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If you are **media**, please e-mail ([press@eedar.com](mailto:press@eedar.com)) for permission to publish excerpts of material included in this .pdf and for higher resolution assets.

The data here is **macro** trending data; individual genres, platforms, brands, regions, etc. perform differently than amalgamations of industry games. If you have questions about how games like yours perform, please reach out to us at EEDAR ([solutions@eedar.com](mailto:solutions@eedar.com)) – game industry research is what we do.

# AWESOME VIDEO GAME DATA



**EEDAR**

**DATA | ANALYSIS | RESEARCH | FORECASTING | DILIGENCE**

# YOUR PRESENTER



Indie Dev  
1991 to 1996



Lead Designer  
2003 to 2005



SNOW  
CANNON  
GAMES

Board  
2015 to Current



Founder  
2015 to Current



Geoffrey "GZ" Zatkin  
@GeoffreyZatkin

Sr / Lead Designer  
1997 to 2003



EEDAR



## 2,500+ Objectively Quantifiable Video Games Attributes





## About EEDAR

- Founded in 2006
- Based in Carlsbad, California w/ 45 Employees
- Exclusively Servicing the Video Game Industry
- Over a Half Dozen Industry Data Partners
- Servicing >90% of the top Publishers and >50 Development Studios

## EEDAR Data

- 130,000+ Products (Games, Accessories, Hardware) Observed To Date
- 176,500,000+ Data Points



# WHERE WE ARE

We are in the **8<sup>th</sup> generation** of game consoles,  
and in the midst of an expansion in both  
the **demographics** and **regions** of people  
who **play**, **pay for** and **watch** games

as well as the **beginning** of a  
**completely new gaming vertical**  
with the introduction of  
consumer grade **virtual reality**.



AUDIENCE

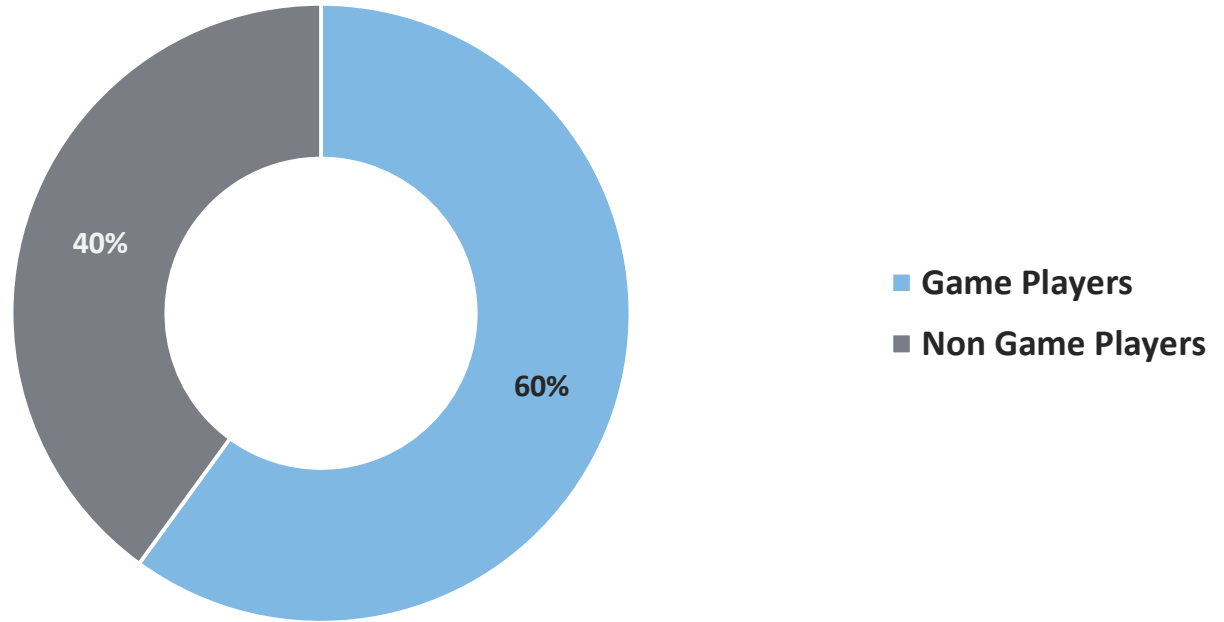
# THE 'GAMERS' OF TODAY ARE ENTERTAINMENT CONSUMERS





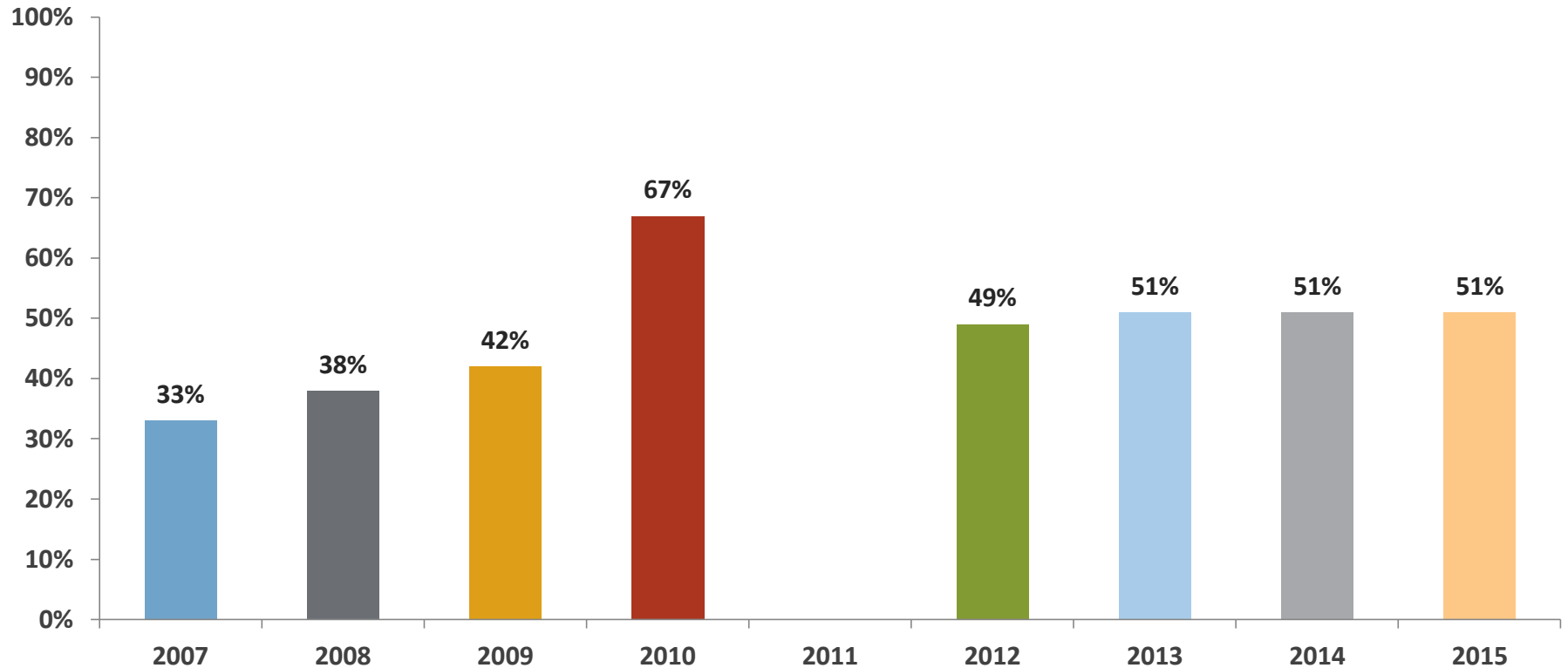
# WHO GAMES?

## Game Playing Population of the USA [Ages 13+][2016][NA]



# WHO GAMES?

% of American homes with a video game console



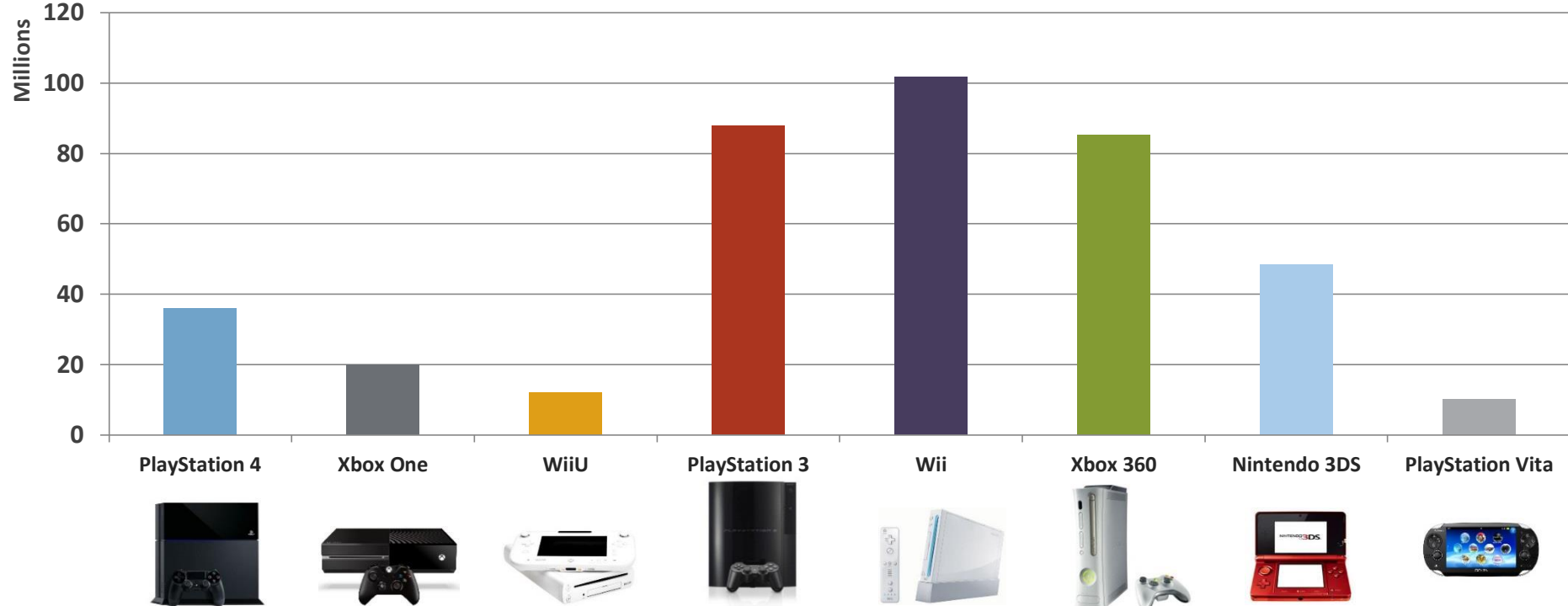
EEDAR

CONTEXT IS EVERYTHING

Source: ESA

# HARDWARE SALES

## Platform Sales Worldwide Through December, 2015



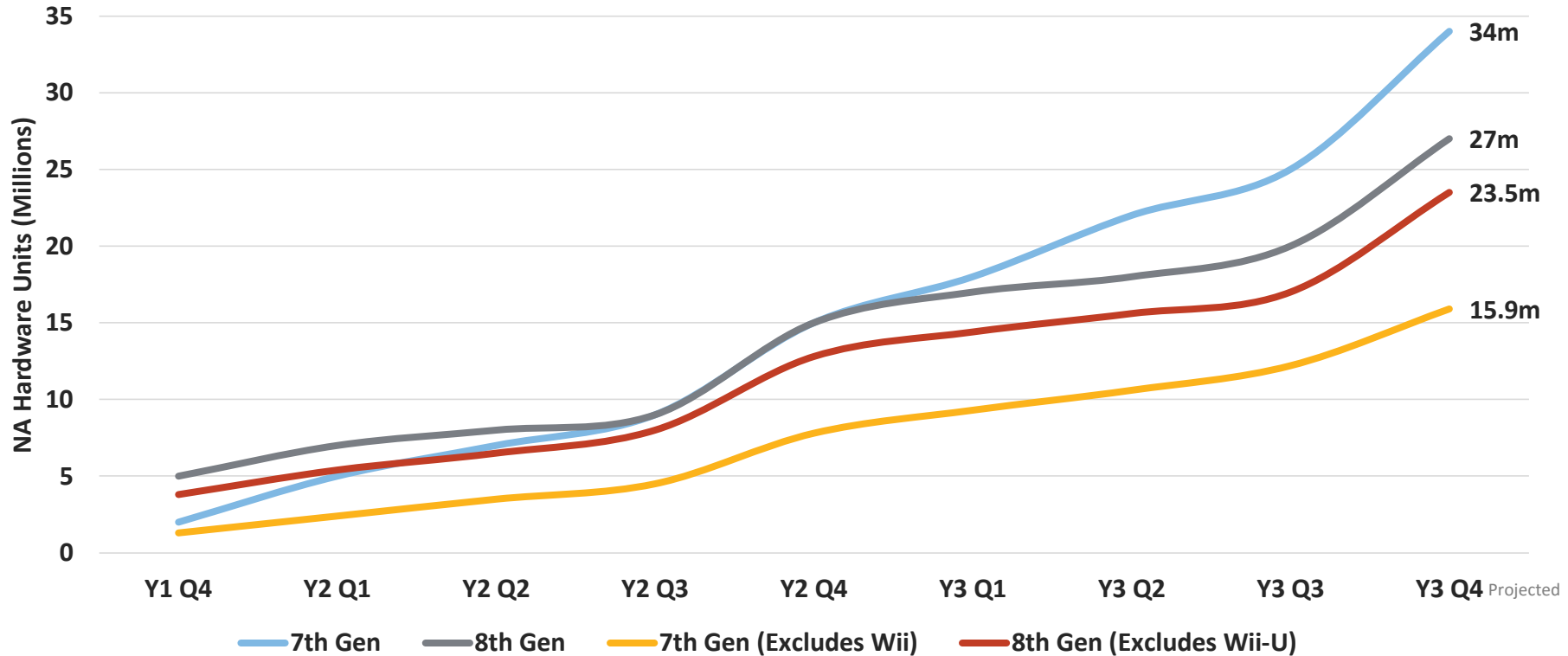
EEDAR

CONTEXT IS EVERYTHING

Source: EEDAR

# CONSOLE SALES

## 7th vs. 8th Generation Console Sales in North America



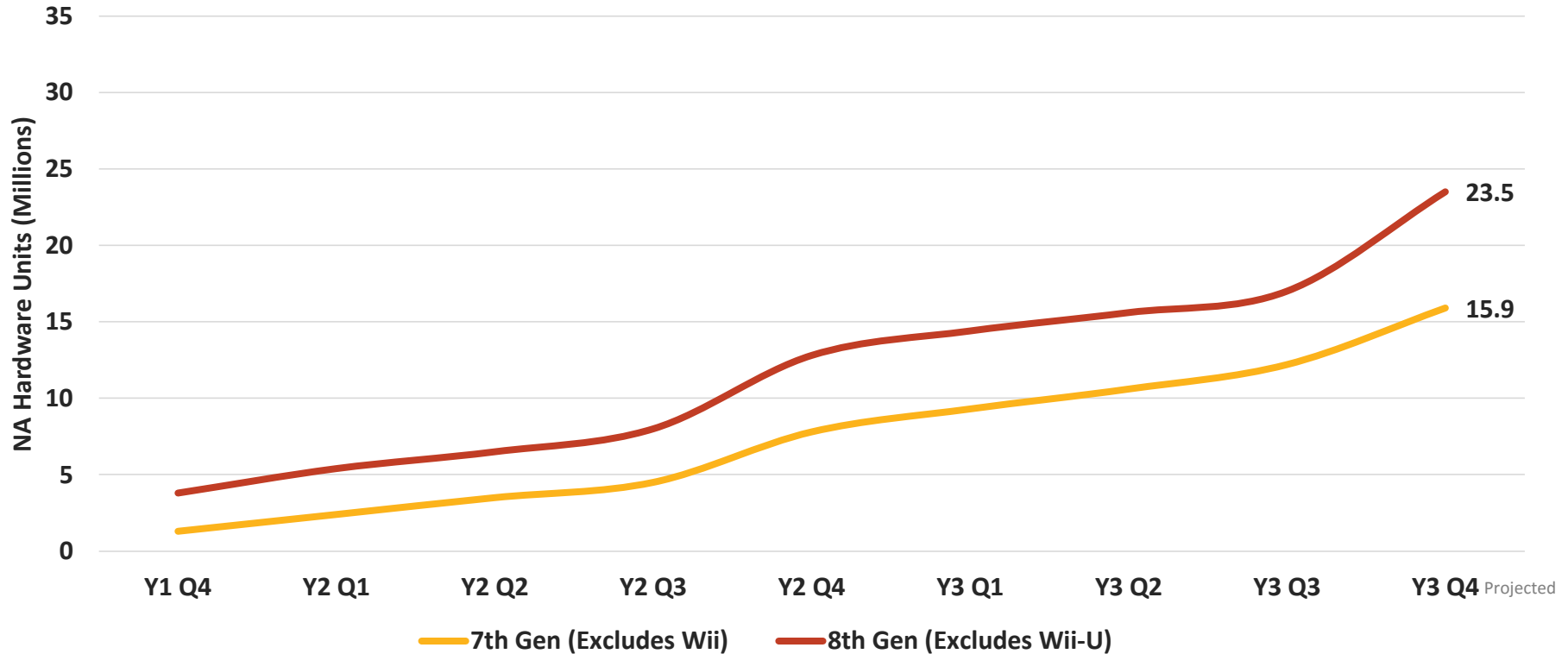
EEDAR

CONTEXT IS EVERYTHING

Source: EEDAR & The NPD Group

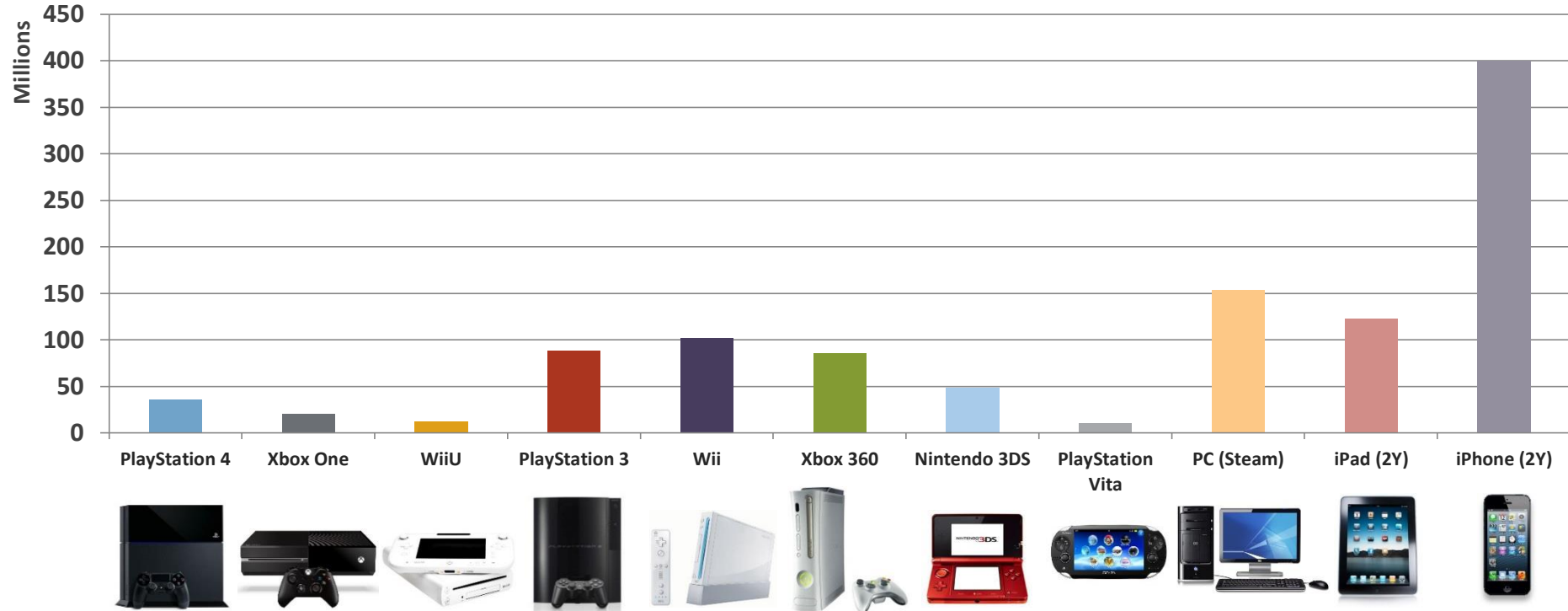
# CONSOLE SALES

## 7th vs. 8th Generation Console Sales in North America



# HARDWARE SALES

## Platform Sales Worldwide Through December, 2015

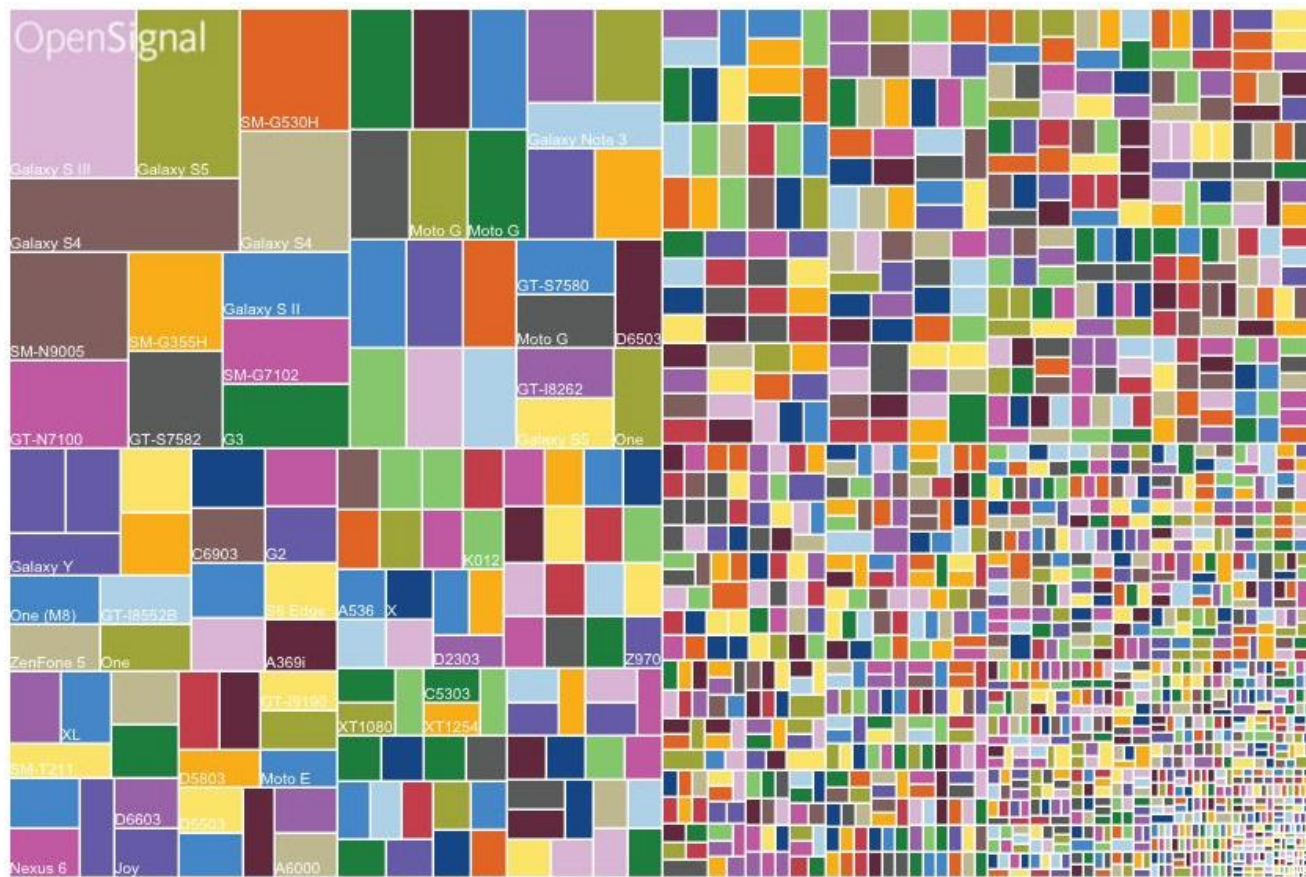


EEDAR

CONTEXT IS EVERYTHING

Source: EEDAR

# ANDROID DEVICE FRAGMENTATION

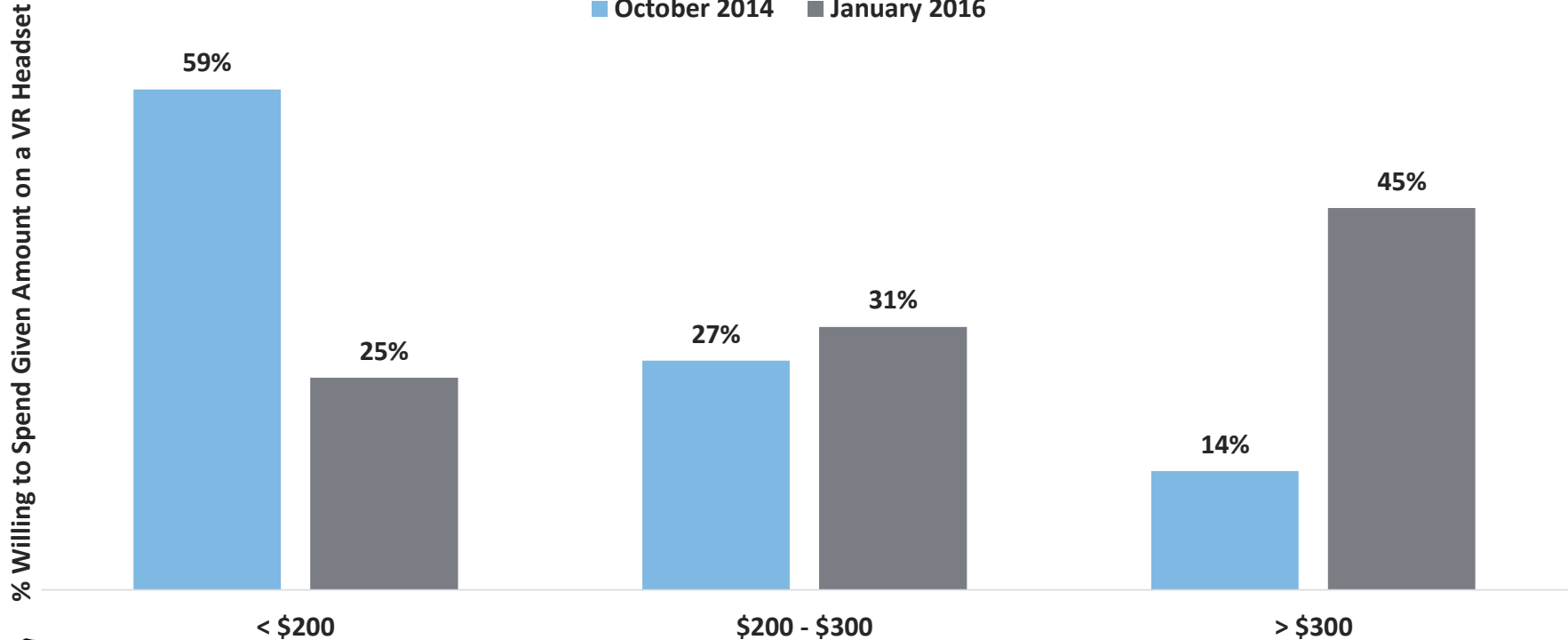


## VR Headset Consumer-Reported Spend Limits

[NA Active PC/Console Game Players Interested in Purchasing a VR Headset]

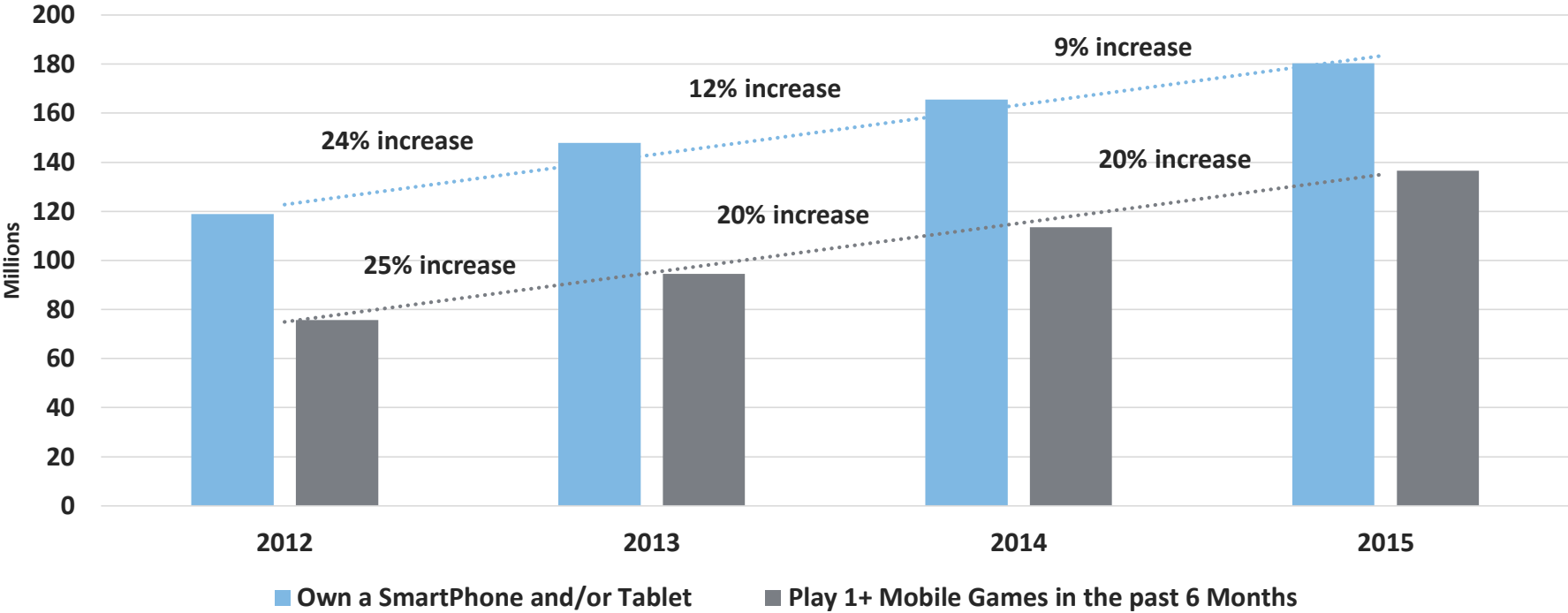
Jan 2016 data collected Jan 13-15, one week after the Oculus preorder announcement of \$599.99.

■ October 2014 ■ January 2016





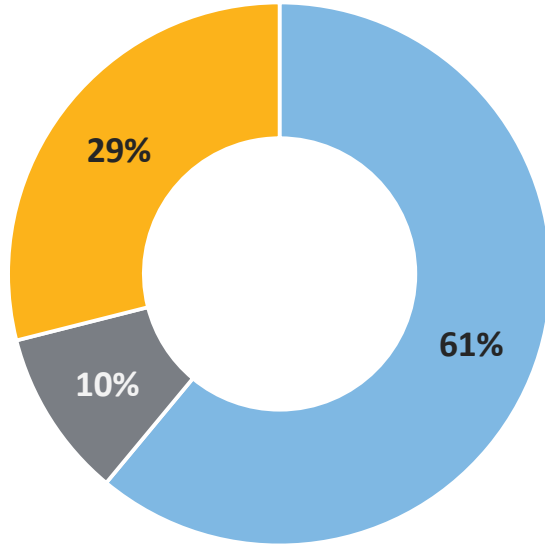
## Mobile Game Players [2012-2015] [Age 18+][NA]



# MOBILE GAMERS

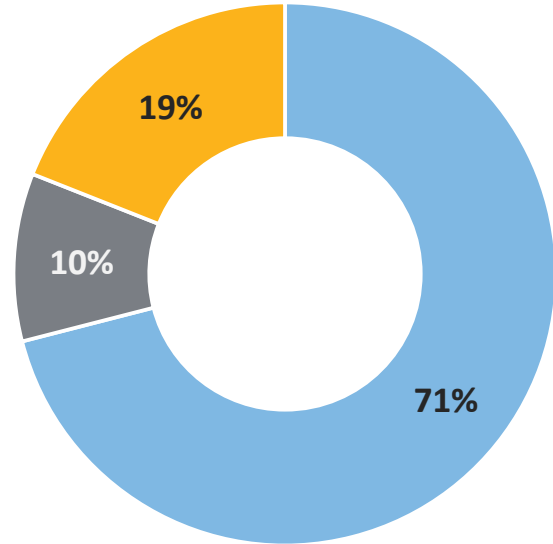
## Mobile Gamers by Device Ownership

[Active Mobile Game Players][18+][NA]



## Mobile Gaming \$\$\$ by Device Ownership

[Active Mobile Game Players][18+][NA]



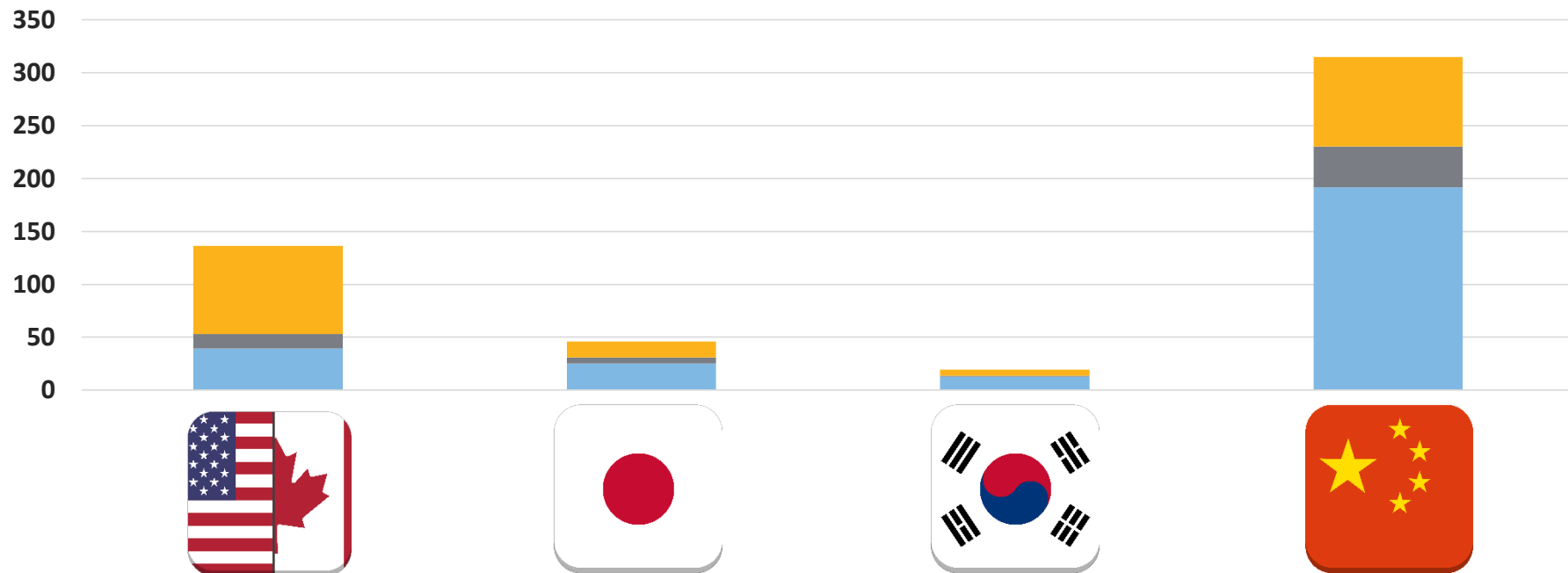
■ Both Smartphone & Tablet ■ Tablet Only ■ SmartPhone Only

■ Both Smartphone & Tablet ■ Tablet Only ■ Smartphone Only

# MOBILE GAMERS

## Devices Used For Mobile Gaming [2015][NA & APAC][Active Mobile Game Players][Age 18+]

■ Smartphone Only   ■ Tablet Only   ■ Both Smartphone & Tablet



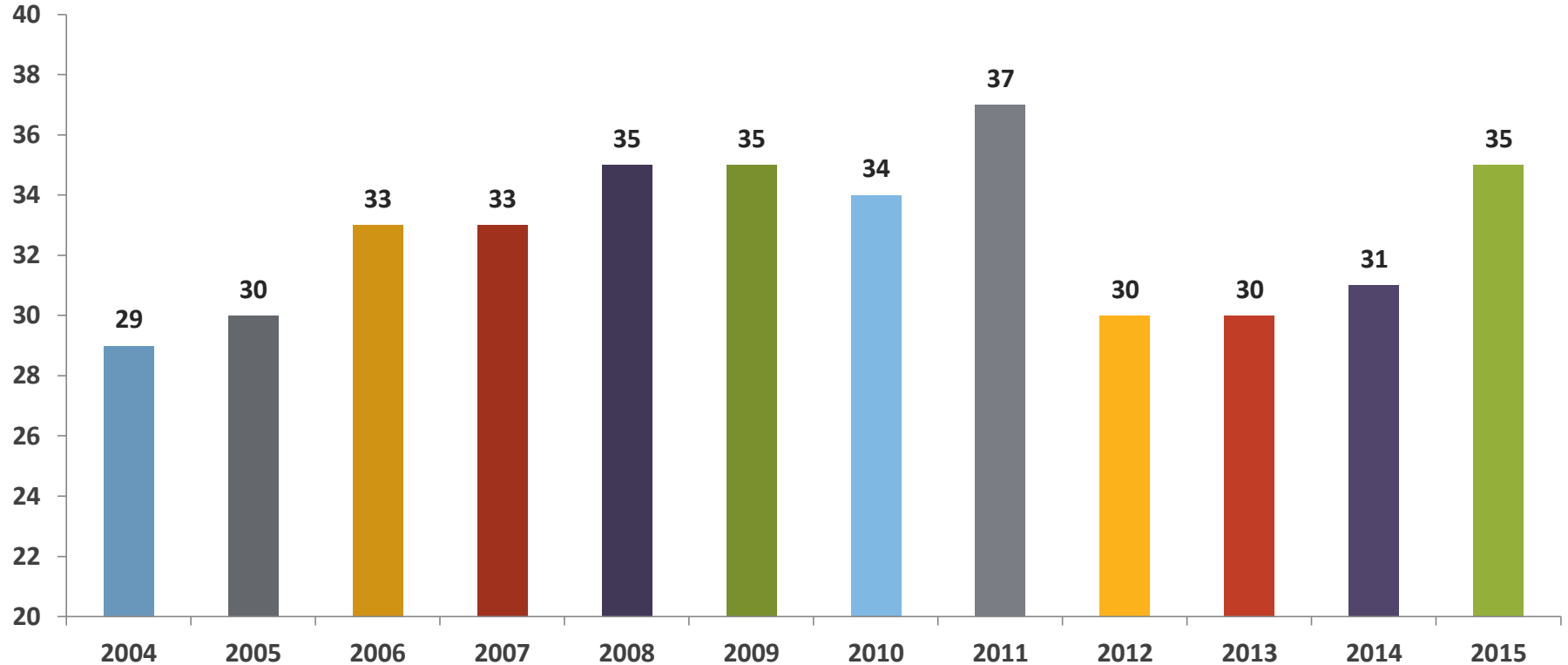
EEDAR

CONTEXT IS EVERYTHING

Source: EEDAR NA / APAC Mobile Reports 2015

# WHO GAMES?

Average Age of Game Players in the USA



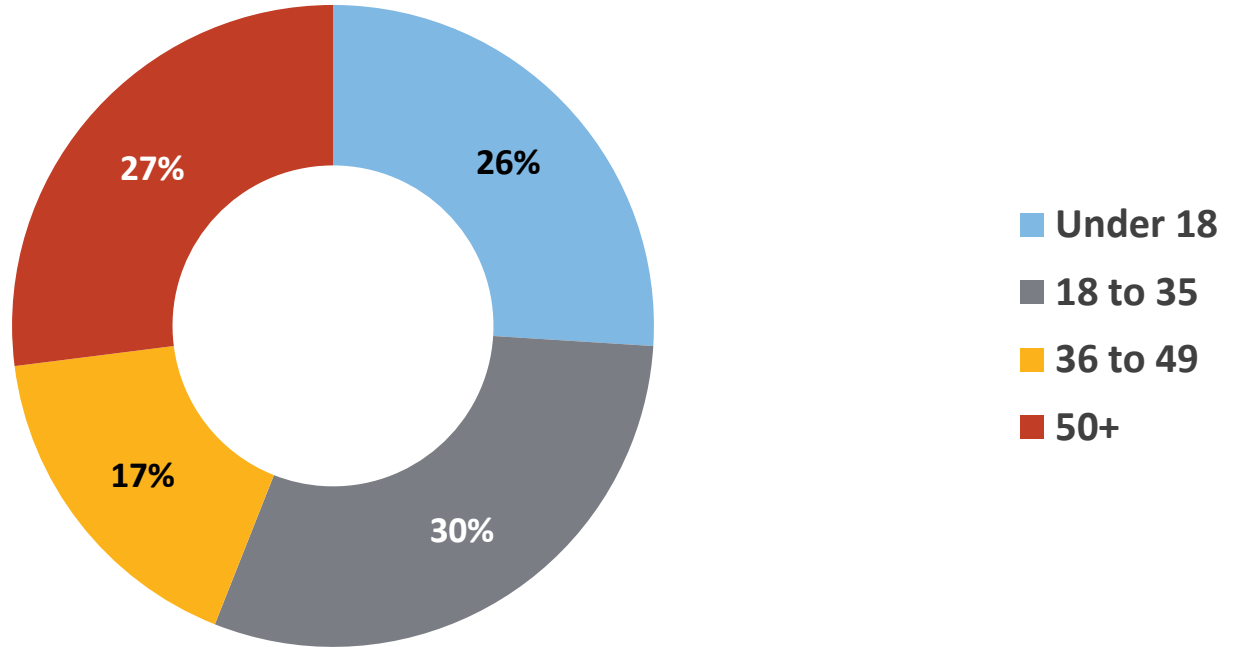
EEDAR

CONTEXT IS EVERYTHING

Source: ESA

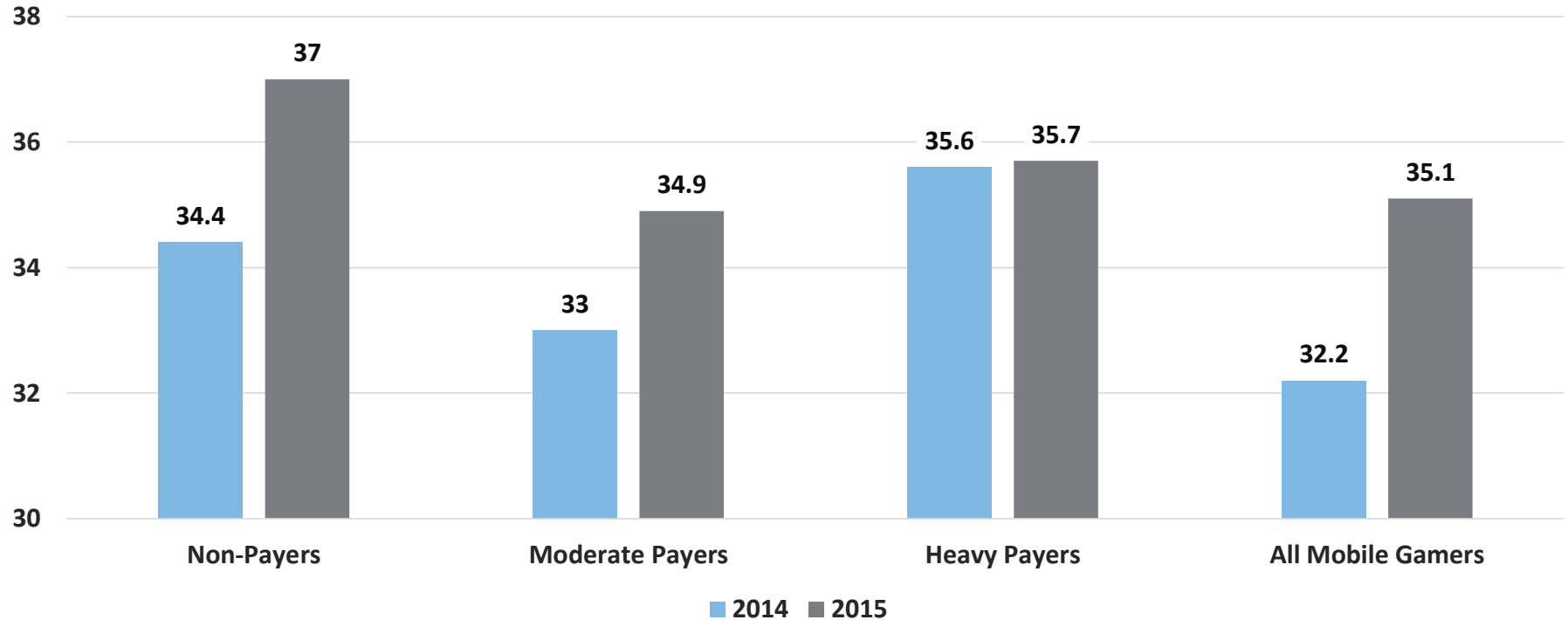
# WHO GAMES?

Age of Game Players



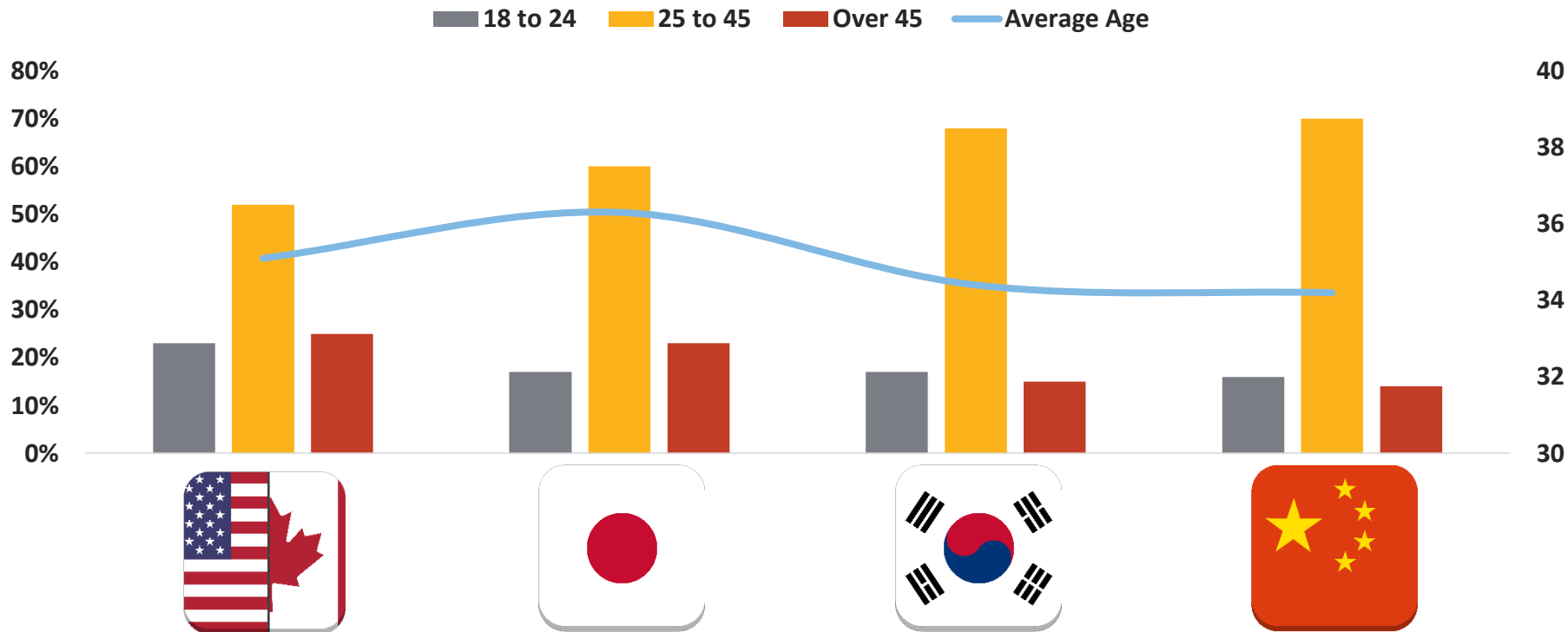
# MONETIZING MOBILE - AGE

**Age by Mobile Spending Segment**  
[2014-2015][NA][Active Mobile Game Players][Age 18+]



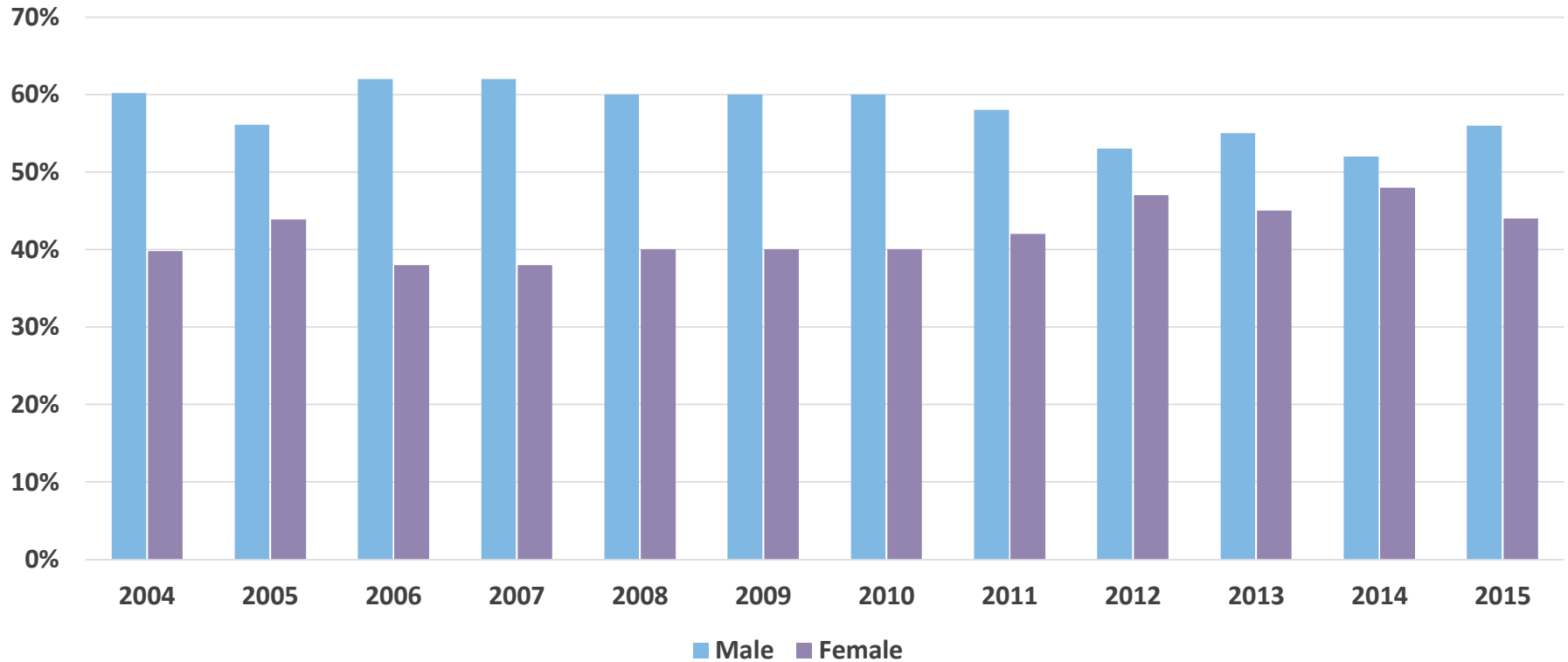
# MONETIZING MOBILE - AGE

Mobile Game Player Age by Region  
[2015][Active Mobile Game Players]



# WHO GAMES?

## Gender of Game Players in NA



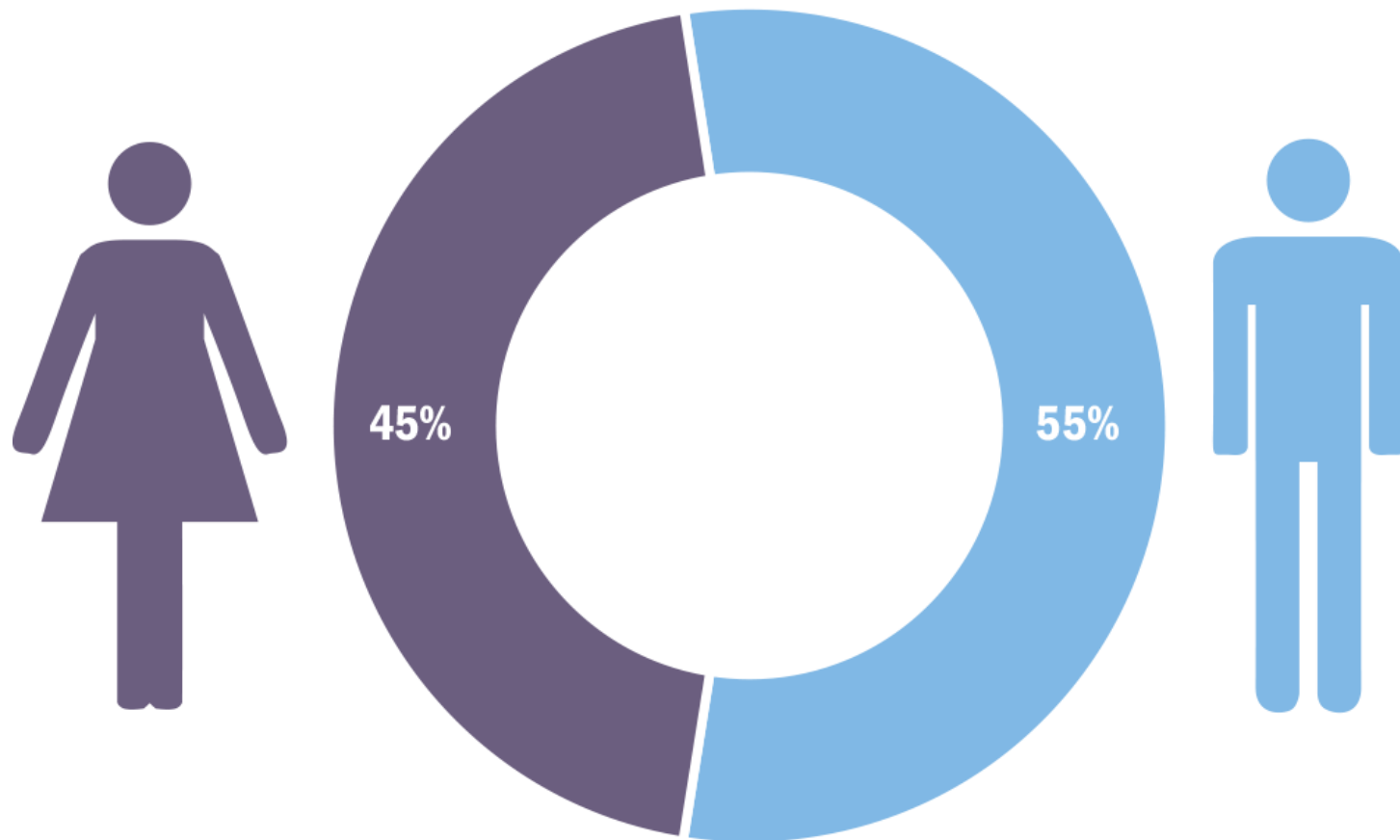
EEDAR

CONTEXT IS EVERYTHING

Source: ESA

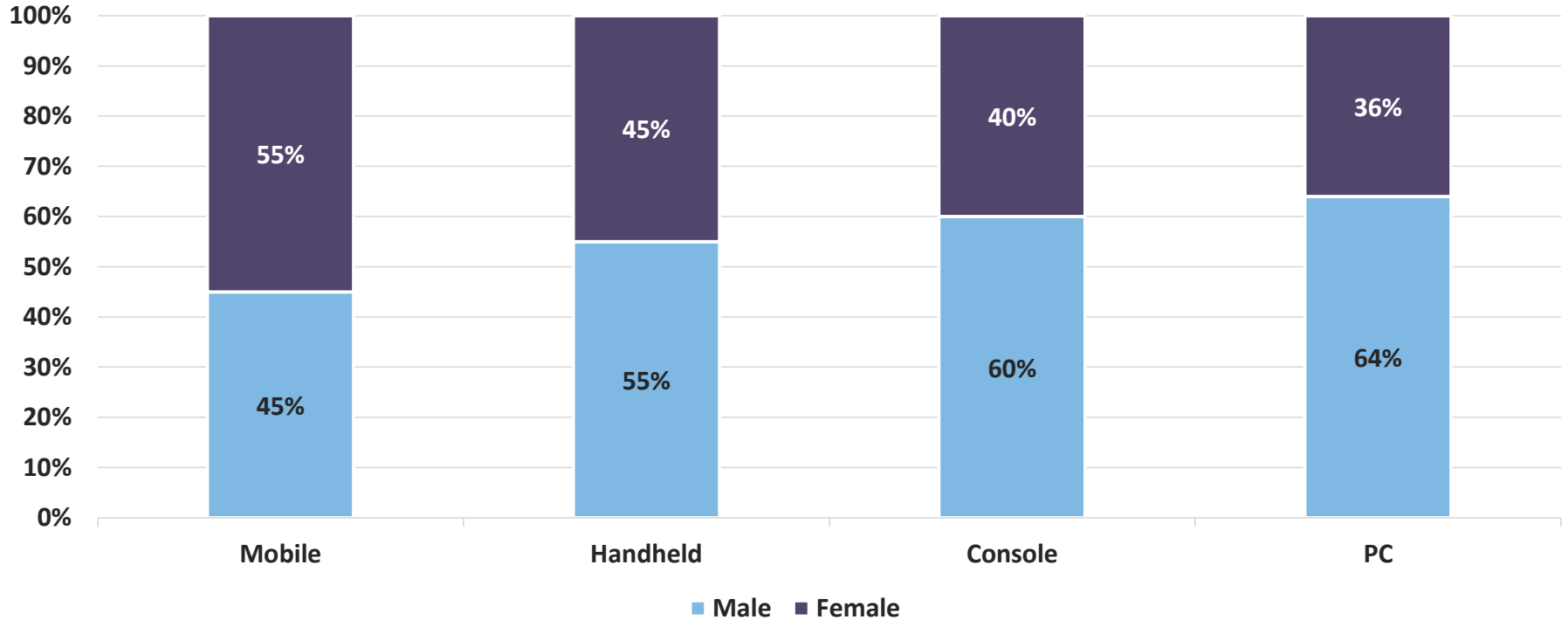


# WHO GAMES?



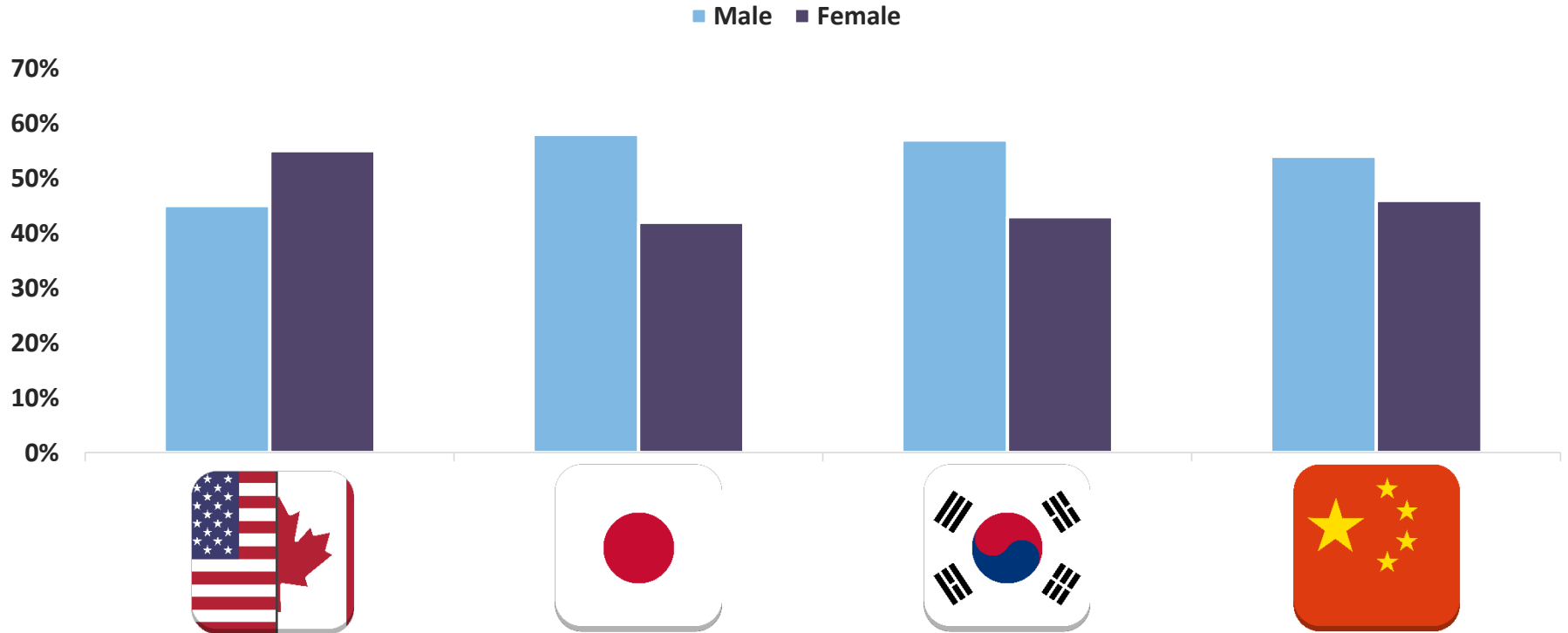
# WHO GAMES?

Active Game Players Across Platforms  
[2015][NA]

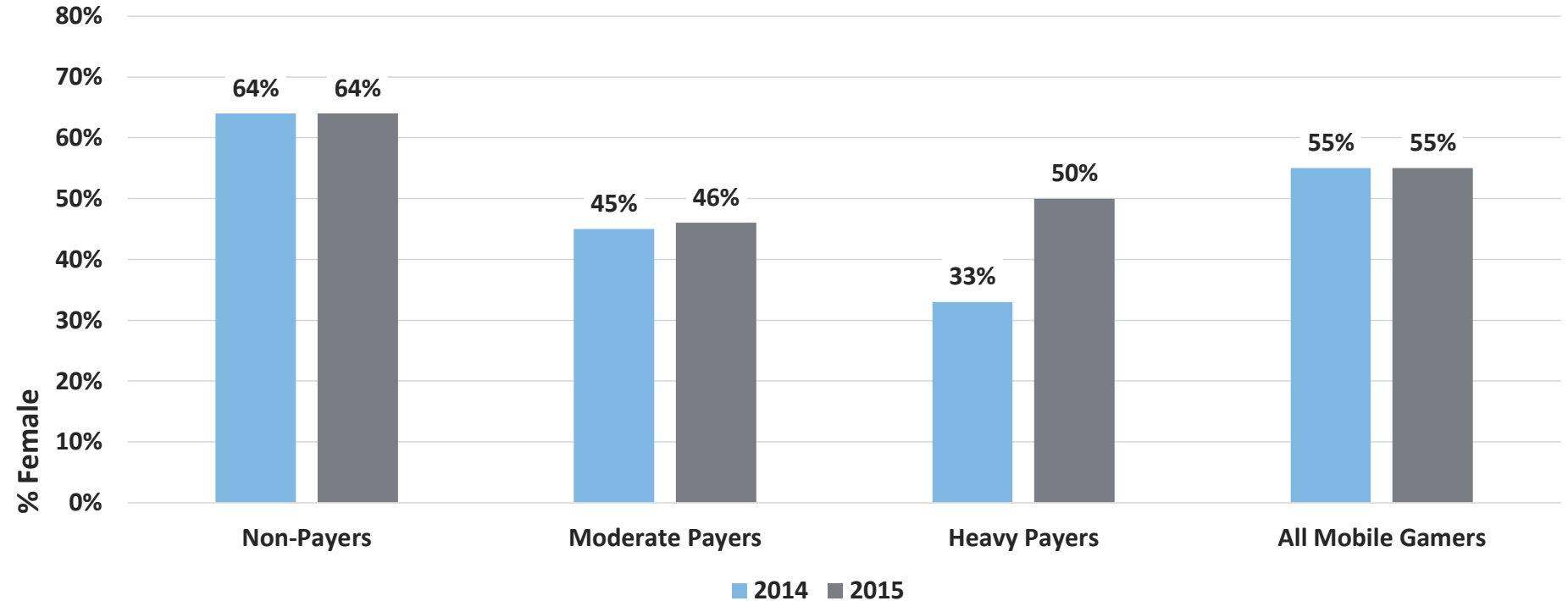


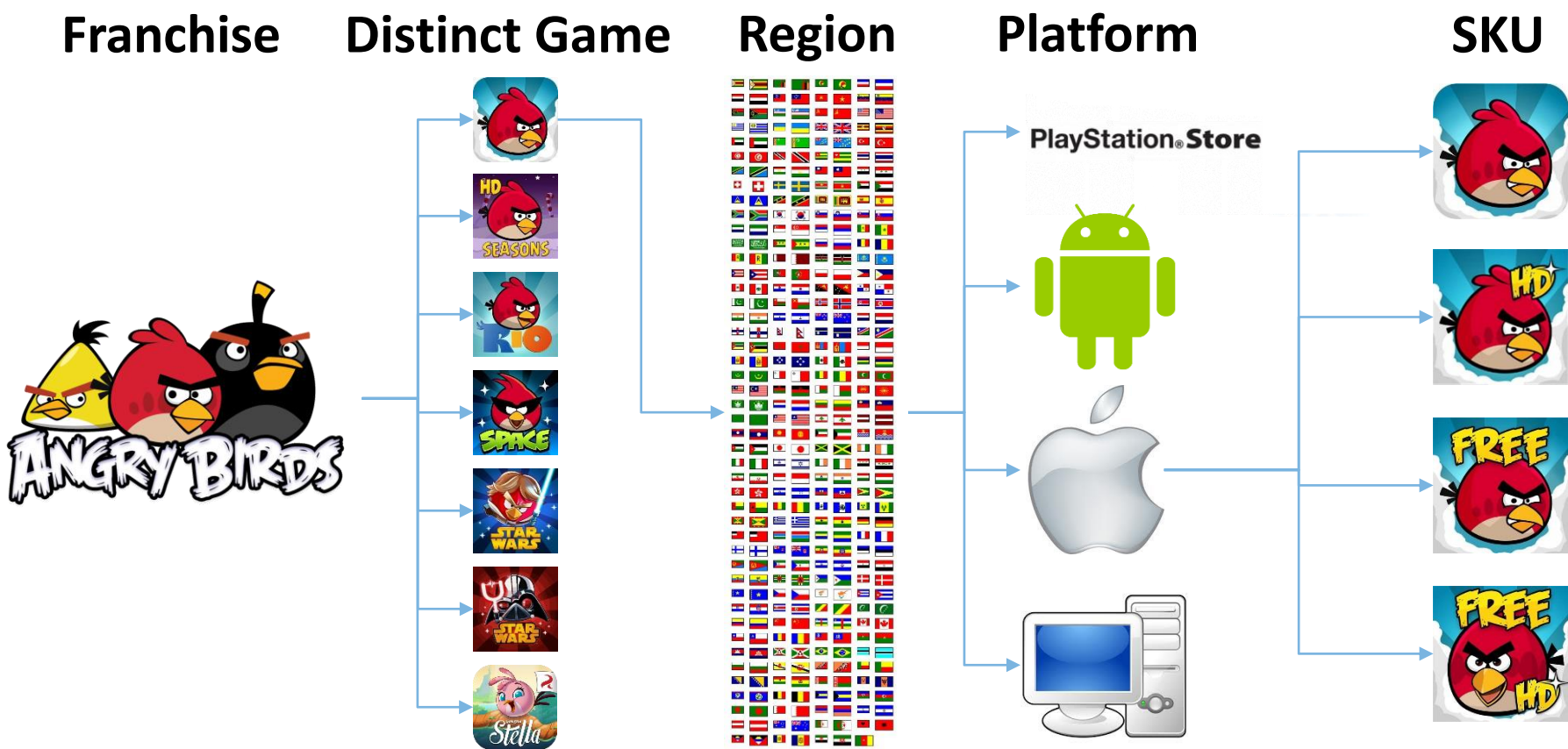
# WHO GAMES?

## Mobile Game Player Age by Region [2015][Active Mobile Game Players]

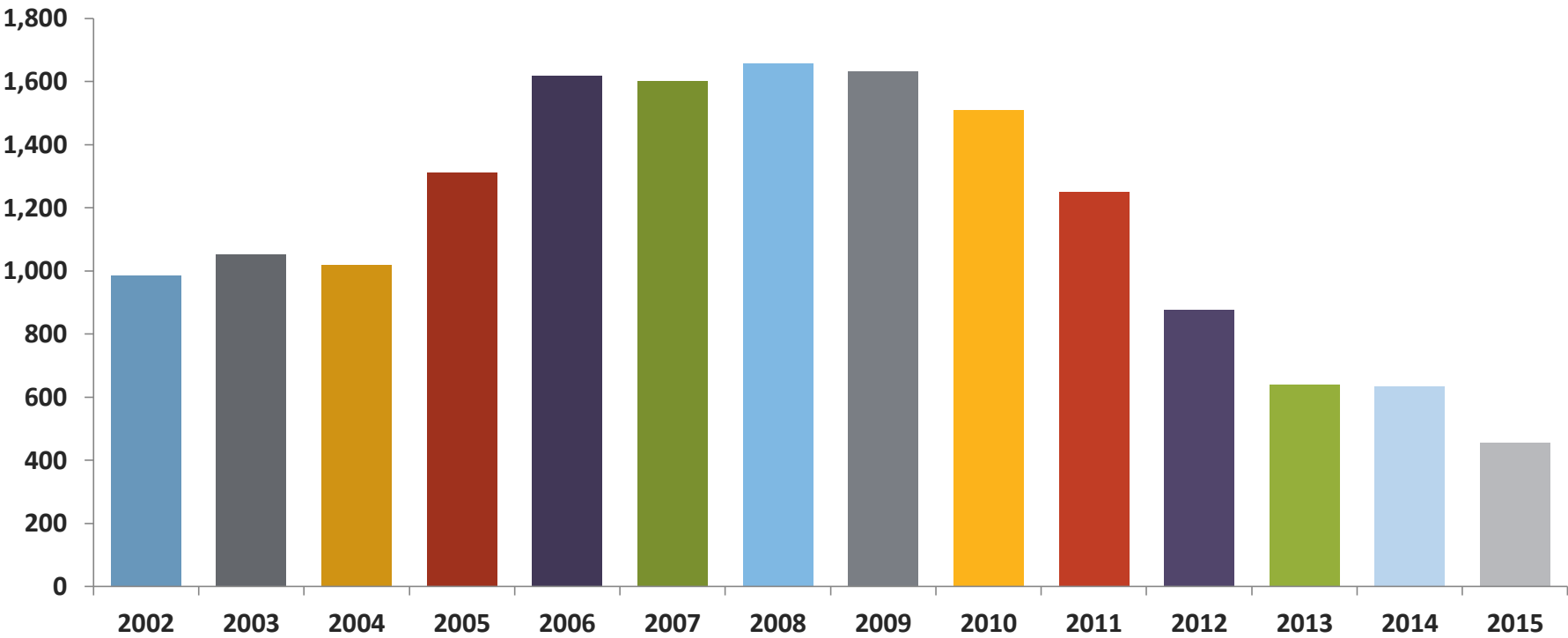


## Female Game Players by Mobile Spending Segment [2014-2015][NA][Active Mobile Game Players][Age 18+]



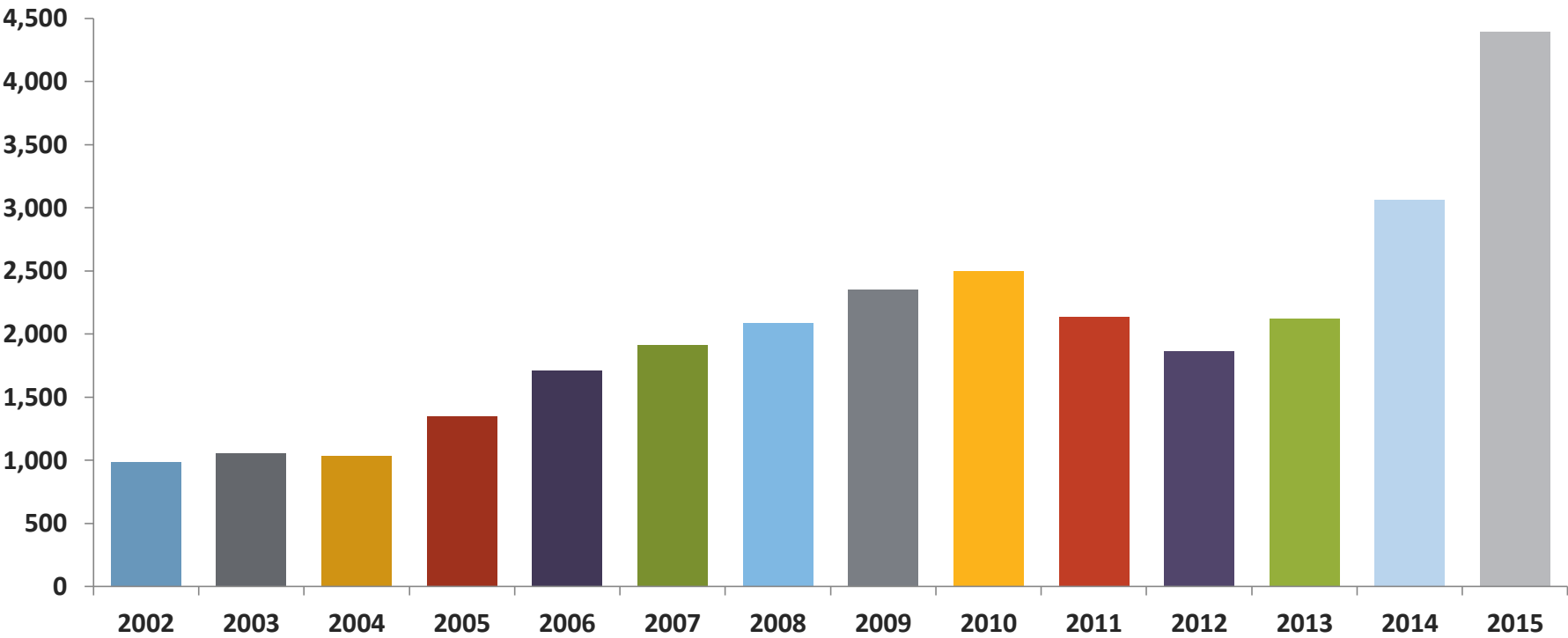


Quantity of Games Released  
Retail Console, Handheld & PC Platform Title Releases in the USA



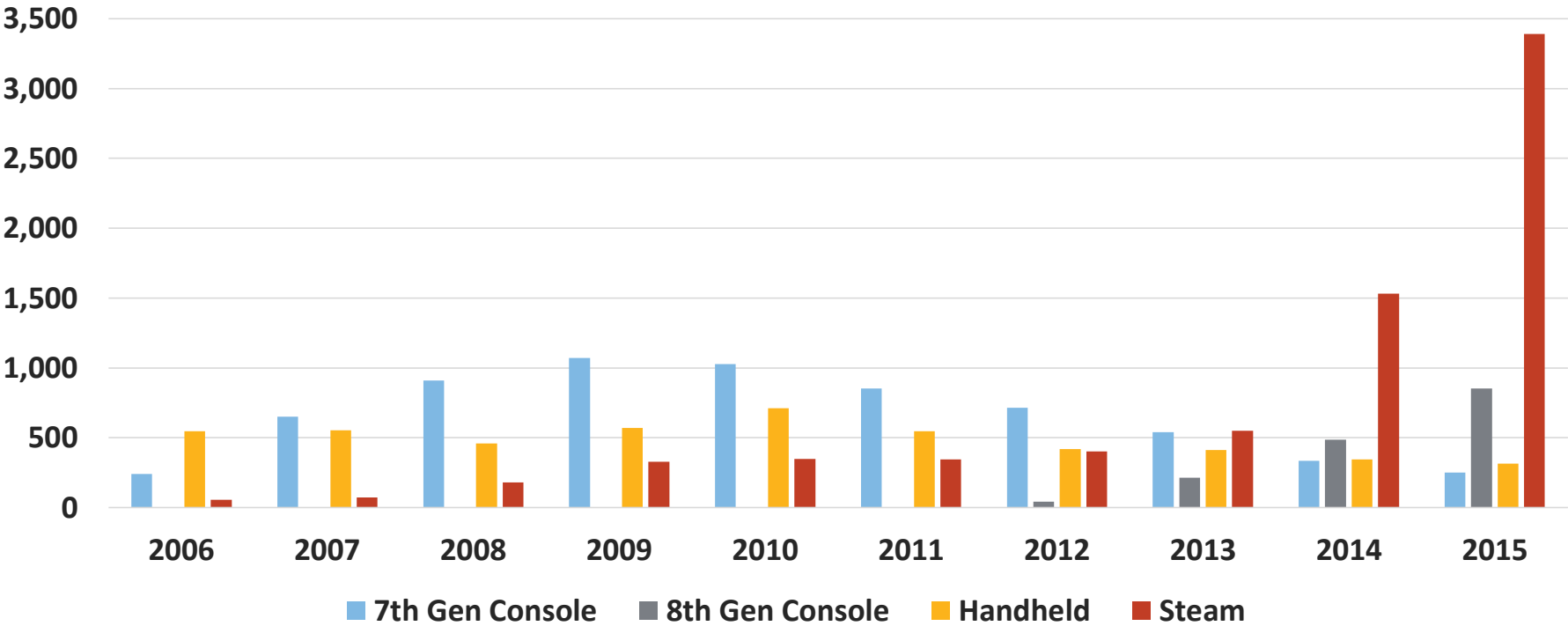
## Quantity of Games Released

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



## Quantity of Games Released

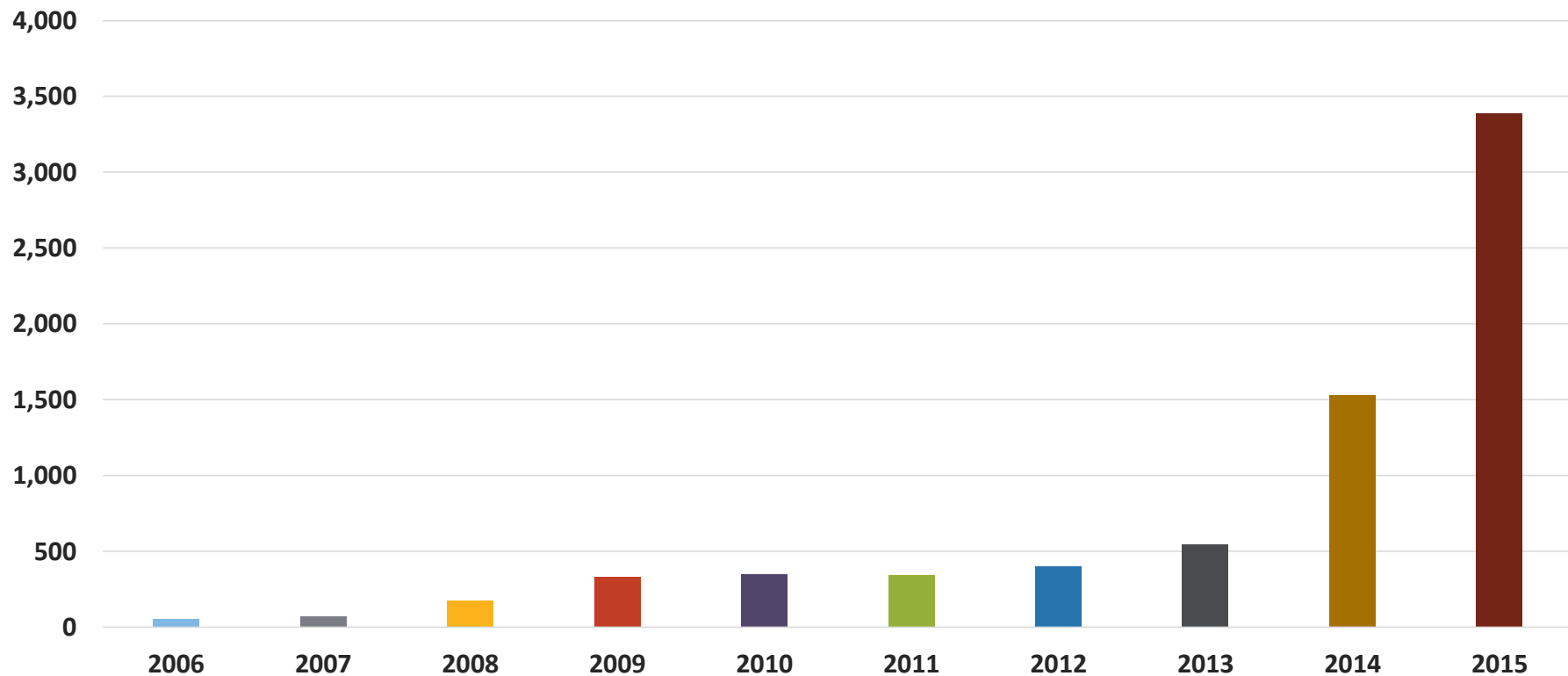
Retail & Digital Console, Handheld & Steam Platform Title Releases in the USA





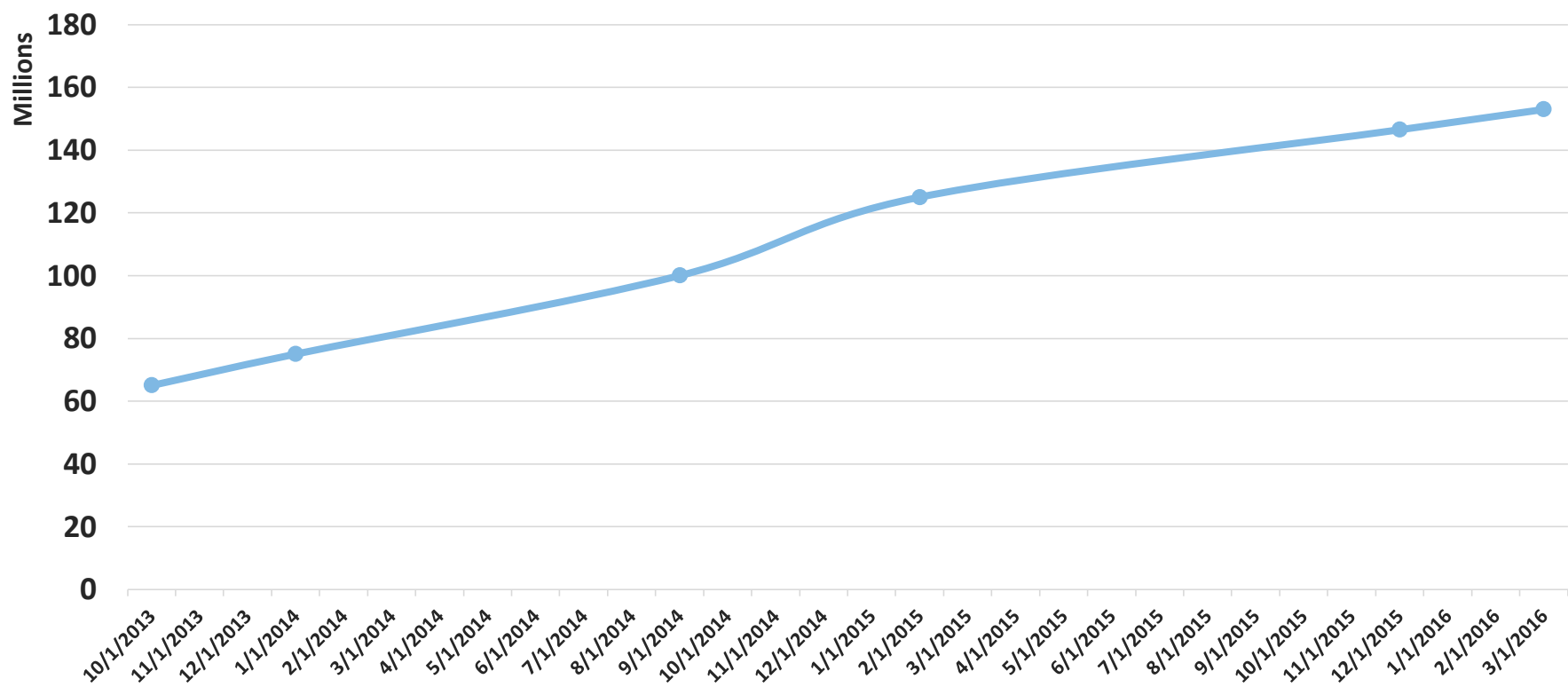
# GAME RELEASES - STEAM

Quantity of Steam Games Released per Year



# STEAM ACTIVE USERS

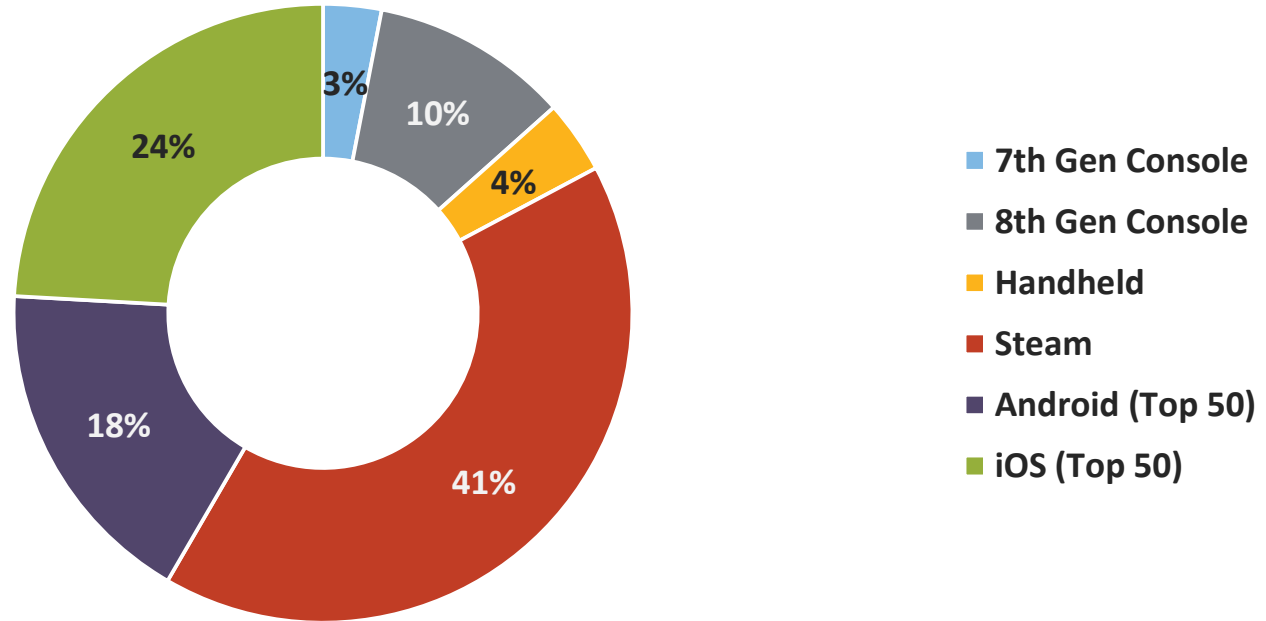
Steam Active Users Over Time



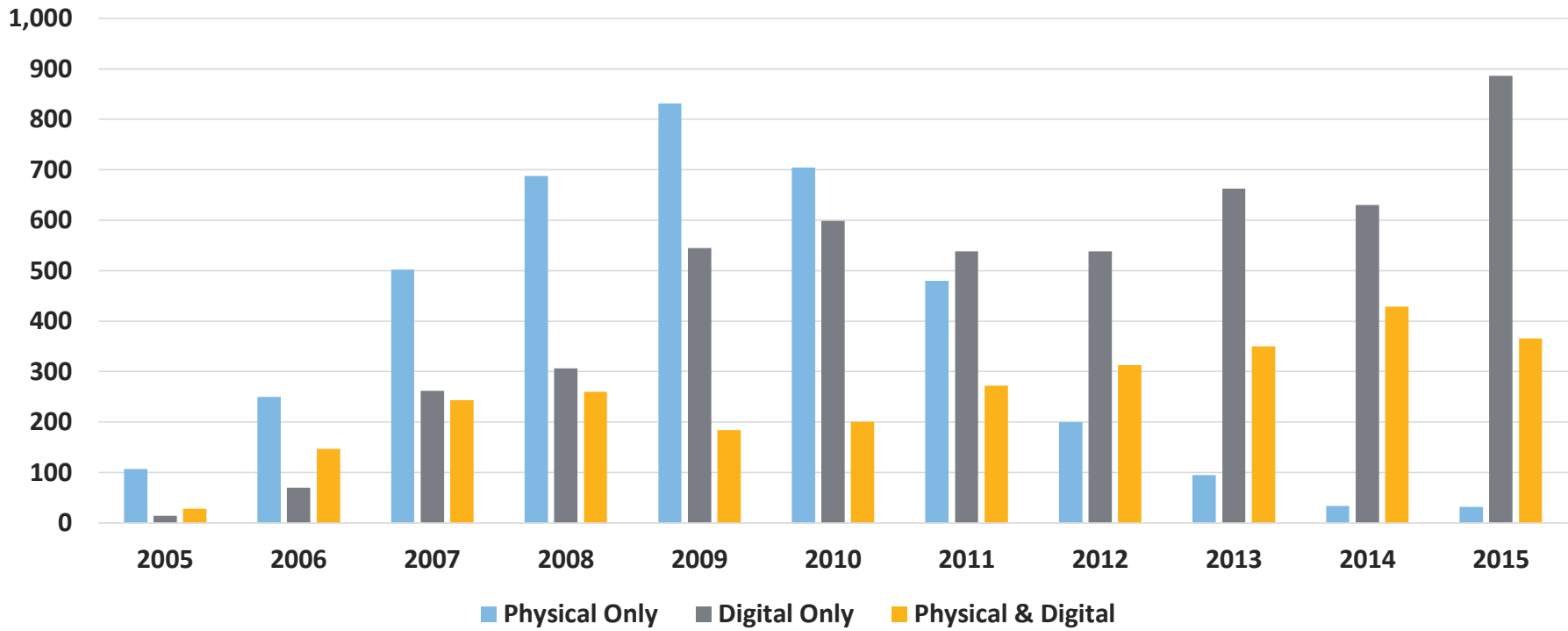
# GAMES RELEASED



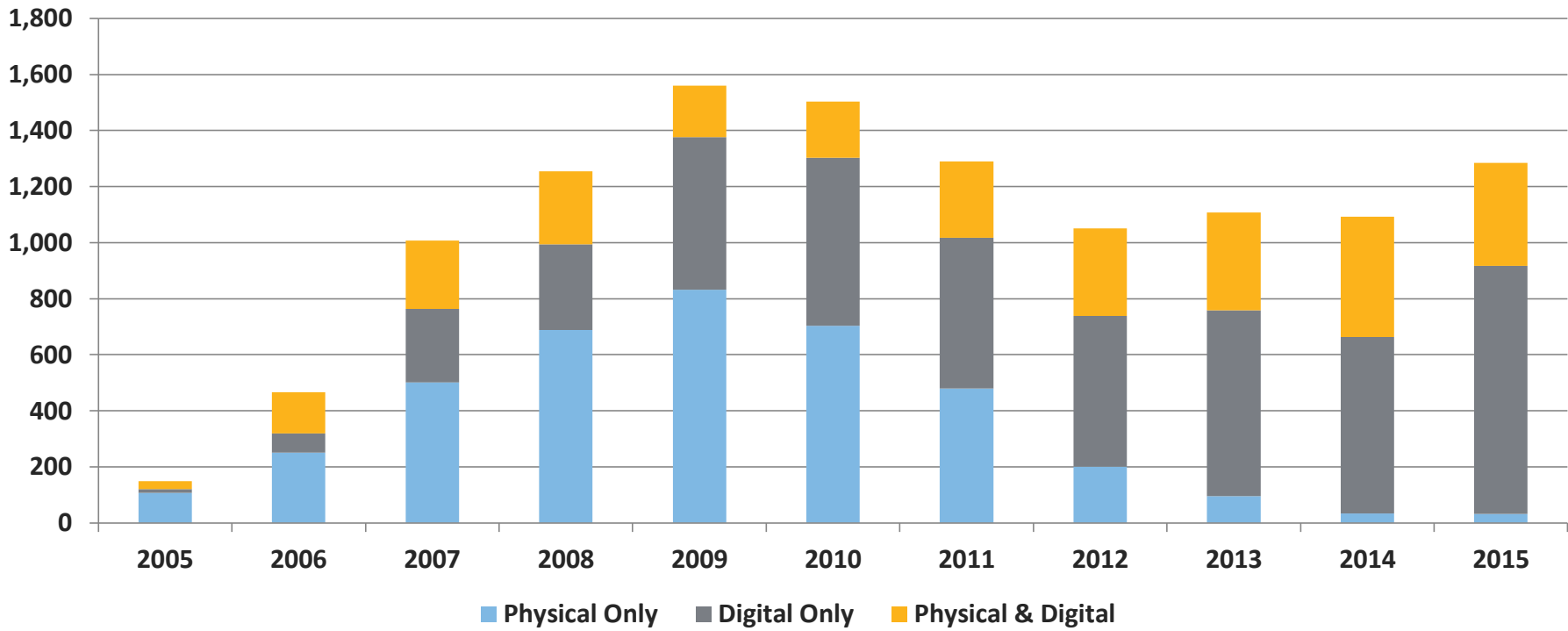
**Games Released by % of Market**  
[2015][Retail & Digital Platform Title Releases][USA]



Quantity of Digital and Retail Console Games Over Time  
7th & 8th Generation Consoles & Handhelds in the USA

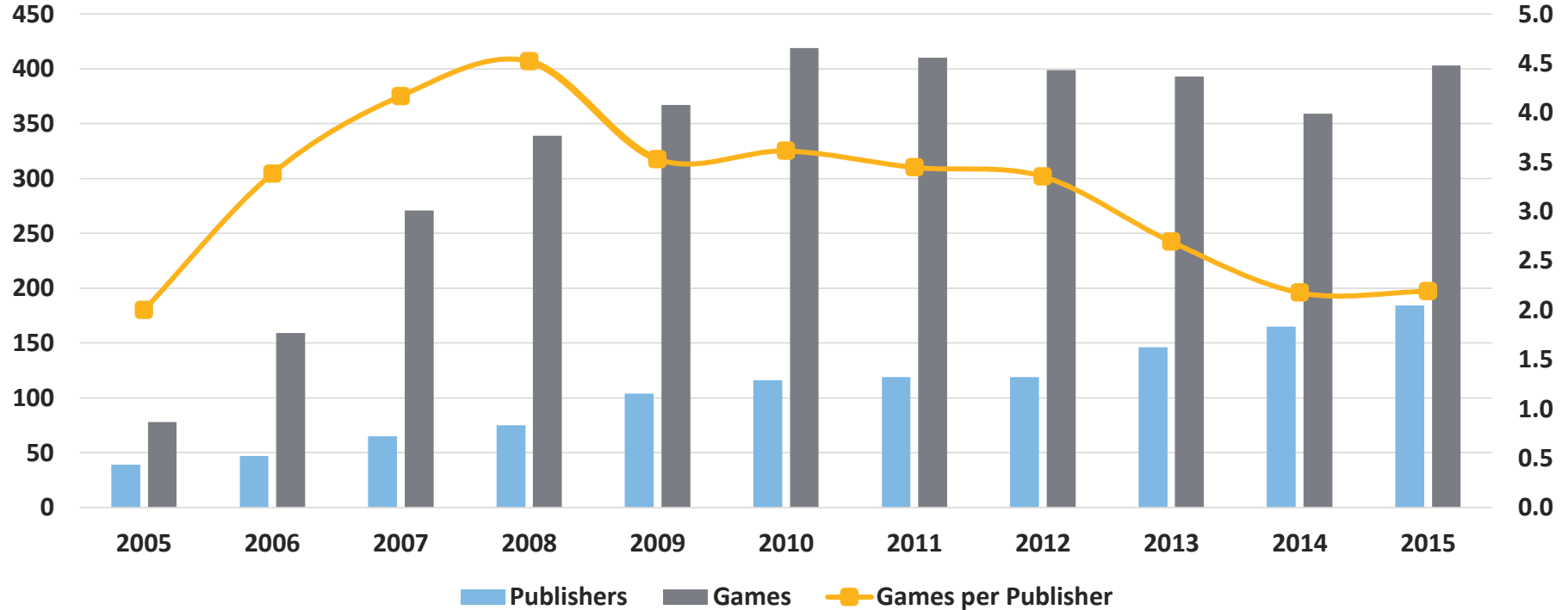


Quantity of Digital and Retail Console Games Over Time  
7th & 8th Generation Consoles & Handhelds in the USA



# PUBLISHER RELEASES

Quantity of Console Games per Publisher  
[7th and 8th Generation Console][2005-2015][NA]

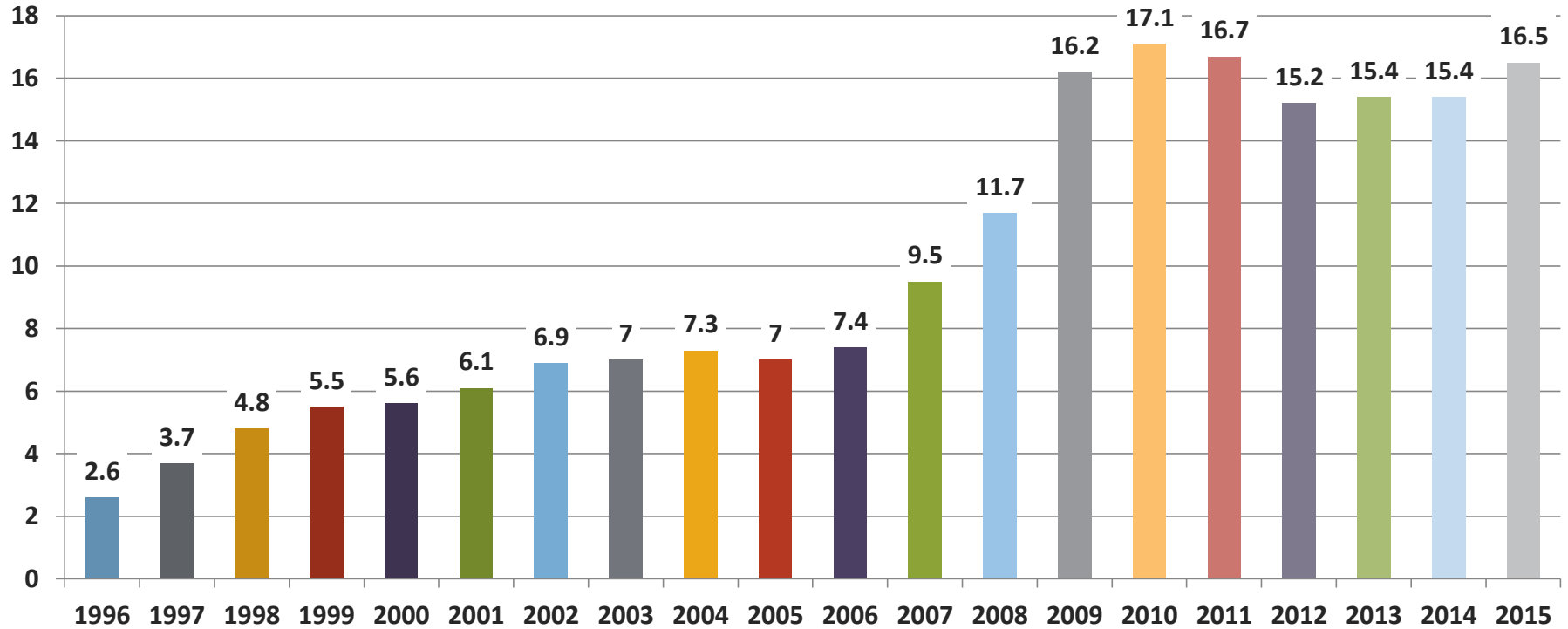


EEDAR

CONTEXT IS EVERYTHING

Source: EEDAR

## US Video Game Sales Billions of Dollars





# MOBILE REGIONS

Mobile Payers (MM)

125.9



68.3



17.9



8.9



Market Revenue in Billions (USD)

\$5.01



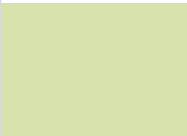
\$5.41



\$5.16



\$1.37



# MOBILE REGIONS

Mobile Payers (MM)

Ave. Yearly Spend (USD)

125.9



\$39.79



68.3



\$79.27



17.9



\$288.88



8.9



\$154.31



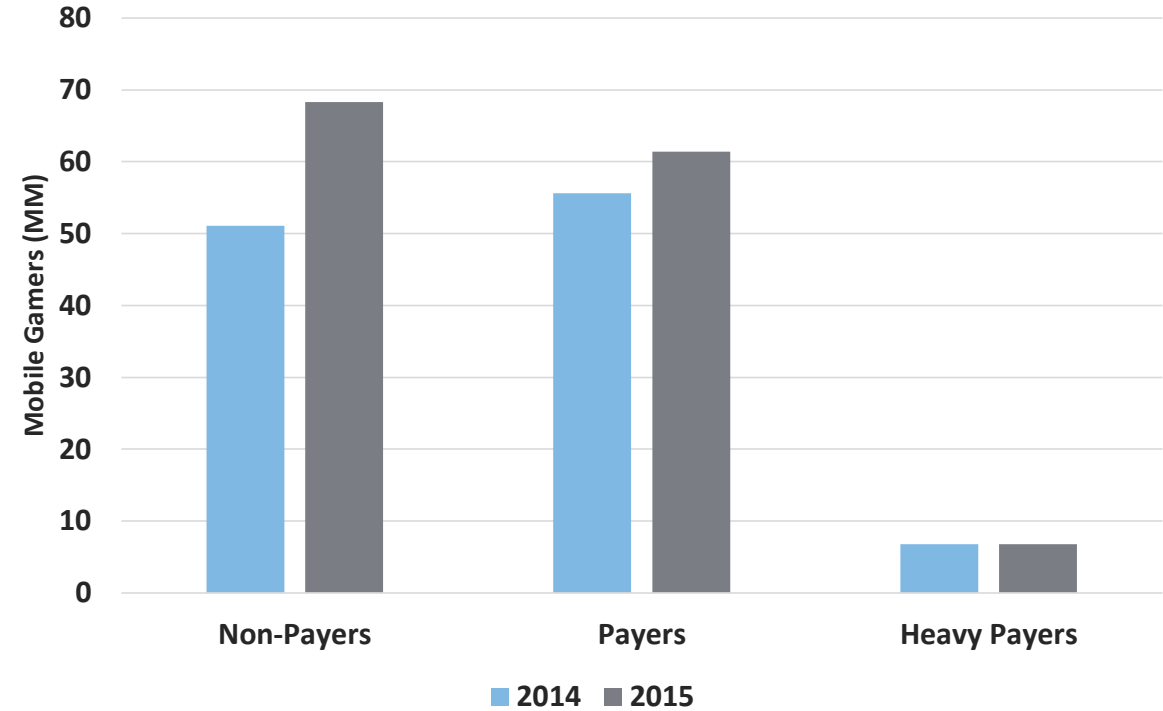
EEDAR

CONTEXT IS EVERYTHING

Source: EEDAR NA / APAC Mobile Reports 2015

## Mobile Gaming Payer Segmentations

[2014-2015][NA][Active Mobile Game Players][Age 18+]

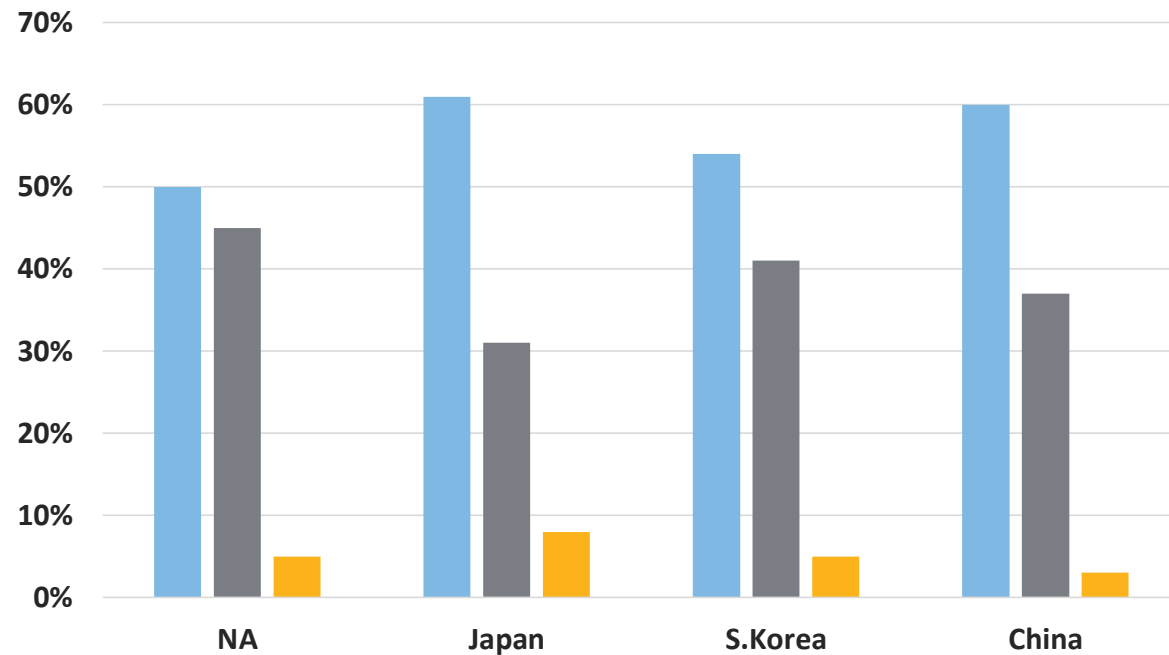


PLAYER SEGMENT [total yearly spend]	AVG. YEARLY SPEND	
	2014	2015
NON-PAYERS [\$0]	\$0	\$0
PAYERS [\$0.01 - \$99.99]	\$33.03	\$44.06
HEAVY PAYERS [over \$100]	\$293.70	\$396.15
TOTAL MARKET	\$32.65	\$39.63

# MONETIZING MOBILE

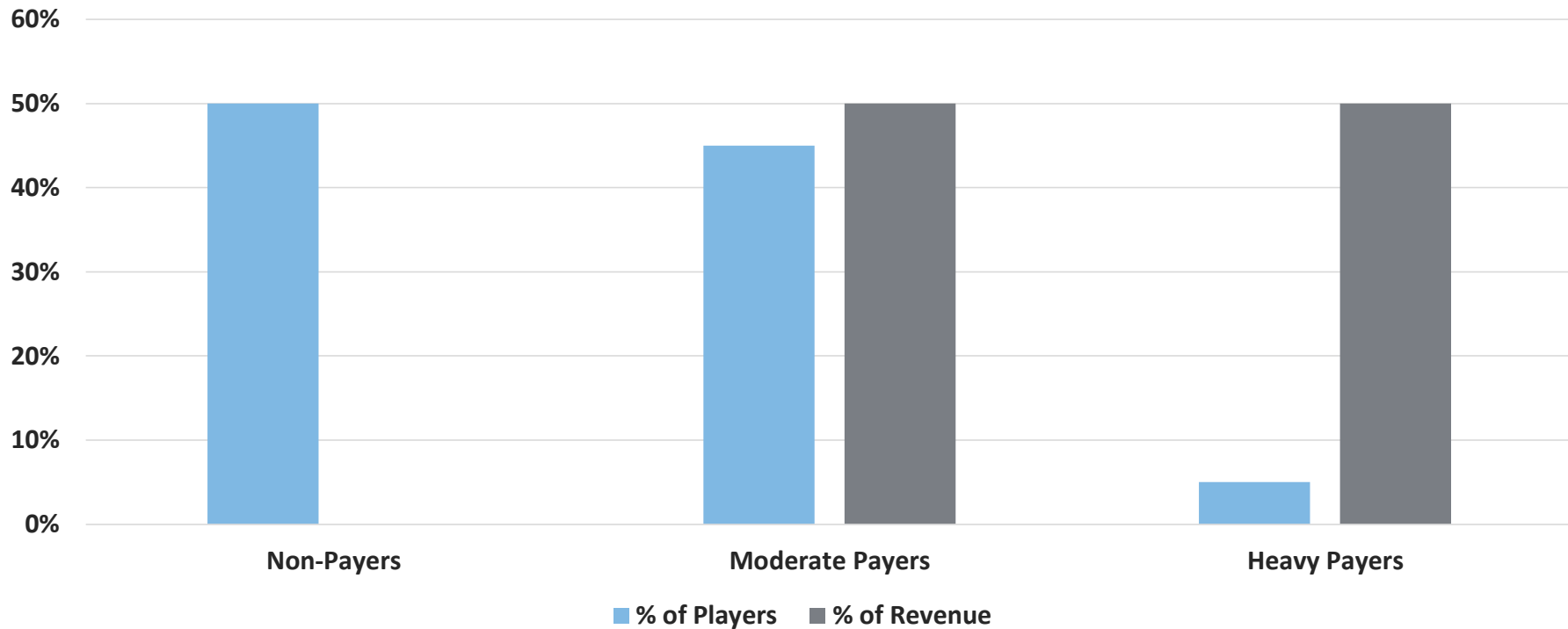
## Mobile Gaming Payer Segmentations [2015][NA & APAC][Active Mobile Game Players][Age 18+]

■ Non-Payer ■ Payer ■ Heavy Payer

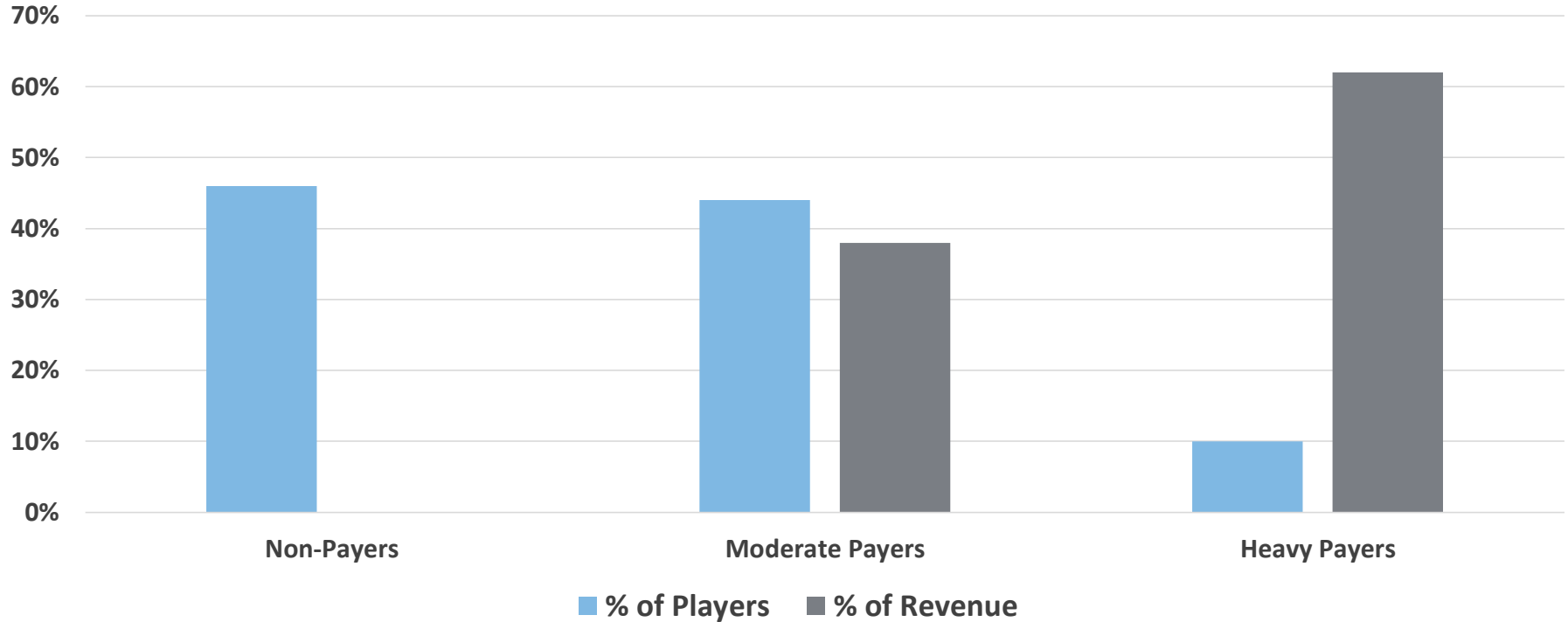


	AVG. YEARLY SPEND	
	MODERATE PAYERS	HEAVY PAYERS
NORTH AMERICA	\$44.06	\$396.15
JAPAN	\$135.50	\$882.40
SOUTH KOREA	\$83.39	\$732.42
CHINA	\$23.99	\$234.49

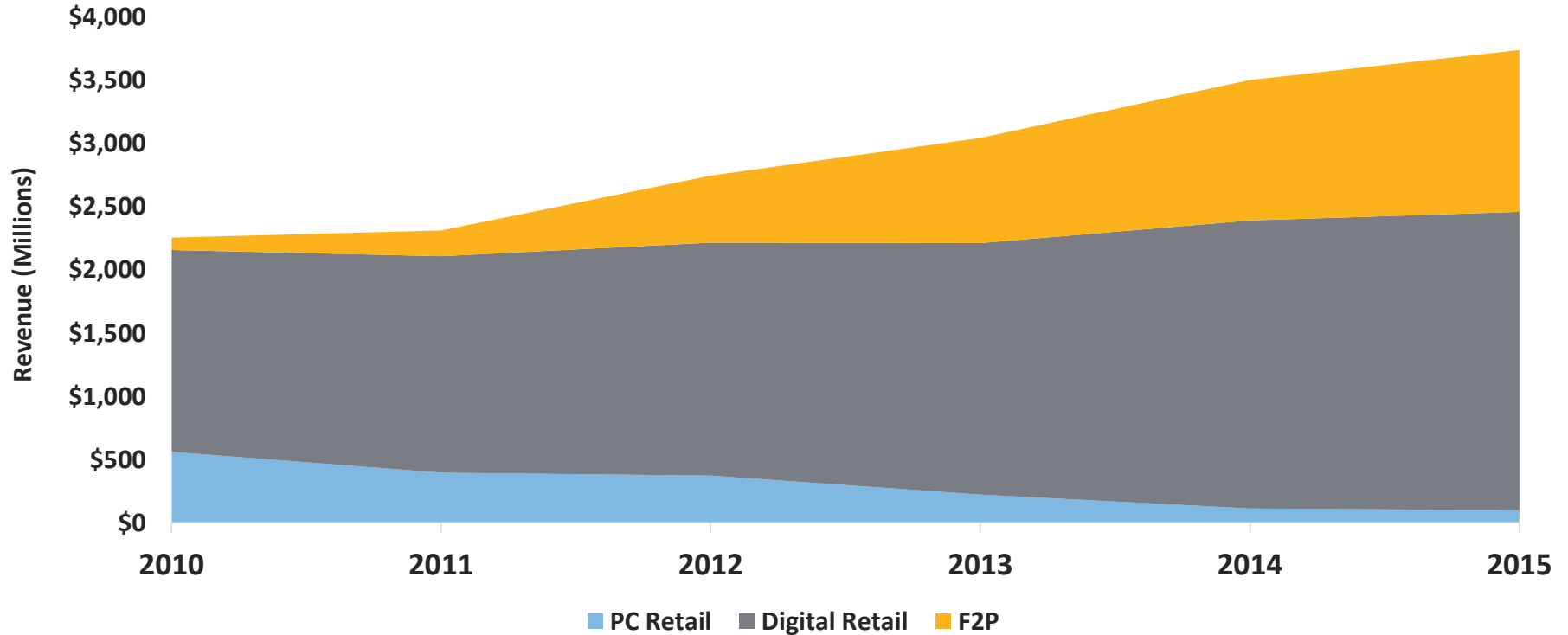
## Mobile Game Player Revenue Breakdown [Active SmartPhone/Tablet Game Players][NA/Europe]



## PC F2P Spend Segmentation [NA][PC][2014]

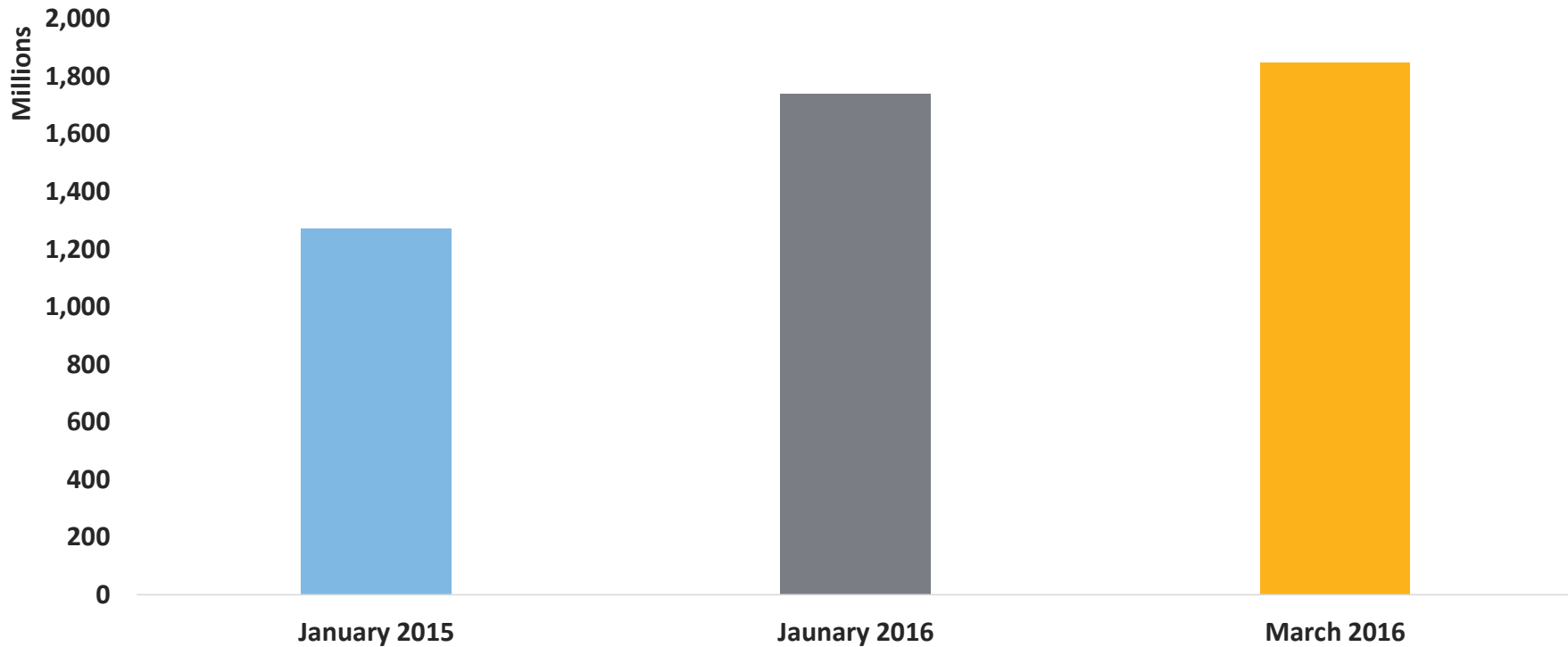


## The PC Market - Video Game Revenues [NA][B2P+F2P+Subscriptions]



# STEAM UNIT SALES

## Steam Game Unit Sales [Games & Expansions Owned]



**EEDAR**

CONTEXT IS EVERYTHING

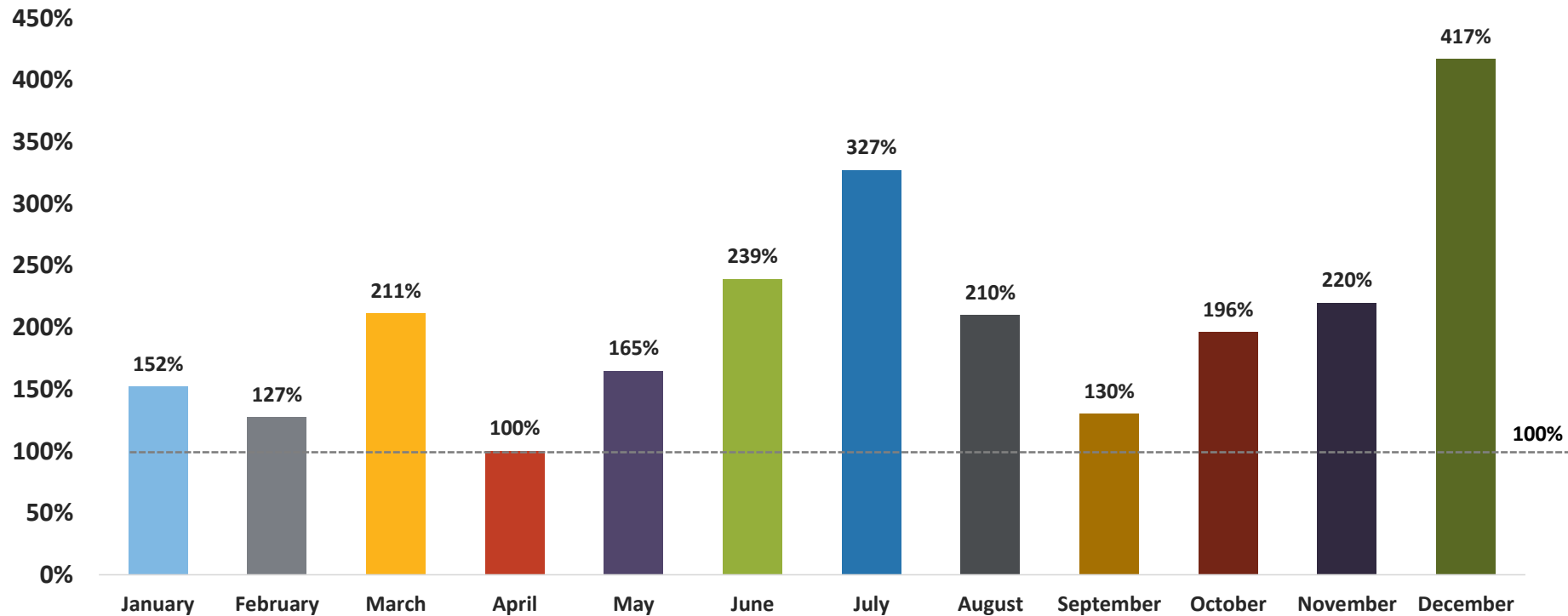
Source: EEDAR



# STEAM (OFF-SEASON SALES)

## Steam Digital Revenue by Month (April = 100%)

[Steam][Full Game Downloads][2012-2015][NA]



EEDAR

CONTEXT IS EVERYTHING

Source: EEDAR

# WHY DO I STILL TALK ABOUT CONSOLE?

Some “Best In Class” Examples

March 2016



\$2 Billion+



\$1.5 Billion+



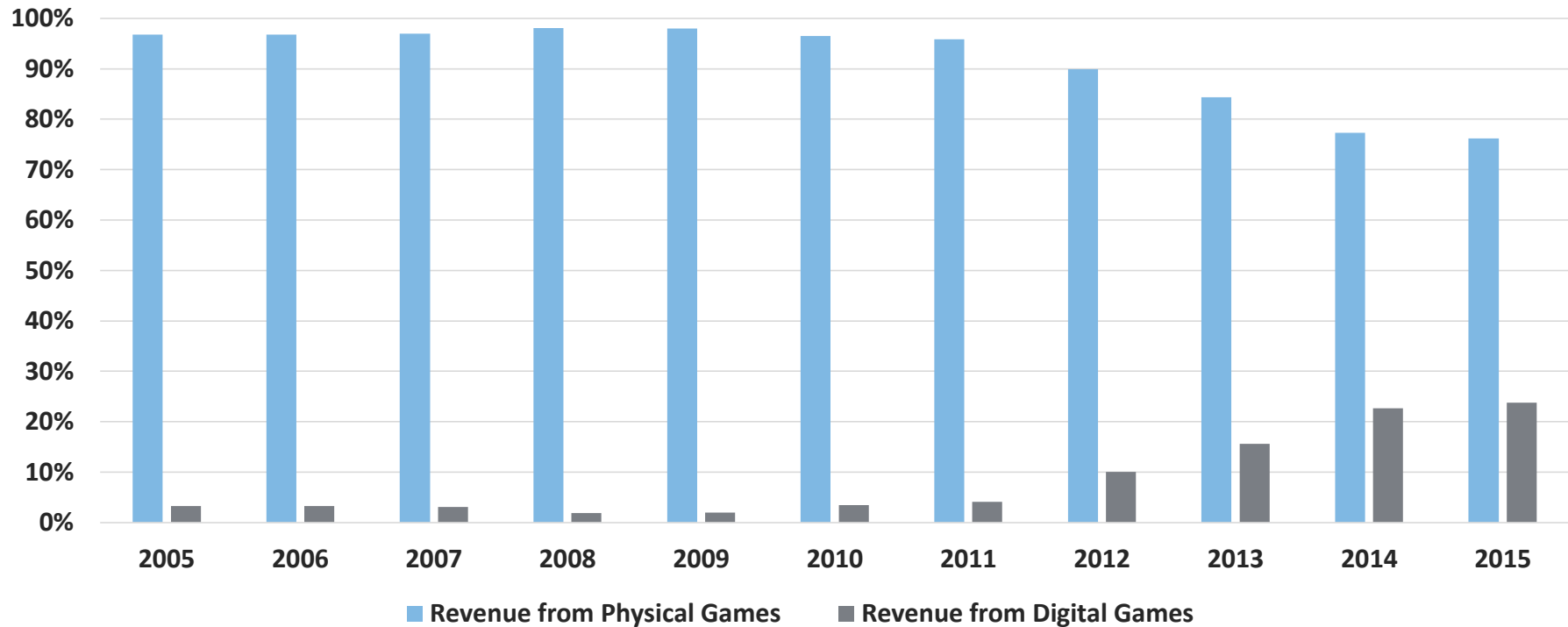
\$1 Billion+



[ \$500 Million+ ]

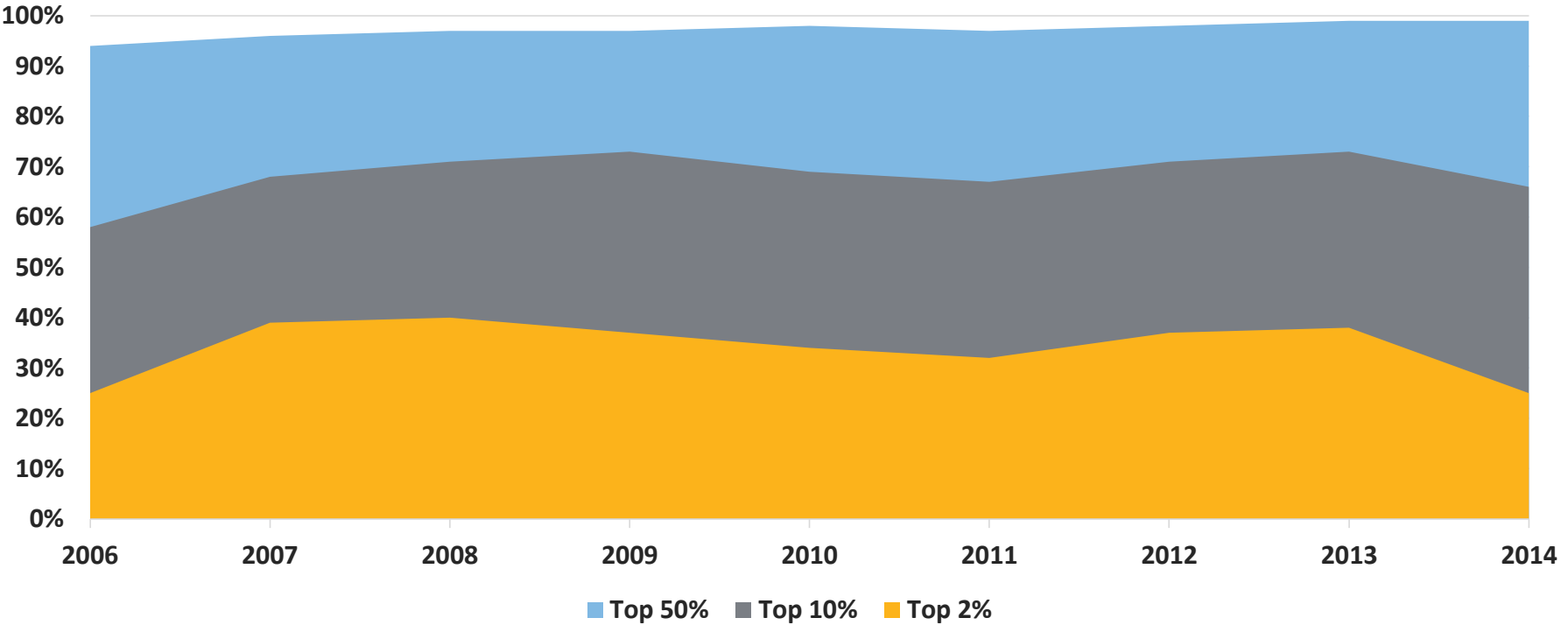
# PHYSICAL/DIGITAL RELEASES

Revenue Split of Games Released both Physically and Digitally  
[7th and 8th Gen Console][2005-2015][NA]

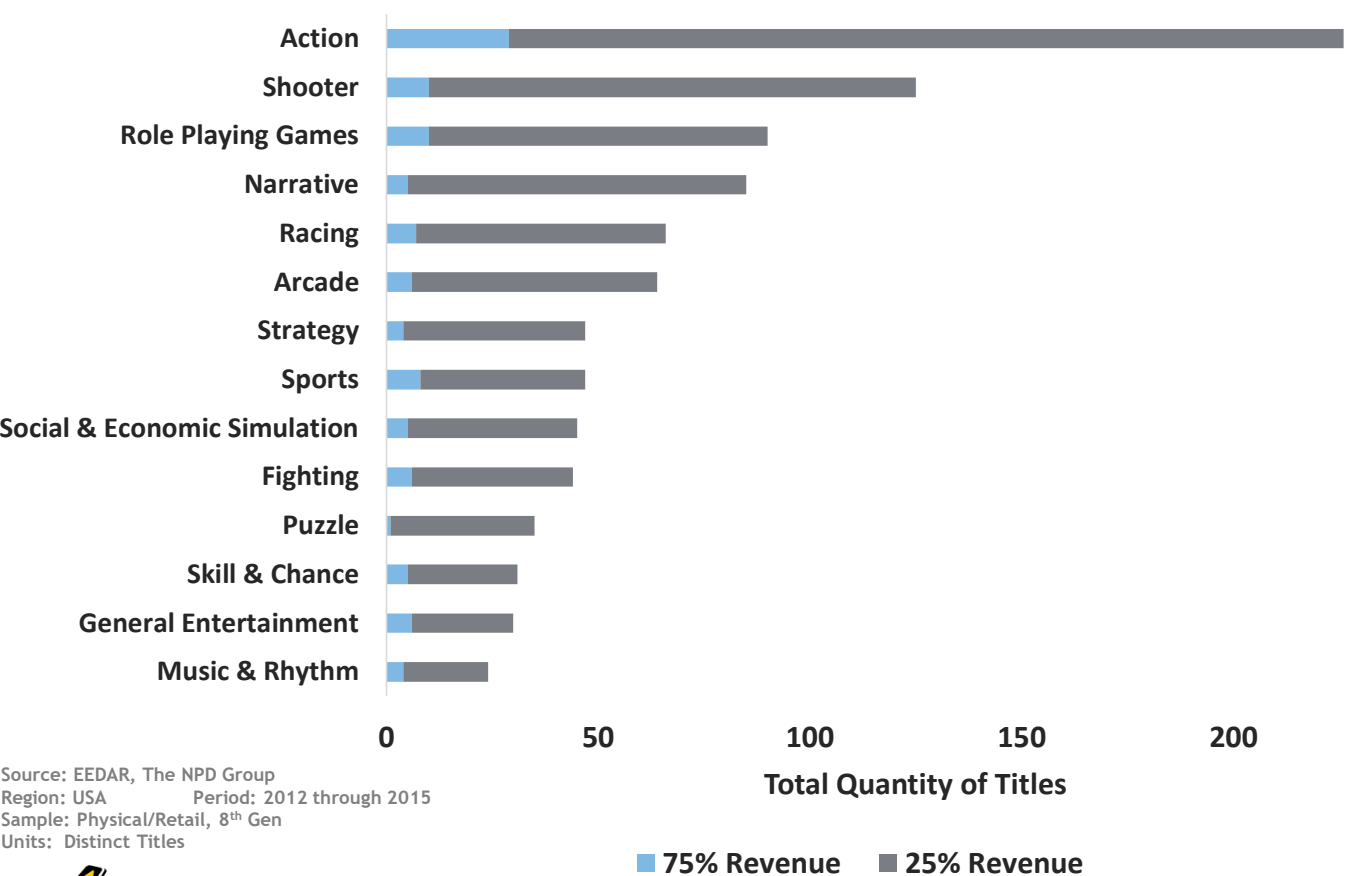


# CONSOLE REVENUE

Percentage of Revenue Contributed by Top Titles  
[Physical + Digital][Console][NA][Excludes DLC]



# RETAIL REVENUE TITLE SHARE



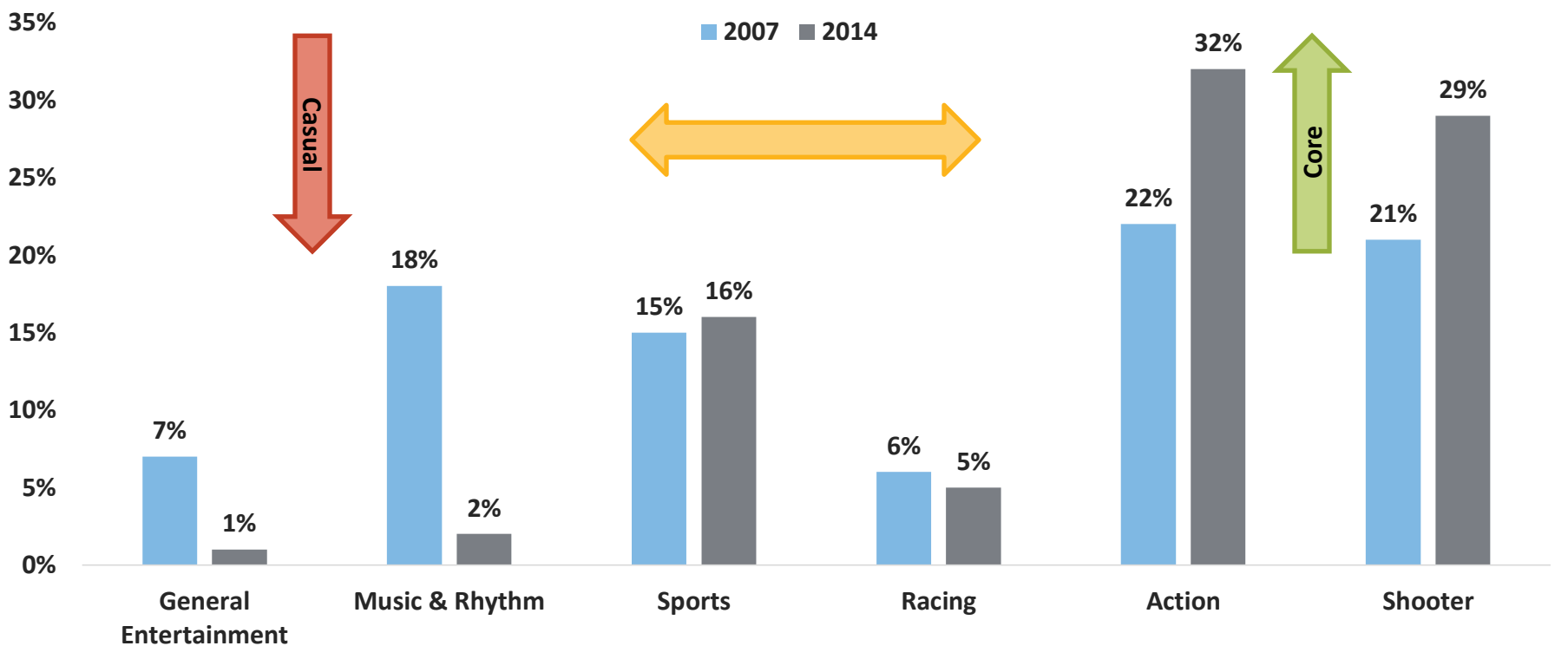
**12%**  
OF RETAIL TITLES  
HAVE GENERATED  
**75%**  
OF RETAIL REVENUE  
SINCE 2012.

Source: EEDAR, The NPD Group  
Region: USA      Period: 2012 through 2015  
Sample: Physical/Retail, 8<sup>th</sup> Gen  
Units: Distinct Titles

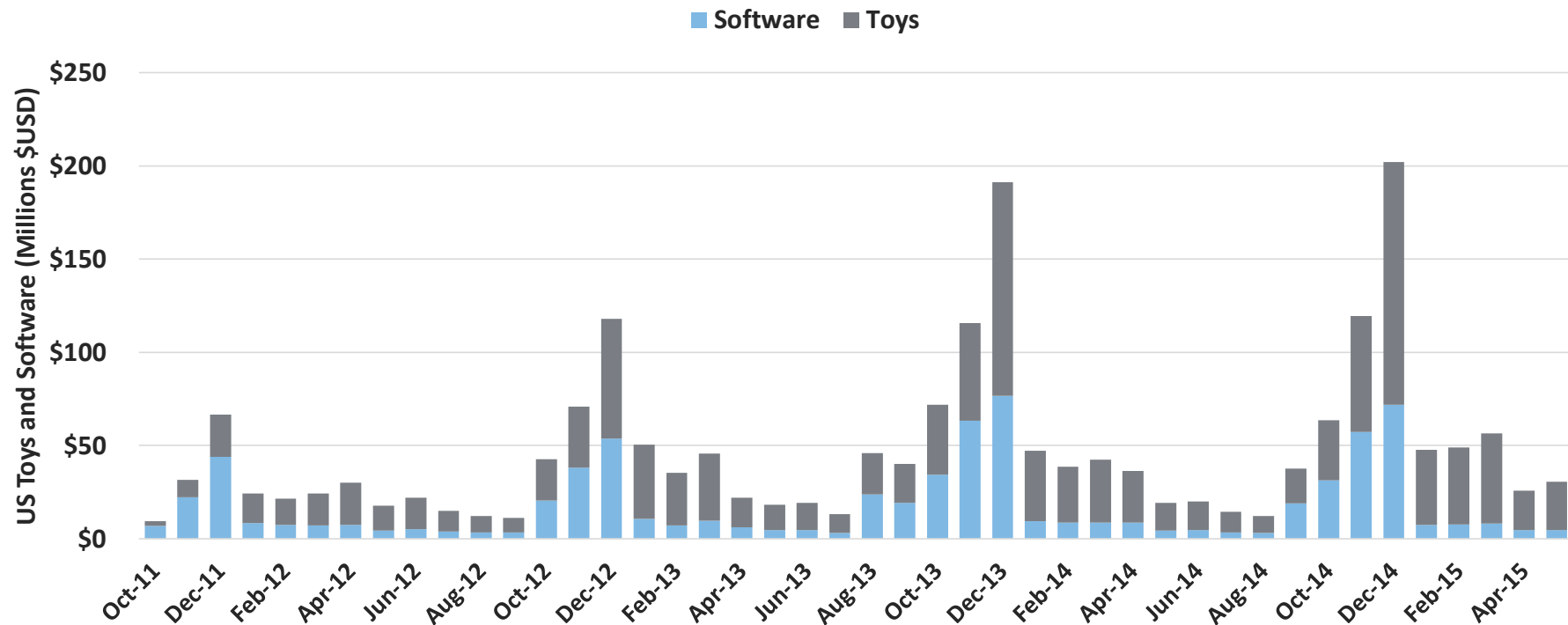


# CONSOLE REVENUE

Percentage of Software Sales by Genre for 7<sup>th</sup> and 8th Gen Consoles  
[Digital & Physical][NA]

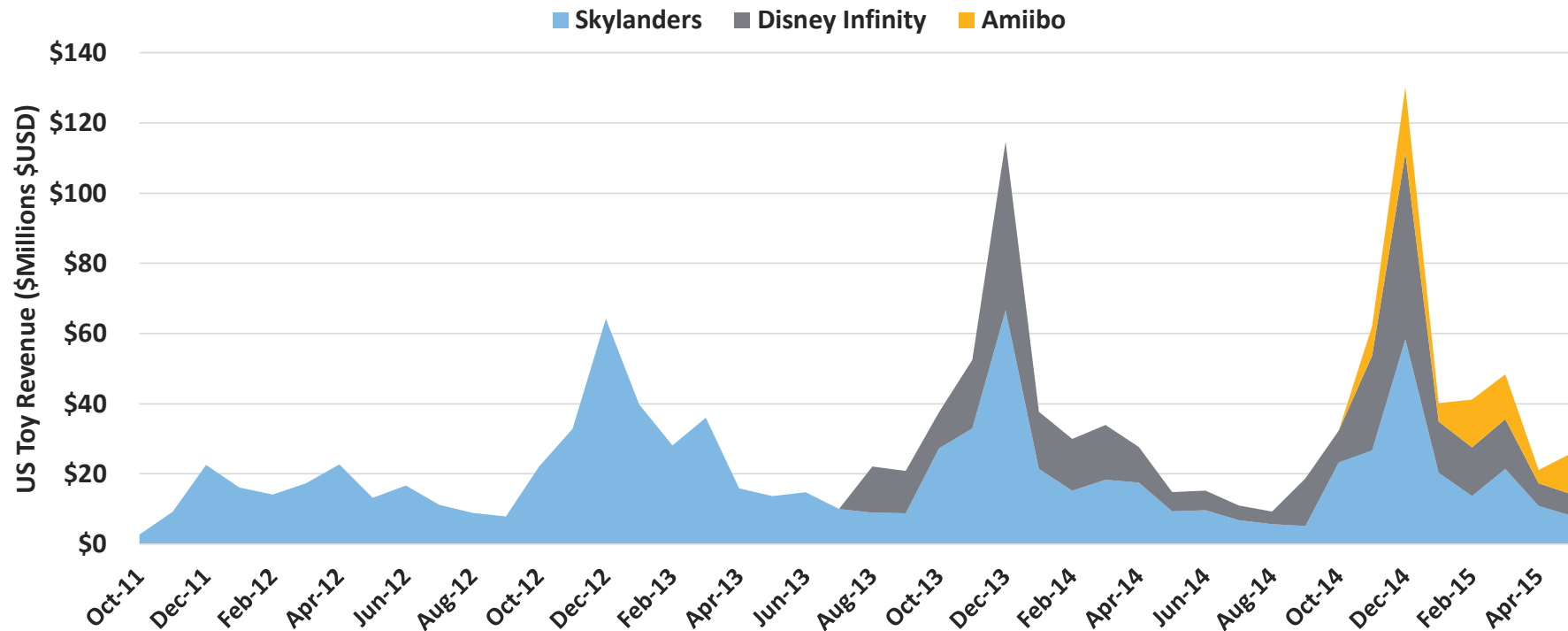


## Toys-to-Life Total Revenue by Month [Toys + Software][Skylanders/Disney Infinity/Amiibo][NA]



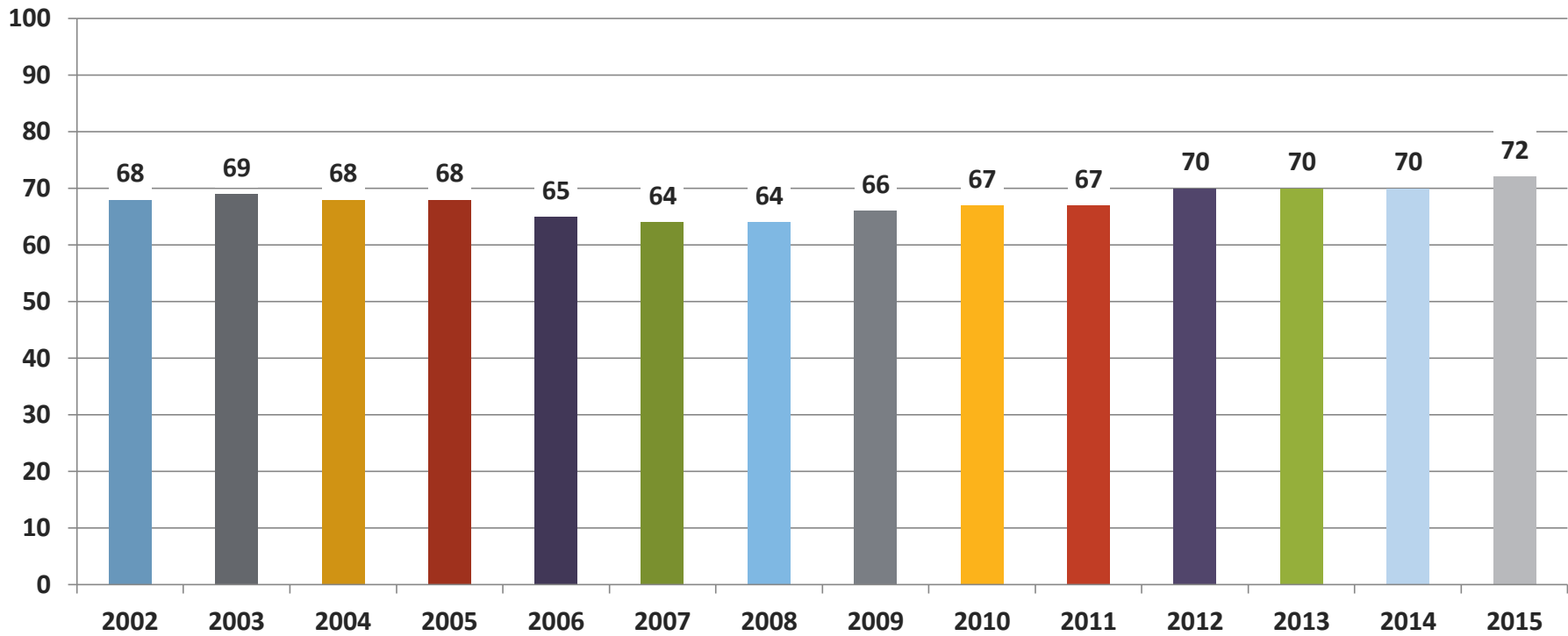
## Toys-to-Life Accessories Revenue by Publisher

[Toys Only][Skylanders/Disney Infinity/Amiibo][NA]



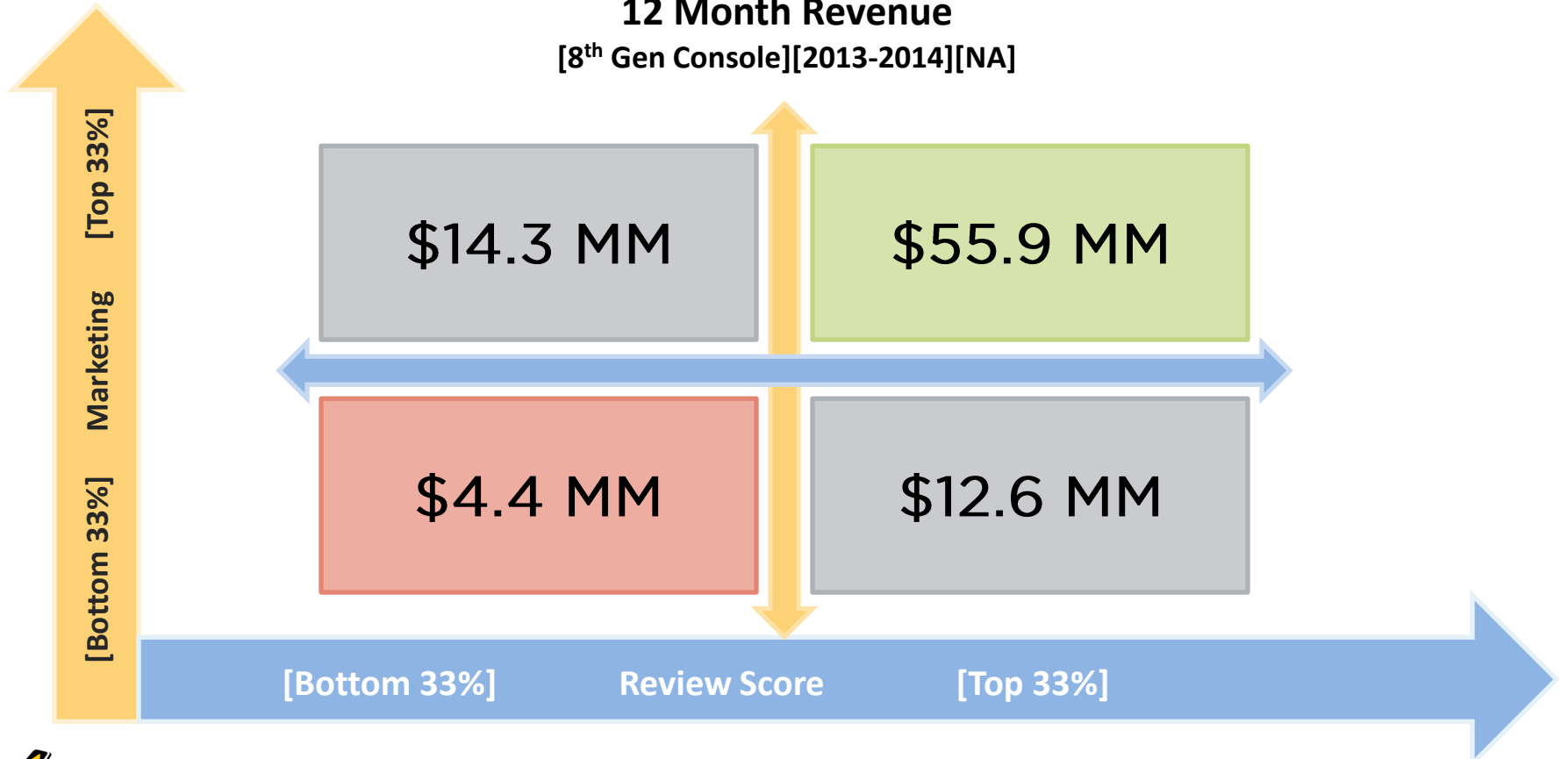


Average Review Score  
Retail Console, Handheld & PC Title Releases in the USA

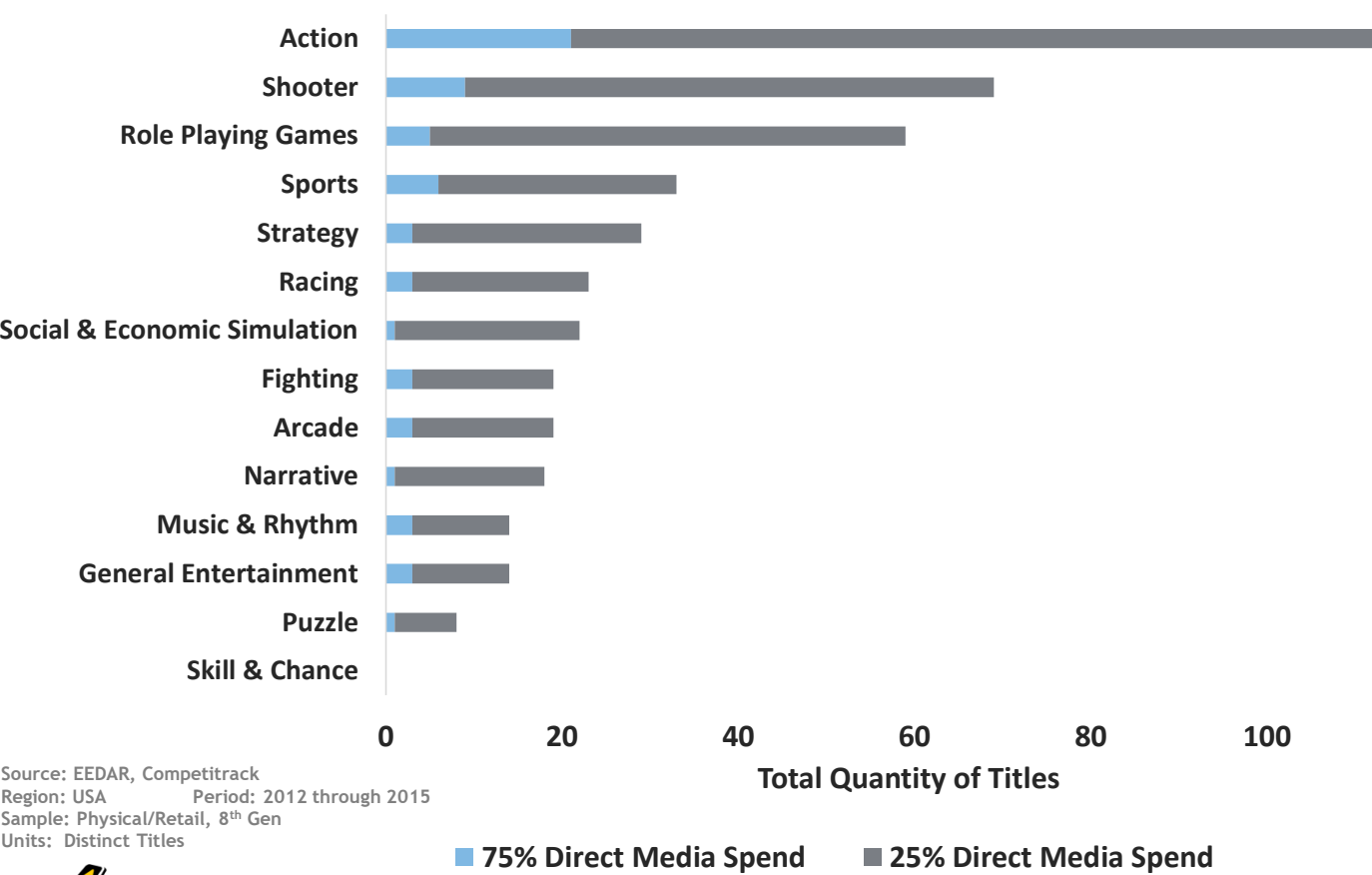


# MARKETING VS. GAME QUALITY

12 Month Revenue  
[8<sup>th</sup> Gen Console][2013-2014][NA]



# DIRECT MEDIA SPEND SHARE



**13%**  
**OF RETAIL TITLES  
ACCOUNT FOR**  
**75%**  
**OF DIRECT MEDIA  
SPEND SINCE 2012.**

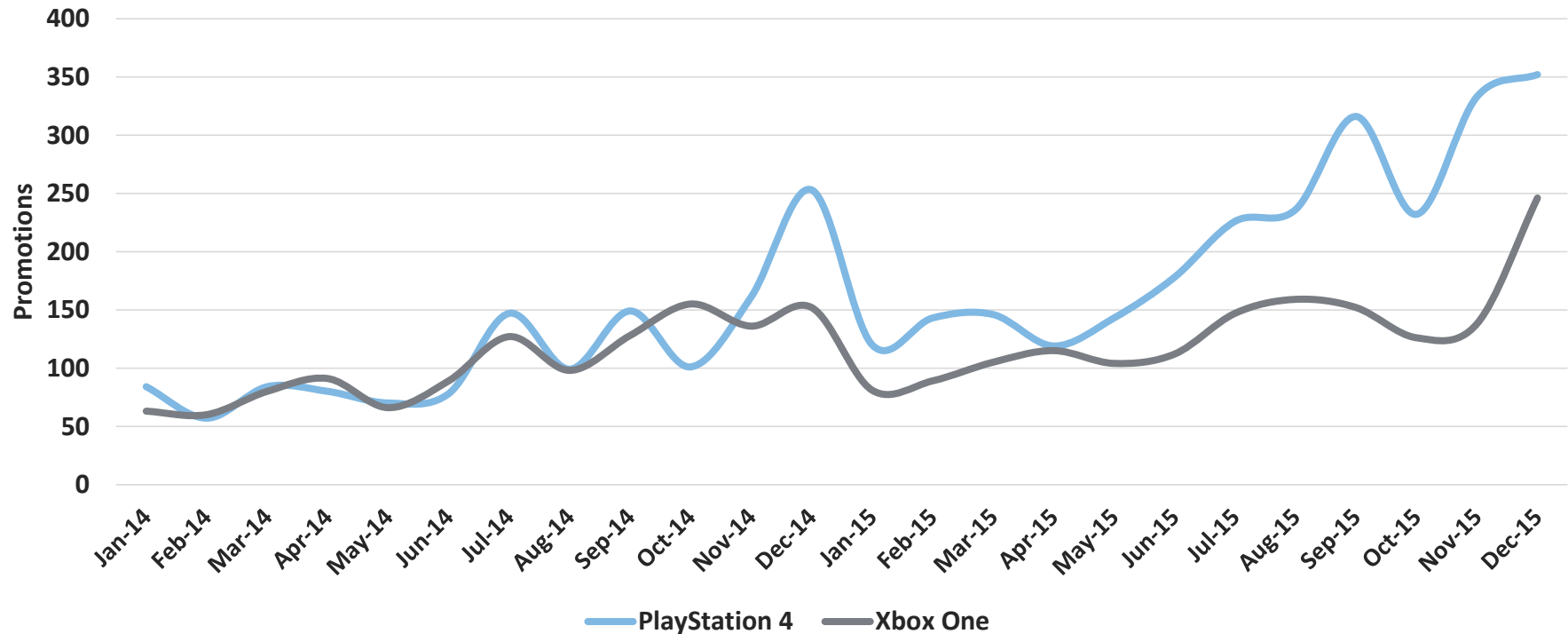
Source: EEDAR, Competitrack  
Region: USA      Period: 2012 through 2015  
Sample: Physical/Retail, 8<sup>th</sup> Gen  
Units: Distinct Titles



■ 75% Direct Media Spend    ■ 25% Direct Media Spend

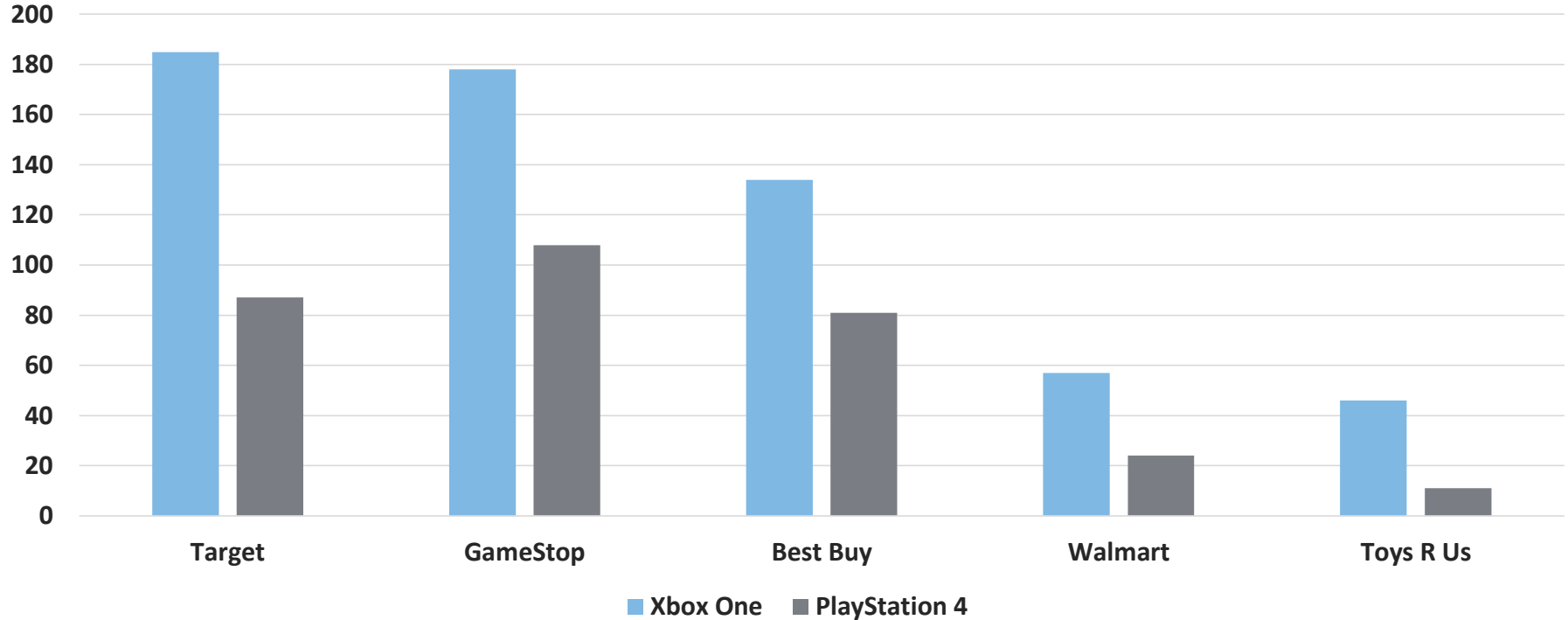
# DIGITAL ADVERTISING

## 8<sup>th</sup> Gen Game Related Promotional Activity [US][8th Gen][Digital Storefronts]

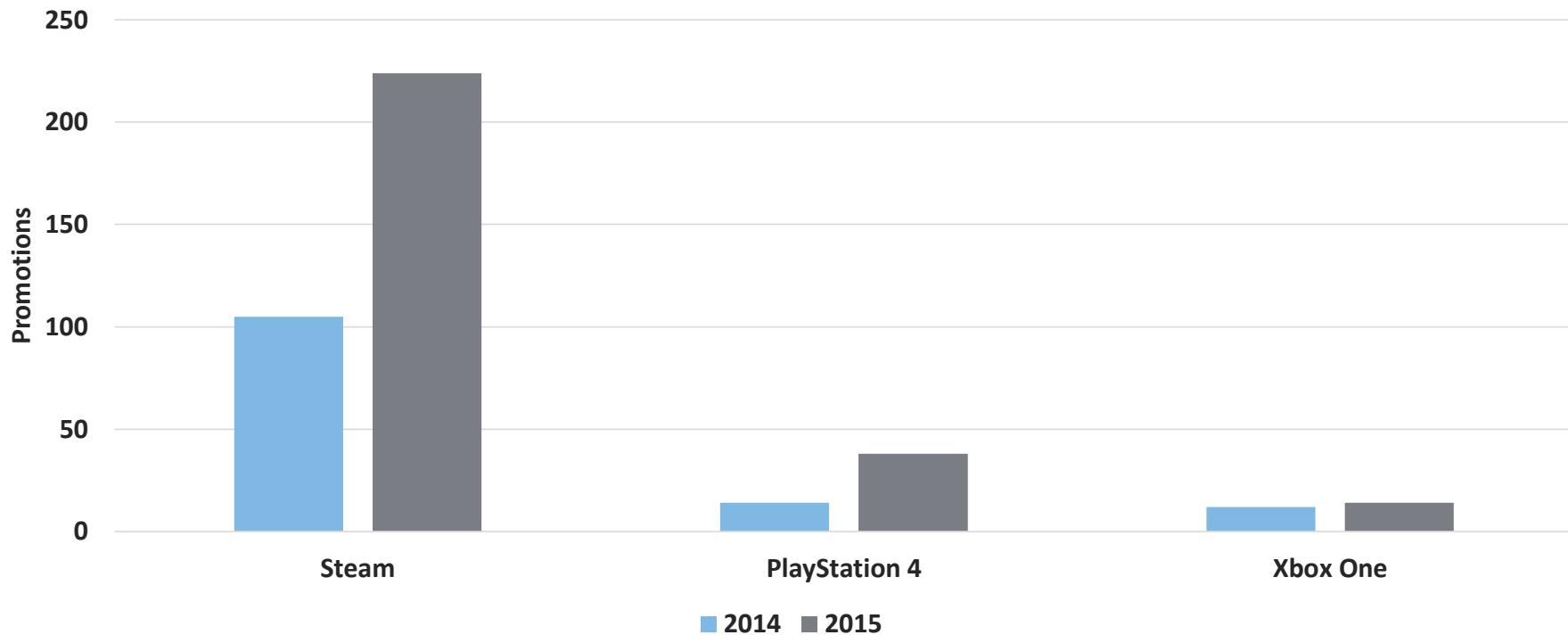


# RETAIL ADVERTISING

## Promotions by Retailers for 8th Gen Console Hardware [US][Physical Retailers][In-Store]



## Early Access / Beta Promotional Trends [US][Digital Storefronts]



## TOP MOTIVATIONS FOR MOBILE GAMING



#1	PASS TIME WHILE WAITING			RELAX
#2	RELAX	CONVENIENT DEVICE	RELAX	PASS TIME WHILE WAITING
#3	CHEAP / FREE GAMES		TAKE A BREAK	
#4	TAKE A BREAK	RELAX	CHEAP / FREE GAMES	HAVE NEW EXPERIENCES
#5	CHALLENGE MYSELF	TAKE A BREAK	CONVENIENT DEVICE	MULTITASKING



## TOP MOTIVATIONS FOR MOBILE GAMING

2014

2015

#1

PASS TIME WHILE WAITING

#2

RELAX

#3

CHEAP OR FREE GAMES

TAKE A BREAK

#4

TAKE A BREAK

CHEAP OR FREE GAMES

#5

CONVENIENT DEVICE

CHALLENGE MYSELF



## TOP FACTORS AFFECTING DISCOVERY



MOST USED	SOCIAL SOURCES	TELEVISION ADS		SOCIAL SOURCES
	ADS IN APPS, GAMES, AND SOCIAL MEDIA	STOREFRONT CHARTS / FEATURED		TOP CHARTS
	STOREFRONT CHARTS/FEATURED	SOCIAL MEDIA ADS	ADS IN OTHER GAMES	GAMING NEWS / REVIEW SITES
LEAST USED	ADS NOT CONSUMED ON DEVICE (PRINT, TV)	OTHER SOCIAL SOURCES		ADVERTISEMENTS (ESP, TV)

# ENGAGEMENT

## TOP FACTORS AFFECTING DECISION TO ENGAGE



KEY FACTORS	GENRE			
	PRICE			
TOP FACTORS	USER REVIEWS / STAR RATING	GRAPHICS		
	GRAPHICS	USER REVIEWS / STAR RATING	POPULARITY	CONTROLS
	RECOMMENDED BY OTHERS	CONTROLS & ART	USER REVIEWS	PLAYER REVIEW/RECOMMEND
BOTTOM FACTORS	STOREFRONT ELEMENTS	PROFESSIONAL REVIEWS	STOREFRONT ELEMENTS	
		STOREFRONT ELEMENTS	PROFESSIONAL REVIEWS	

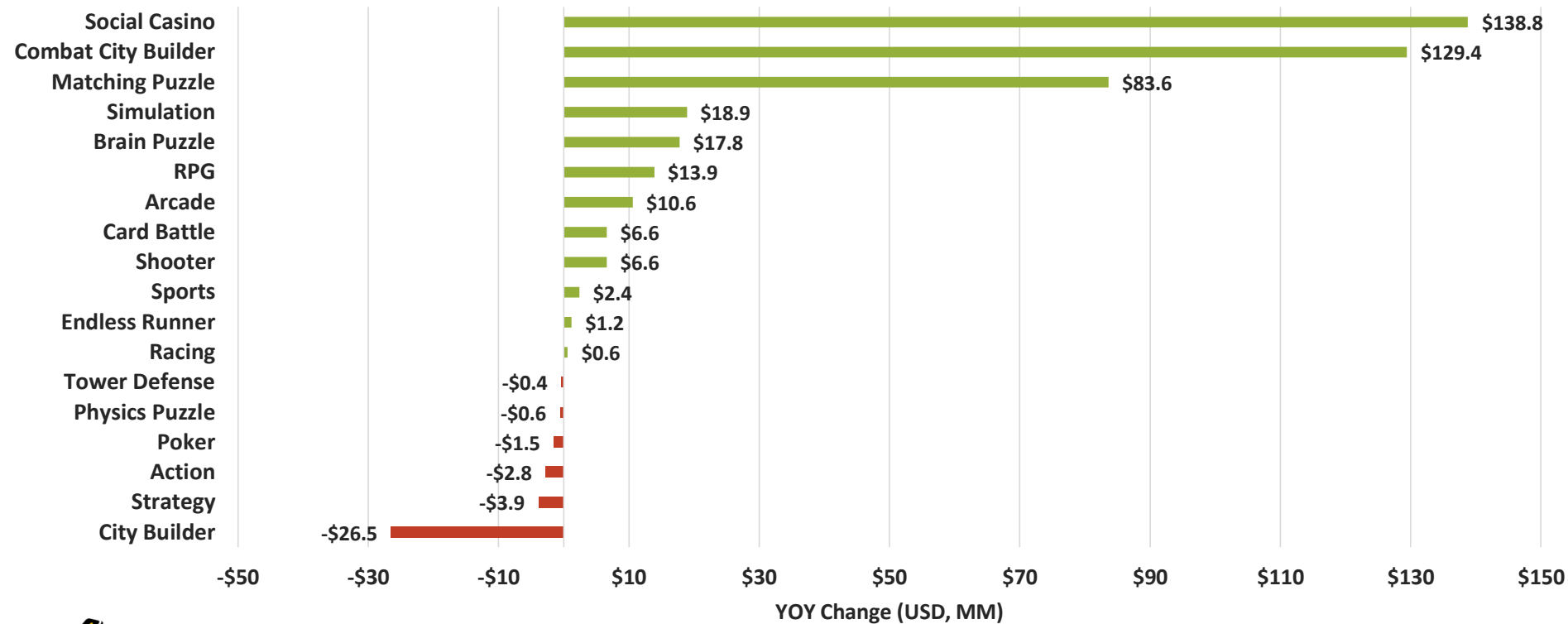
TOP FACTORS LEADING TO CHURN



KEY FACTOR	LOSS OF INTEREST		
TOP FACTORS	FAILS TO MEET EXPECTATIONS	OTHER GAMES BETTER	TOO MUCH FRICTION
	TOO MUCH FRICTION		LOADING TIMES
			DIFFICULTY
BOTTOM FACTORS	SOCIAL FACTORS	PROBLEMS W/ OTHER PLAYERS	SOCIAL FACTORS
	CUSTOMER SERVICE ISSUES	SERVICE / TECH ISSUES	

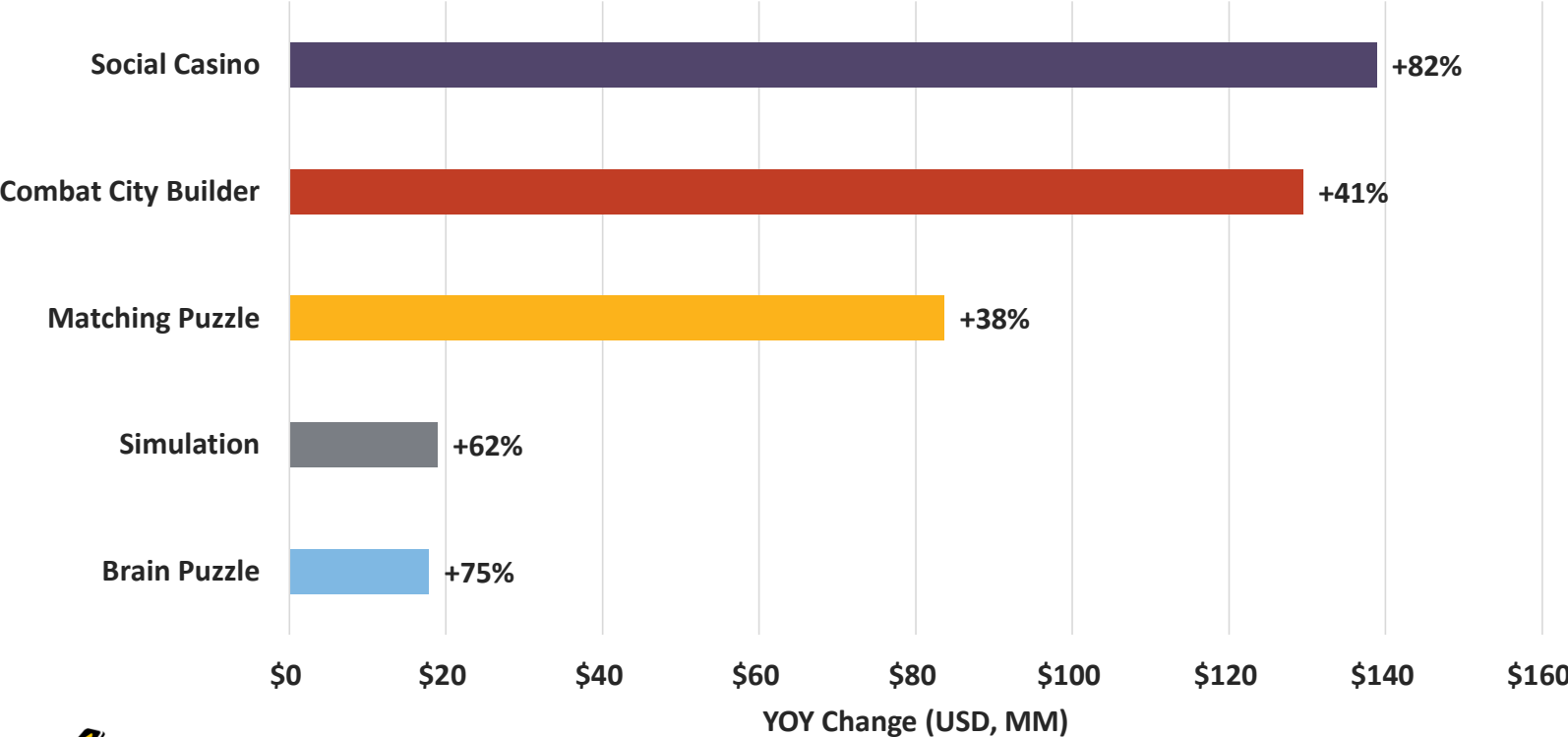
# MOBILE OPTIMIZED GENRES

Year On Year Revenue Change by Genre  
[Q3 2014 & Q3 2015][Western Markets][Top 200 Grossing][iOS]



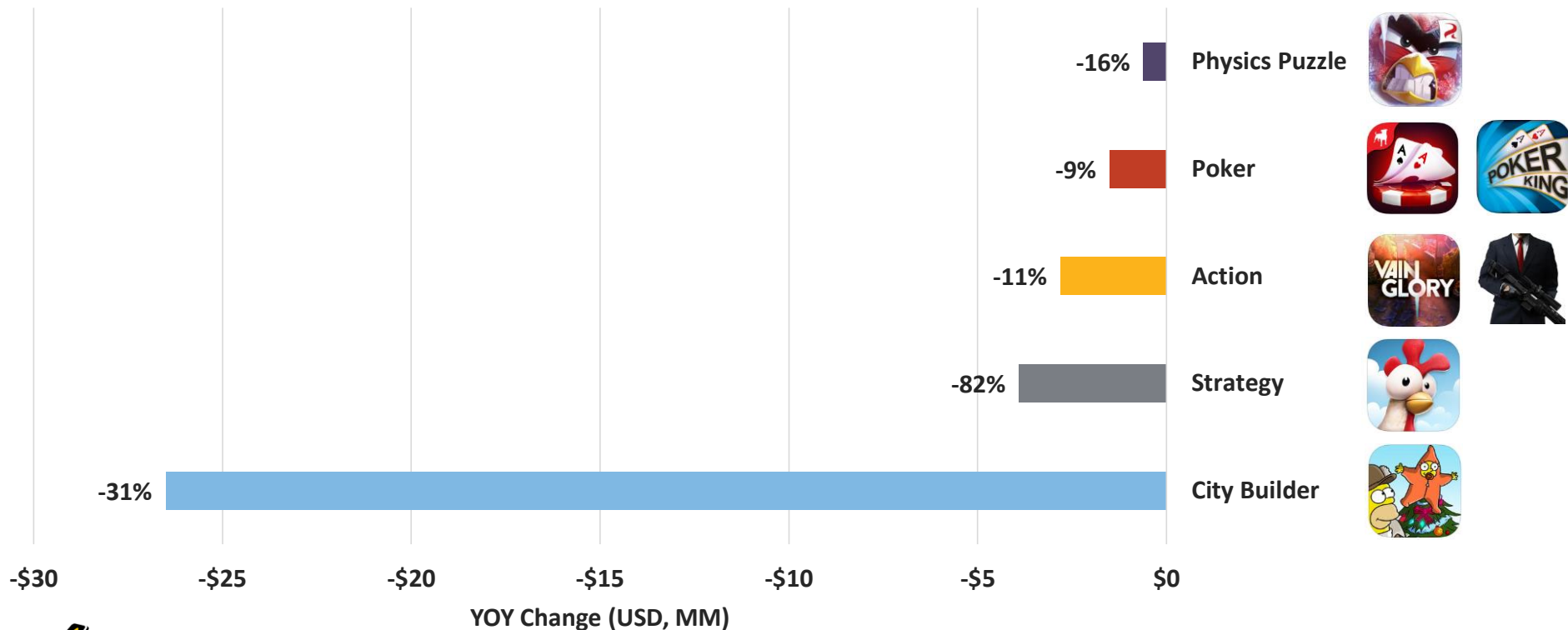
# MOBILE OPTIMIZED GENRES

Year On Year Revenue Change by Genre  
[Q3 2014 & Q3 2015][Western Markets][Top 200 Grossing][iOS]



# MOBILE OPTIMIZED GENRES

Year On Year Revenue Change by Genre  
[Q3 2014 & Q3 2015][Western Markets][Top 200 Grossing][iOS]



\*Feb 2015

# KICKSTARTER

## All Categories

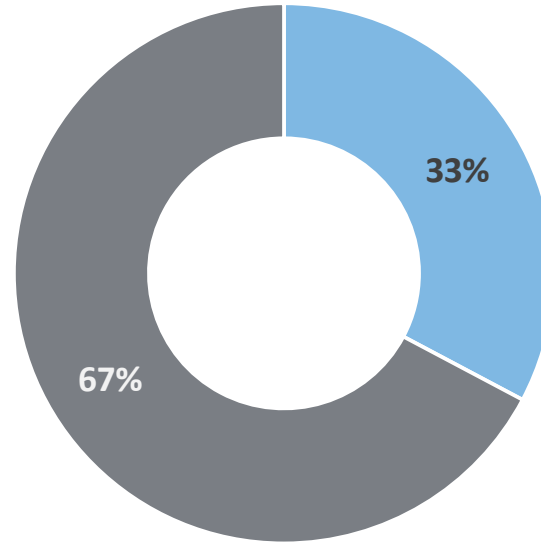
**\$2.232 Billion Dollars Pledged**  
**101,124 Successfully Funded Projects**  
**10.3 Million Total Backers**  
**3.2 Million Repeat Backers**

## GAMES

**22,834 Successfully Funded Projects**  
**\$460 Million Dollars Pledged**  
**\$347 Million Successful Dollars**  
**\$44 Million Unsuccessful Dollars**  
**\$10.9 Million Live Dollars**



## Success Rate of Kickstarter Projects Game Category [March 1st 2016]



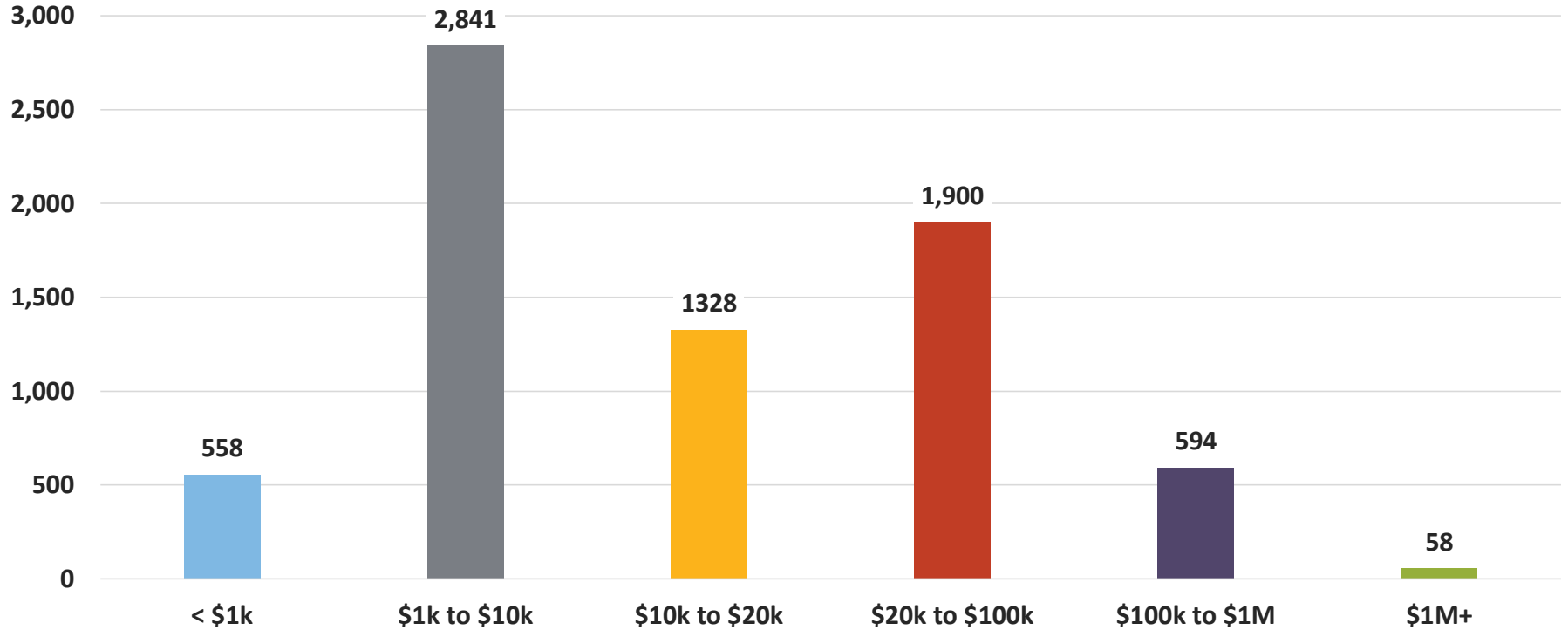
■ Successfully Funded Projects

■ Unsuccessfully Funded Projects

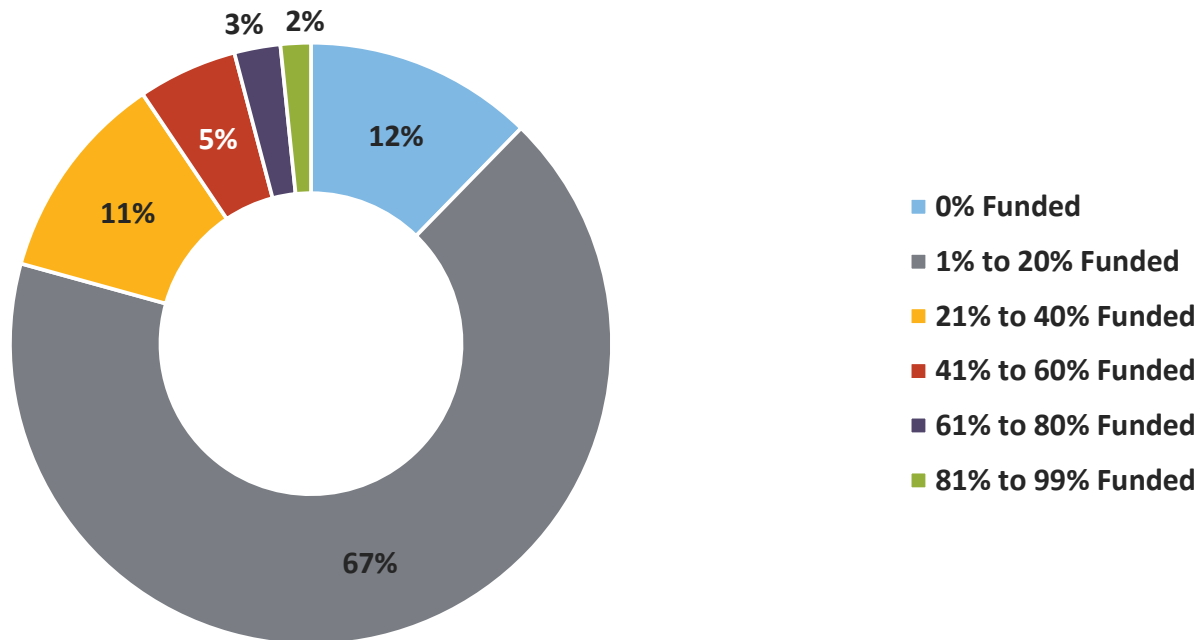


## Successfully Funded Kickstarter Projects

[Game Category] [by Quantity] [March 1st 2016]



## Unsuccessfully Funded Kickstarter Projects [Game Category] [by Percent Funded] [Feb 2015]



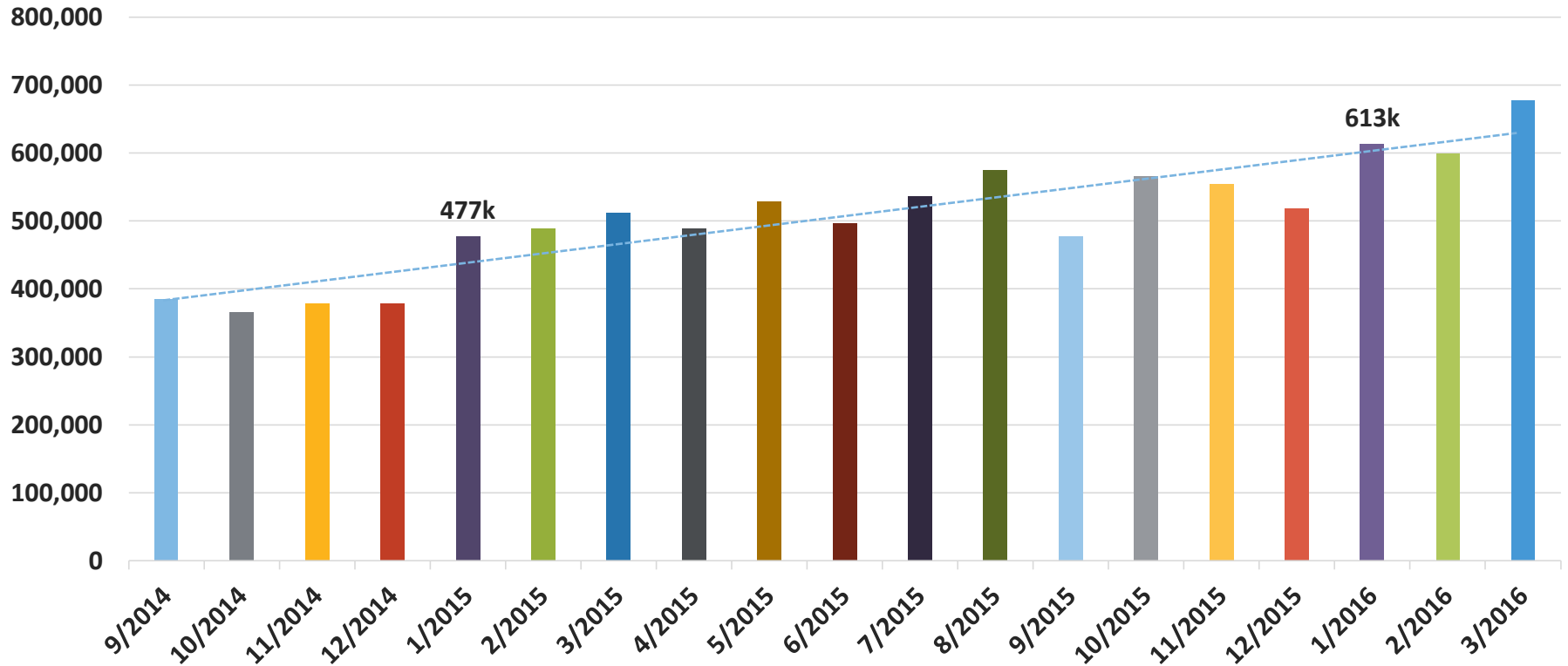
amazon

Google

twitch You Tube

# TWITCH VIEWERS

## Twitch Average Concurrent Viewers

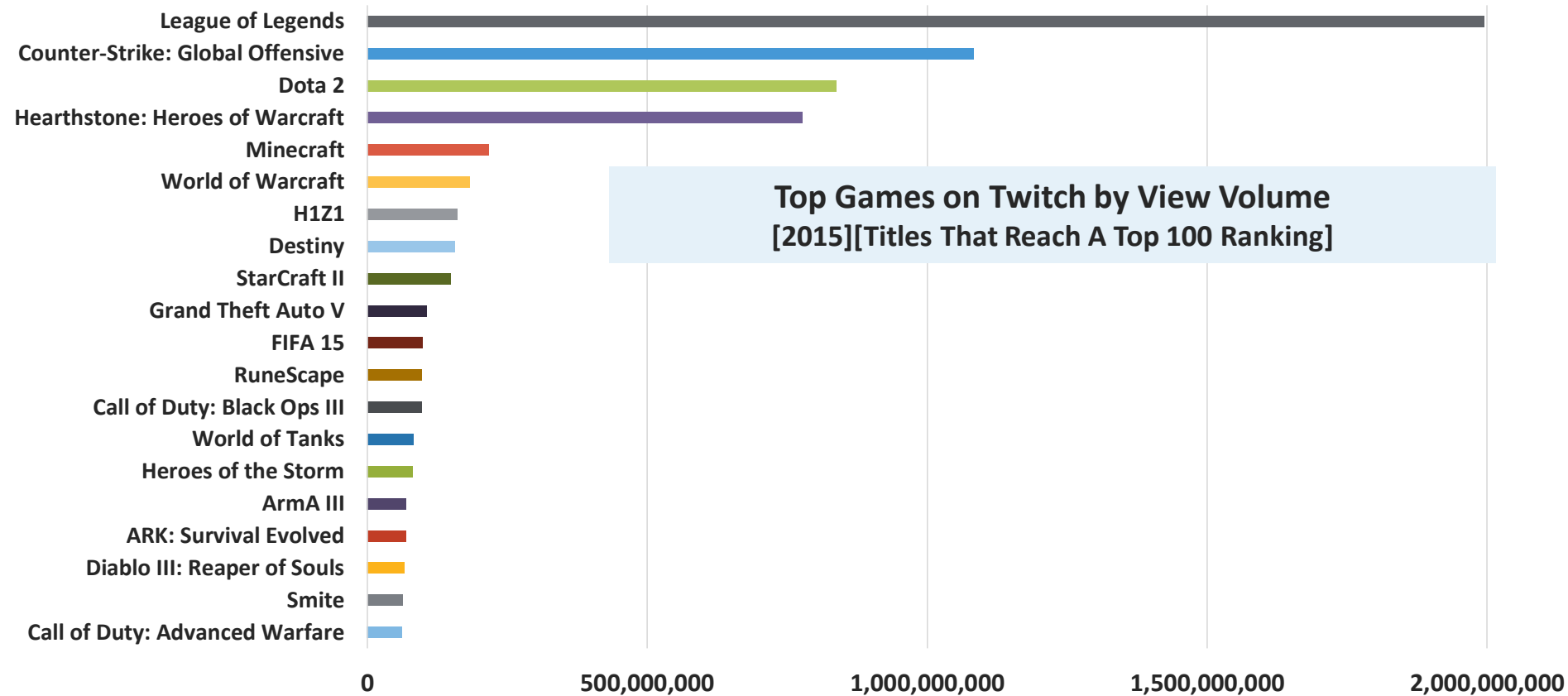


EEDAR

CONTEXT IS EVERYTHING

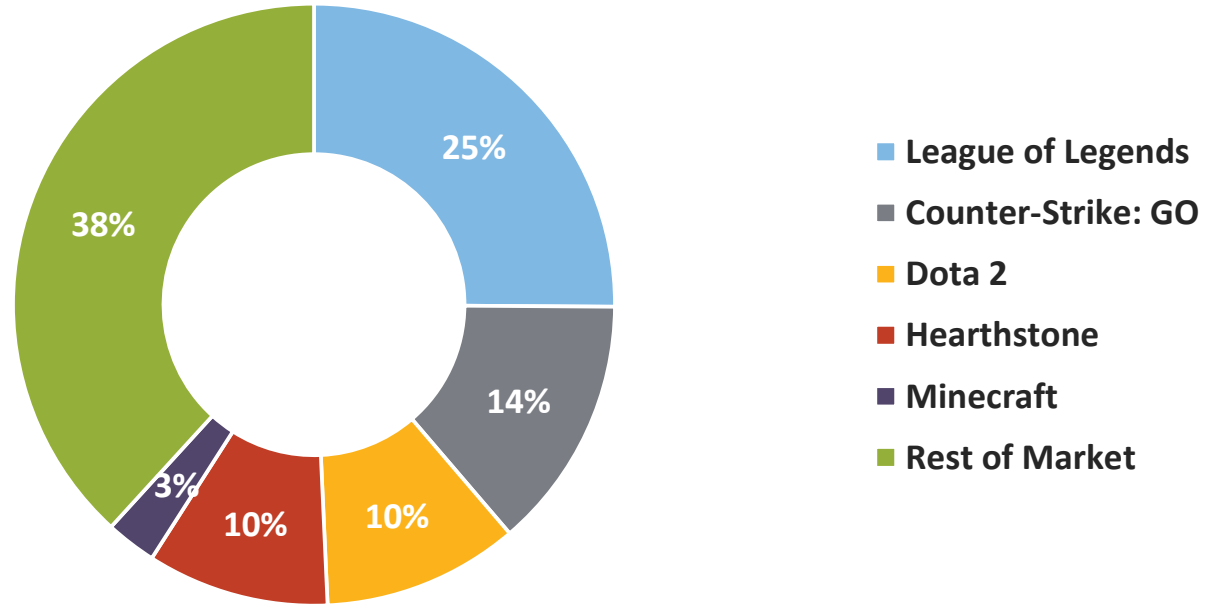
Source: EEDAR & Twitch TV

# TWITCH: NOT JUST ESports



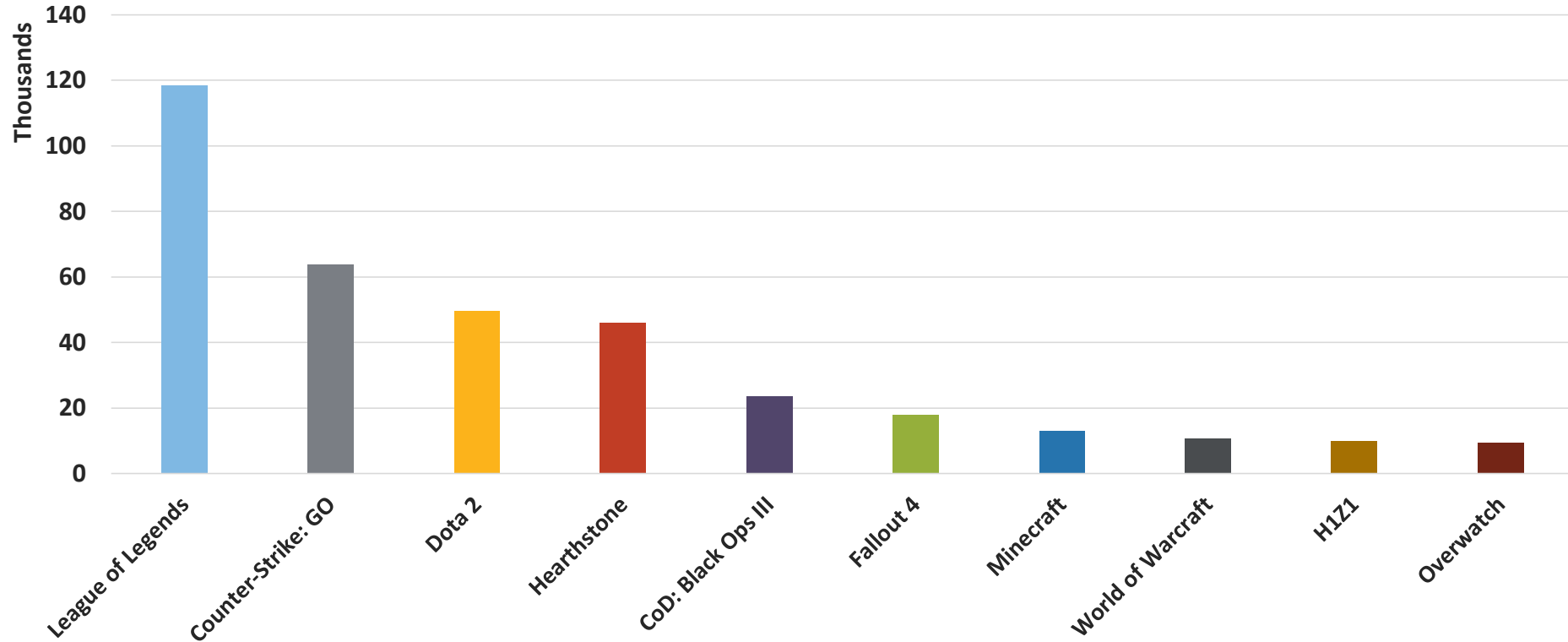
# TWITCH: COMPETITIVE MULTIPLAYER

Percentage of Twitch View Volume  
[2015][Top 100 Games by View Volume]



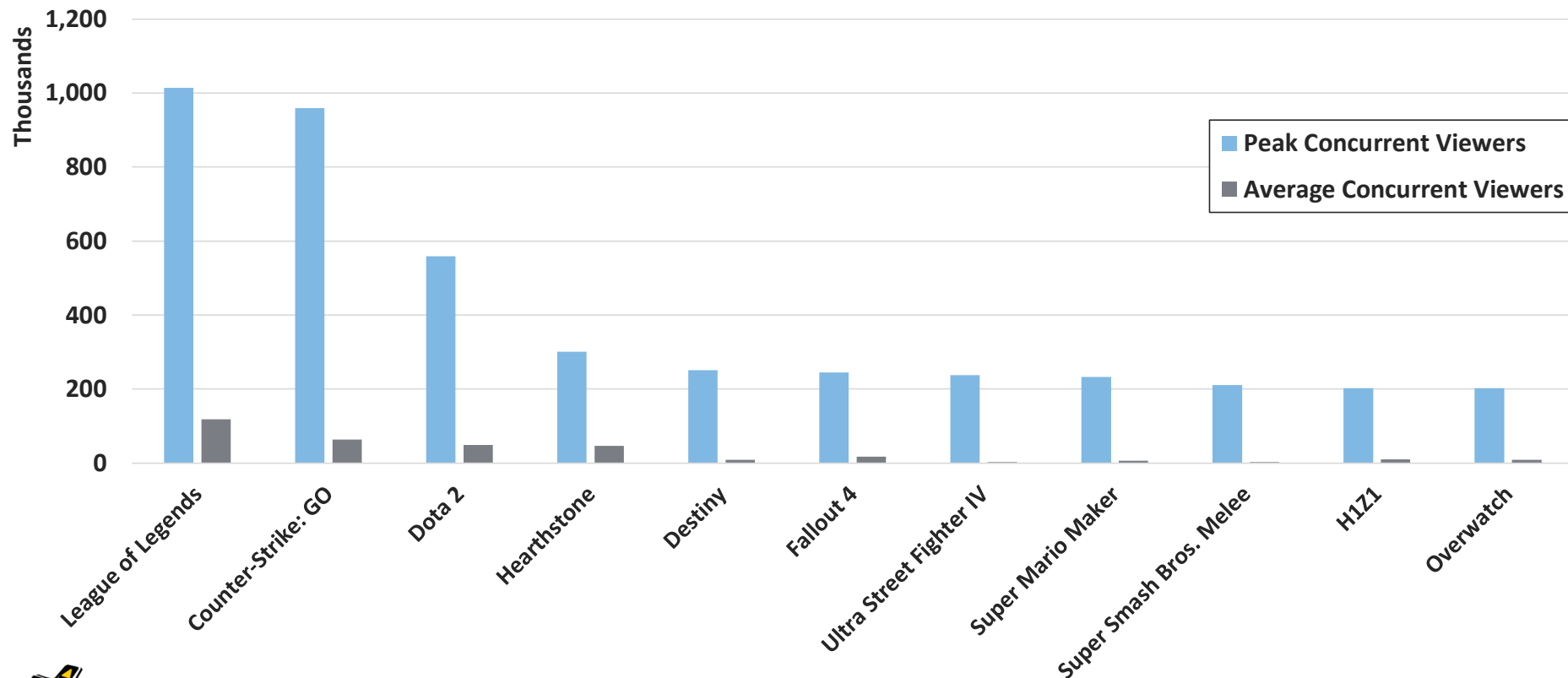
# TWITCH: CONCURRENT VIEWERS

Twitch Average Concurrent Viewers in 2015



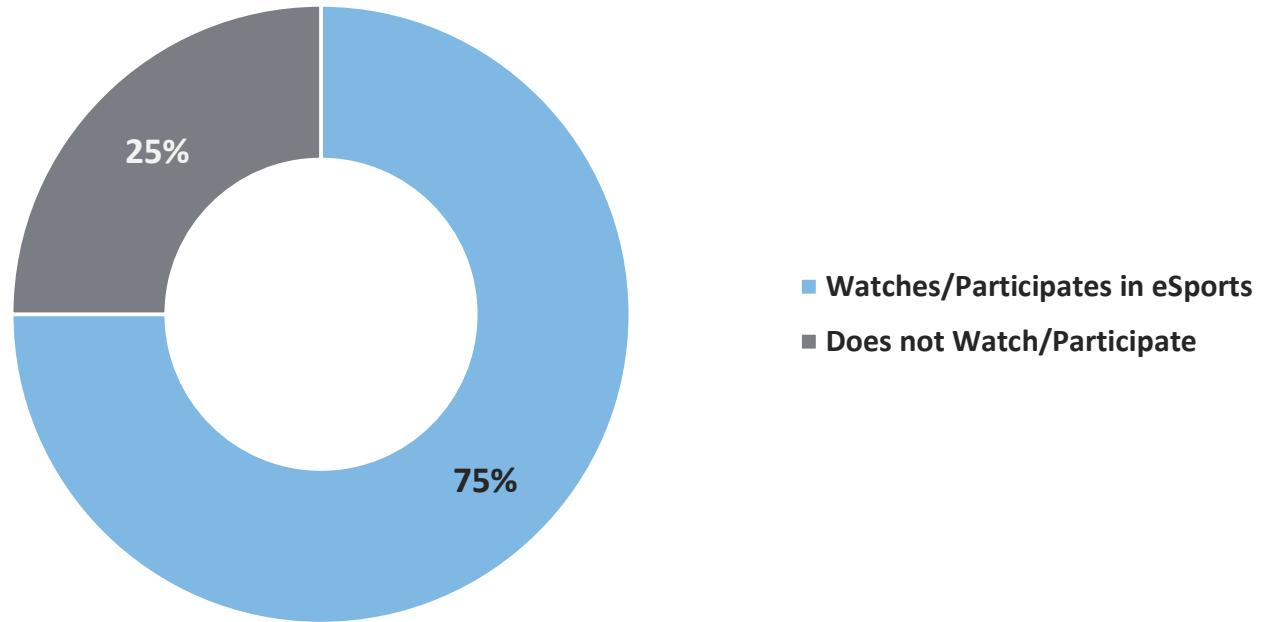
# TWITCH: PEAK VIEWERS

## Twitch Average and Highest Concurrent Viewers in 2015

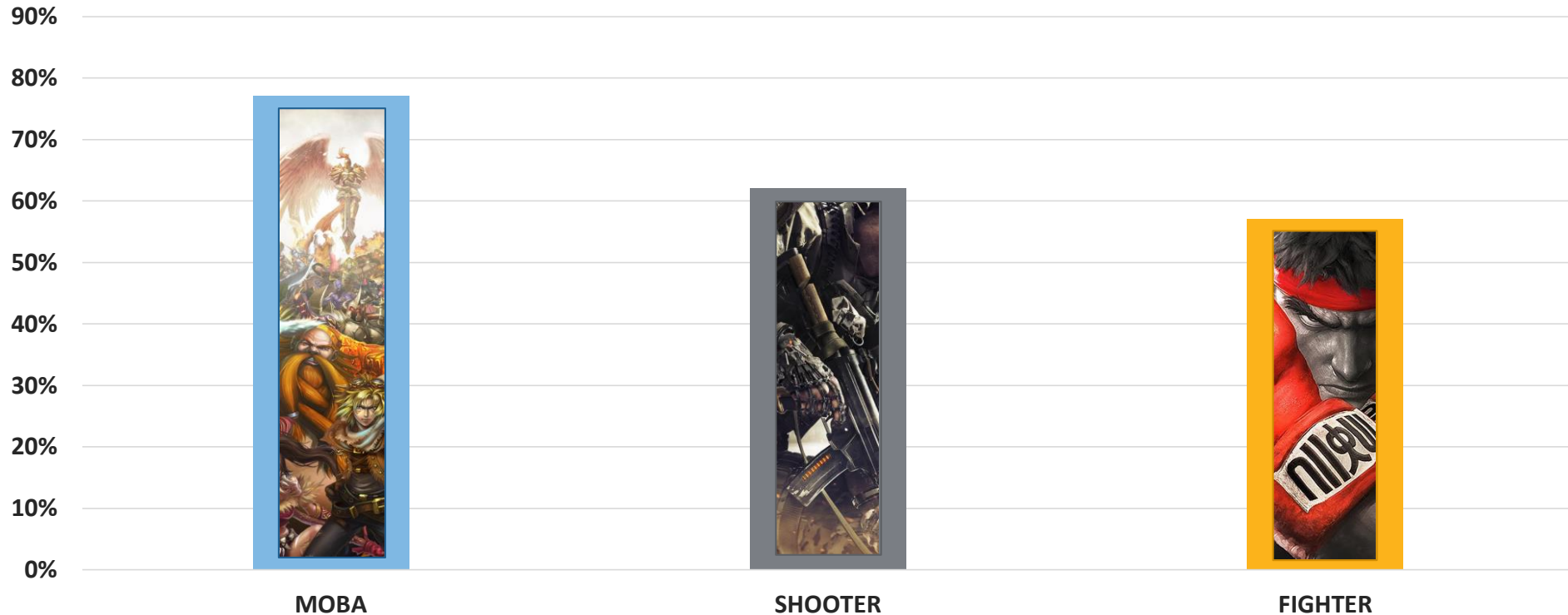




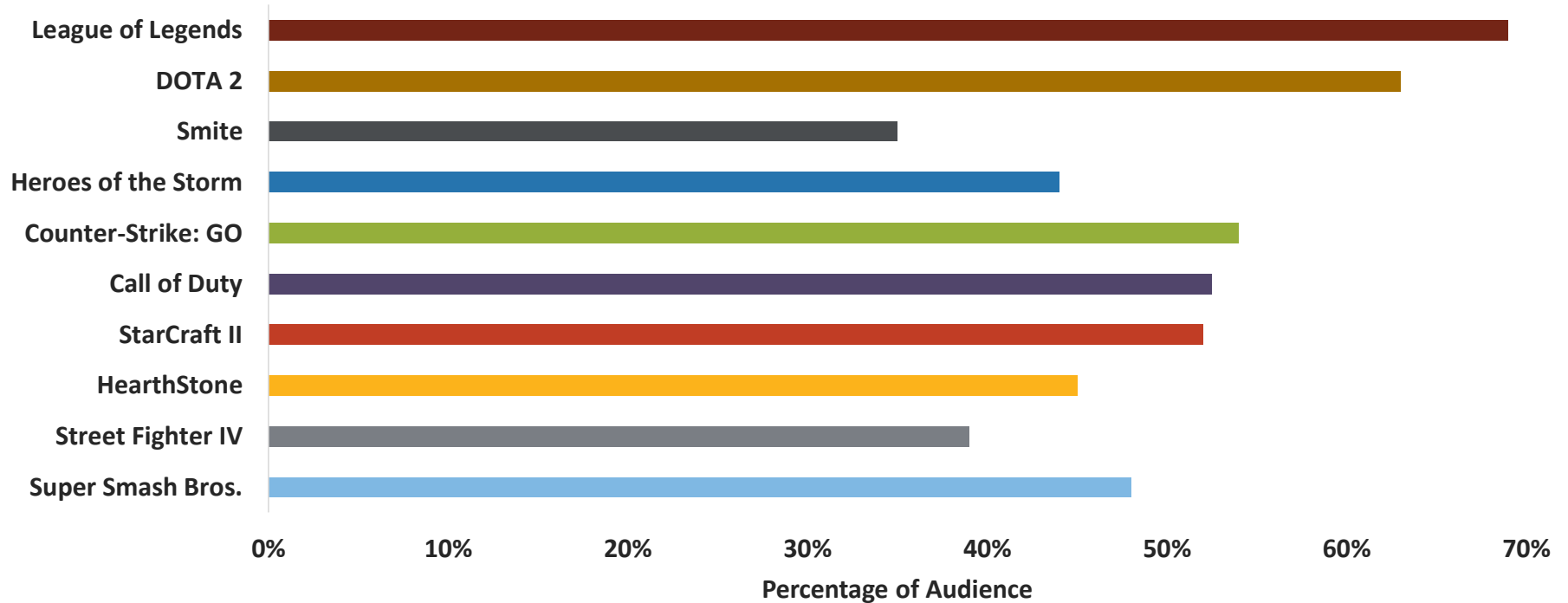
## eSports Engagement by People Playing Games with an eSports Component [NA][2016]



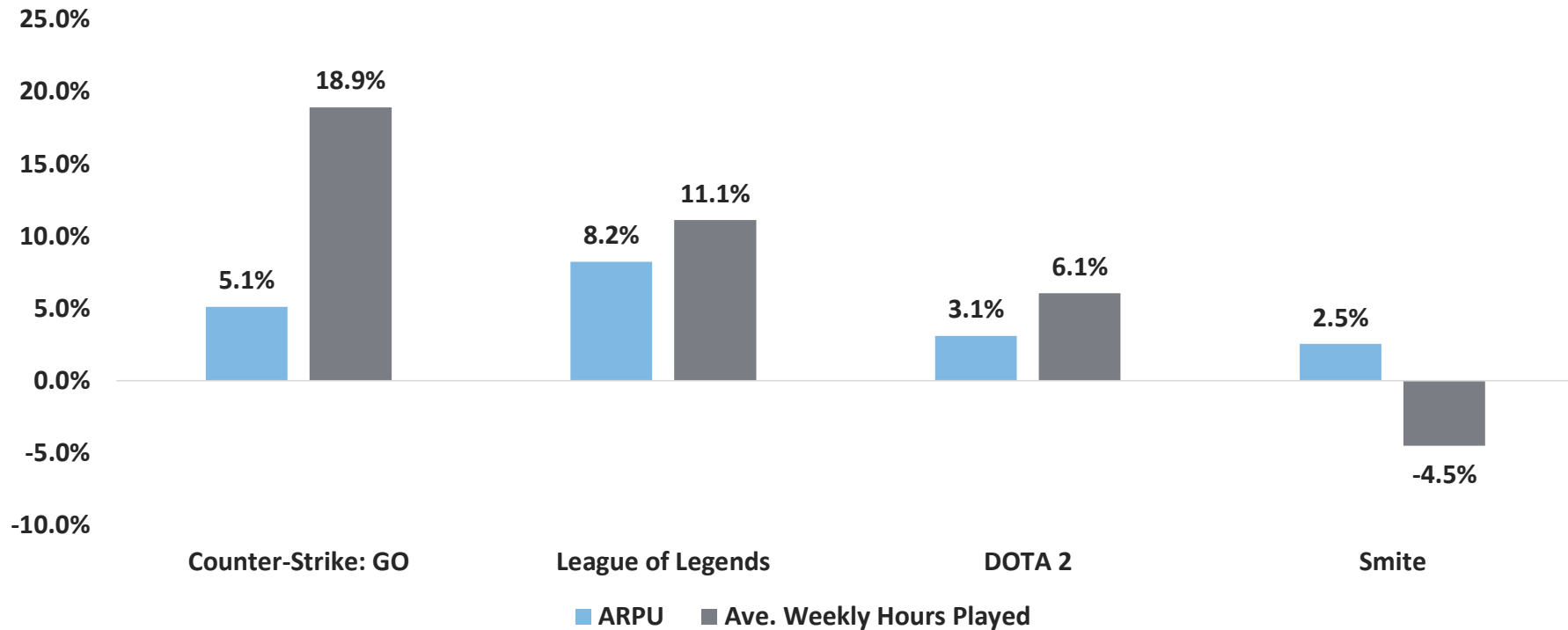
## eSports Engagement by People Playing Games with an eSports Component [Participation by Segment][NA][2015]



## eSports Participation by Title [2015][NA]

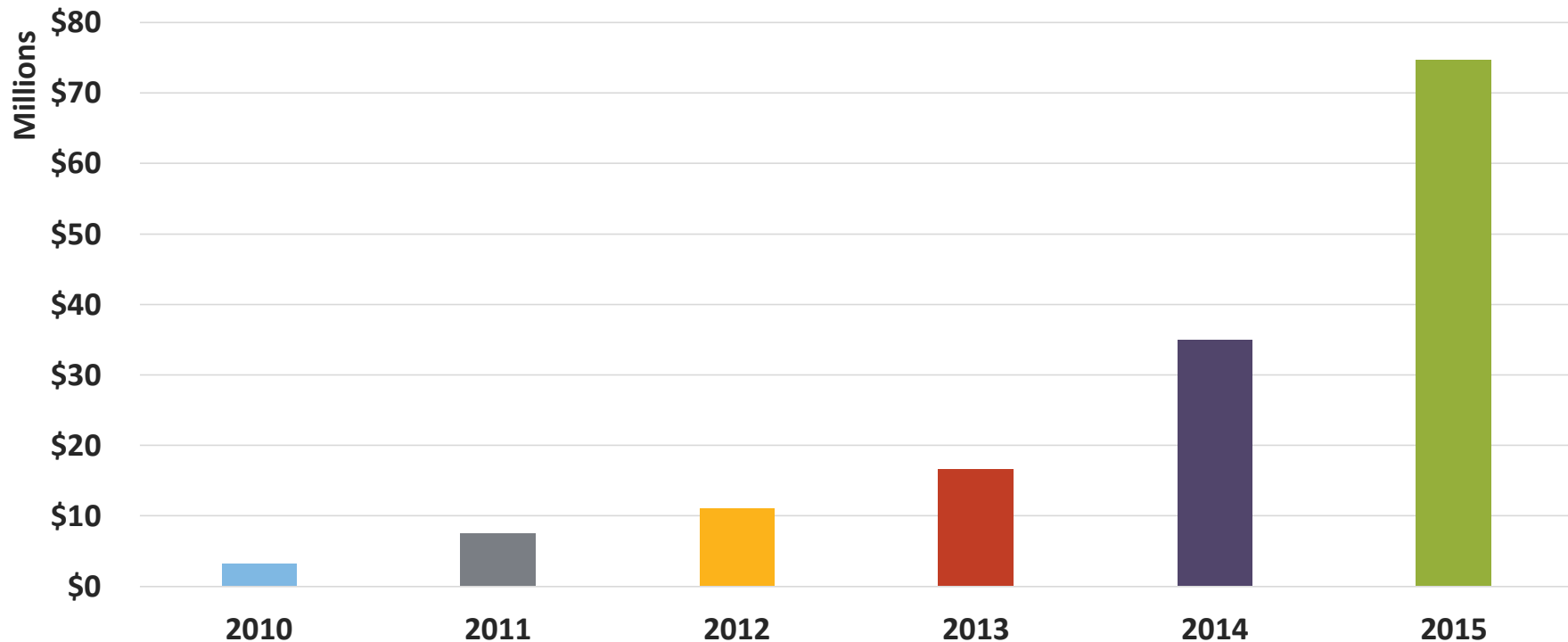


## eSport Engagement Bonus vs. General Population [NA][2015]



# ESPORTS TOURNAMENTS

## eSports Prize Pool And Tournaments [Worldwide]



**EEDAR**

CONTEXT IS EVERYTHING

Source: EEDAR eSports Report 2015

THANKS FOR COMING

# AWESOME VIDEO GAME DATA



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**FOUNDER**

**@GEOFFREYZATKIN**



**EEDAR**

CONTEXT IS EVERYTHING