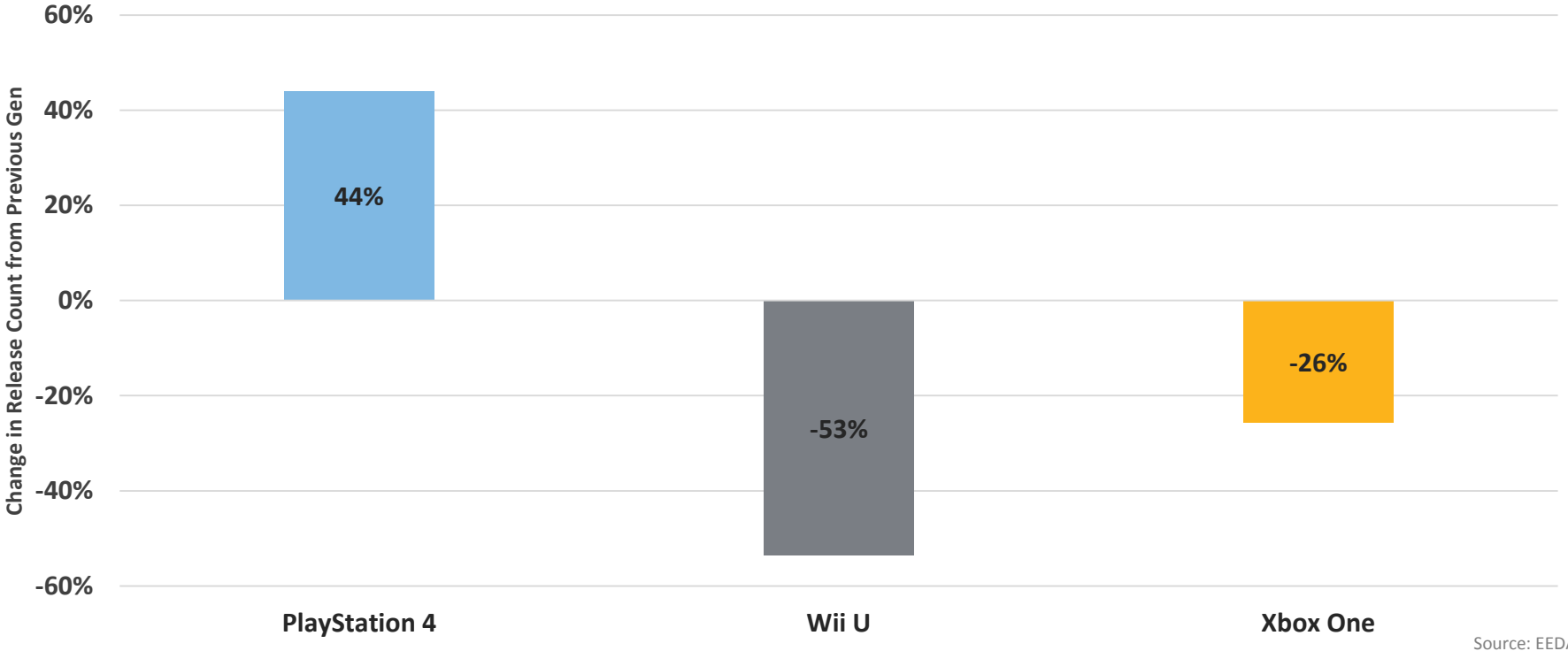


Source: EEDAR

8TH GENERATION CONSOLES

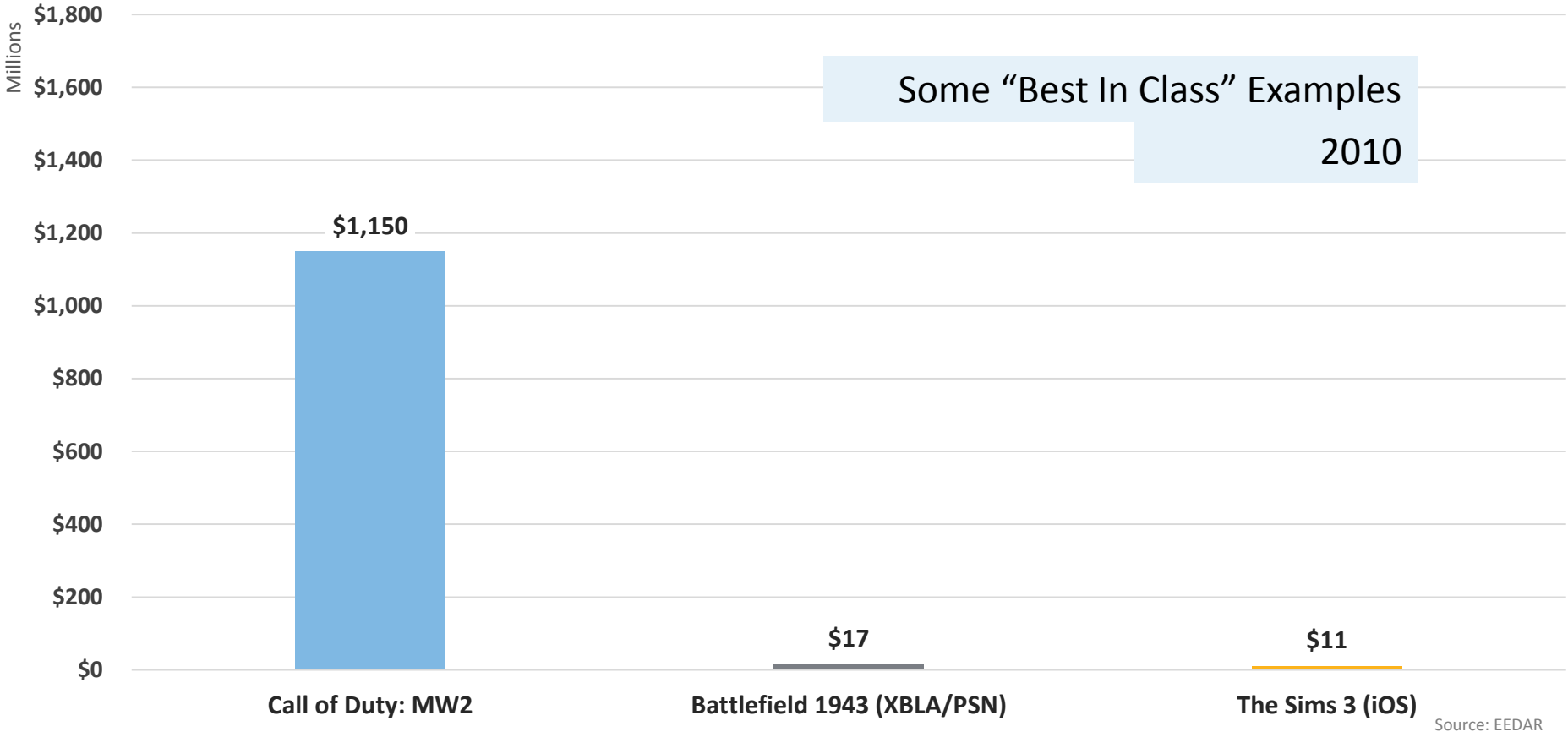
Count of Released Console Games

[7th to 8th Gen][Successor Platform Equal Time on Market][USA]



Source: EEDAR

Why Do I Still Talk About Console?



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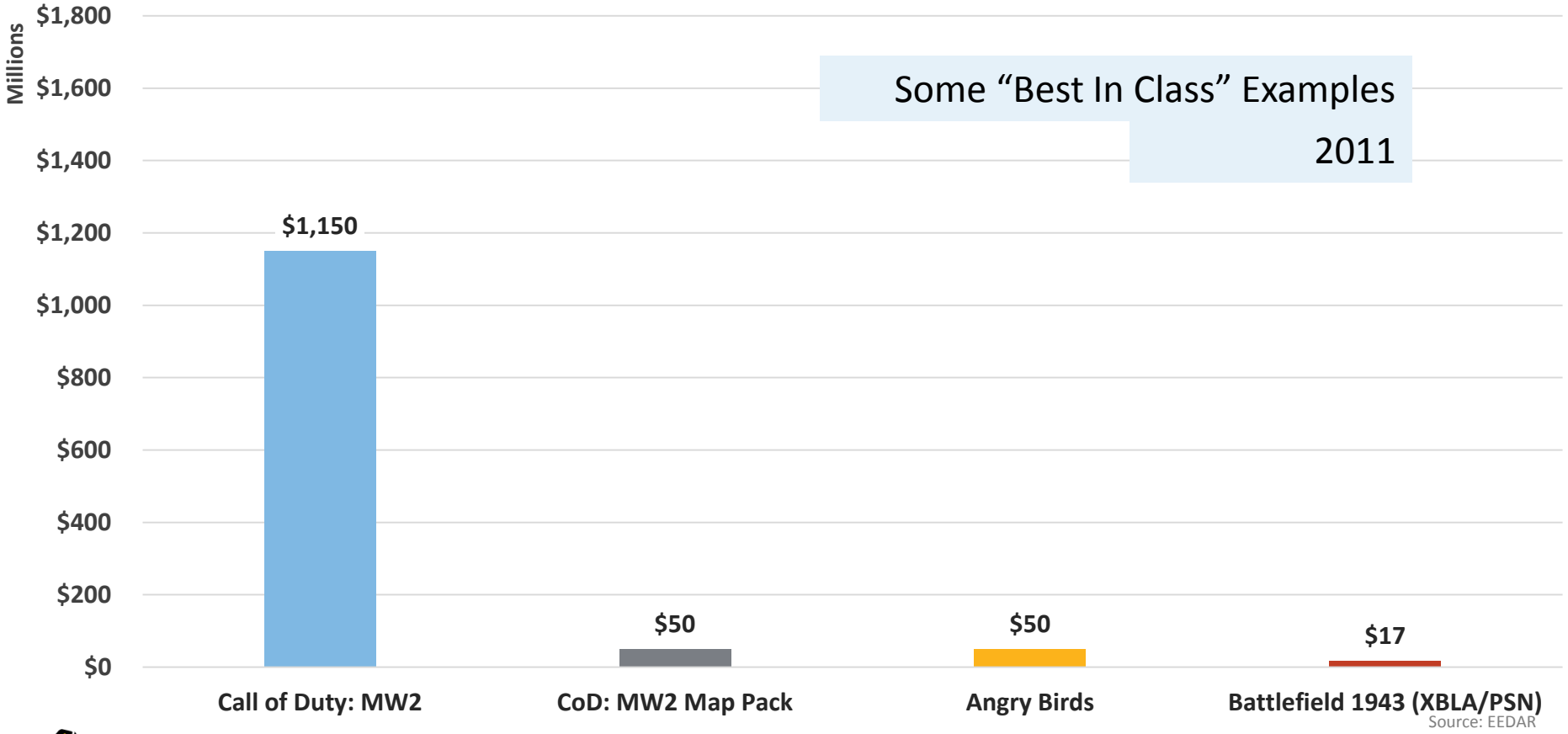

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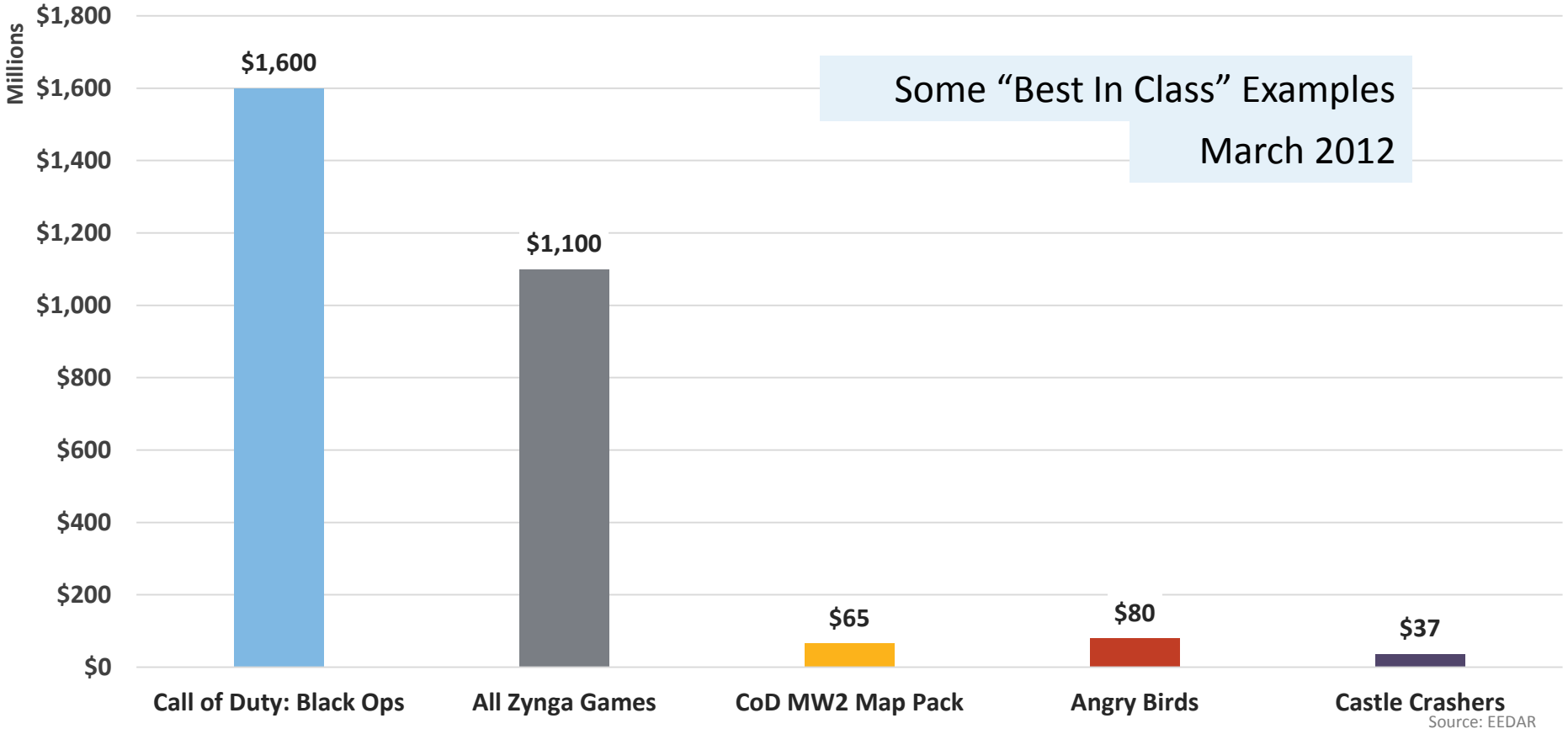

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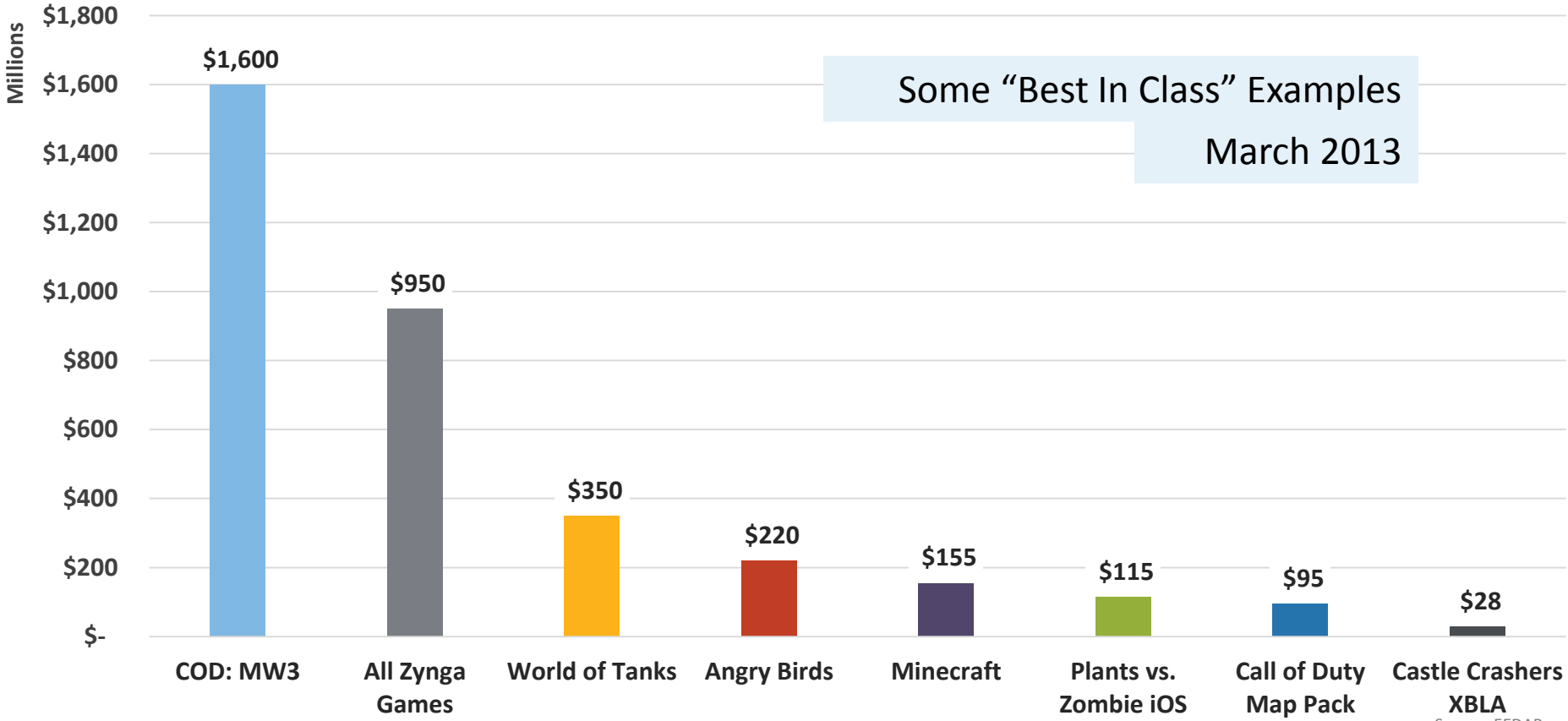

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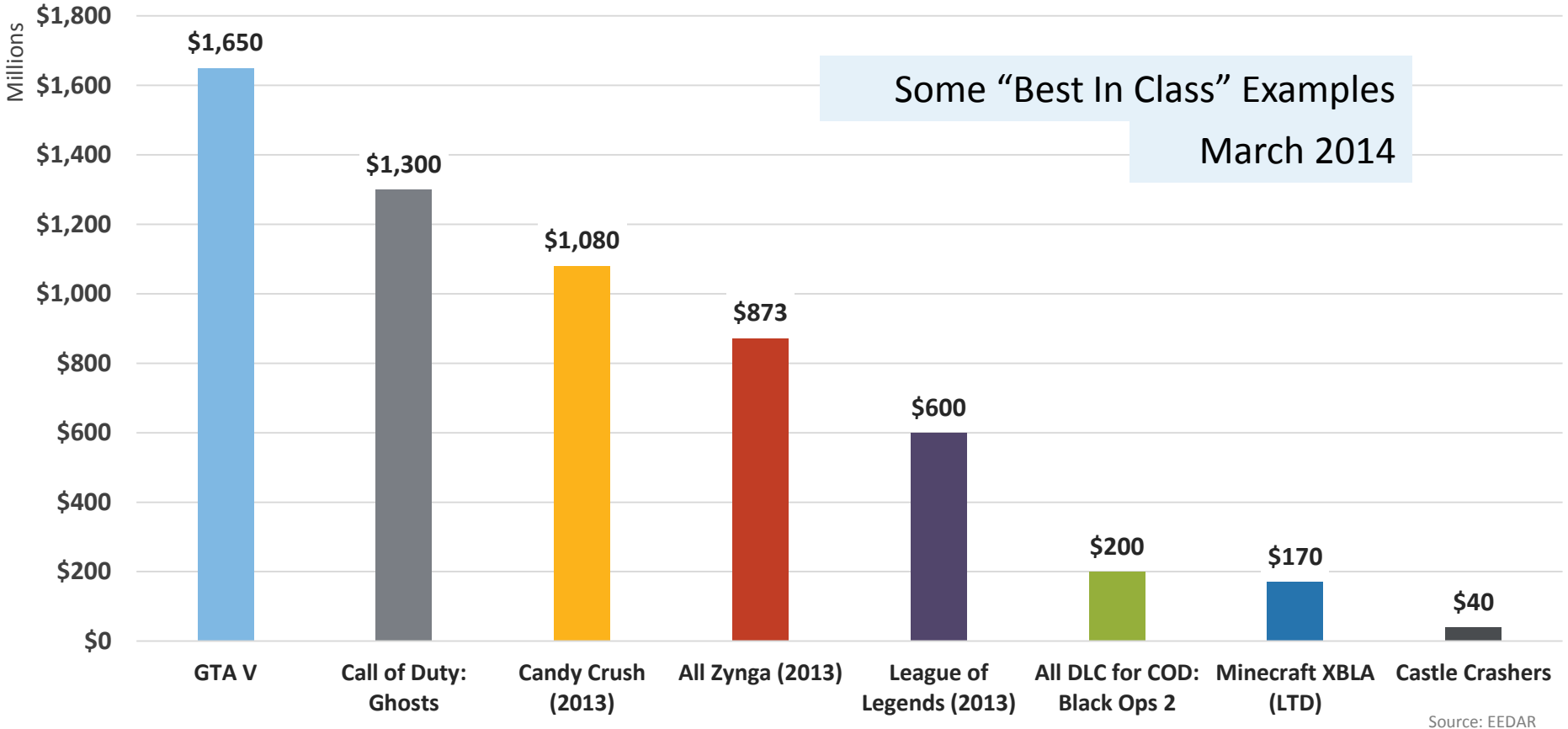
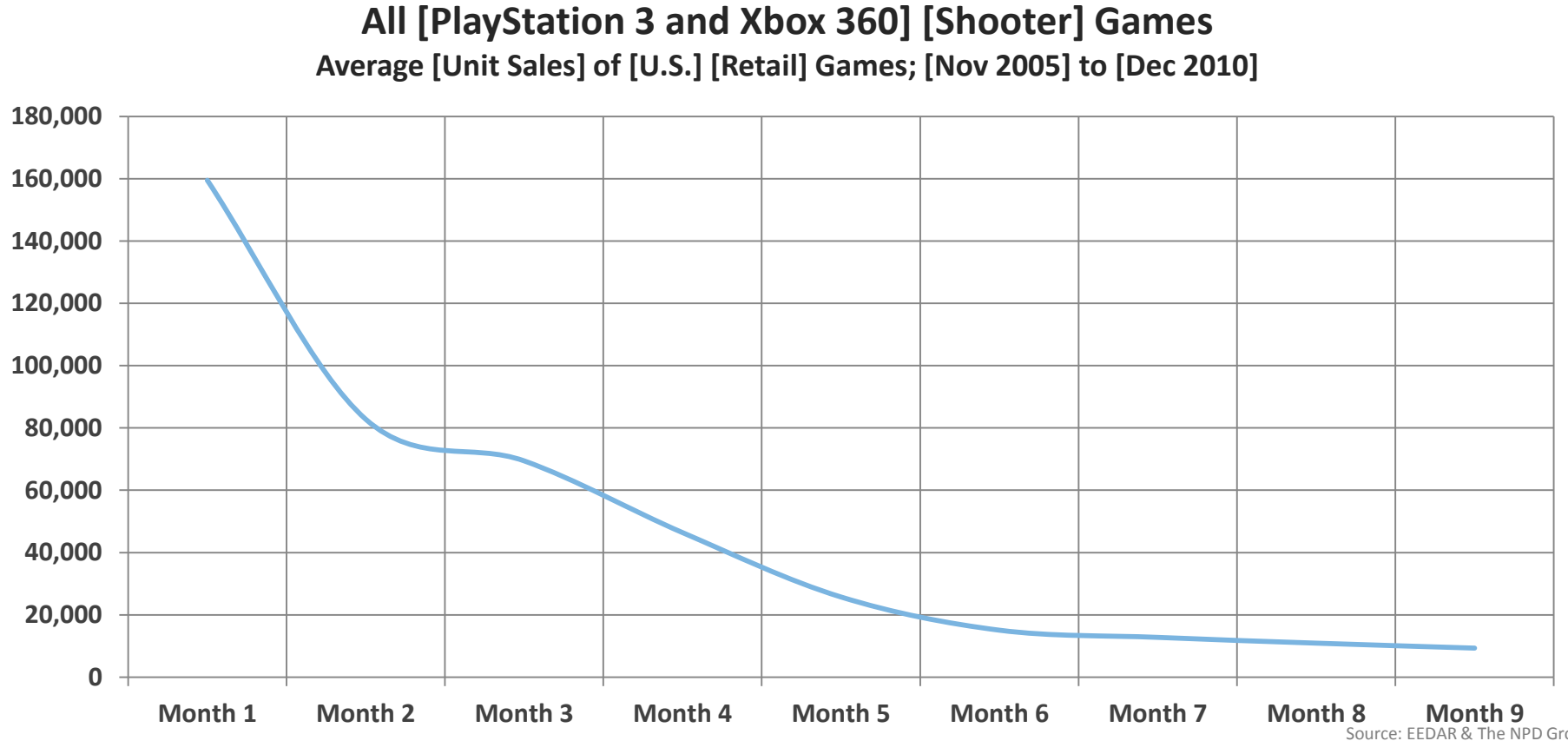


Source: EEDAR

Sales Curve

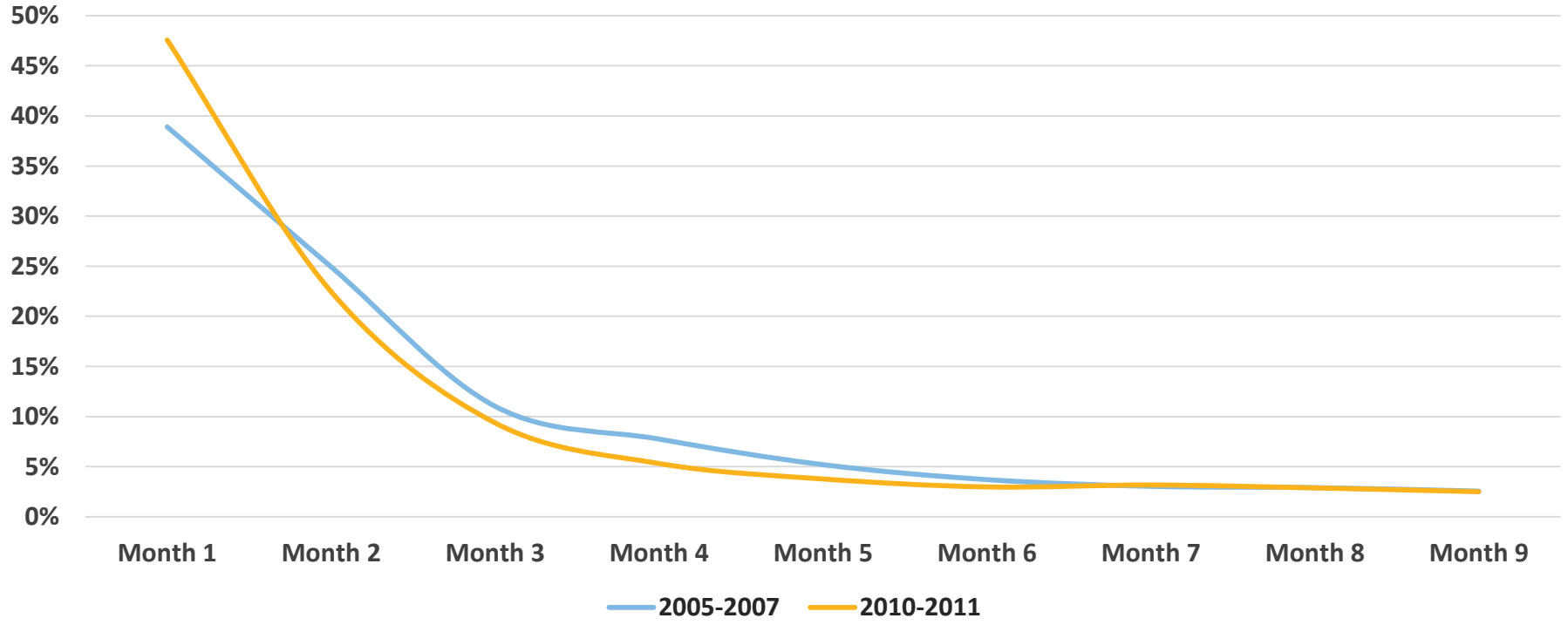


Source: EEDAR & The NPD Group

Sales Curve

Frontloading of Sales by Core Genres over Time

[Genres: Action, Fighting, RPG, Shooter, Strategy] [USA] [% of Total 9 Month Unit Sales]



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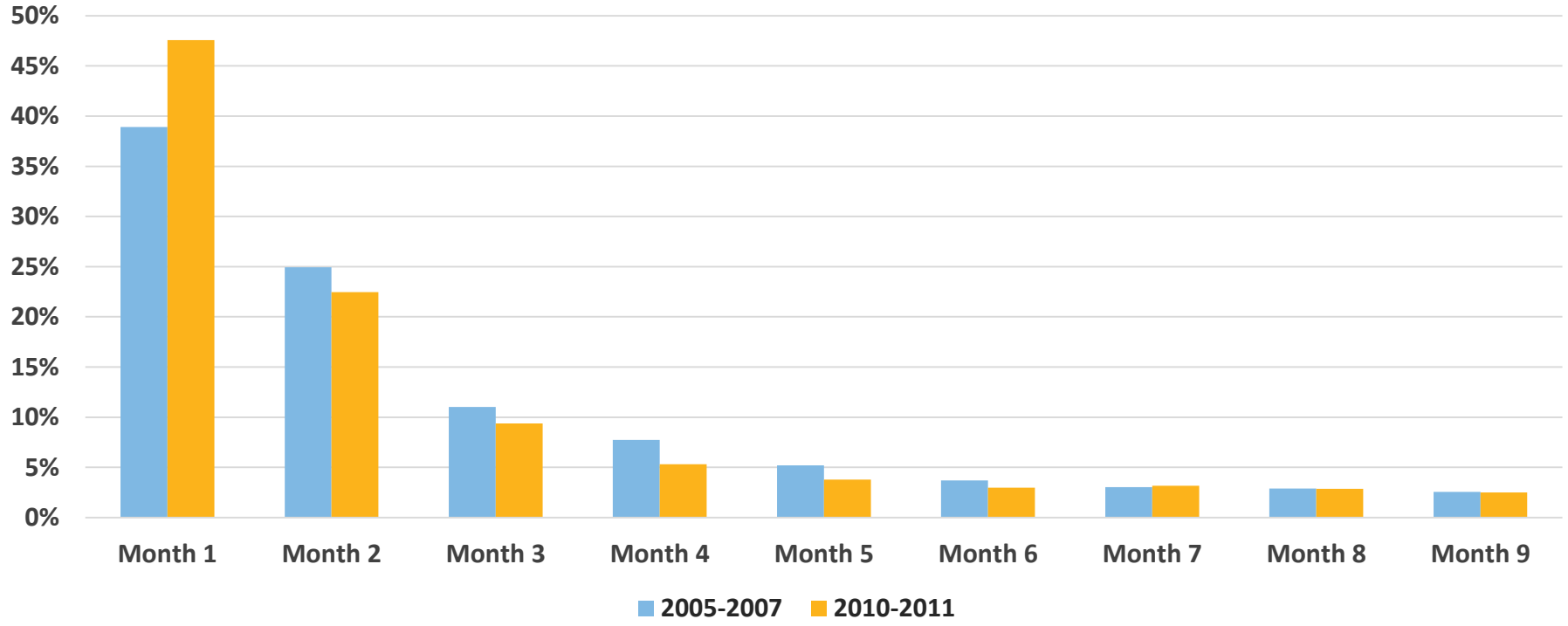
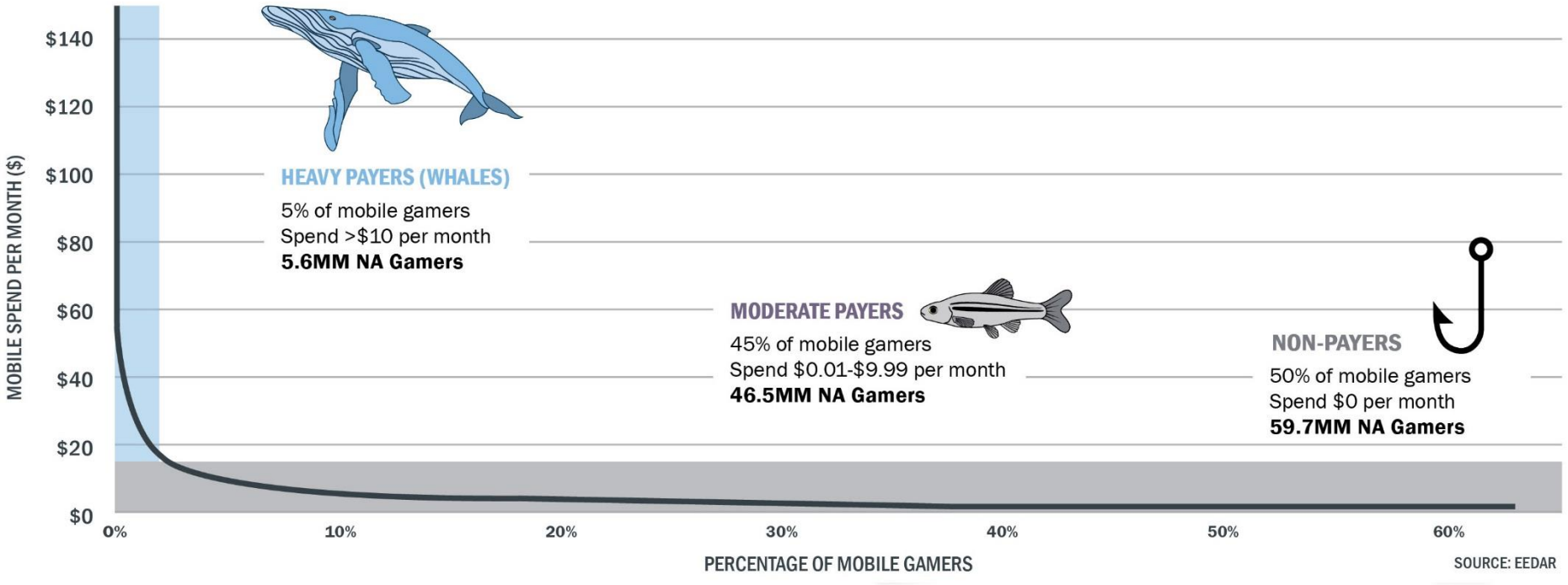


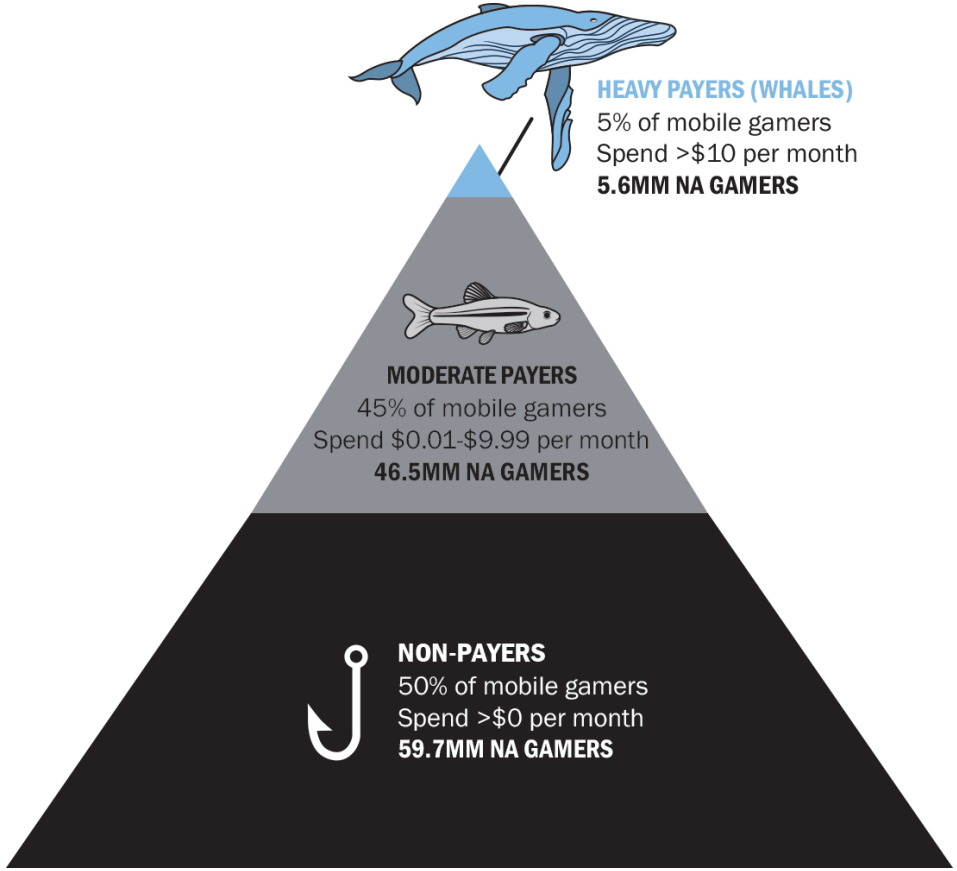
Source: EEDAR & The NPD Group

Go **BIG** or **Go Home**

Monetizing Mobile



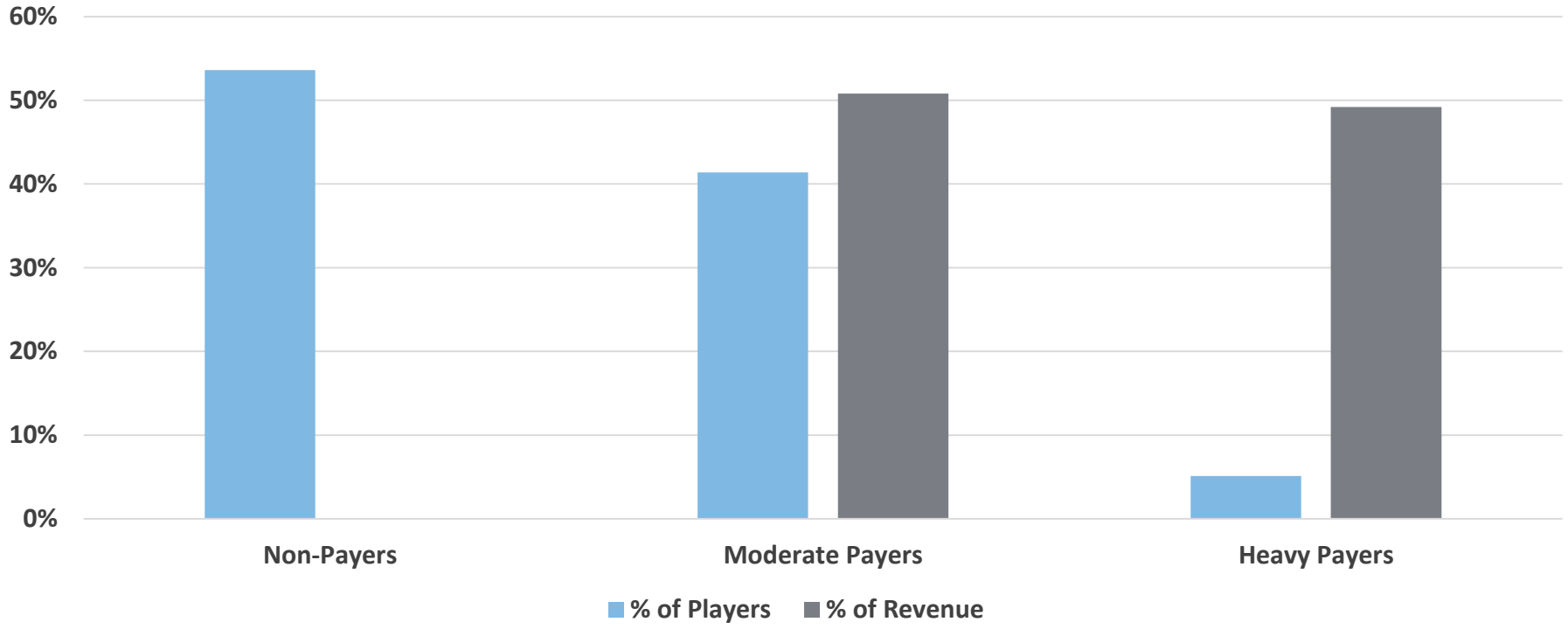
Monetizing Mobile



Source: EEDAR Mobile Report 2013

Mobile Gamers Revenue Breakdown

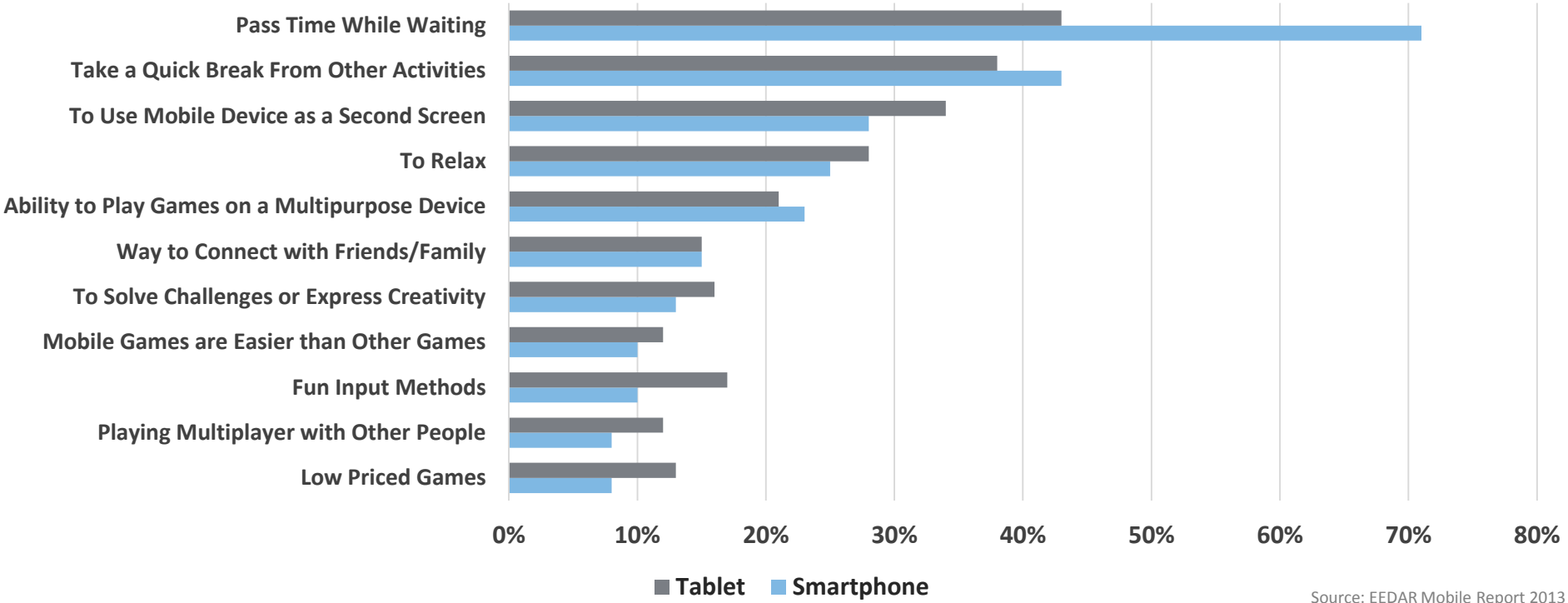
[Active SP/Tablet Gamers][North America]



Source: EEDAR Mobile Report 2013

Reason Mobile Gamers Play Mobile Games

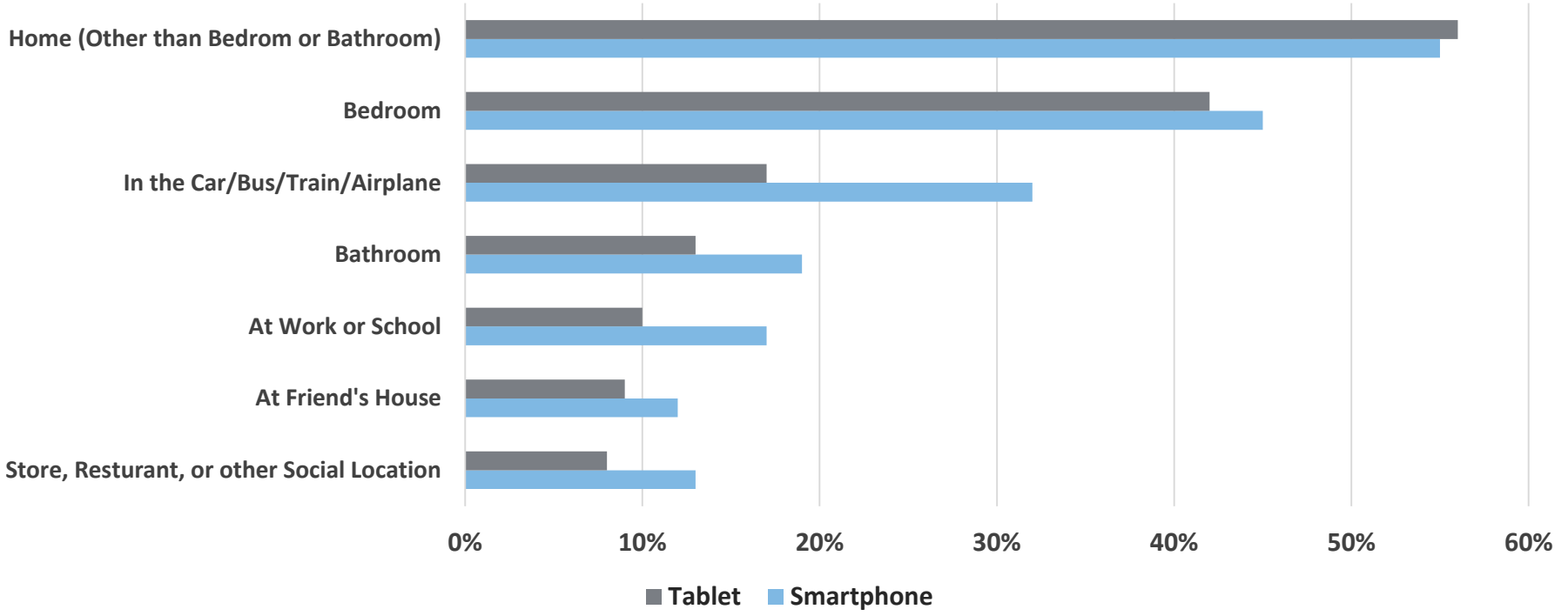
Smartphone vs. Tablet



Source: EEDAR Mobile Report 2013

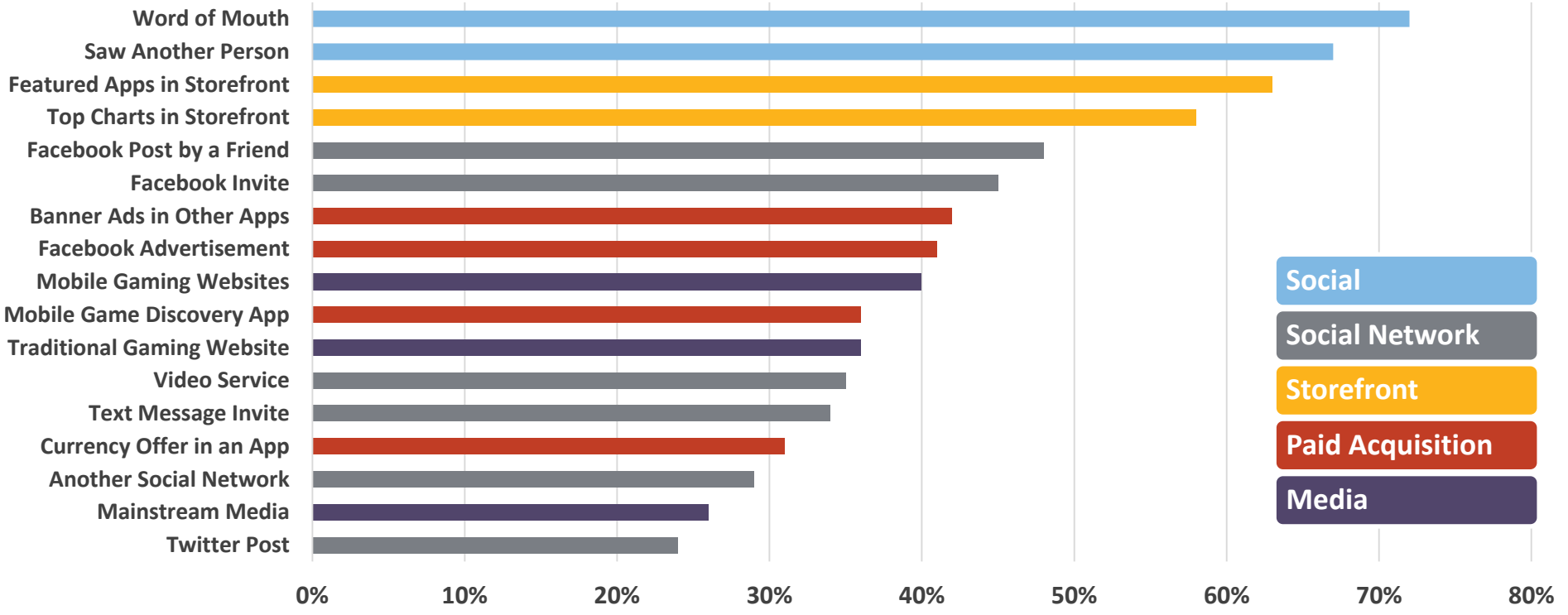
Locations Mobile Gamers Play Mobile Games

SmartPhone vs. Tablet



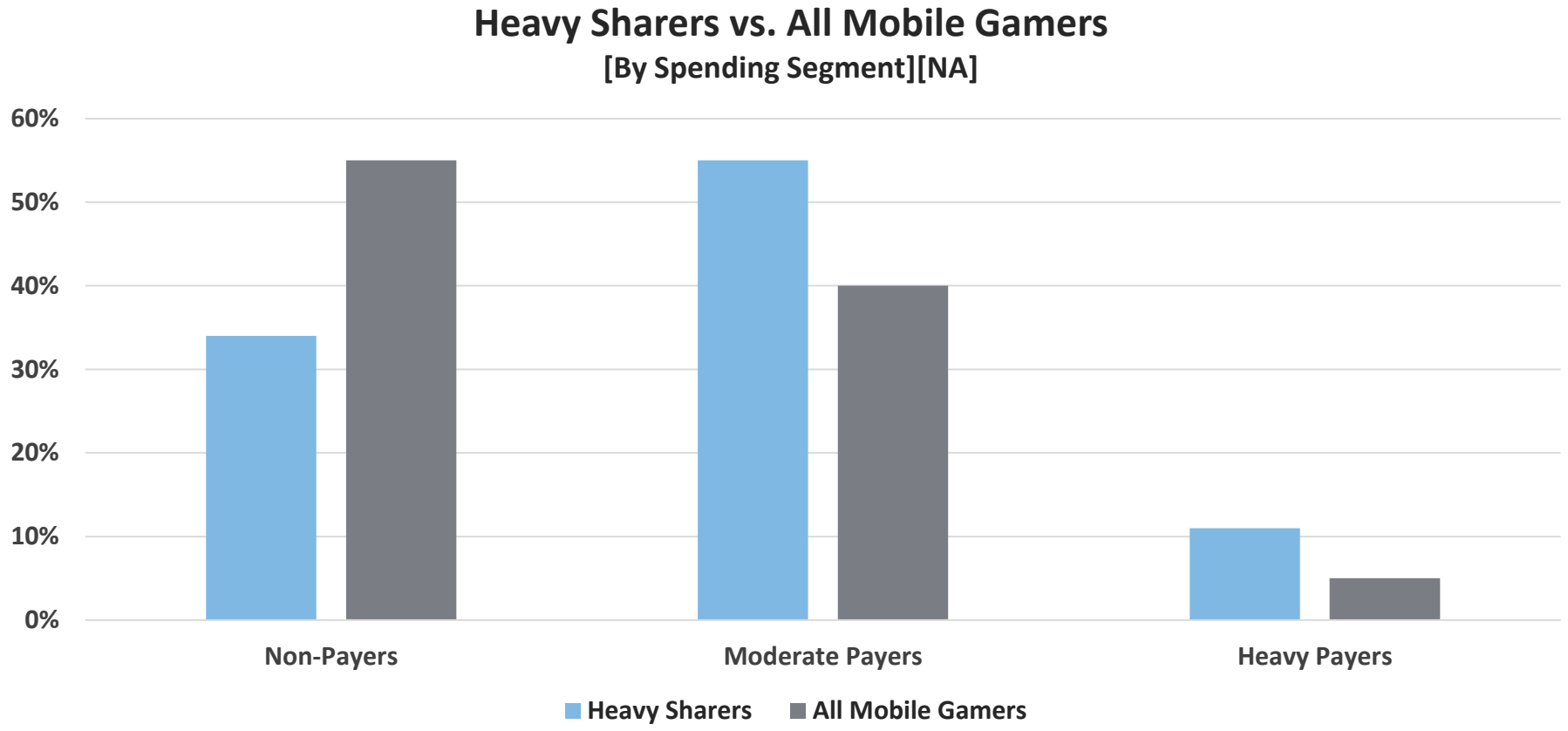
Source: EEDAR Mobile Report 2013

Sources Mobile Gamers Use to Discover Mobile Games



Source: EEDAR Mobile Report 2013

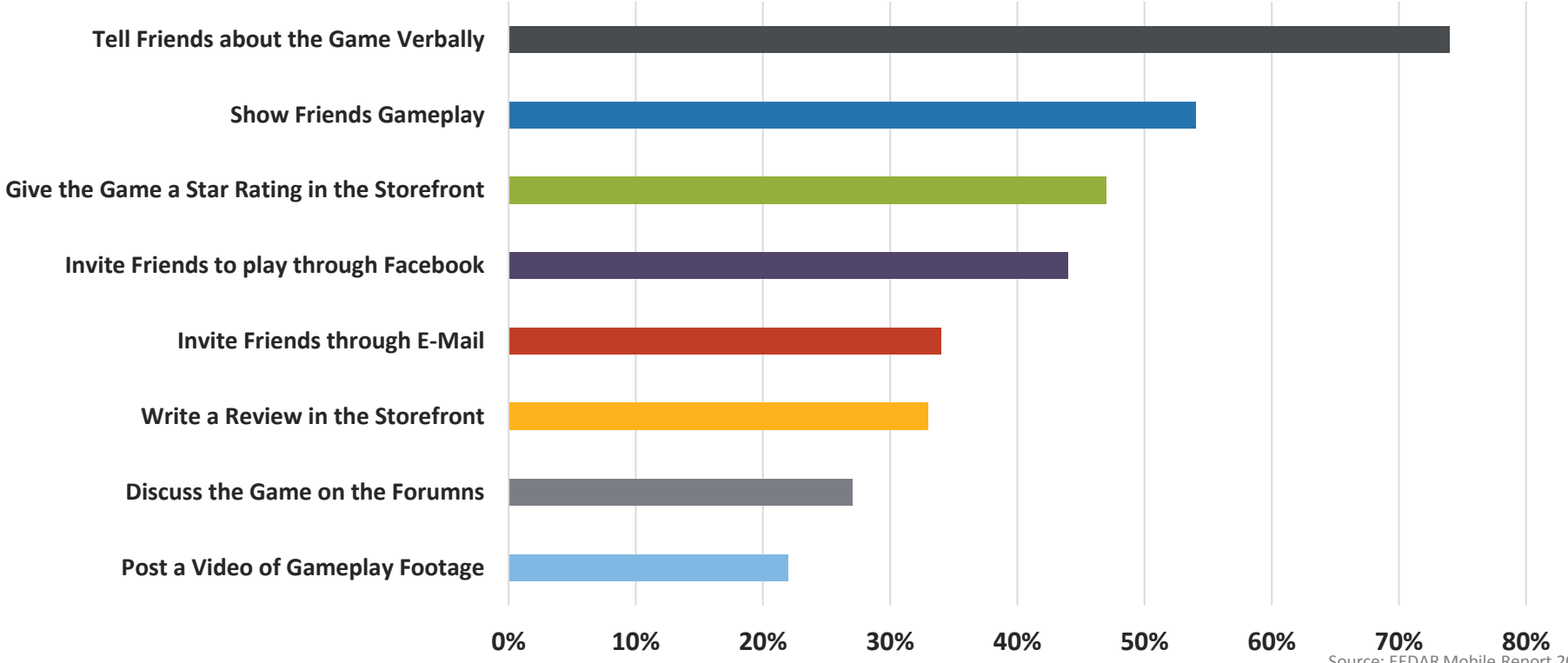
Discovery - Sharing



Source: EEDAR Mobile Report 2013

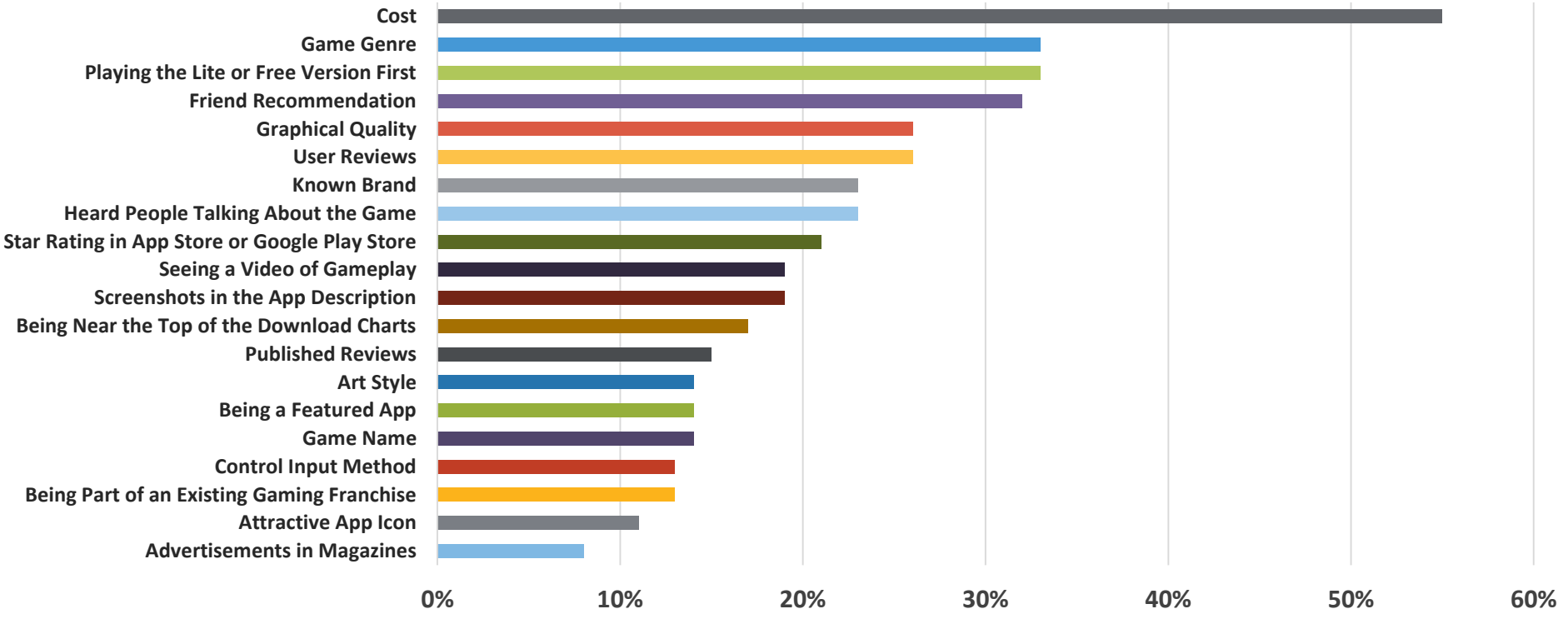
Discovery - Sharing

Breakdown of Mobile Gaming Sharing Activities



Source: EEDAR Mobile Report 2013

Reasons Mobile Gamers Download Mobile Games



Source: EEDAR Mobile Report 2013

Digital Storefronts

Console Storefronts

PlayStation Store

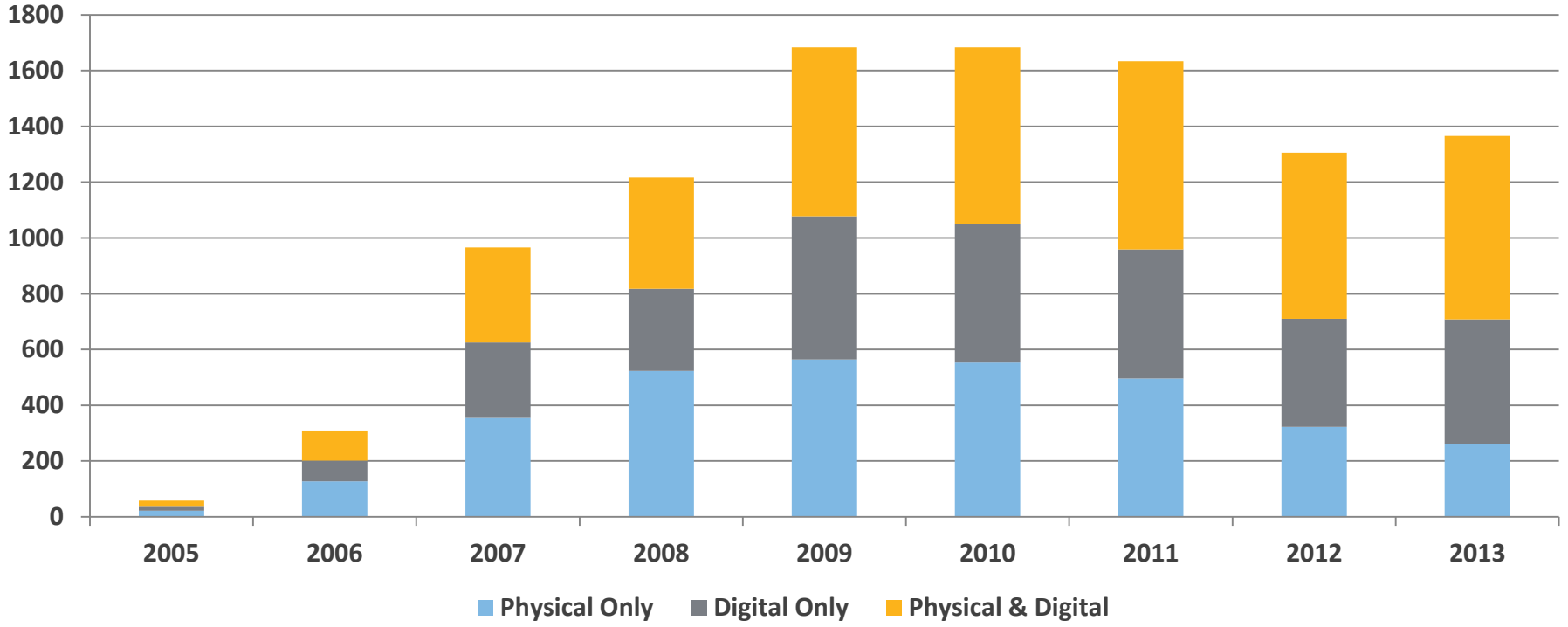
XBOX LIVE

Wii Shop Channel

Digital Releases

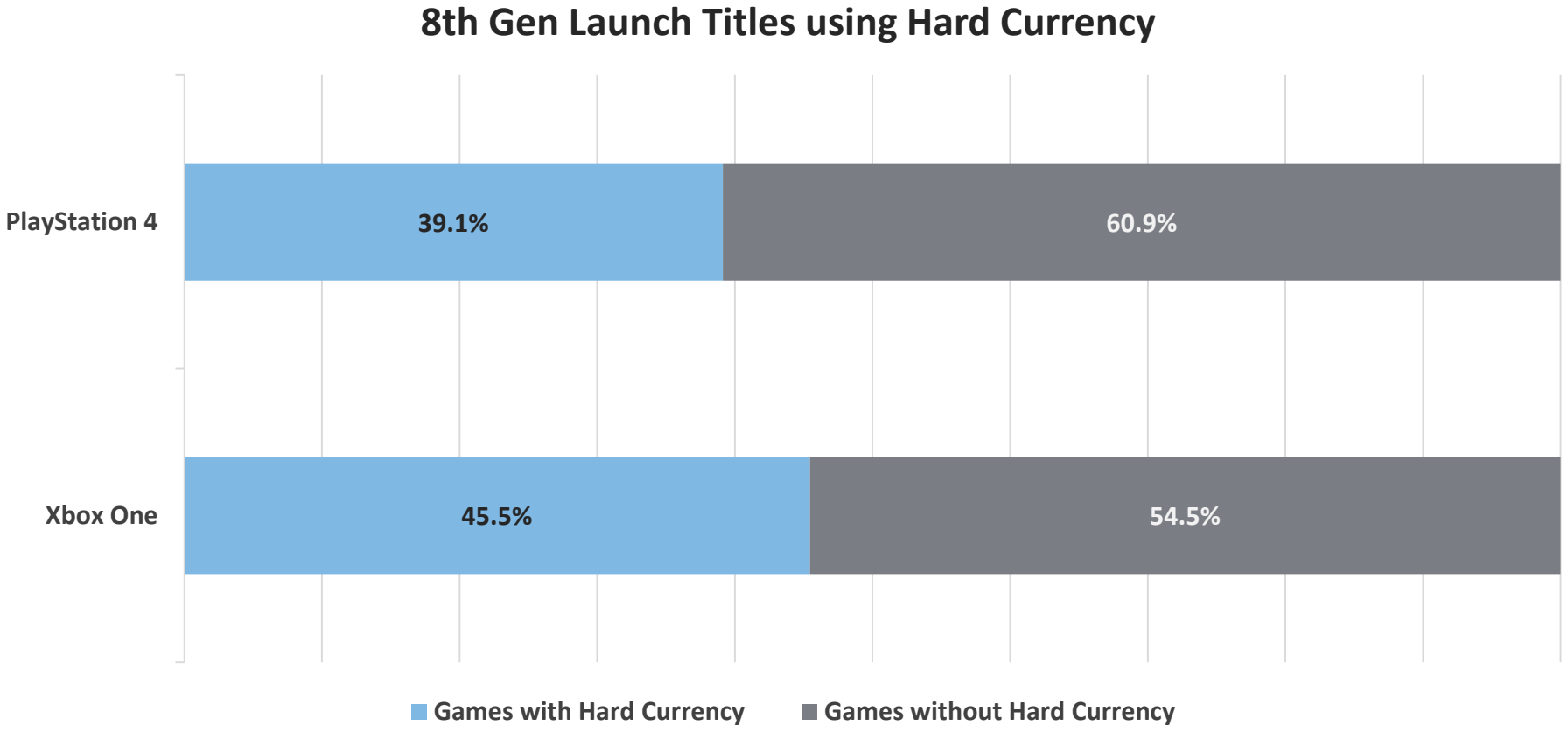
Digital and Retail Console Games Over Time

PS3, PS4, Wii, Wii U, 360 & XB1 in the USA



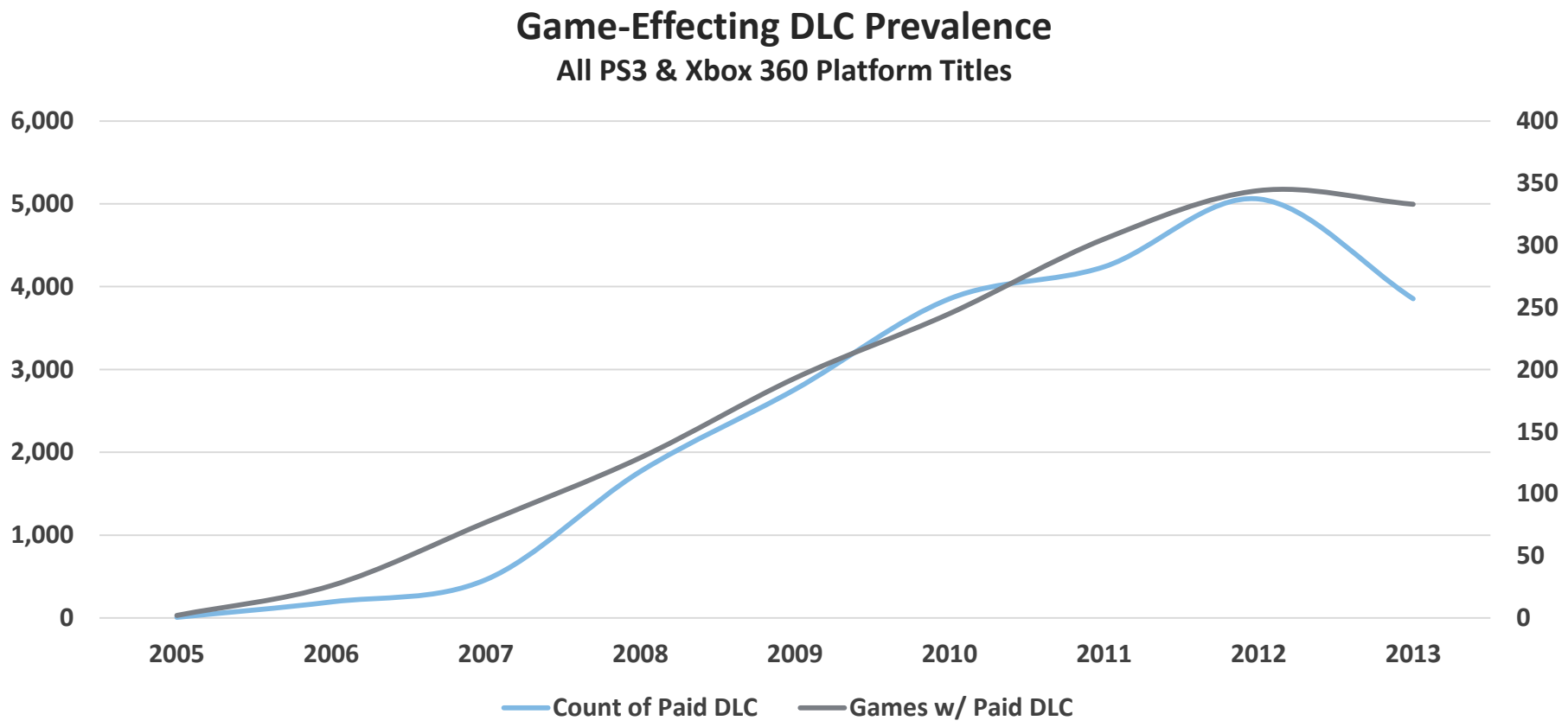
Source: EEDAR

Hard Currency



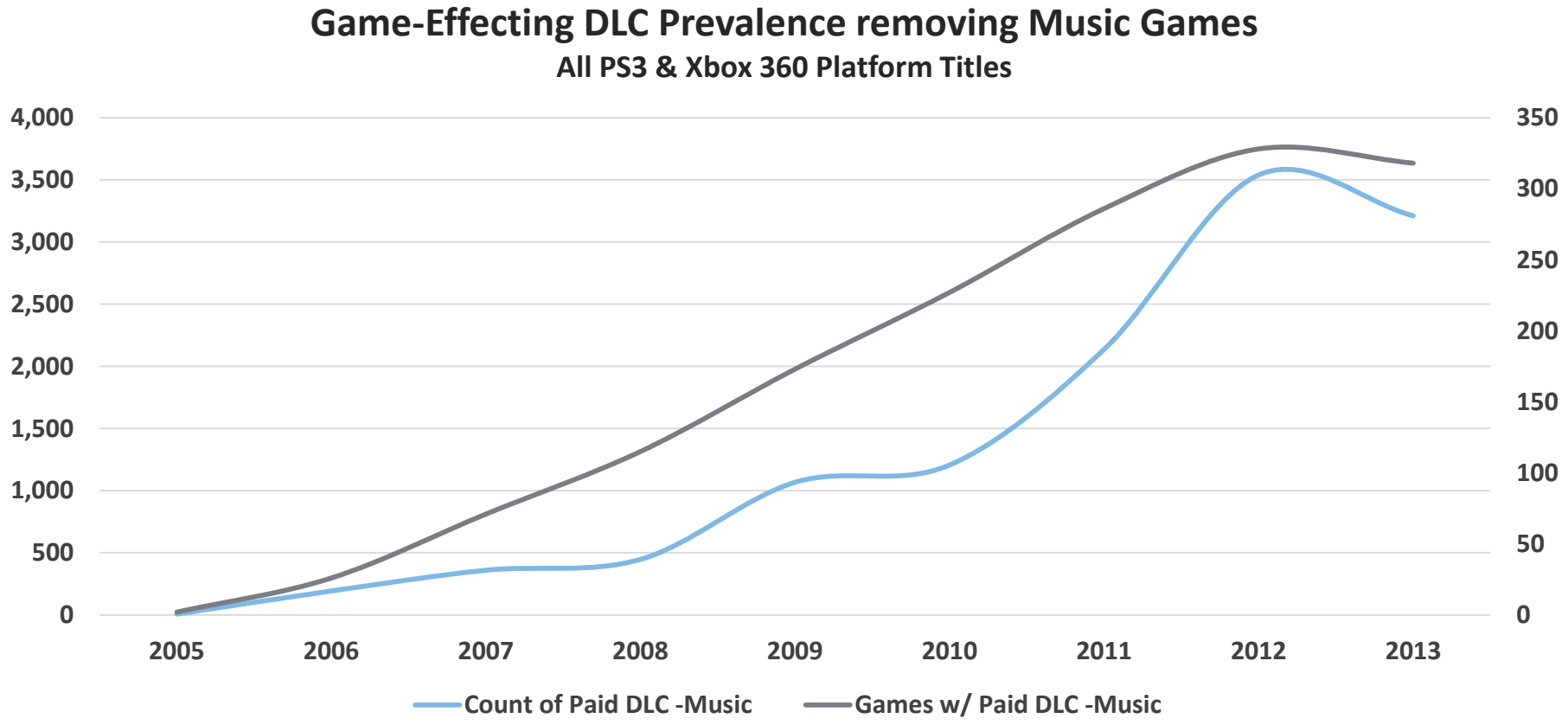
Source: EEDAR

Game Effecting DLC



Source: EEDAR

Game Effecting DLC

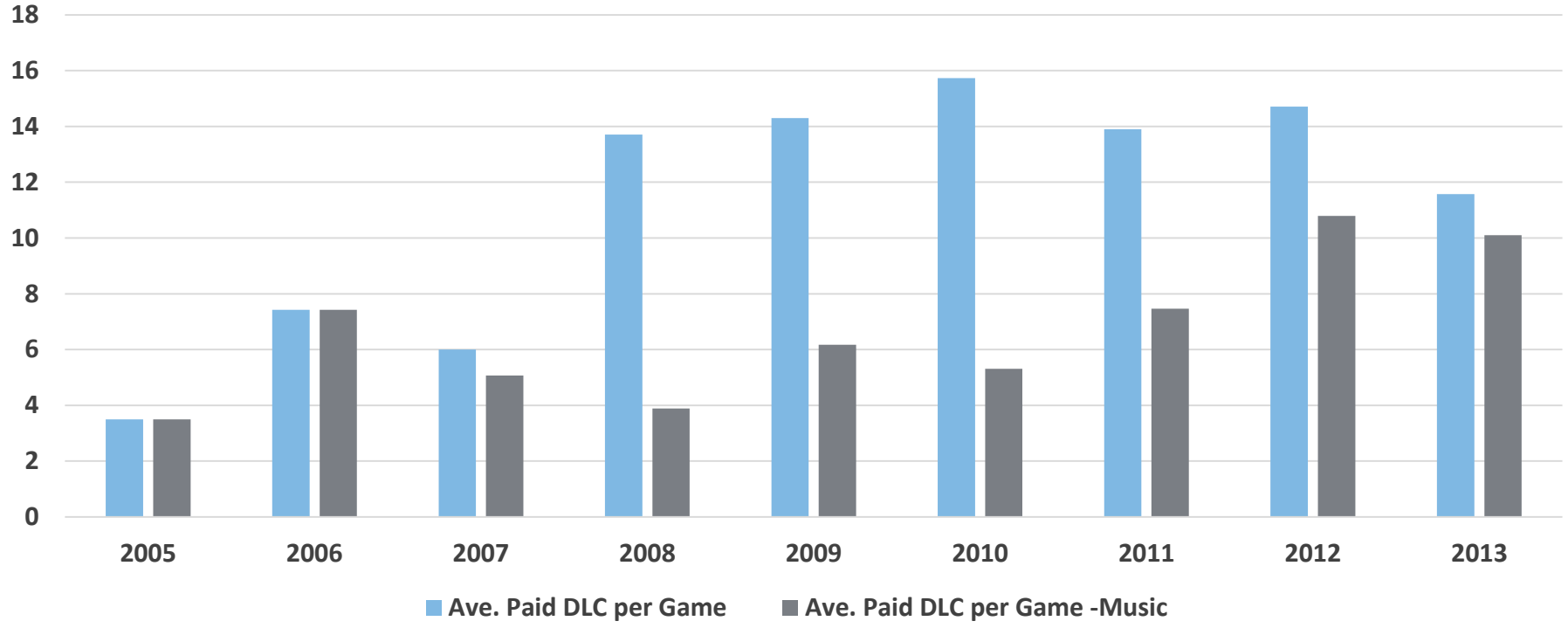


Source: EEDAR

Game Effecting DLC

Average Quantity of Paid Game-Effecting DLC per Game

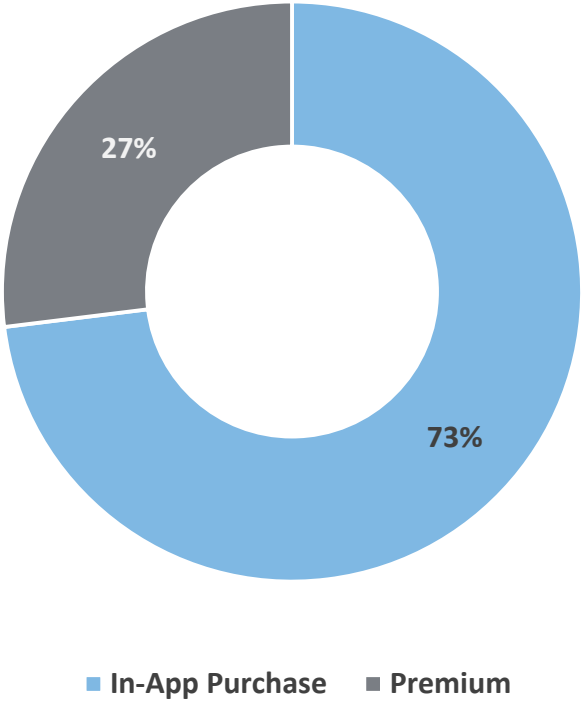
All PS3 & Xbox 360 Platform Titles



Source: EEDAR

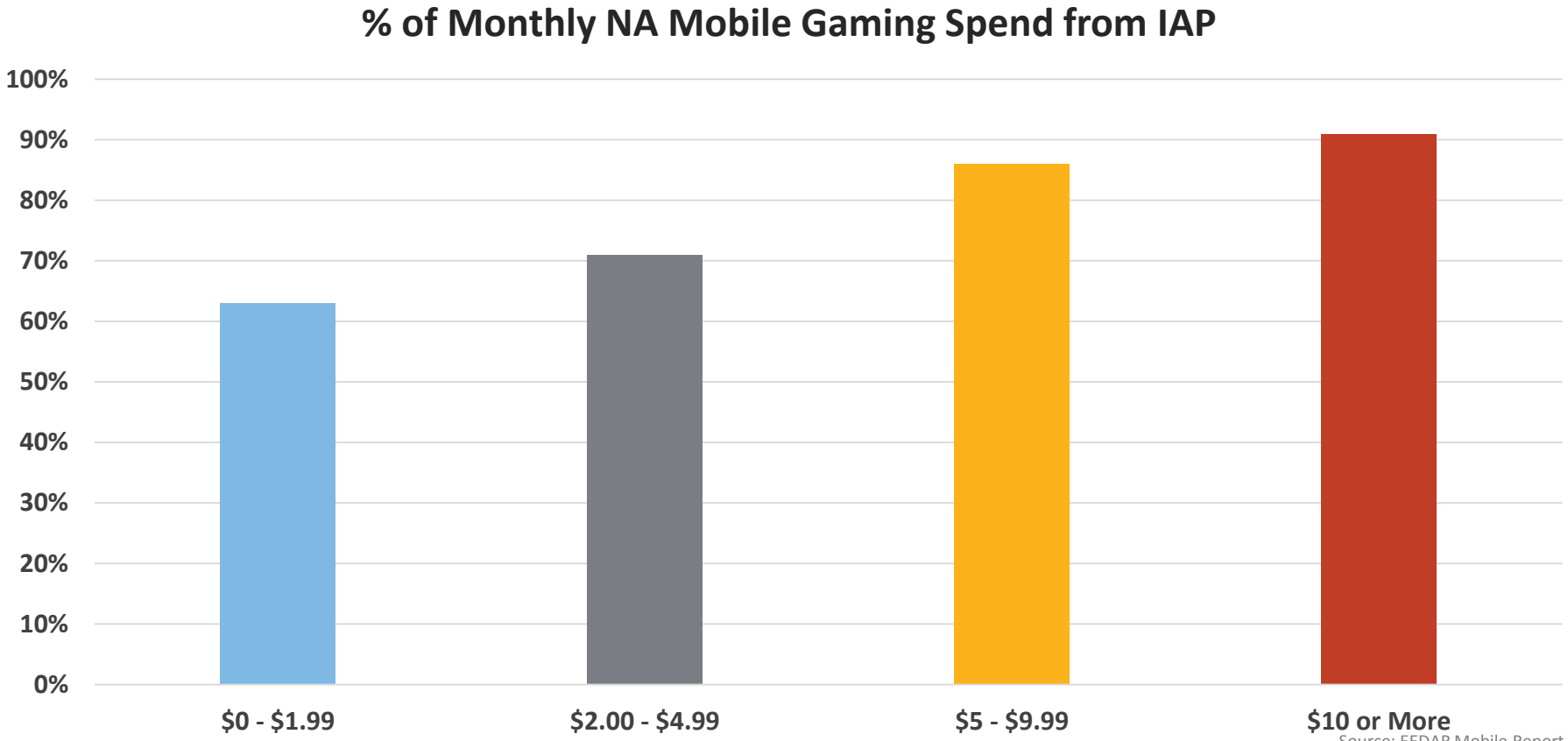
Mobile Monetization

NA Mobile Gaming Revenue by Monetization Type



Source: EEDAR Mobile Report 2013

Mobile Monetization



Source: EEDAR Mobile Report 2013

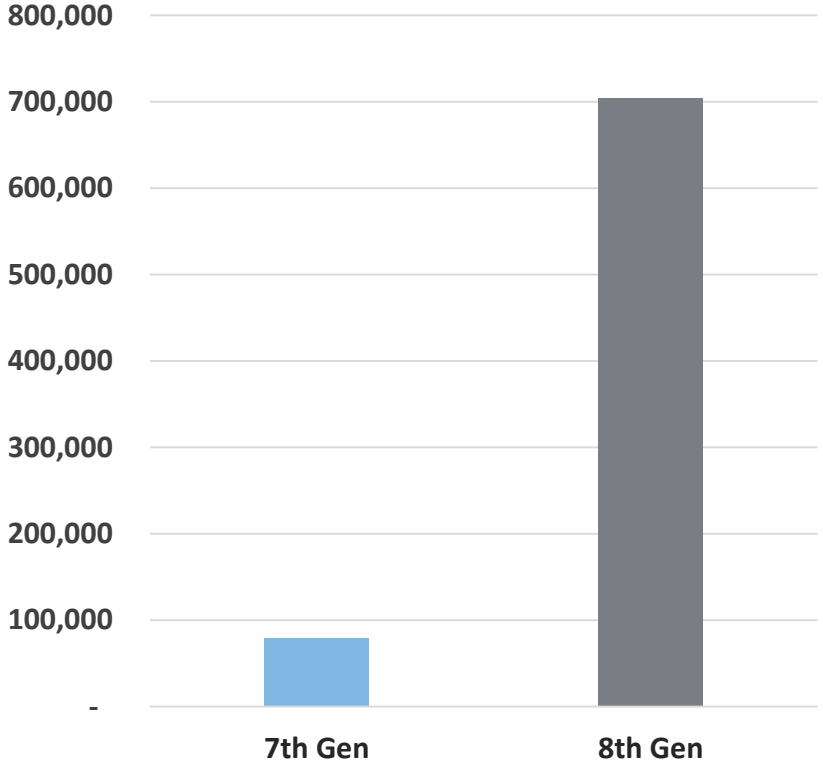
Mobile Monetization

People that spend more money **on** mobile games spend more money **in** mobile games.

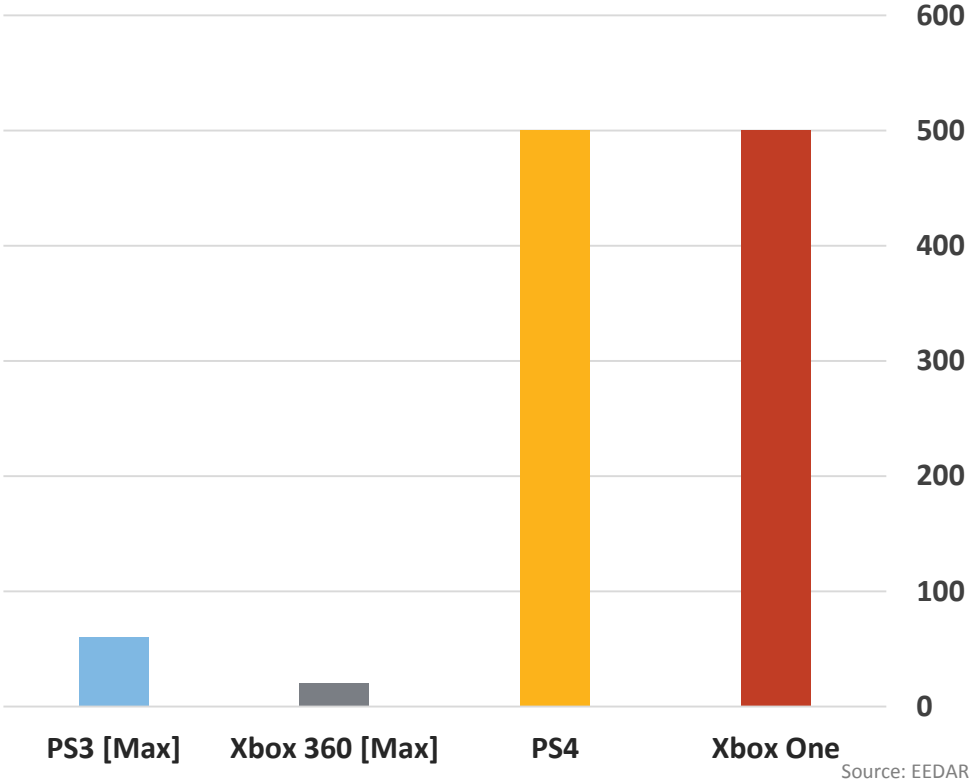
Source: EEDAR Mobile Report 2013

Hard Drives

Average Size of Console DLC in KB

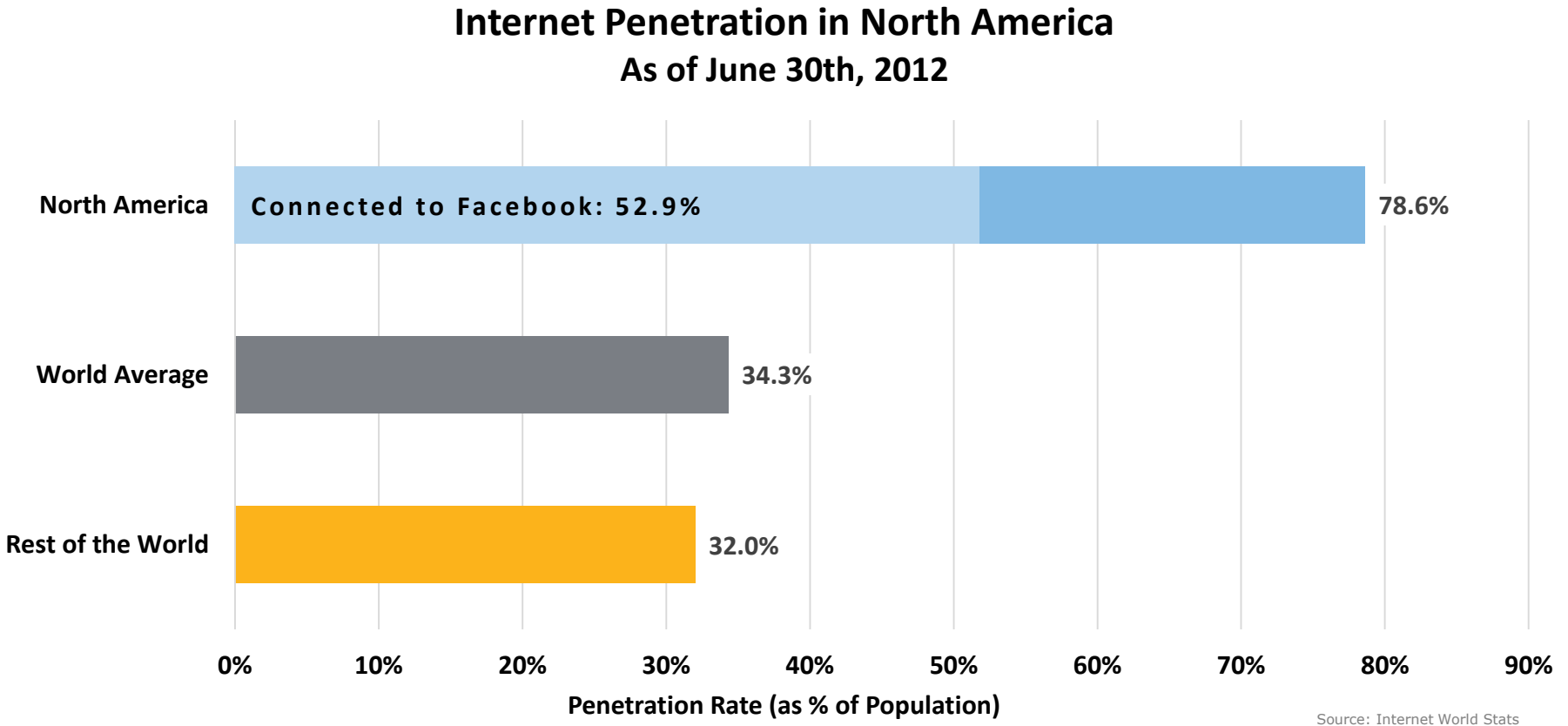


Size of Console Hard Drives in GB



Source: EEDAR

Internet Penetration

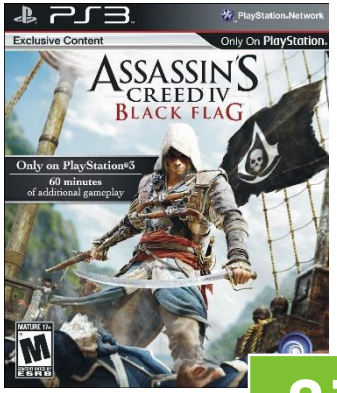


Source: Internet World Stats

DLC: The Quality Threshold

86% of console owners will only consider purchasing DLC if a game has an average review score over **80**.

92



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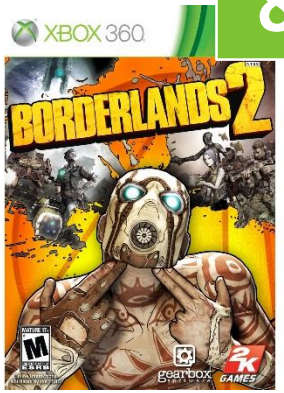

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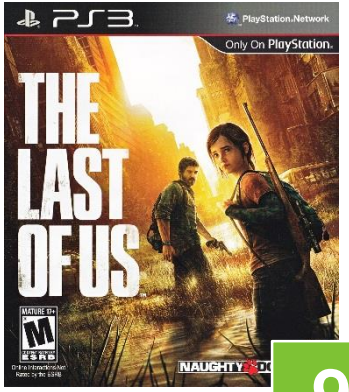


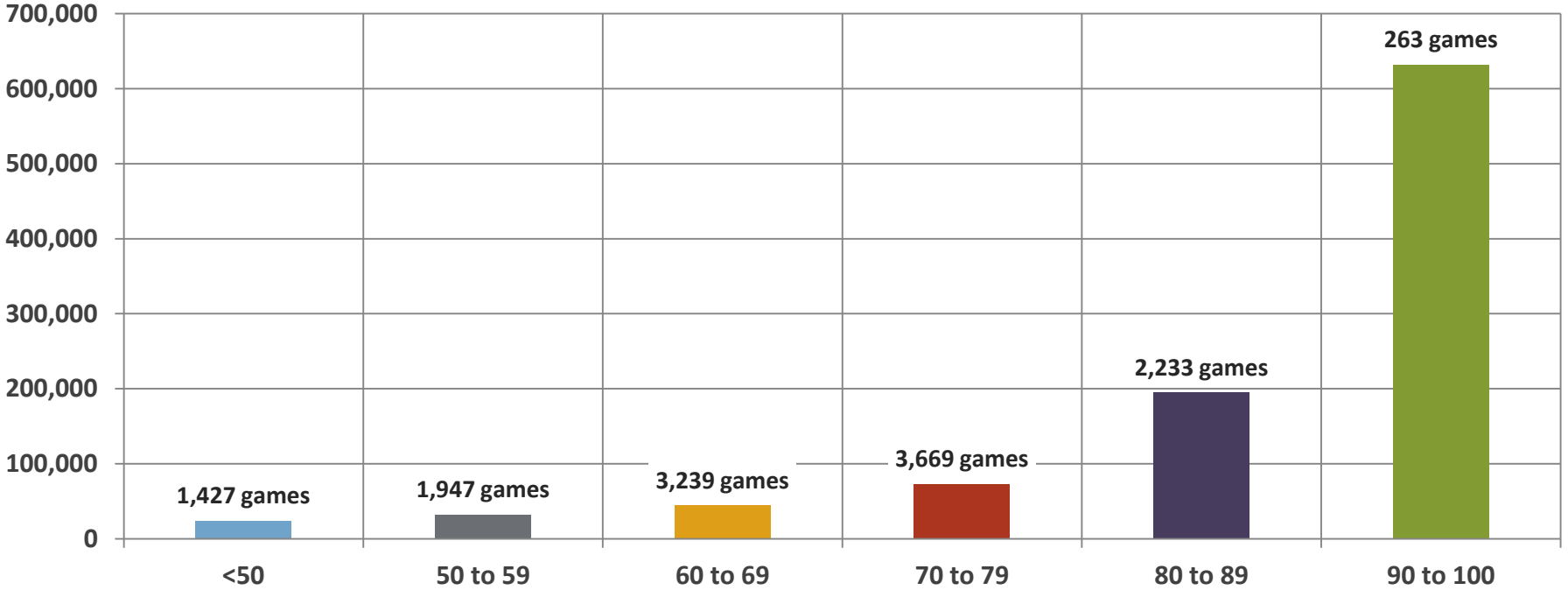
94

Source: EEDAR Deconstructing DLC Survey

Ave. 3 Month [Unit Sales] by [Review Score]

All Retail 6th, 7th and 8th Generation Console, Handheld and PC Platform Games in the U.S.A

Platform Launch through [December 2013]

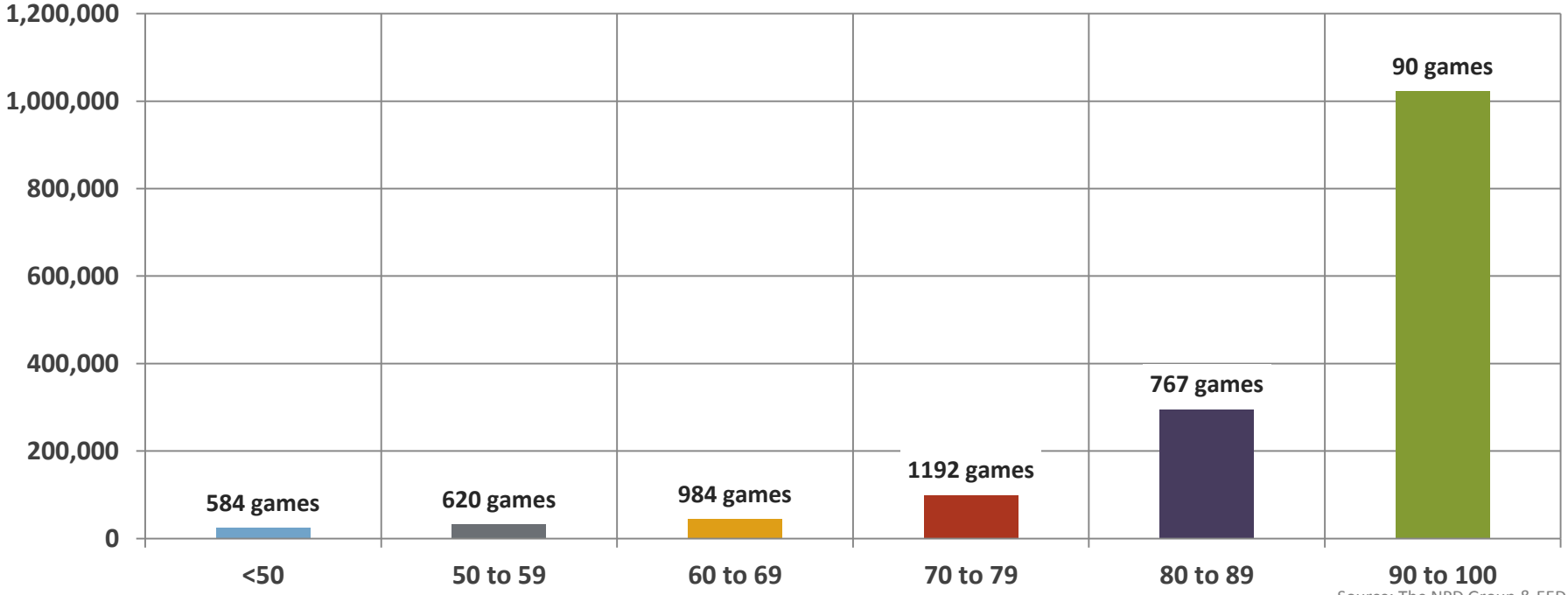


Source: The NPD Group & EEDAR

Ave. 3 Month [Unit Sales] by [Review Score]

All [U.S.] [Retail] [360, PS3, PS4, Wii, WiiU, XB1] games [Combined Editions]

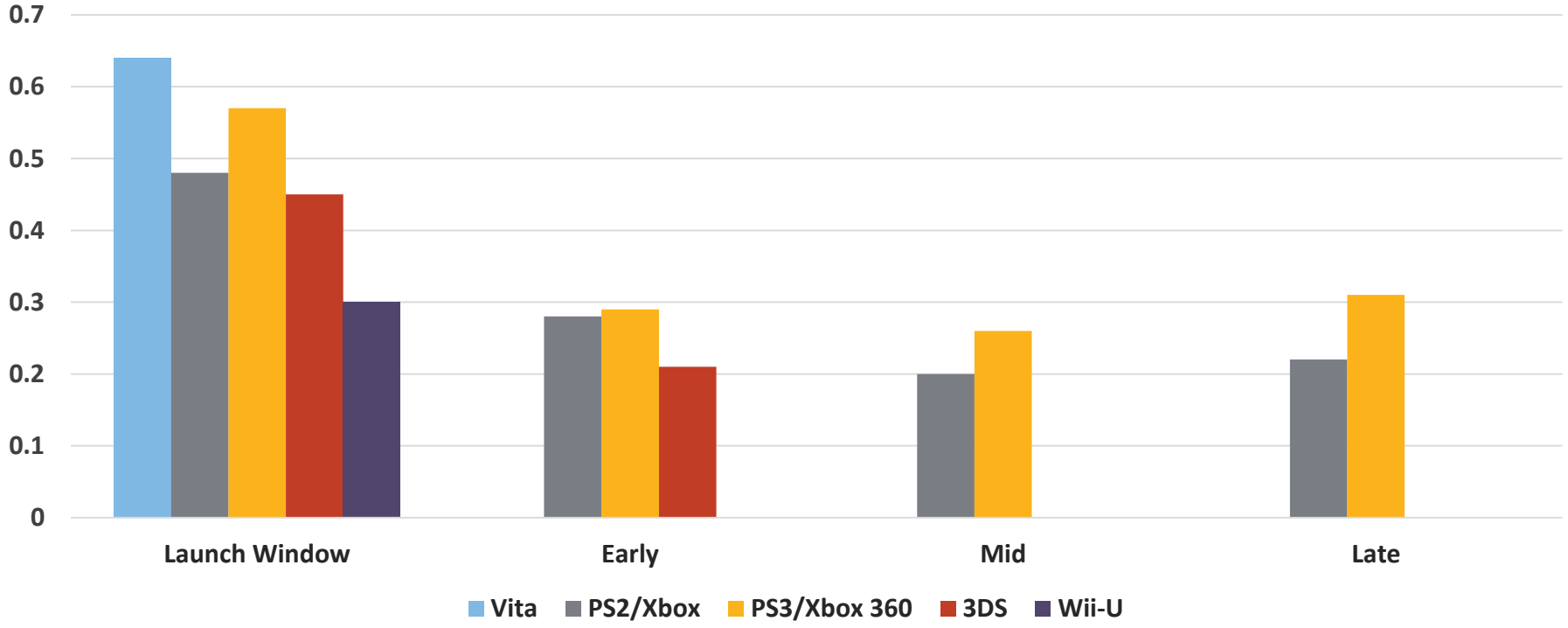
Platform Launch through [December 2013]



Source: The NPD Group & EEDAR

Review Score Correlation to Unit Sales

[Coefficient of Determination - R-Squared] [>10k Unit Sellers] [USA]

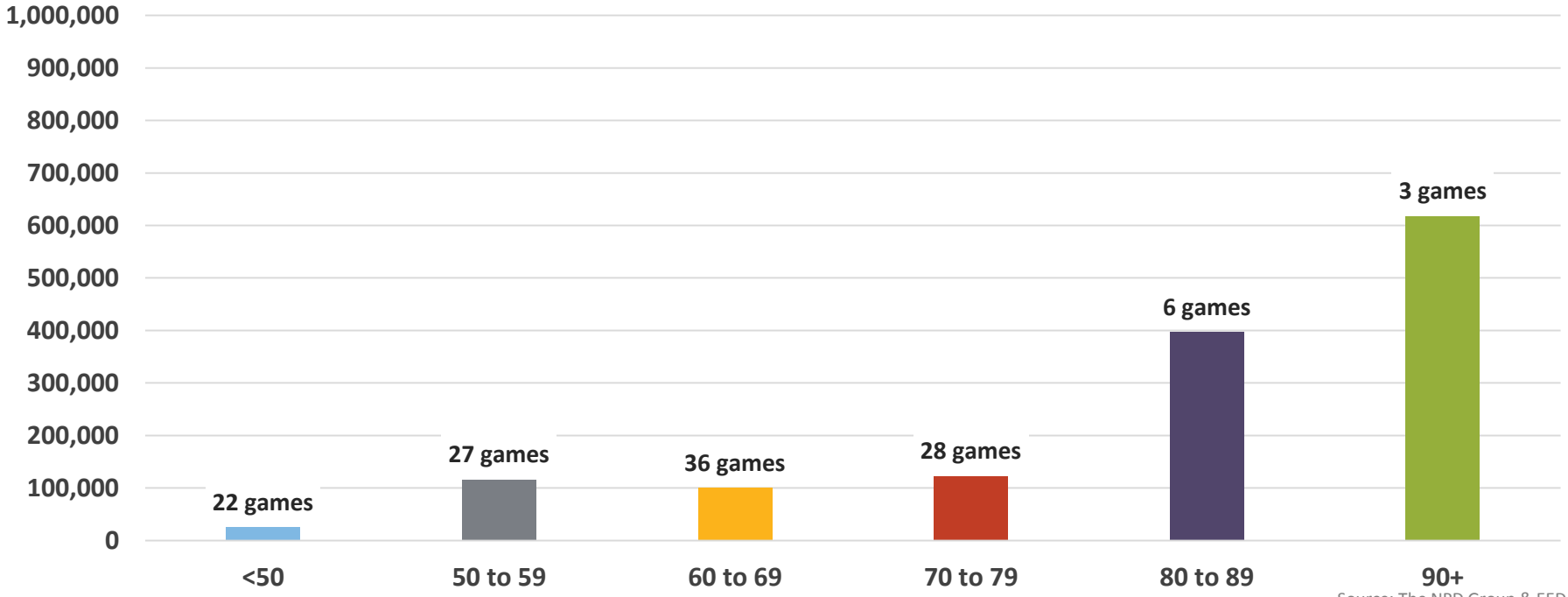


Source: EEDAR

Ave. 3 Month [Unit Sales] by [Review Score]

All [U.S.] [Wii] games [Combined Editions]

Platform Launch through [October 2007]

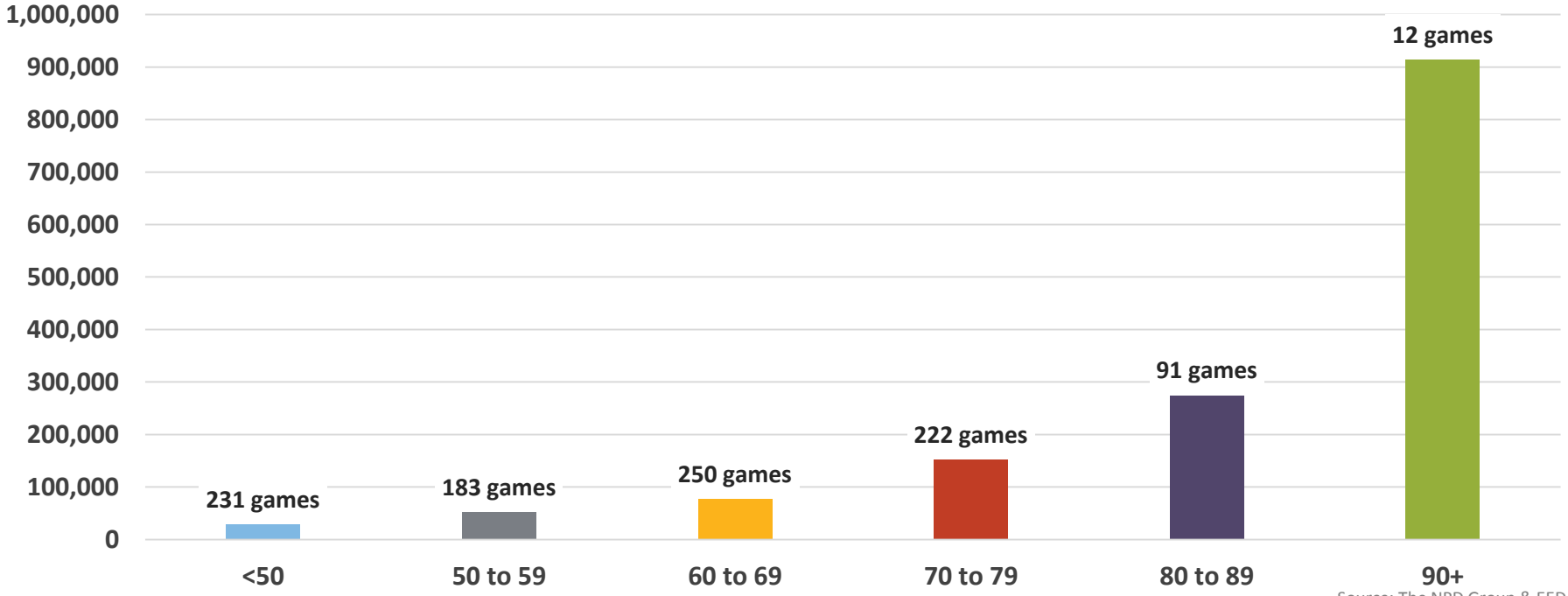


Source: The NPD Group & EEDAR

Ave. 3 Month [Unit Sales] by [Review Score]

All [U.S.] [Wii] games [Combined Editions]

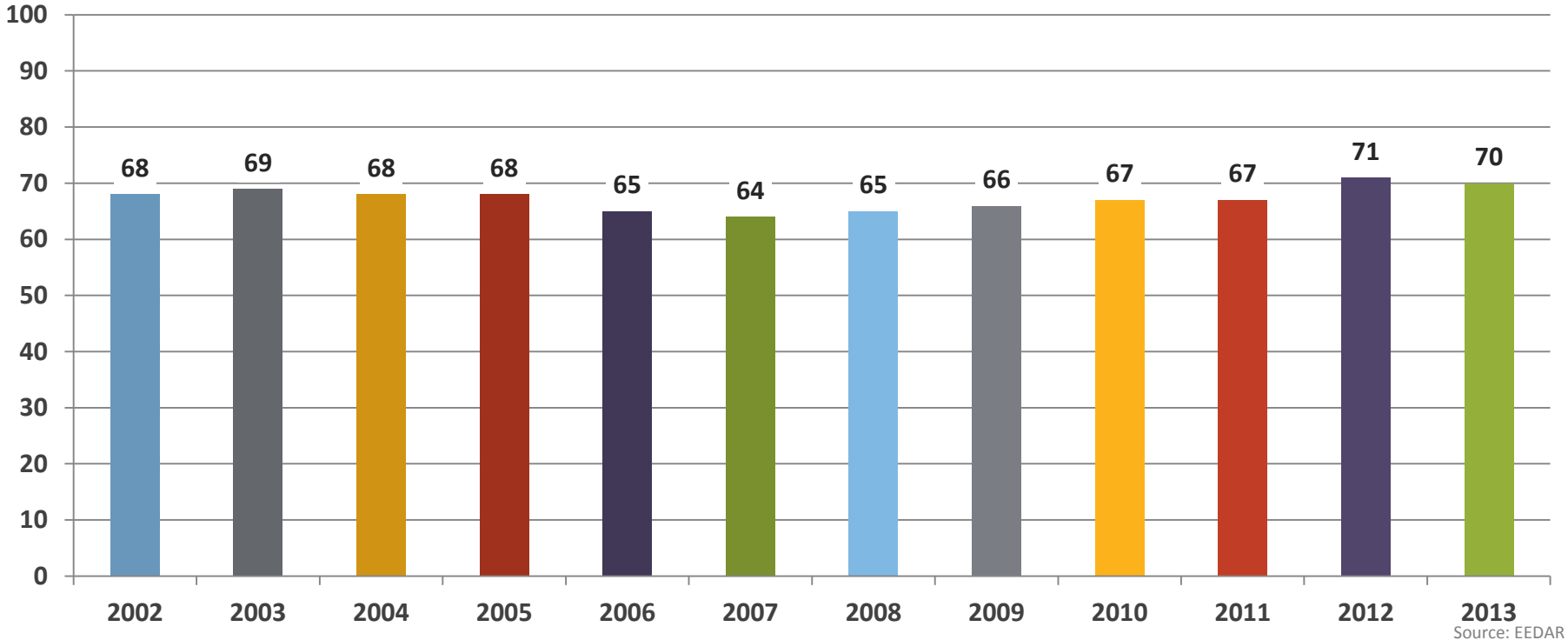
Platform Launch through [April 2013]



Source: The NPD Group & EEDAR

Average Review Score

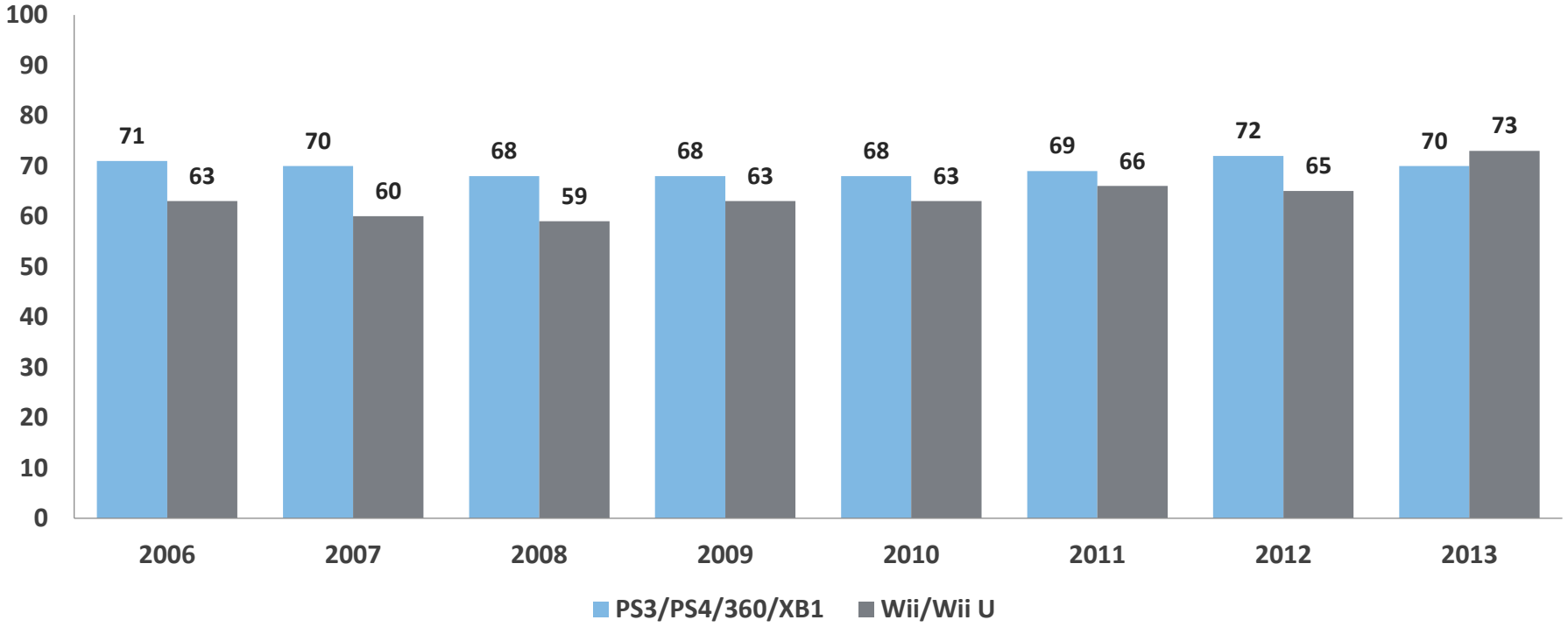
Retail Console, Handheld & PC Title Releases in the USA



Source: EEDAR

Average Review Score

Retail Console Title Releases in the USA

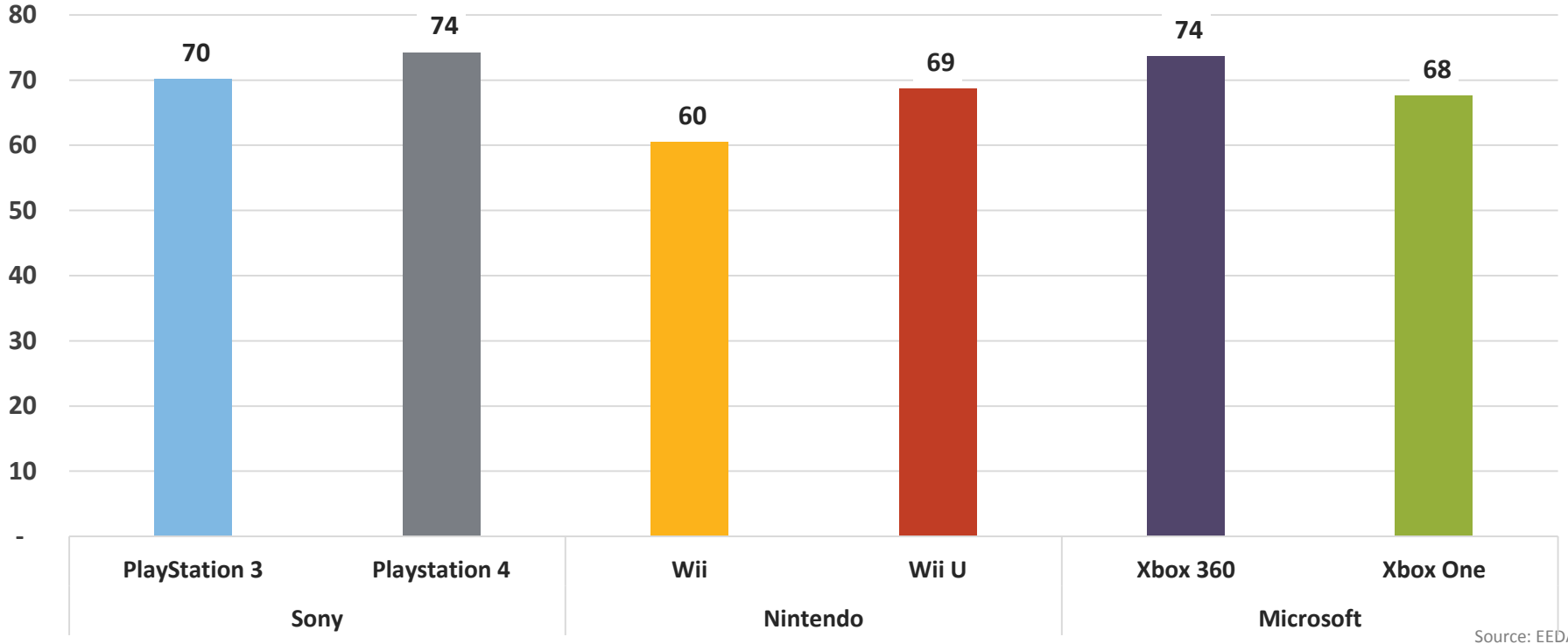


Source: EEDAR

8TH GENERATION CONSOLES

Average Review Scores

[7th to 8th Gen][Successor Platform Equal Time on Market][USA]



Source: EEDAR

There are **so many** games out there…

That if your game isn't **really** good…

AND doesn't spend a lot **marketing**…

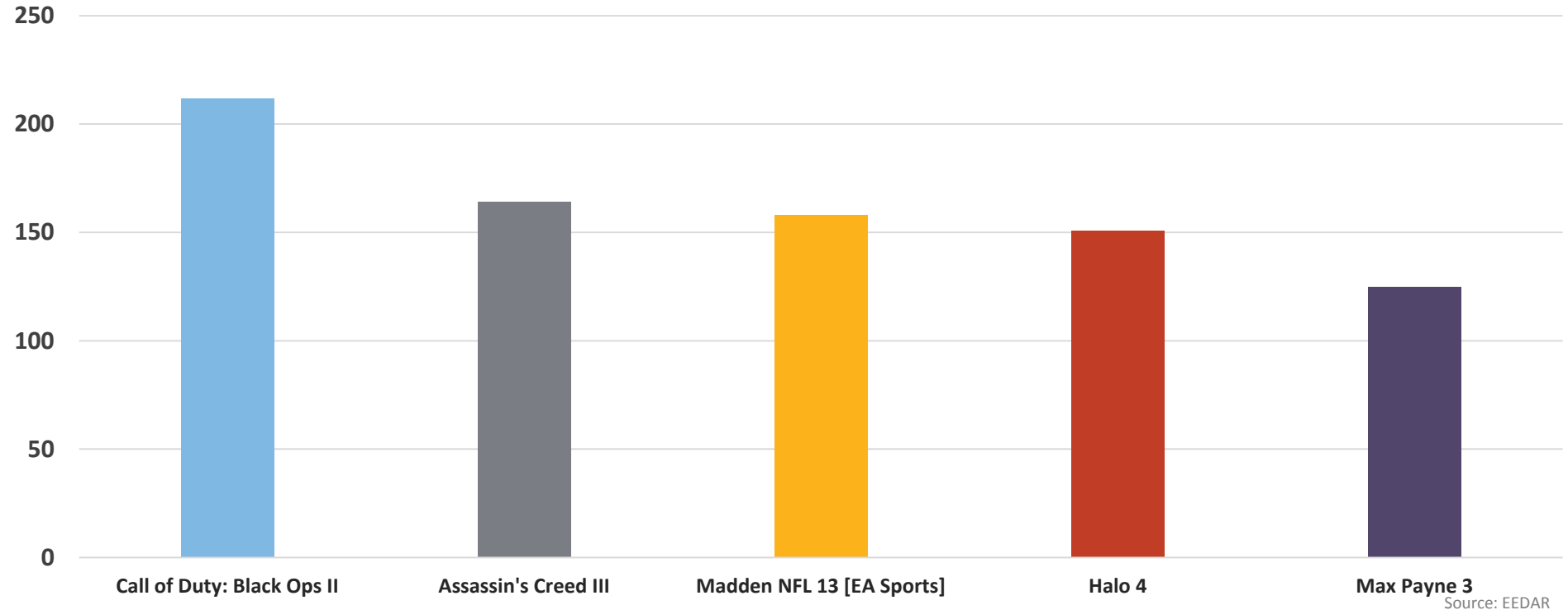
Nobody hears about it…

Which means that **nobody** buys it.

In-Store Advertising

Top 5 Video Games by Quantity of In-Store Promotions

[Best Buy, GameStop, Target, Toys R Us, Walmart] [2012] [USA]

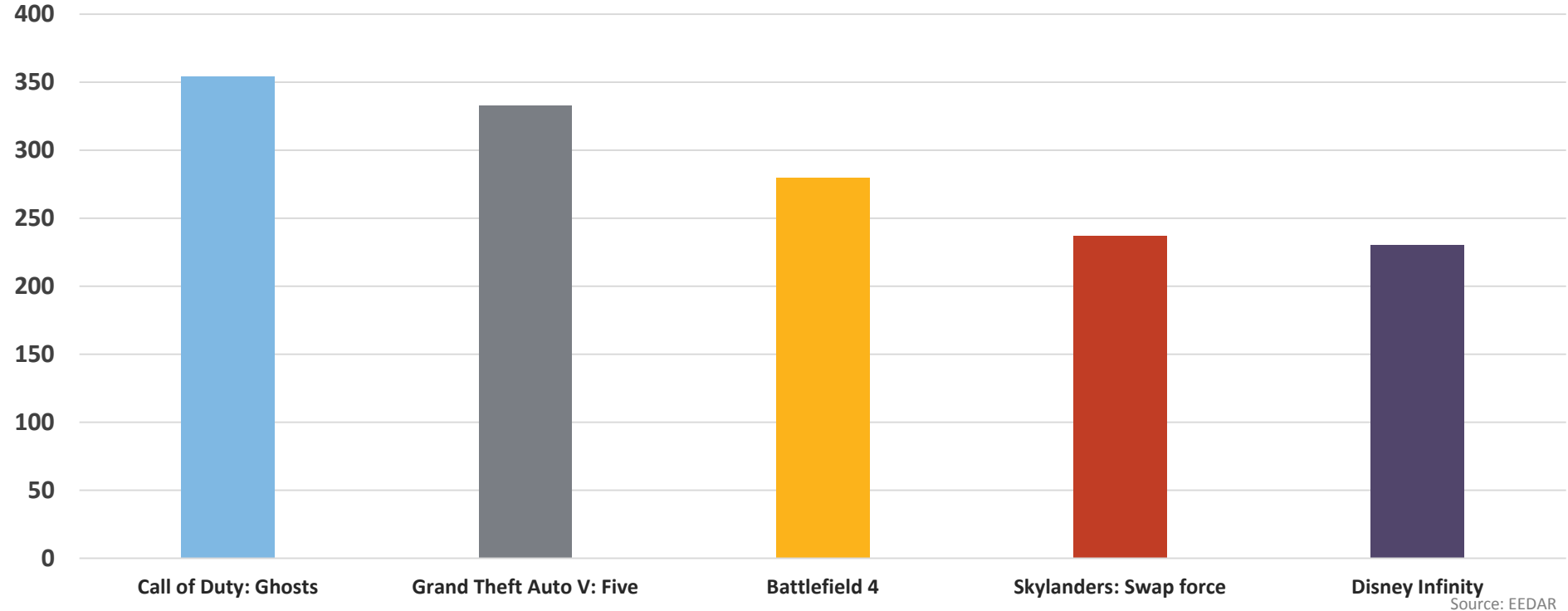


Source: EEDAR

In-Store Advertising

Top 5 Video Games by Quantity of In-Store & Website Promotions

[Best Buy, GameStop, Target, Toys R Us, Walmart] [2013] [USA]

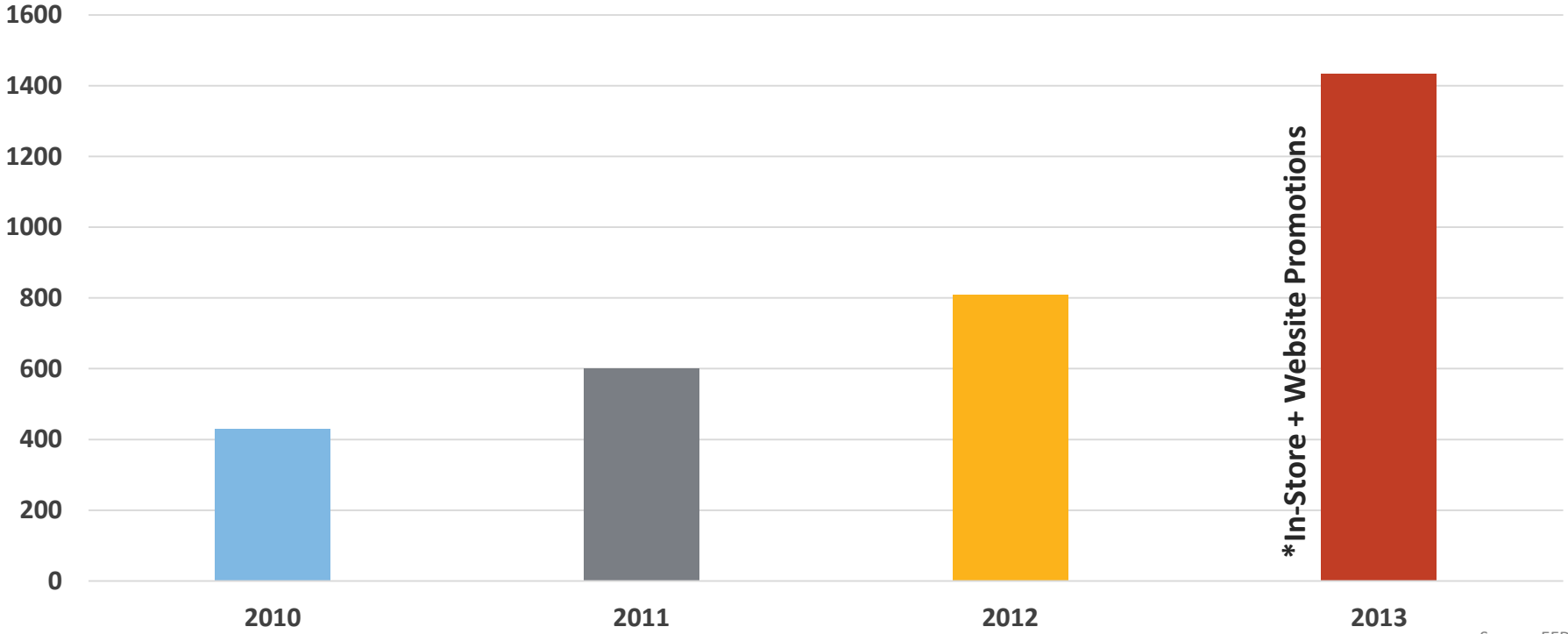


Source: EEDAR

In-Store Advertising

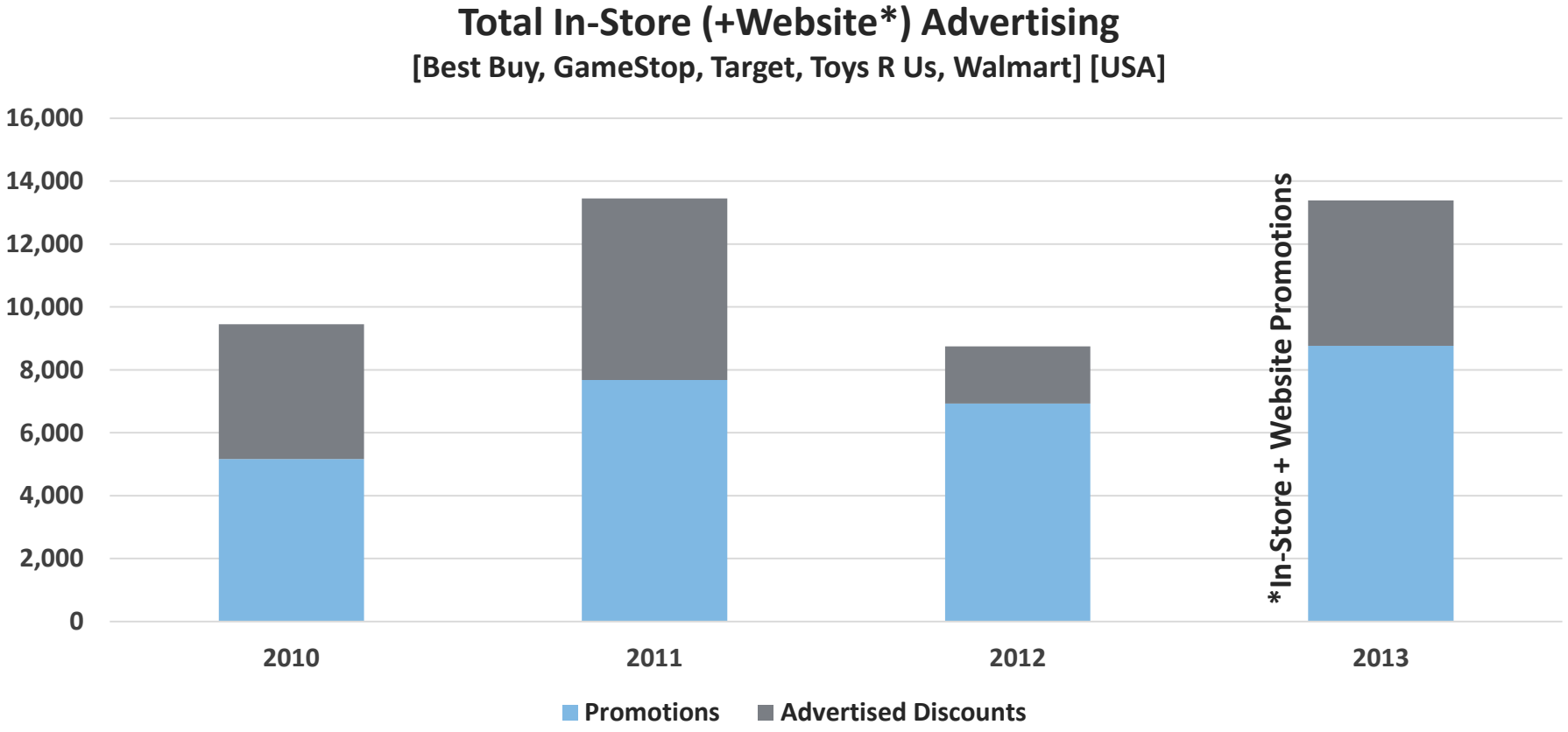
Top 5 Video Games by Quantity of In-Store (+Website*) Promotions

[Best Buy, GameStop, Target, Toys R Us, Walmart] [USA]



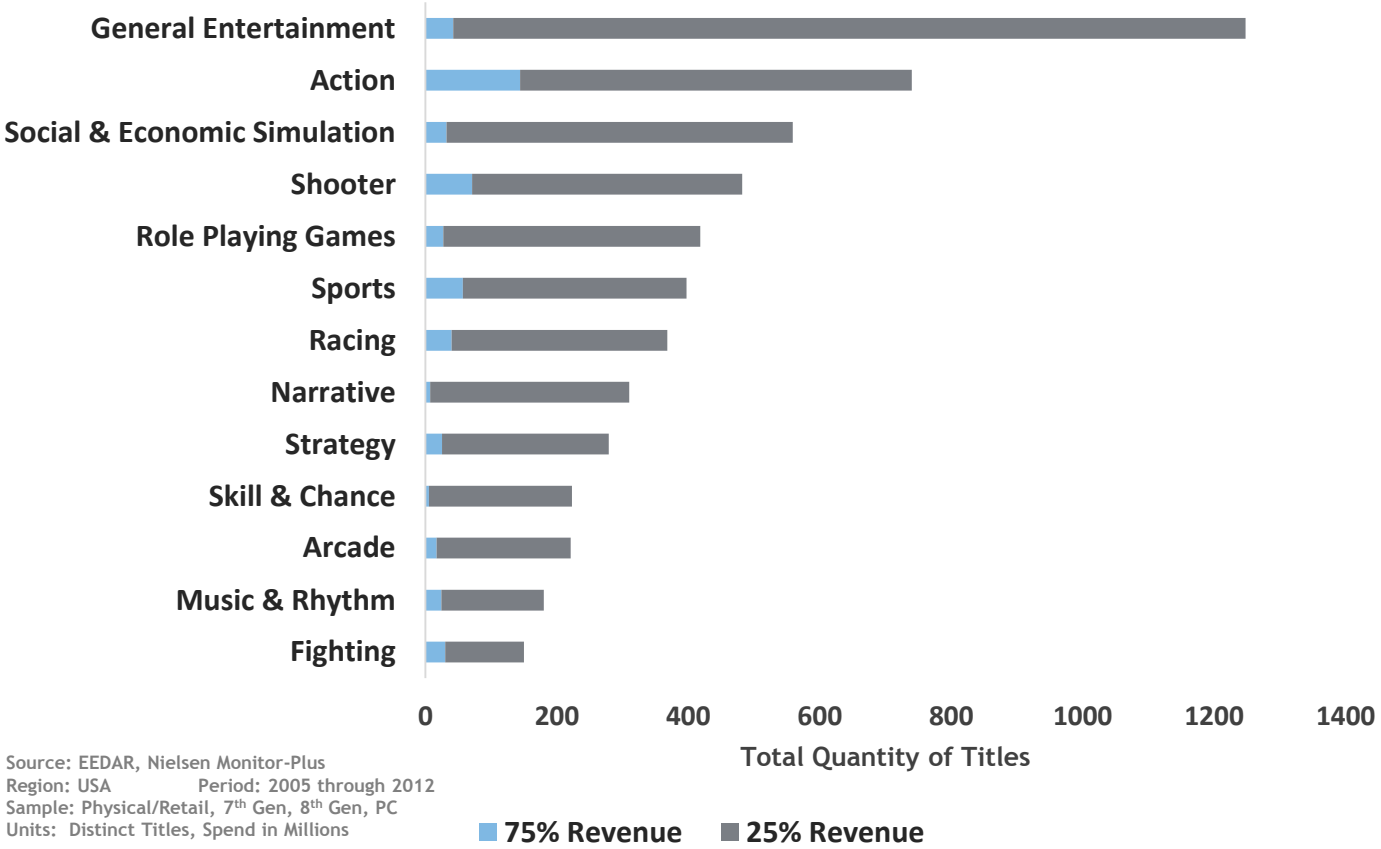
Source: EEDAR

In-Store Advertising



Source: EEDAR

Direct Media Spend Share



Source: EEDAR, Nielsen Monitor-Plus
Region: USA Period: 2005 through 2012
Sample: Physical/Retail, 7th Gen, 8th Gen, PC
Units: Distinct Titles, Spend in Millions

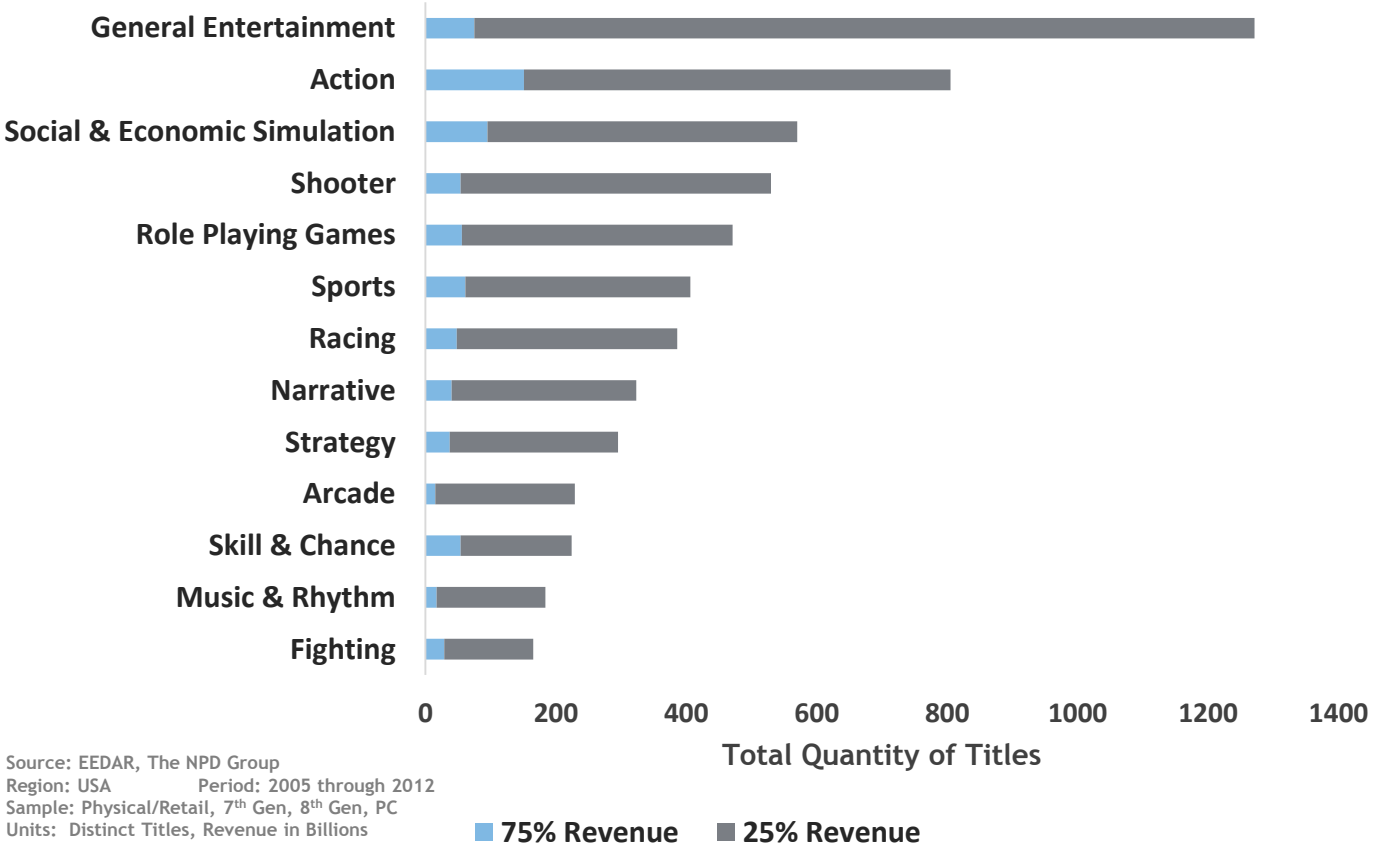
9.3%

OF RETAIL TITLES ACCOUNT FOR

75%

OF DIRECT MEDIA SPEND SINCE 2005.

Retail Revenue Title Share



Source: EEDAR, The NPD Group
Region: USA Period: 2005 through 2012
Sample: Physical/Retail, 7th Gen, 8th Gen, PC
Units: Distinct Titles, Revenue in Billions

12.5%

OF RETAIL TITLES HAVE GENERATED

75%

OF RETAIL REVENUE SINCE 2005.

Market Leaders

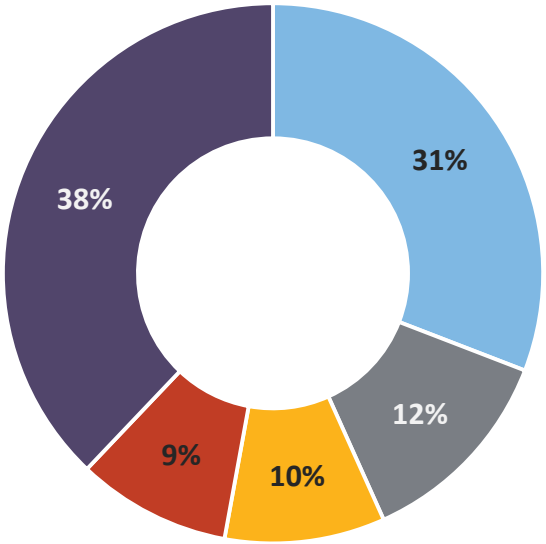
Video games have seen market leaders emerge within each gaming vertical,

With the **top few titles** earning the **lion's share** of the **revenue** generated within that vertical.

Market Share Leaders

PC F2P Shooters

Western Market Share by DAU

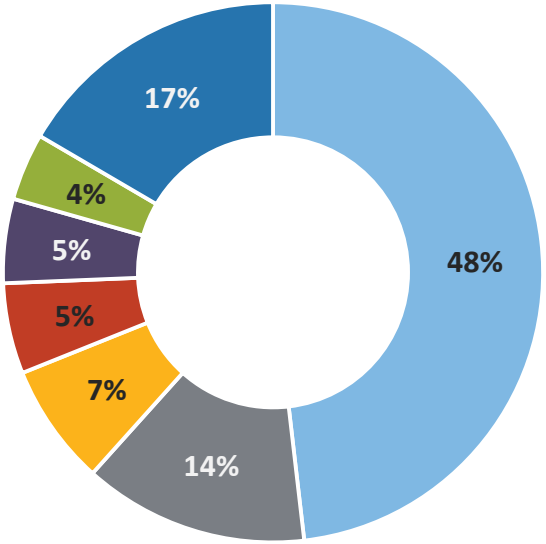


Source: EEDAR

Market Share Leaders

PC F2P Mechanized Shooters

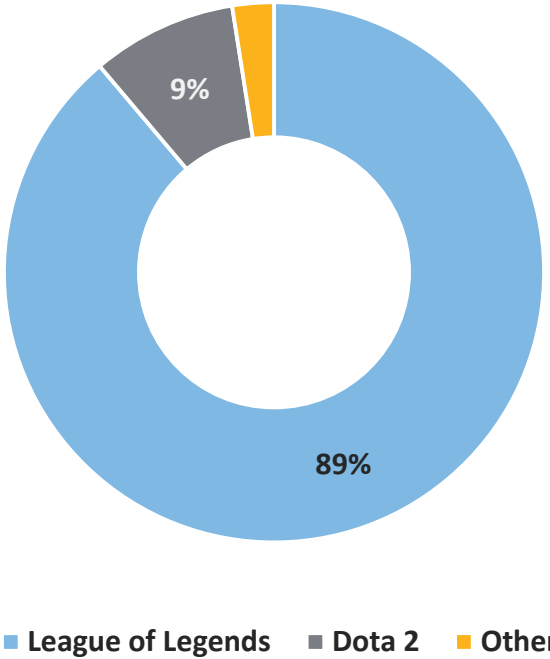
Western Market Share by DAU



Source: EEDAR

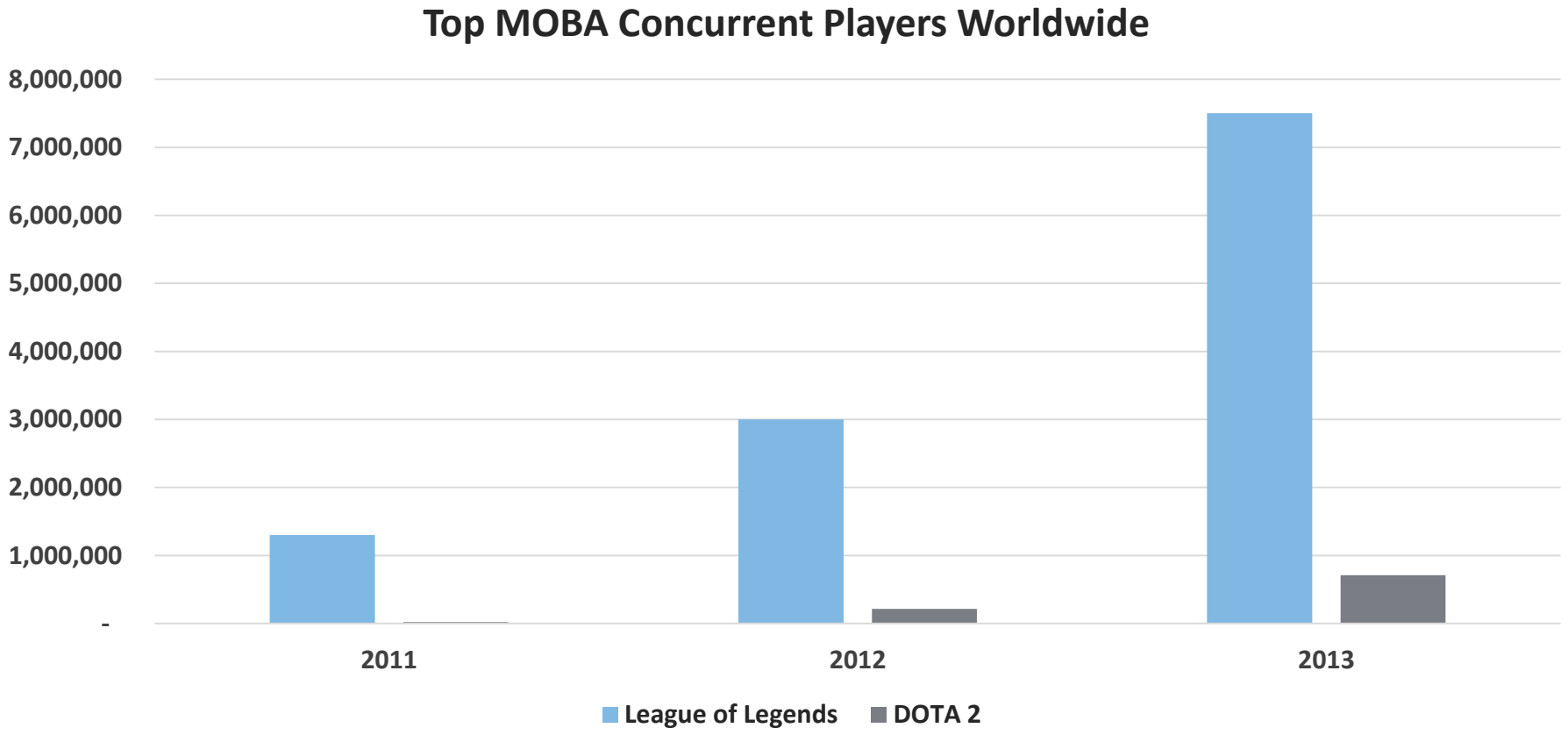
Market Share Leaders

PC F2P MOBA
Worldwide by MAU



Source: EEDAR

Market Share Leaders

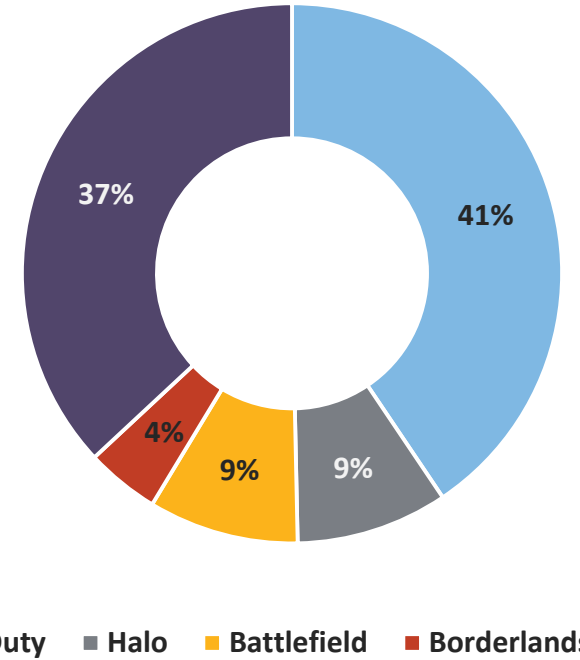


Source: EEDAR

Market Share Leaders

Retail Console/PC Shooters

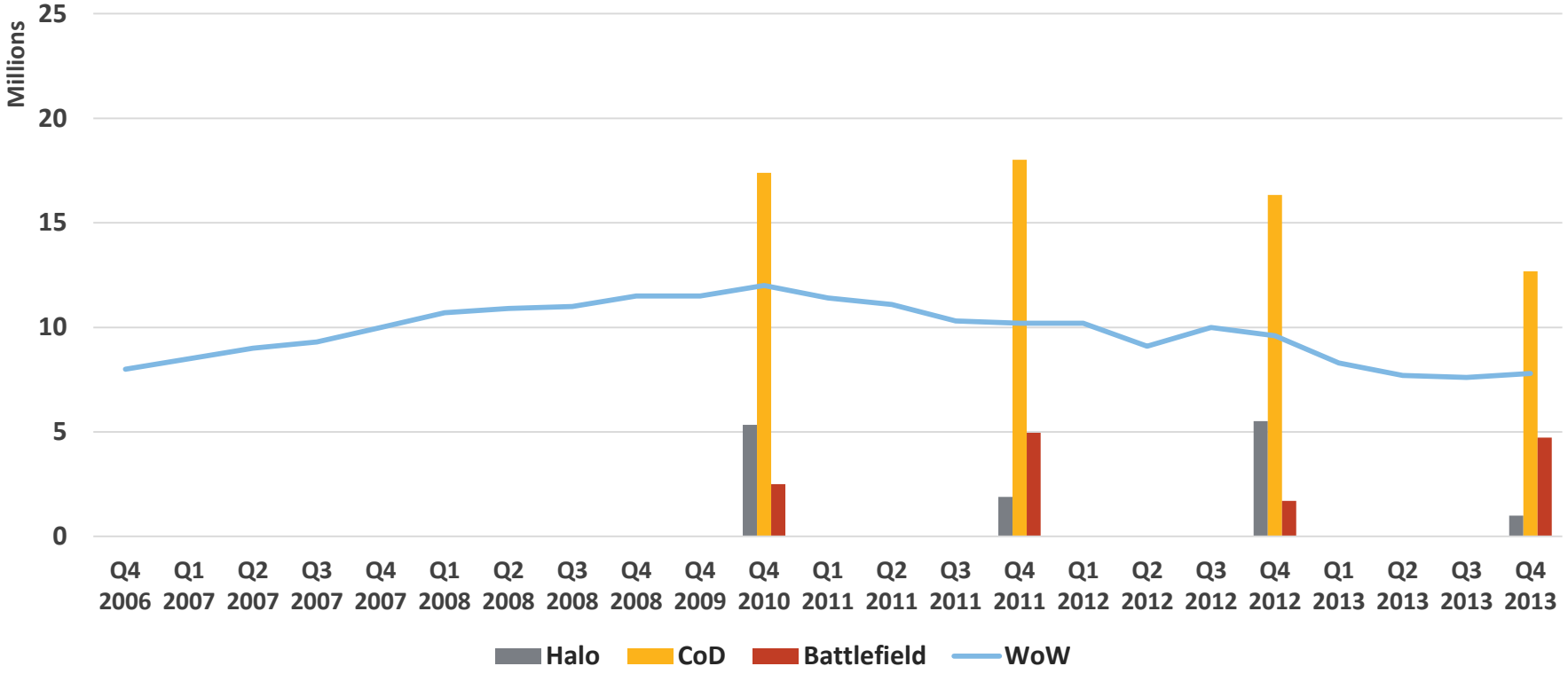
US Market by 2YR Unit Sales



Source: The NPD Group & EEDAR

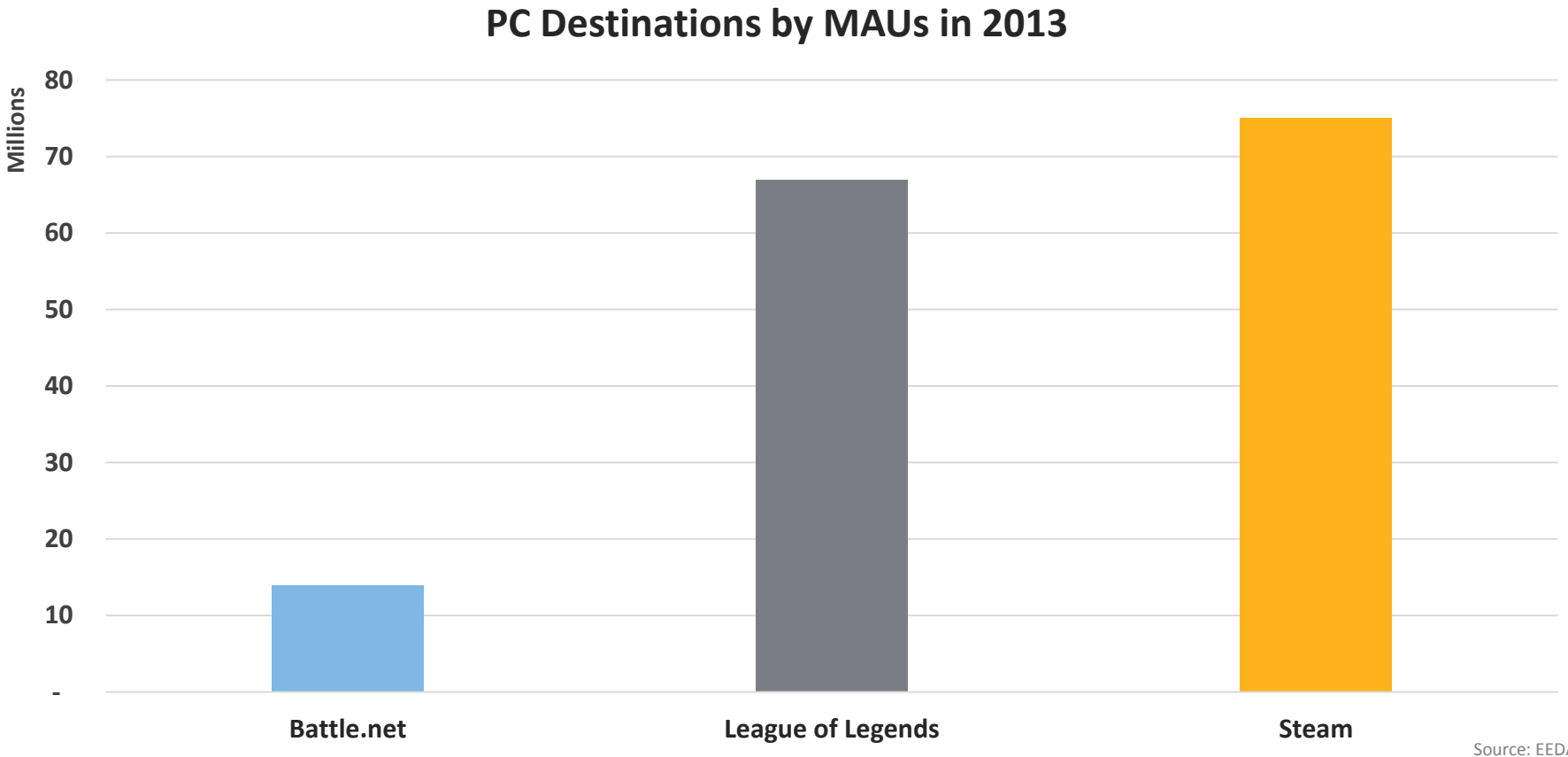
Market Share Leaders

Active WoW Subscribers vs. 2YR US Shooter Unit Sales



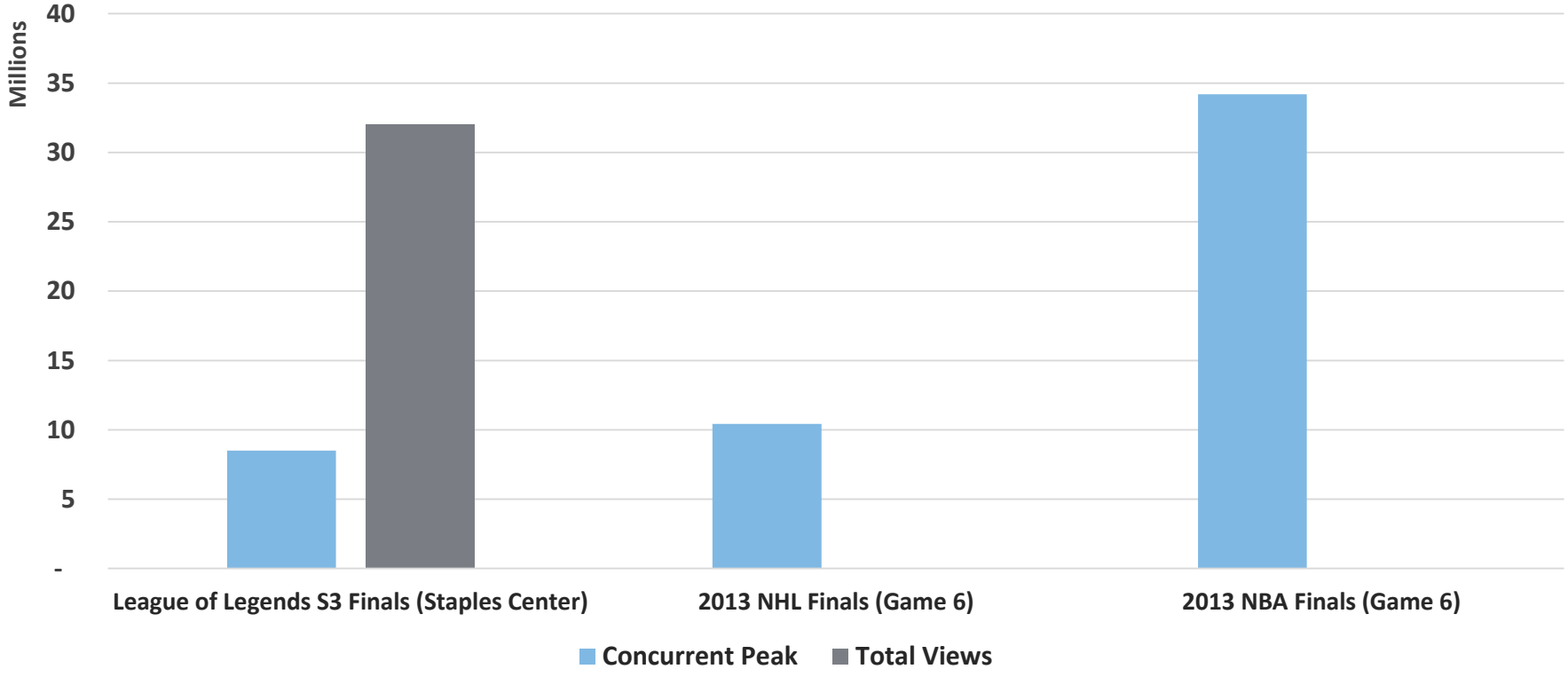
Source: The NPD Group & EEDAR

Market Share Leaders

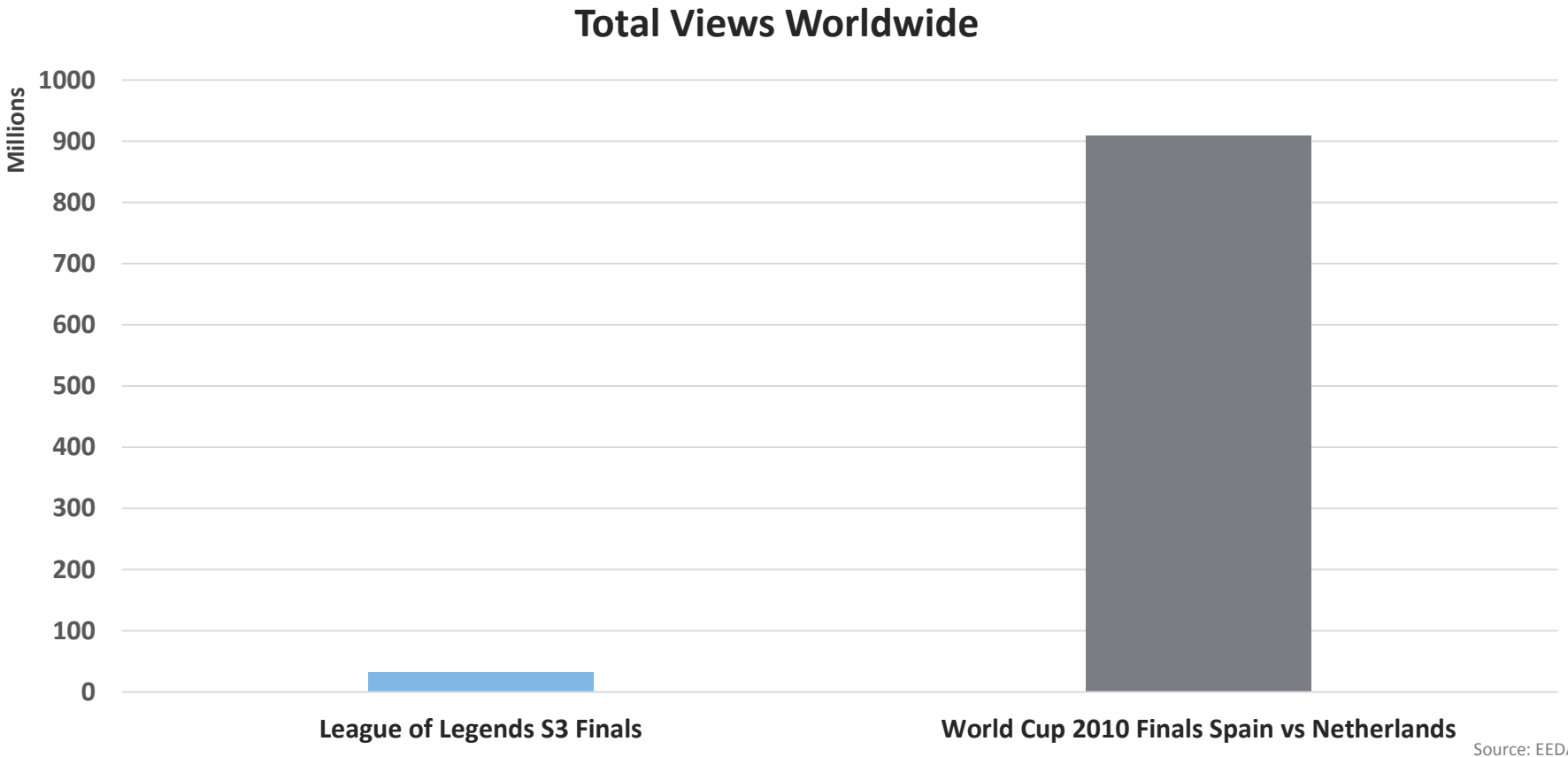


Source: EEDAR

Concurrent Viewership Peak



Source: EEDAR



Source: EEDAR

Awesome Video Game Data

Geoffrey Zatkin
Founder gzatkin@eedar.com

GDC 14

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The data here is macro trending data; individual genres, platforms, brands, etc. often perform differently than an amalgamation of all industry games. If you have questions about how games like “your game” perform, please reach out to us at EEDAR (info@eedar.com) – game industry research is what we do.