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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) – game industry research is what we do.

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@EXPERIMENT7INC

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



Thousands of Objectively Quantifiable Video Games Attributes



About EEDAR

- Founded in 2006, Acquired by The NPD Group 2016
- Based in Carlsbad, CA
- 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

- 106,000+ Products (Games, Accessories, Hardware) Observed To Date
- 150,000,000+ Data Points

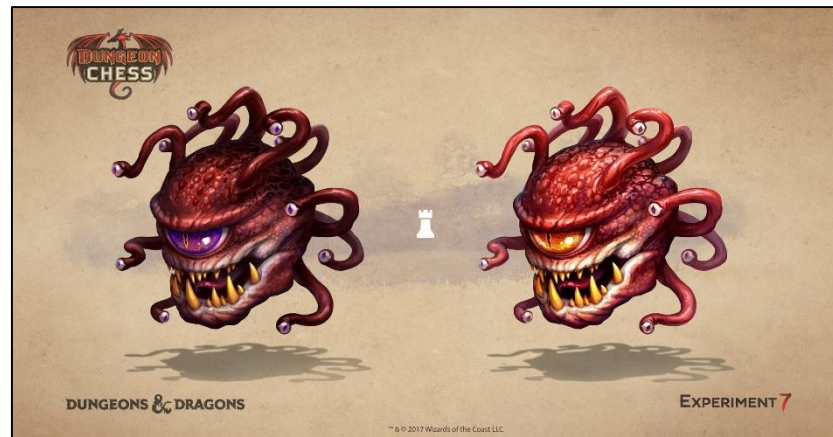
EXPERIMENT 7

MAGIC M TABLE

EXPERIMENT 7



EXPERIMENT 7



To get this talk, visit EEDAR's website

www.EEDAR.com/contact

Ask for:

Awesome Video Game Data 2017

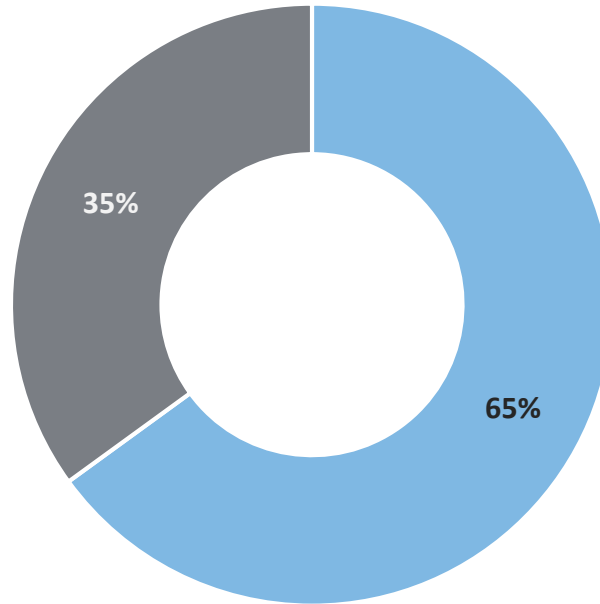
AUDIENCE

THE 'GAMERS' OF TODAY ARE ENTERTAINMENT CONSUMERS



WHO GAMES?

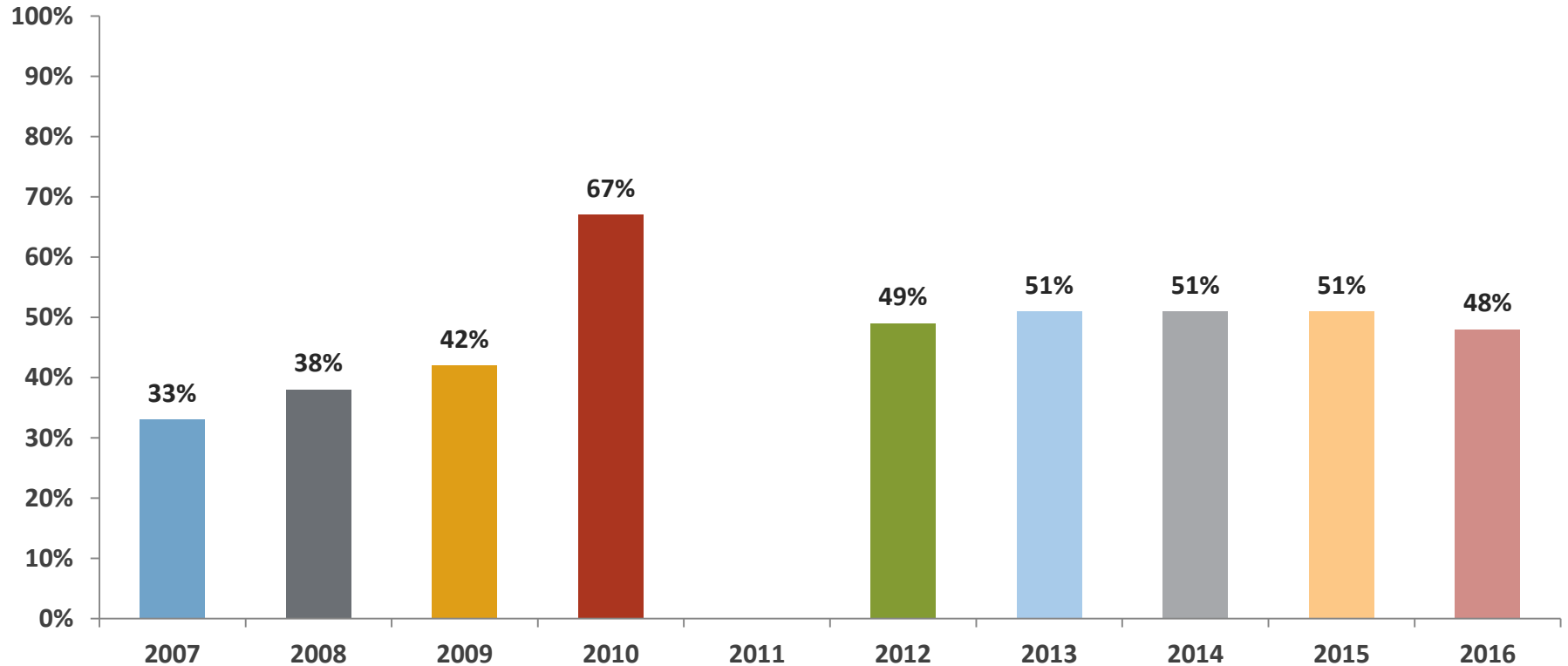
Game Playing Population of the USA [2016][NA]



- Game Players
- Non Game Players

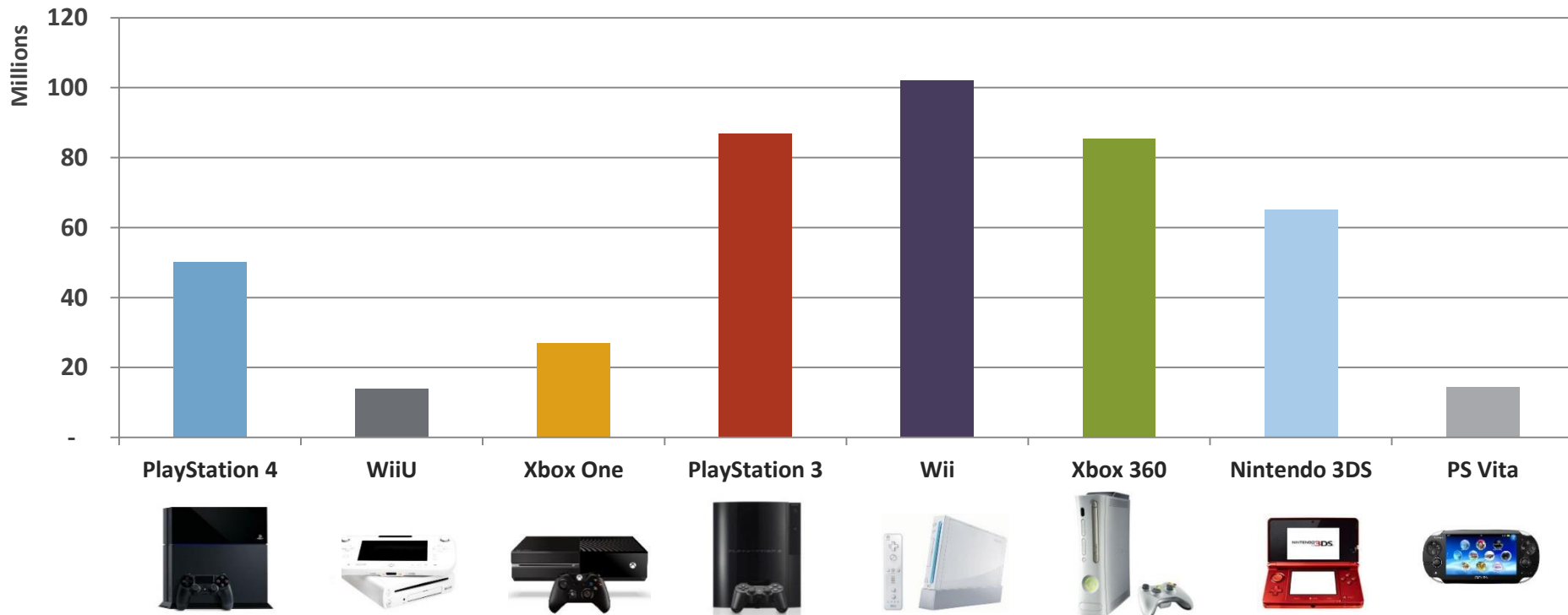
WHO GAMES?

% of American homes with a video game console



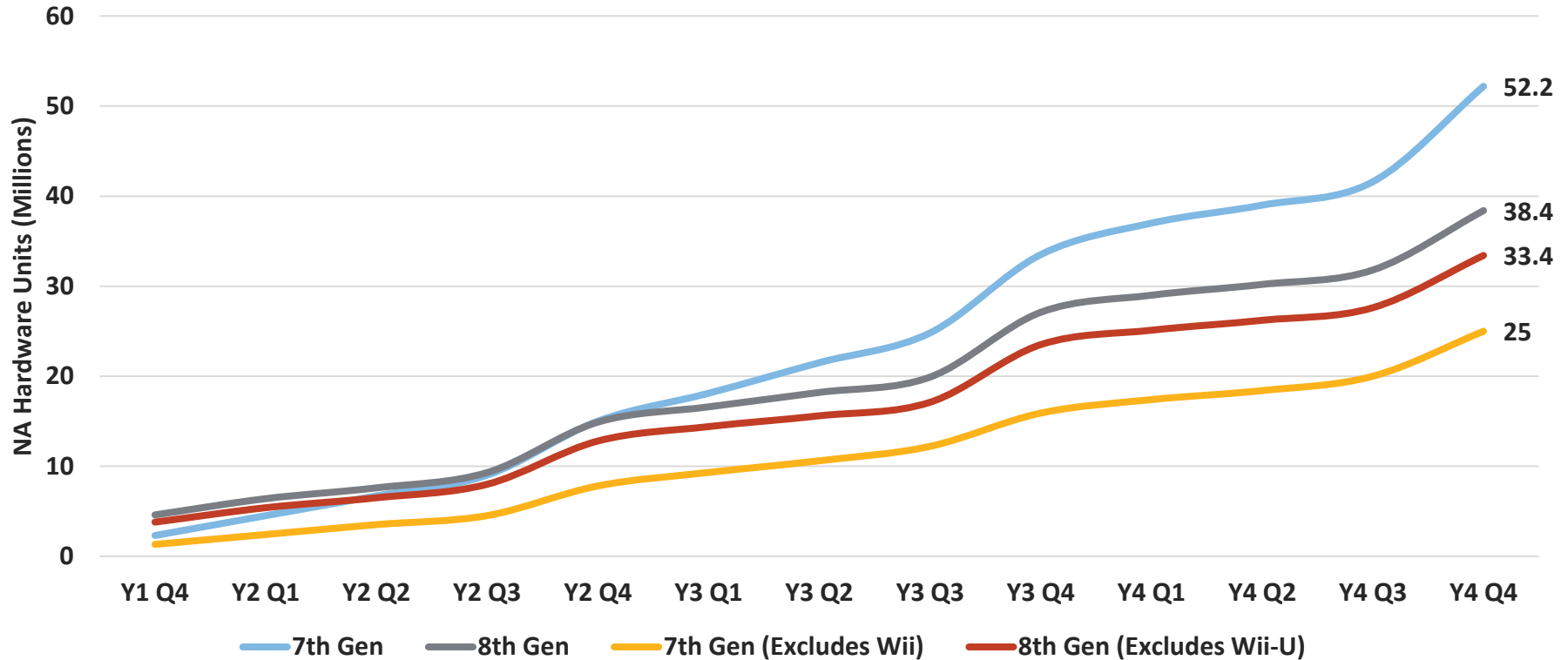
HARDWARE SALES

Platform Sales Worldwide Through December, 2016



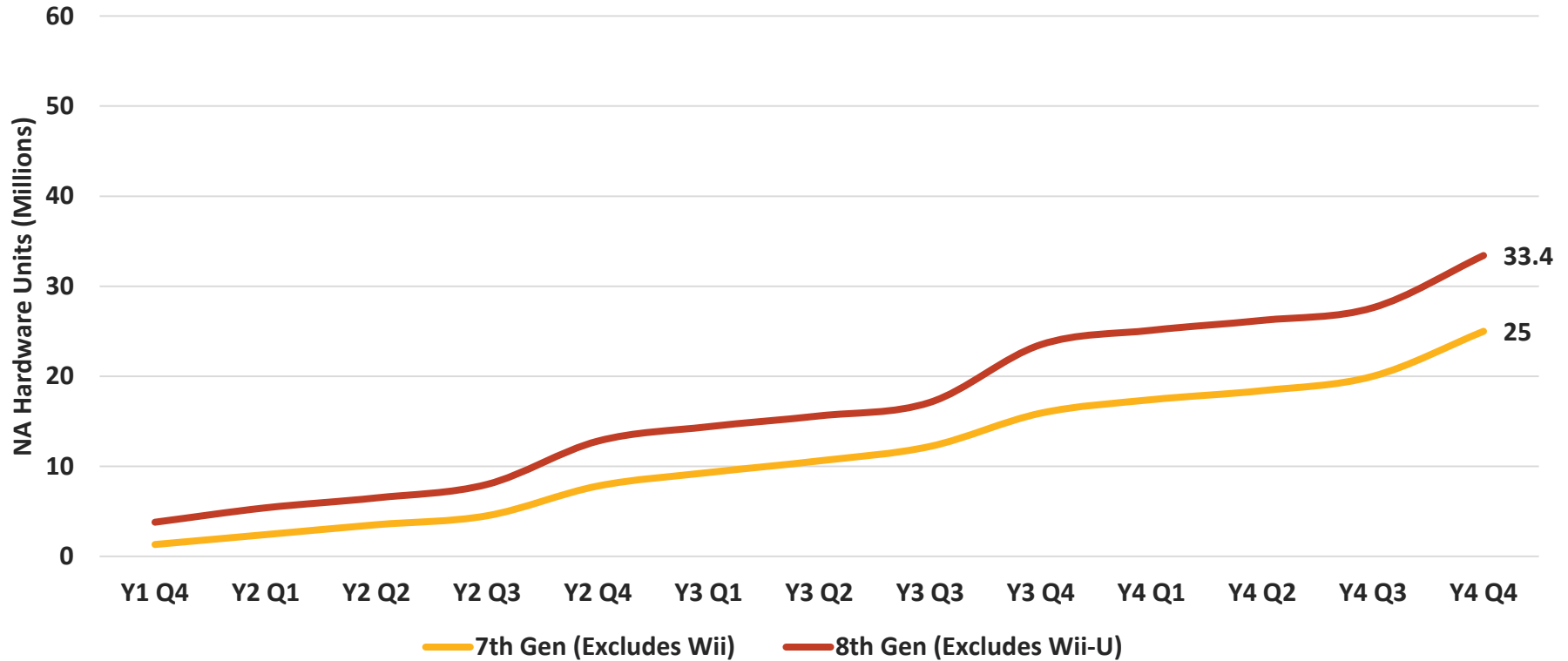
CONSOLE SALES

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



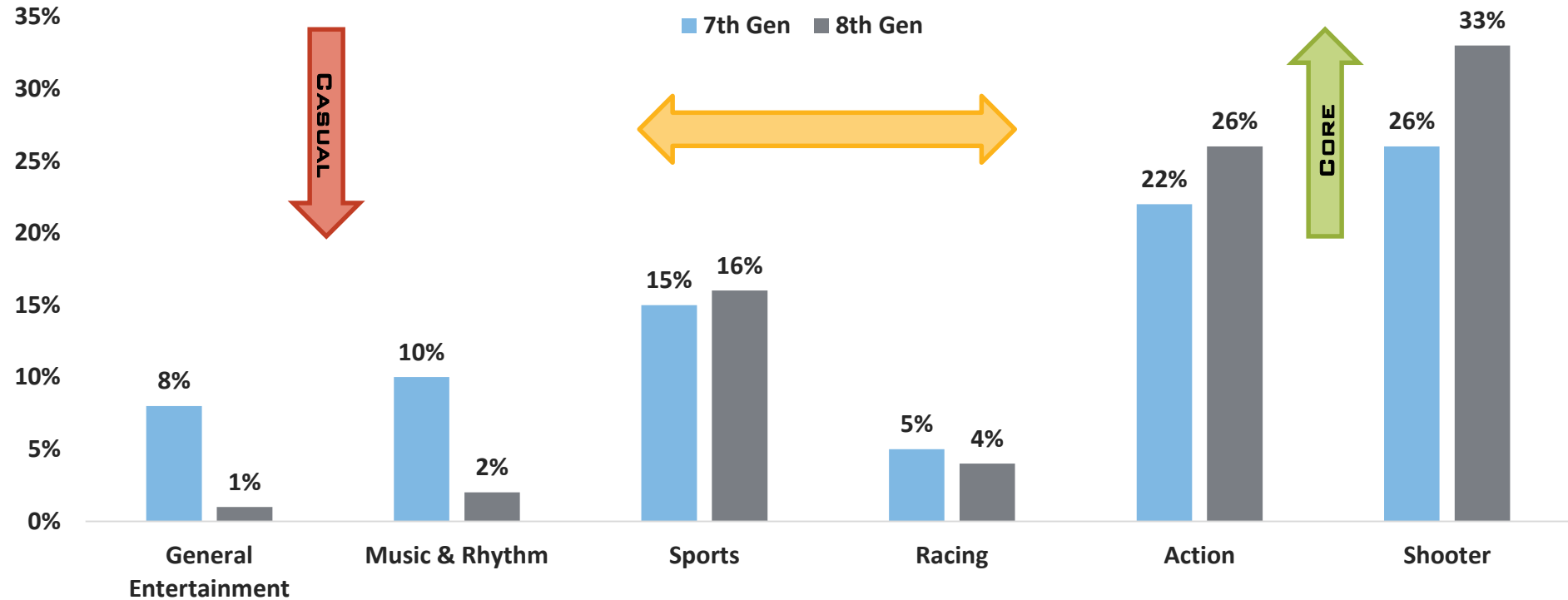
CONSOLE SALES

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



CONSOLE REVENUE

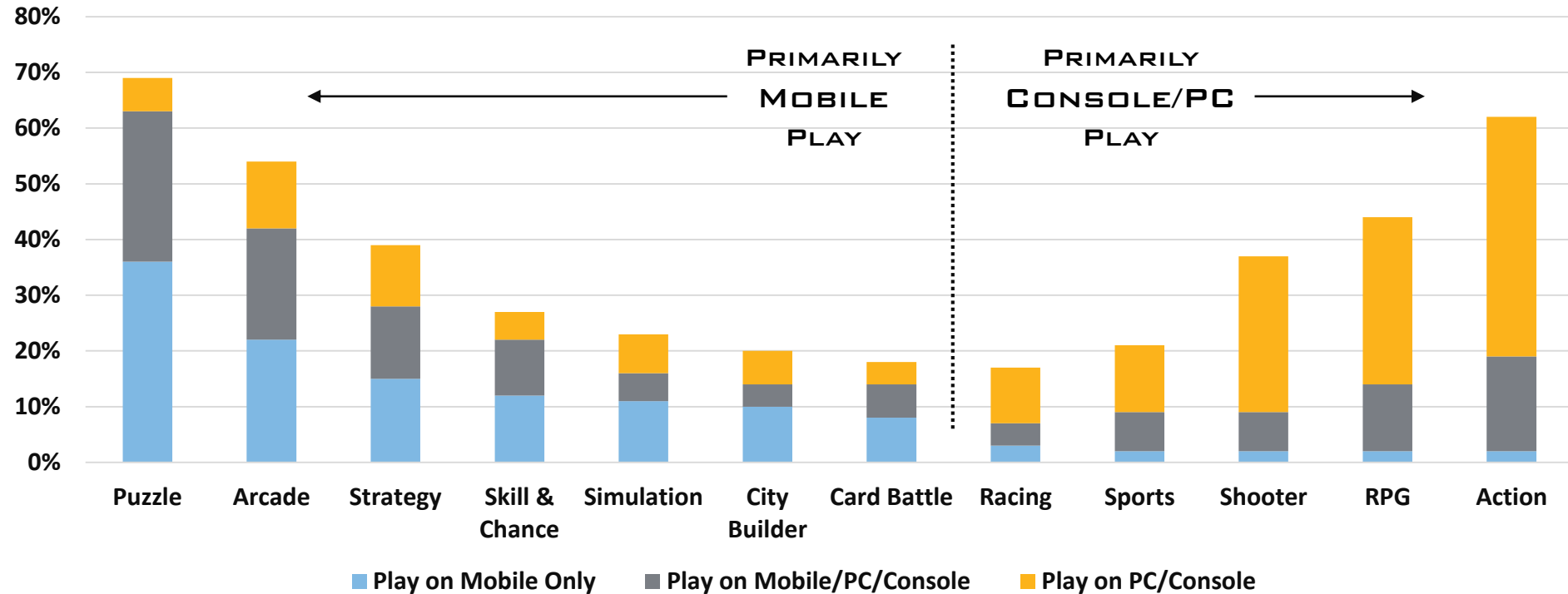
Percentage of Software Sales by Genre for 7th vs. 8th Gen Consoles
[Digital & Physical][US]



PLATFORM CENTRIC GENRES

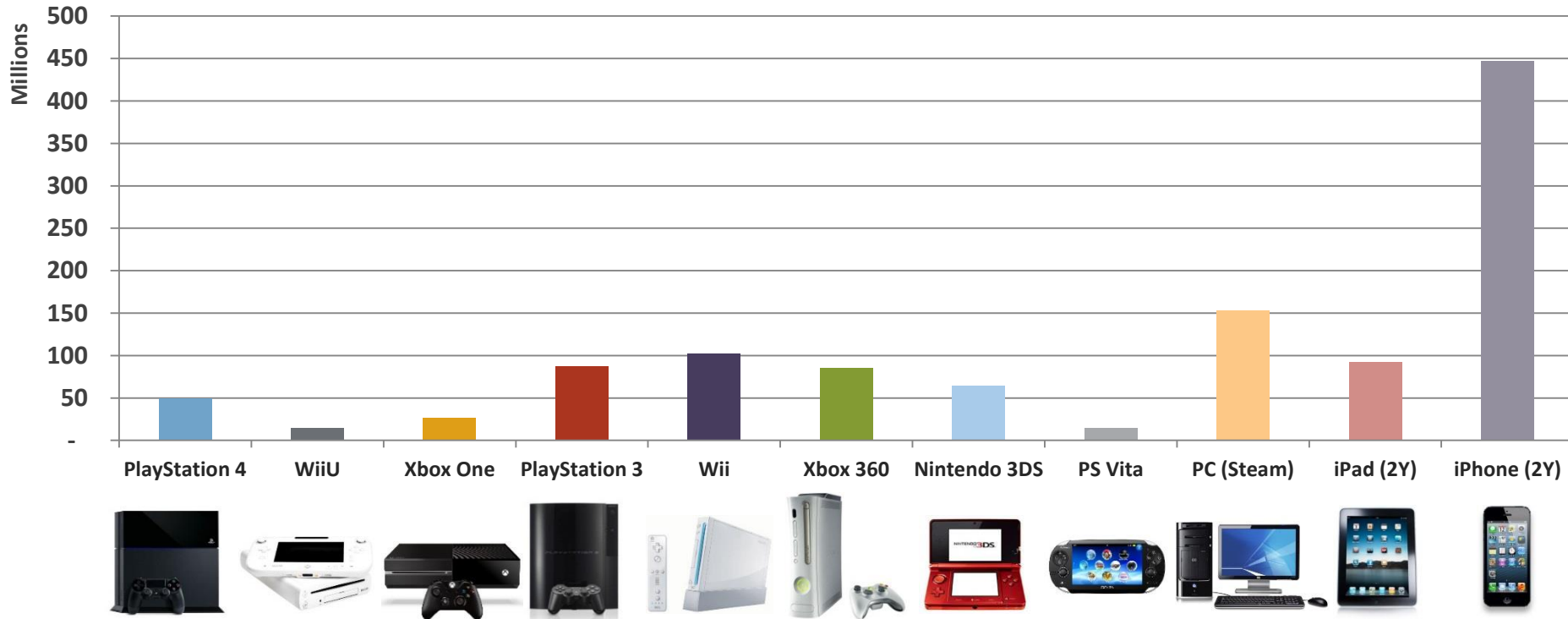
Most Played Genres by Platform

[NA][2016][PlayerPulse][Adult Mobile Gamers, Active Past Month]

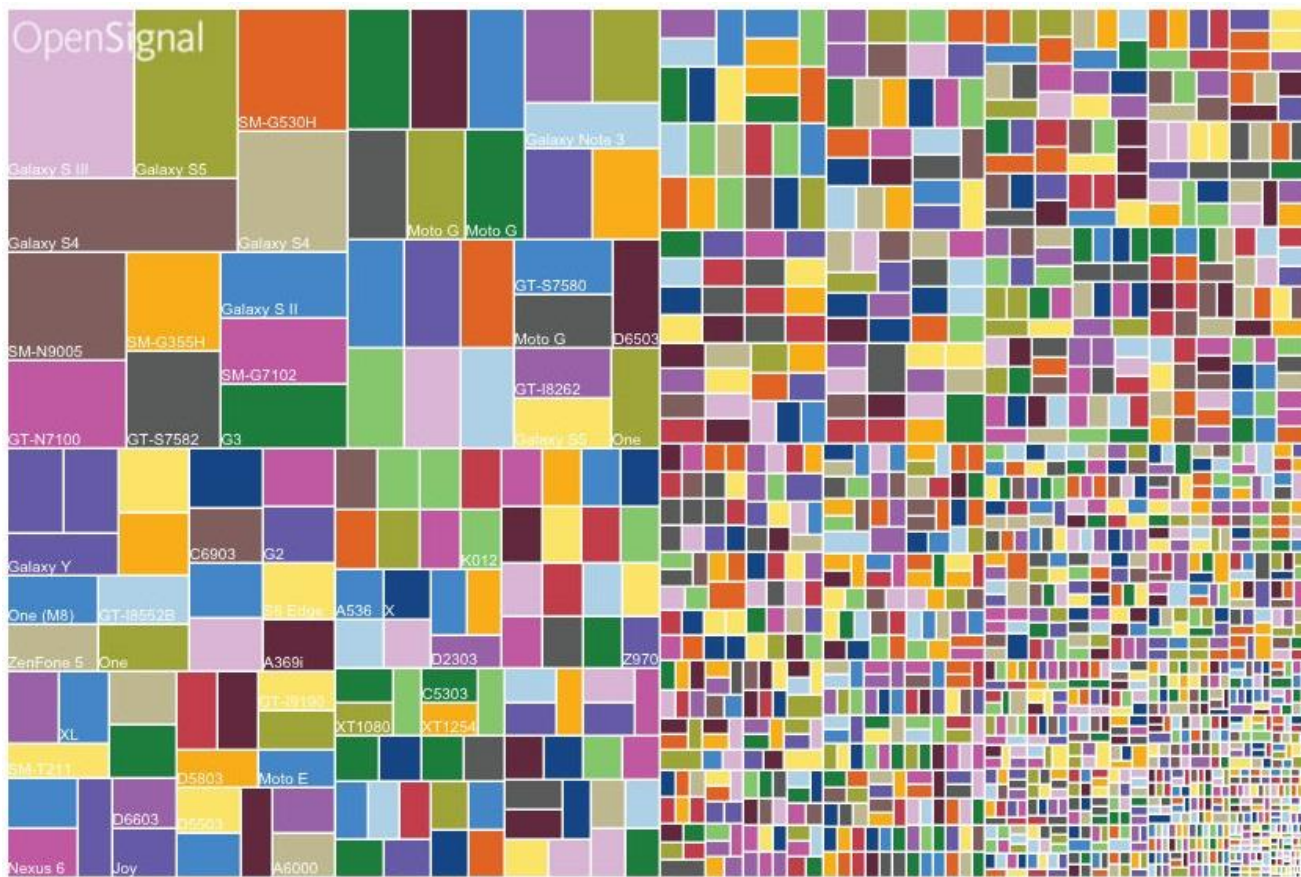


HARDWARE SALES

Platform Sales Worldwide Through December, 2016



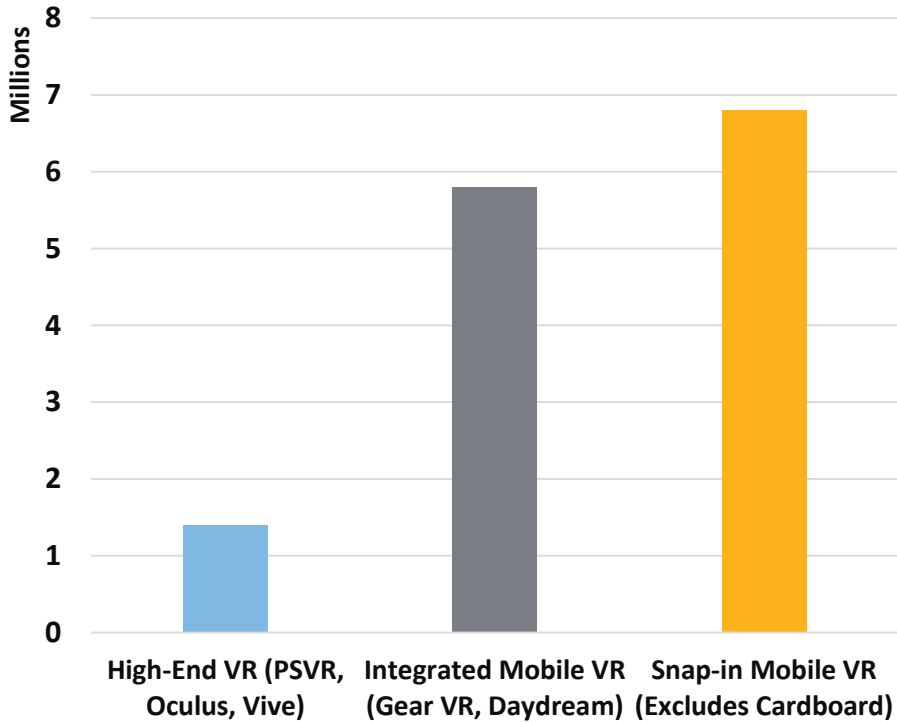
ANDROID DEVICE FRAGMENTATION



VR HARDWARE SALES

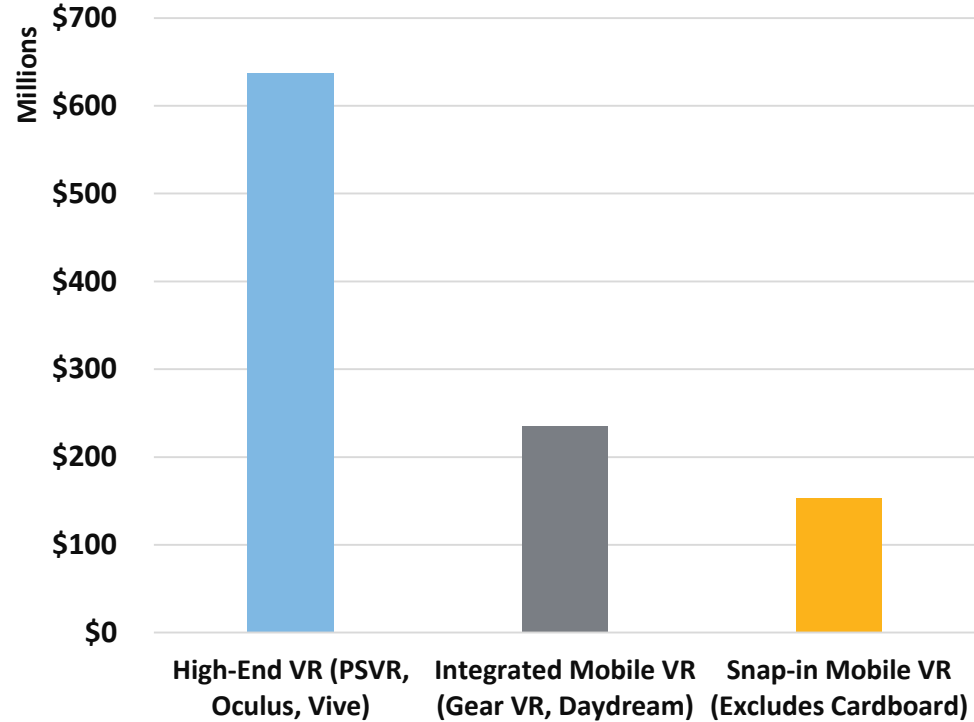
Hardware Units Worldwide

LTD Through December 2016



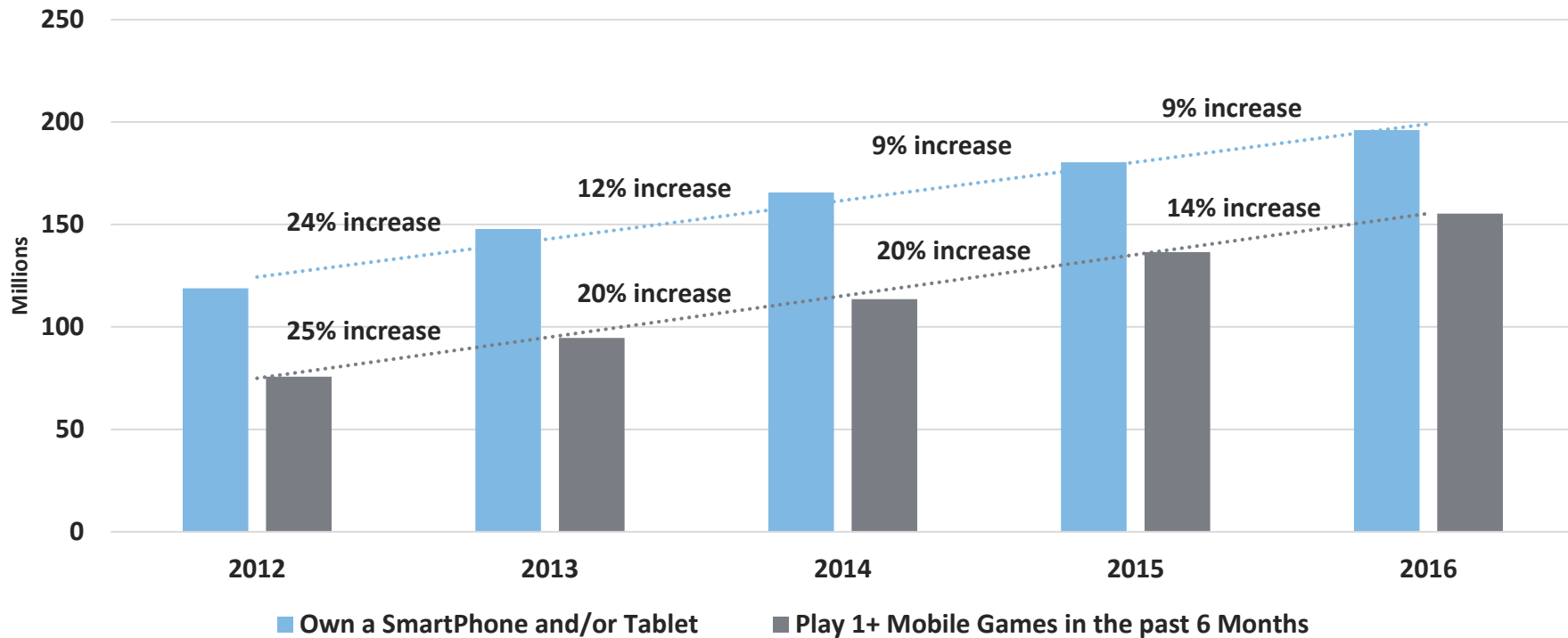
Hardware Revenue Worldwide

Through December, 2016



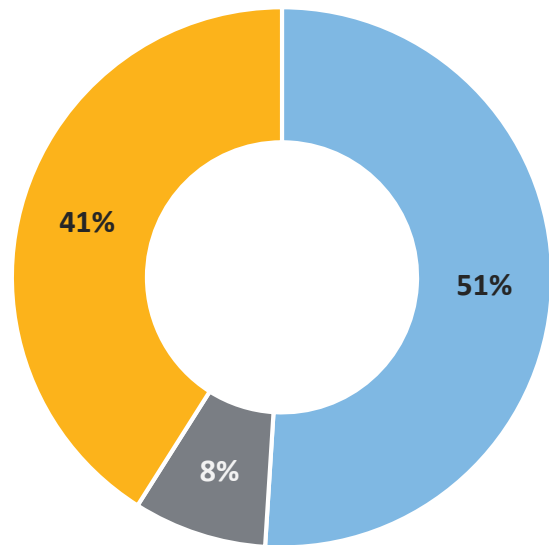
MOBILE GAMERS

Mobile Gamers [2012-2016] [Age 18+][NA]

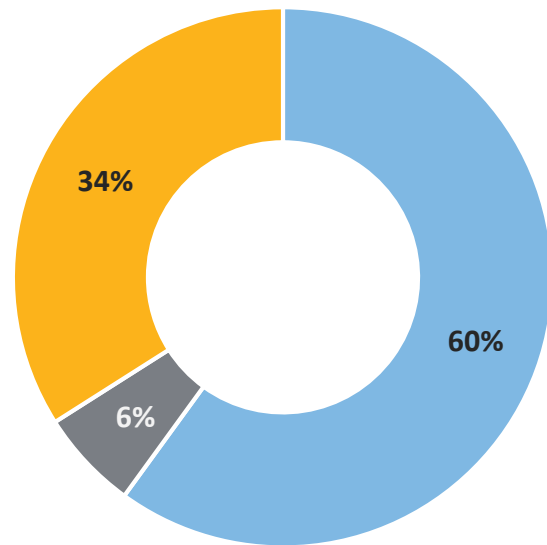


MOBILE GAMERS

Mobile Gamers by Device Ownership
[Active Mobile Gamers][18+][NA]



Mobile Gaming \$\$\$ by Device Ownership
[Active Mobile Gamers][18+][NA]

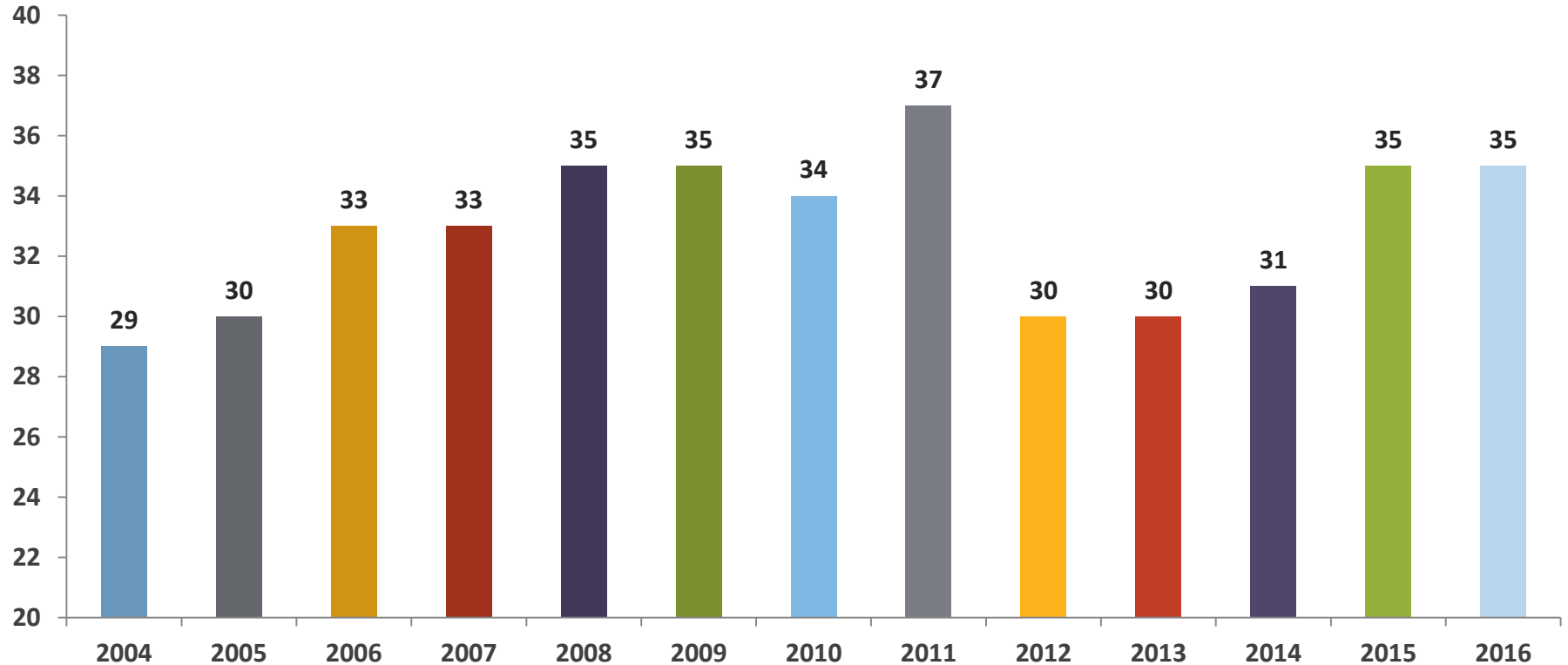


■ Both Smartphone & Tablet ■ Tablet Only ■ SmartPhone Only

■ Both Smartphone & Tablet ■ Tablet Only ■ Smartphone Only

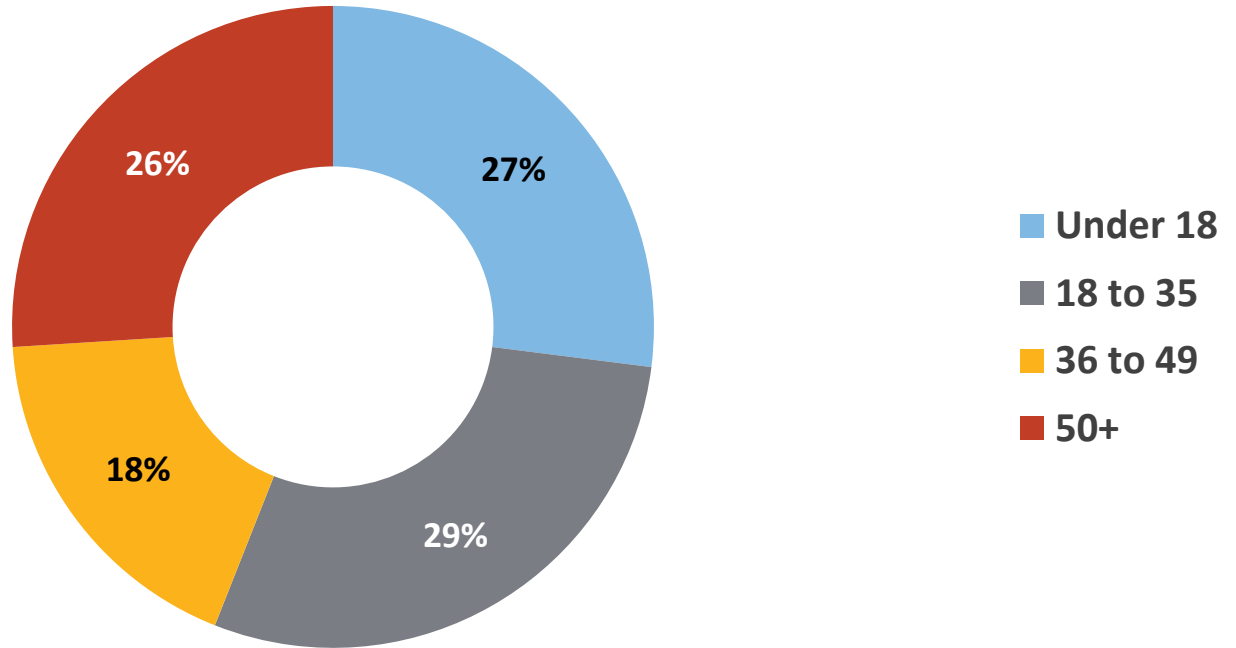
WHO GAMES?

Average Age of Gamers in the USA



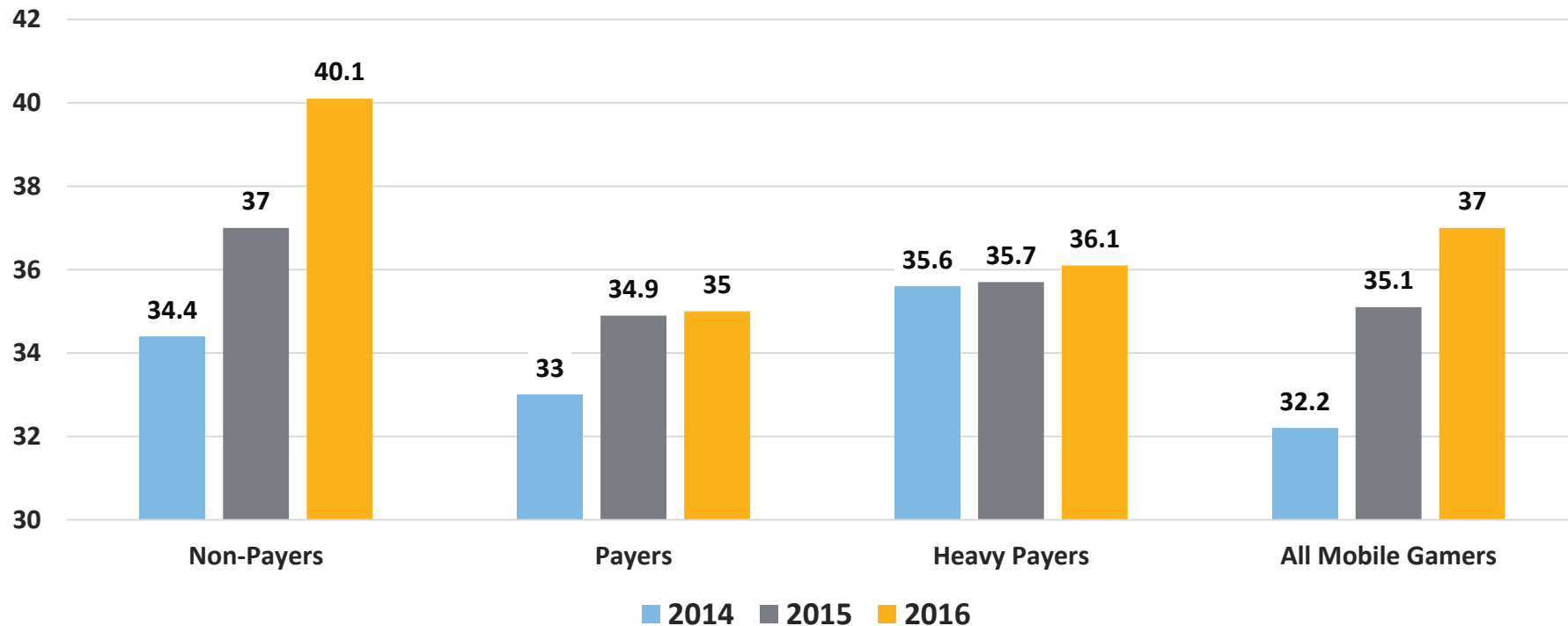
WHO GAMES?

Age of Game Players



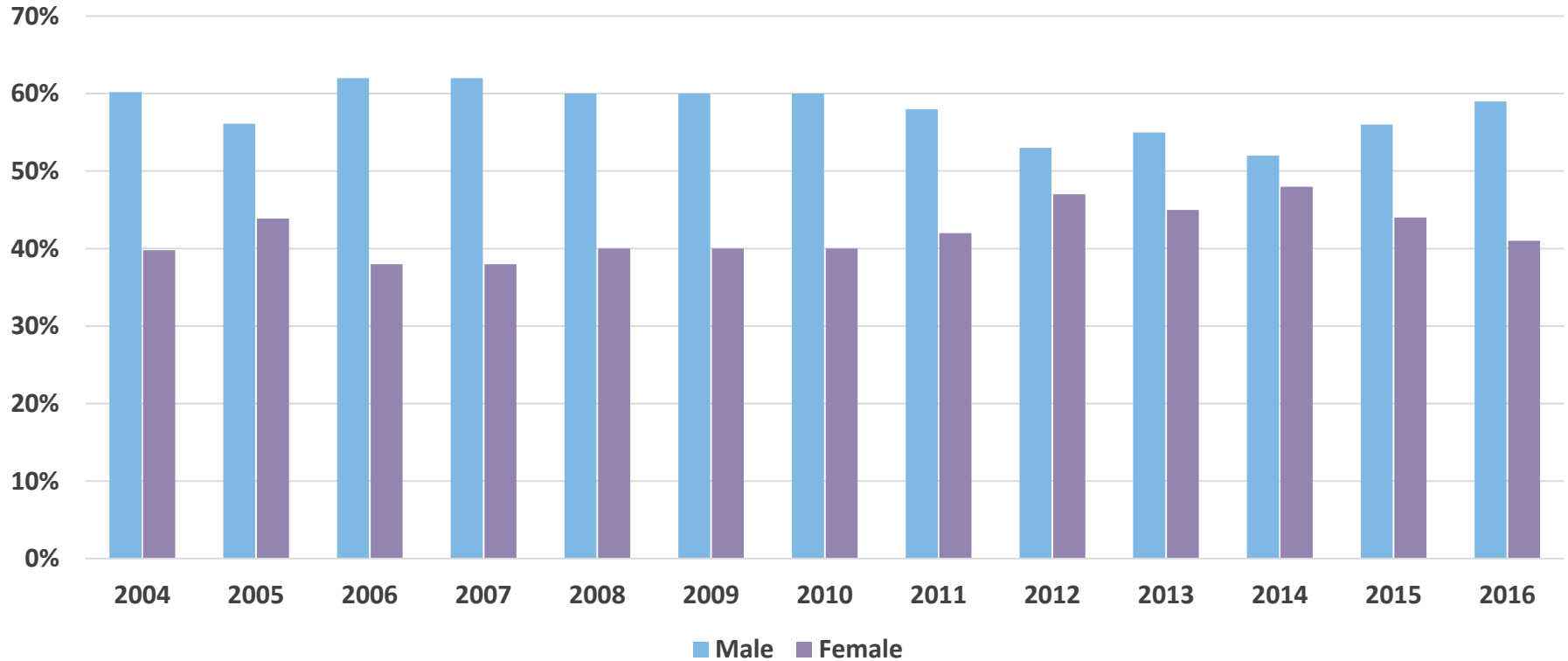
MONETIZING MOBILE - AGE

Age by Mobile Spending Segment
[2014-2016][NA][Active Mobile Gamers][Age 18+]



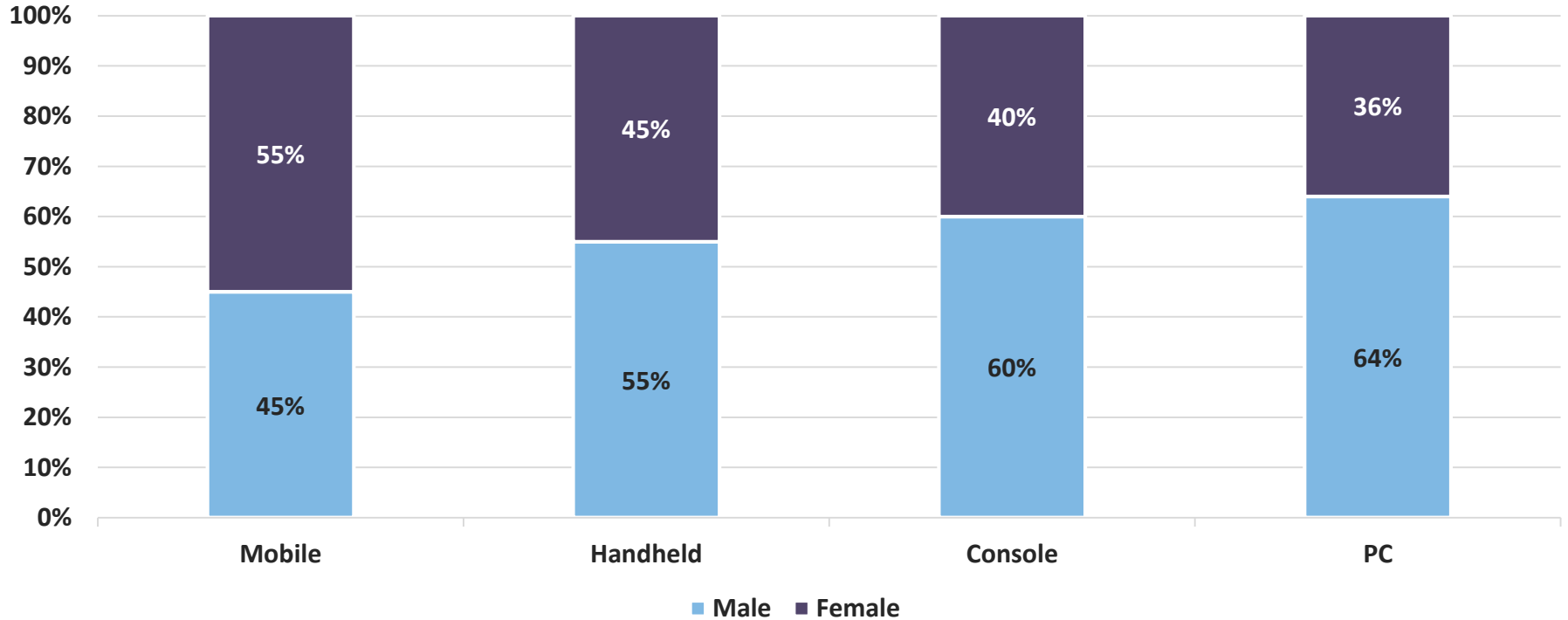
WHO GAMES?

Gender of Game Players in NA

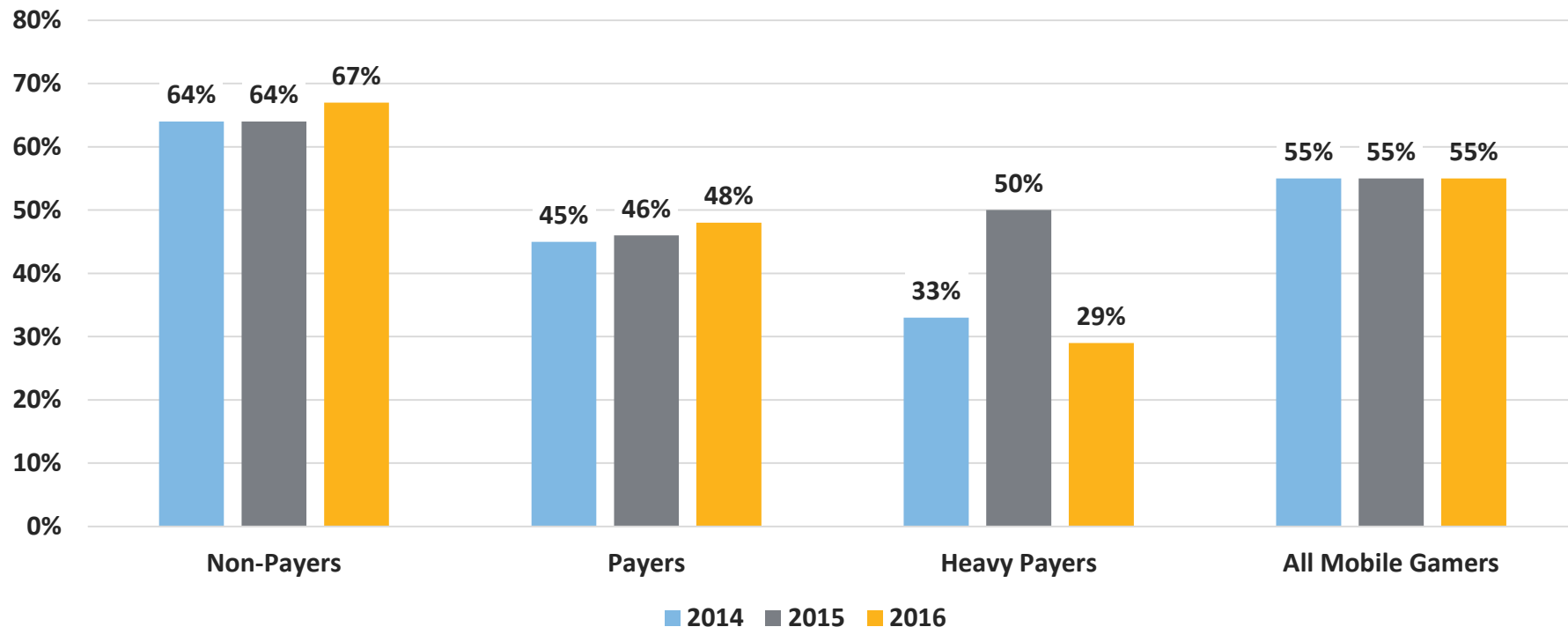


WHO GAMES?

Active Game Players Across Platforms
[2015][NA]



Female Gamers by Mobile Spending Segment [2014-2015][NA][Active Mobile Gamers][Age 18+]



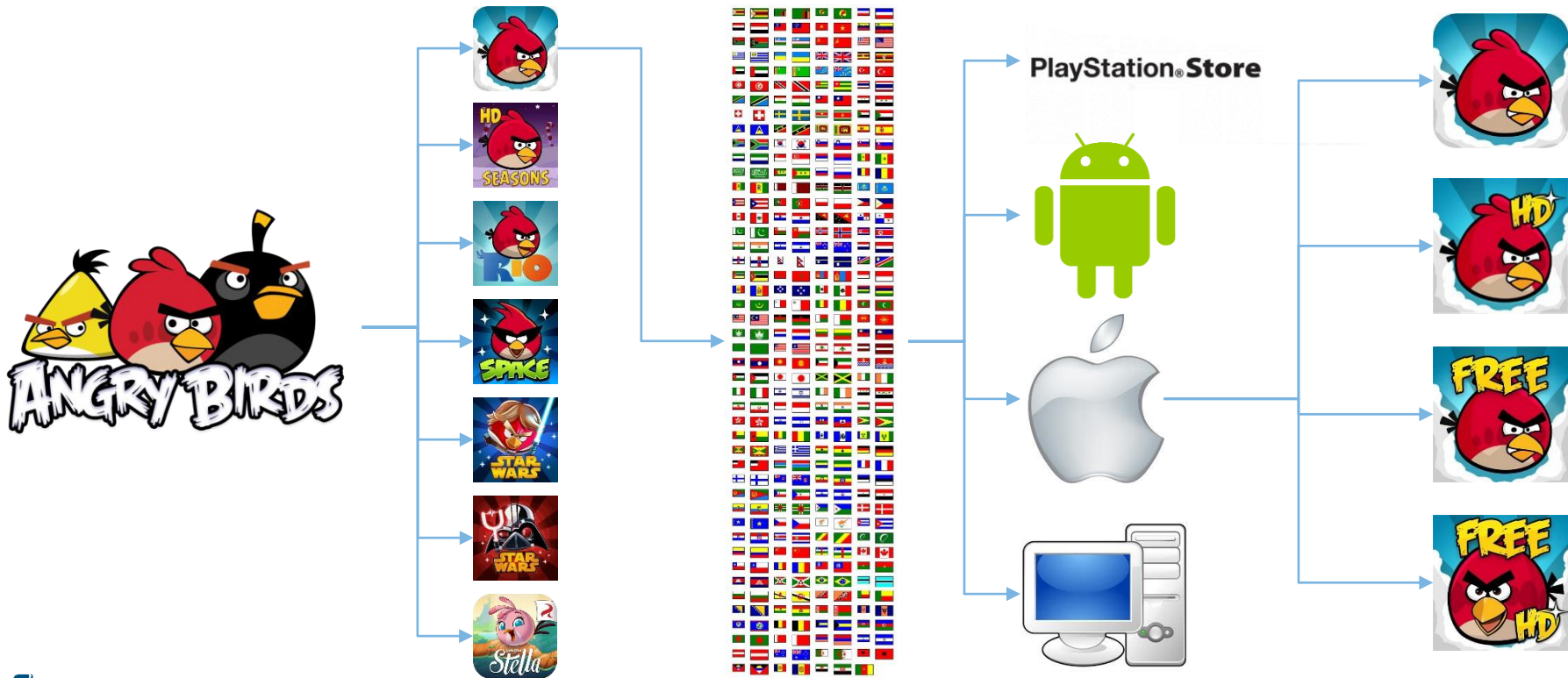
Franchise

Distinct Game

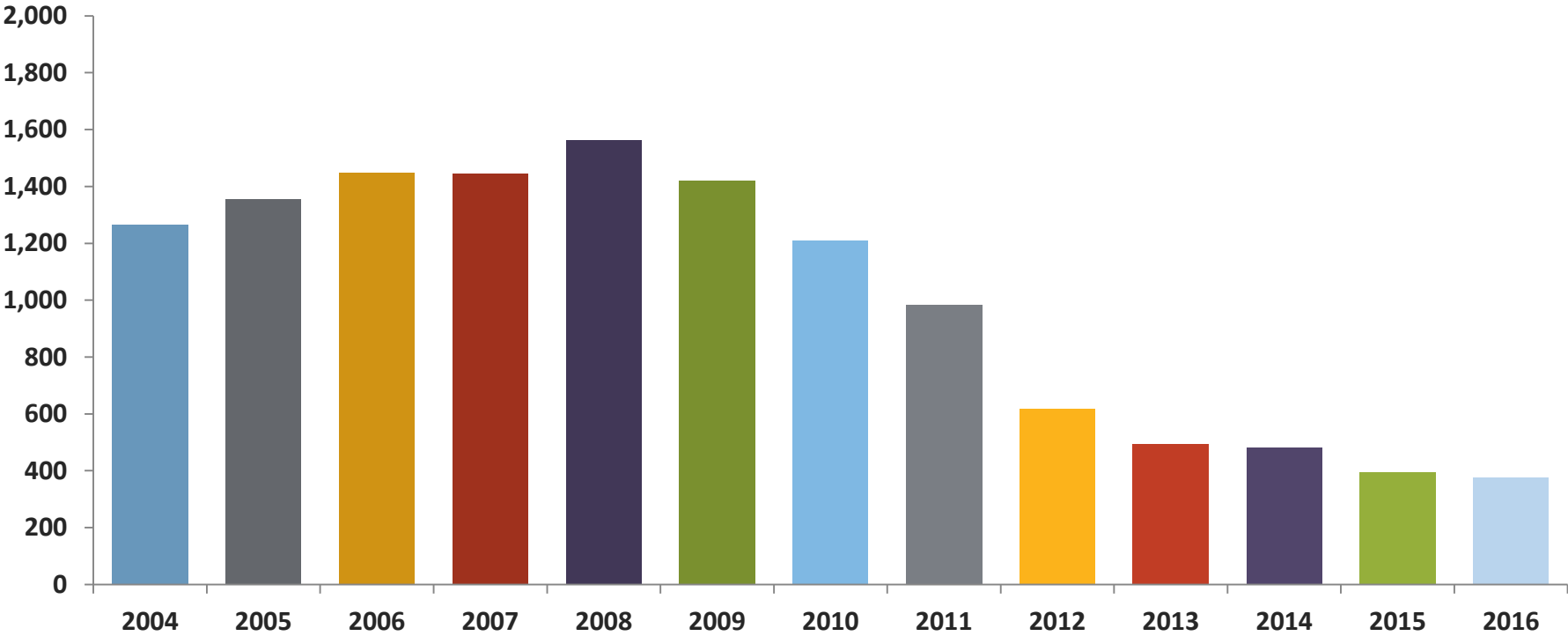
Region

Platform

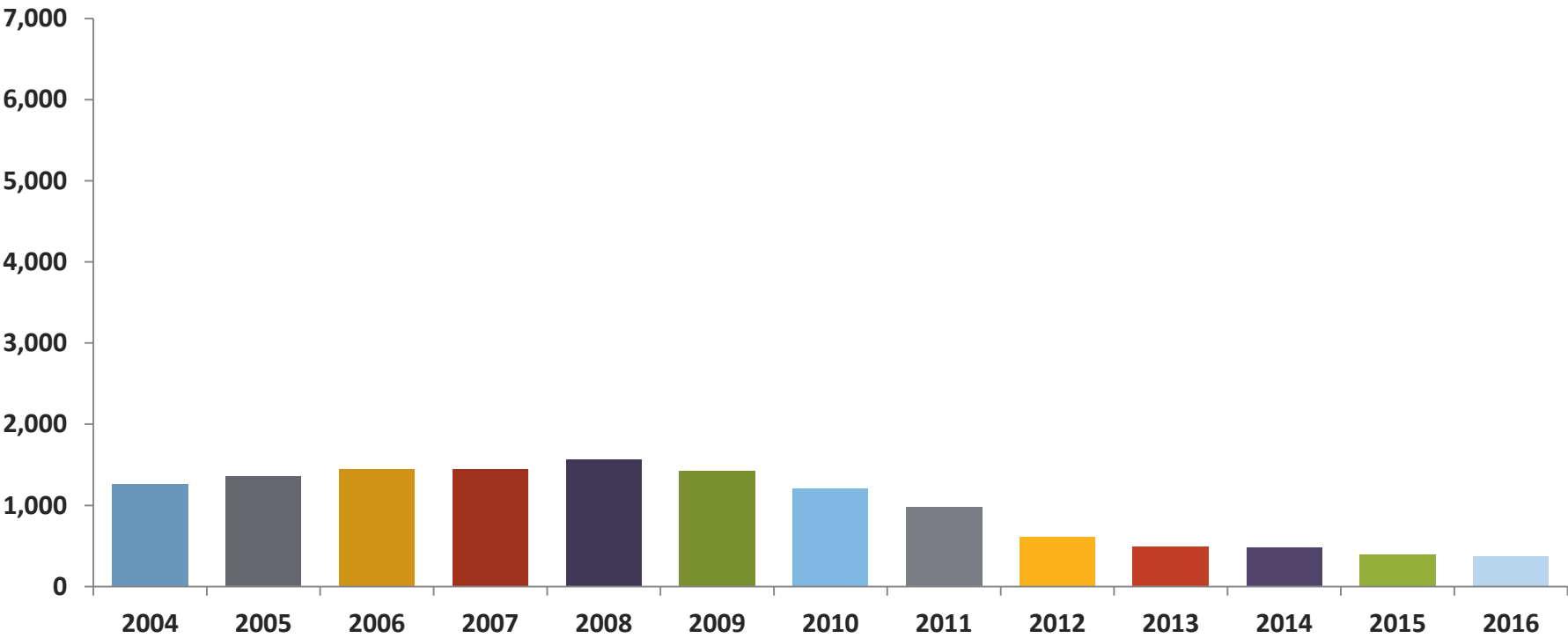
SKU



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

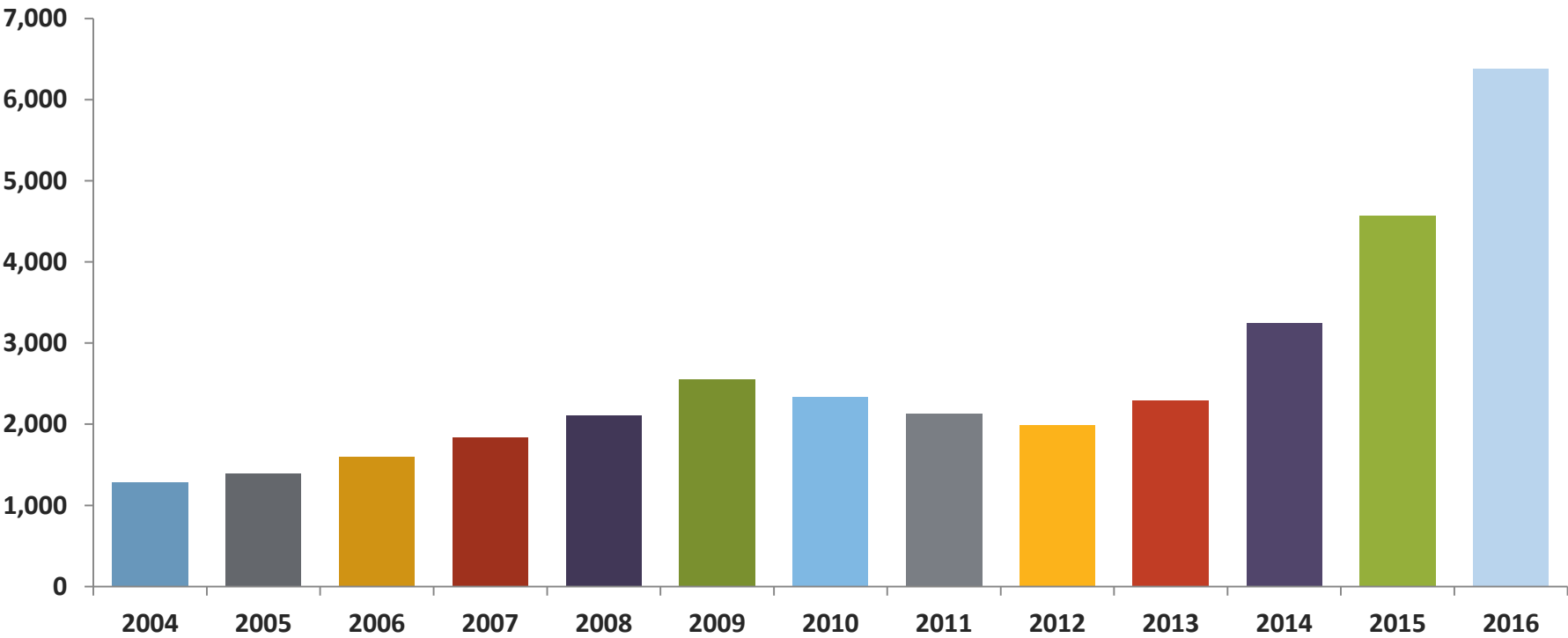


Quantity of Games Released
Retail Console, Handheld & PC Platform Title Releases in the USA



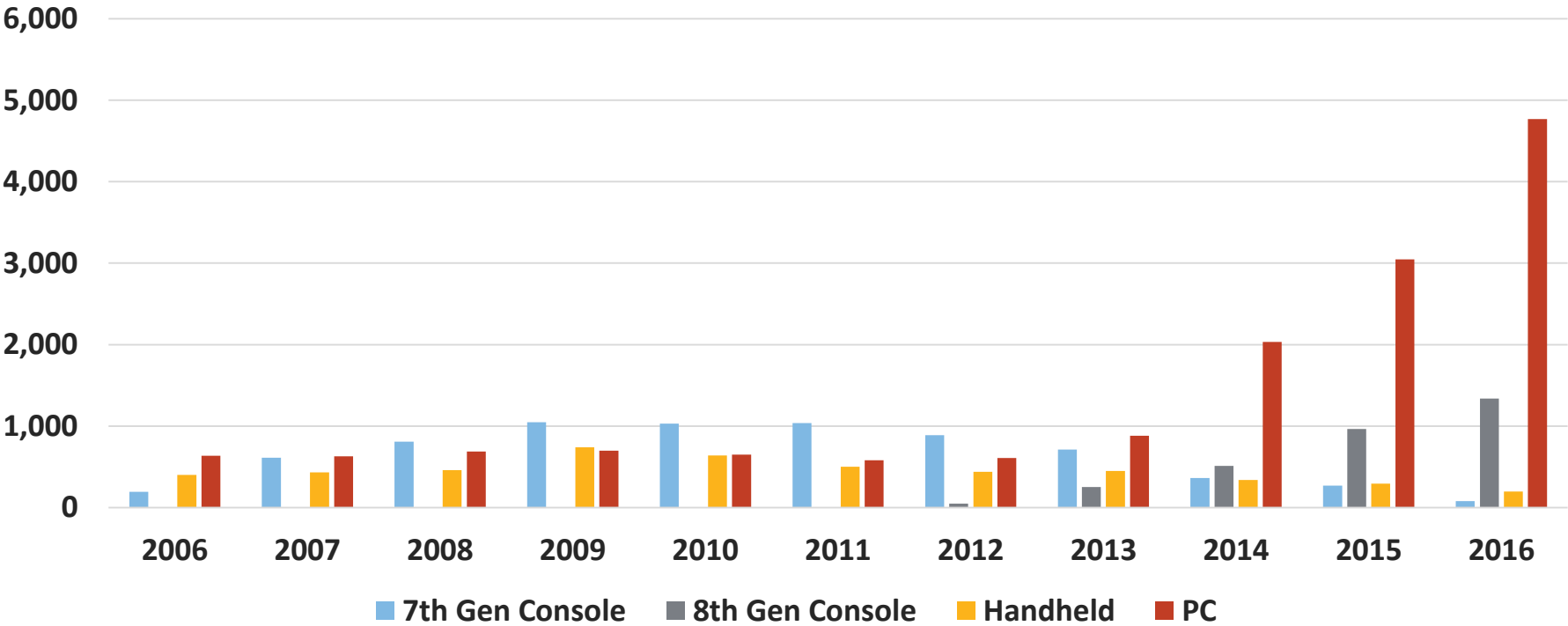
Quantity of Games Released

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



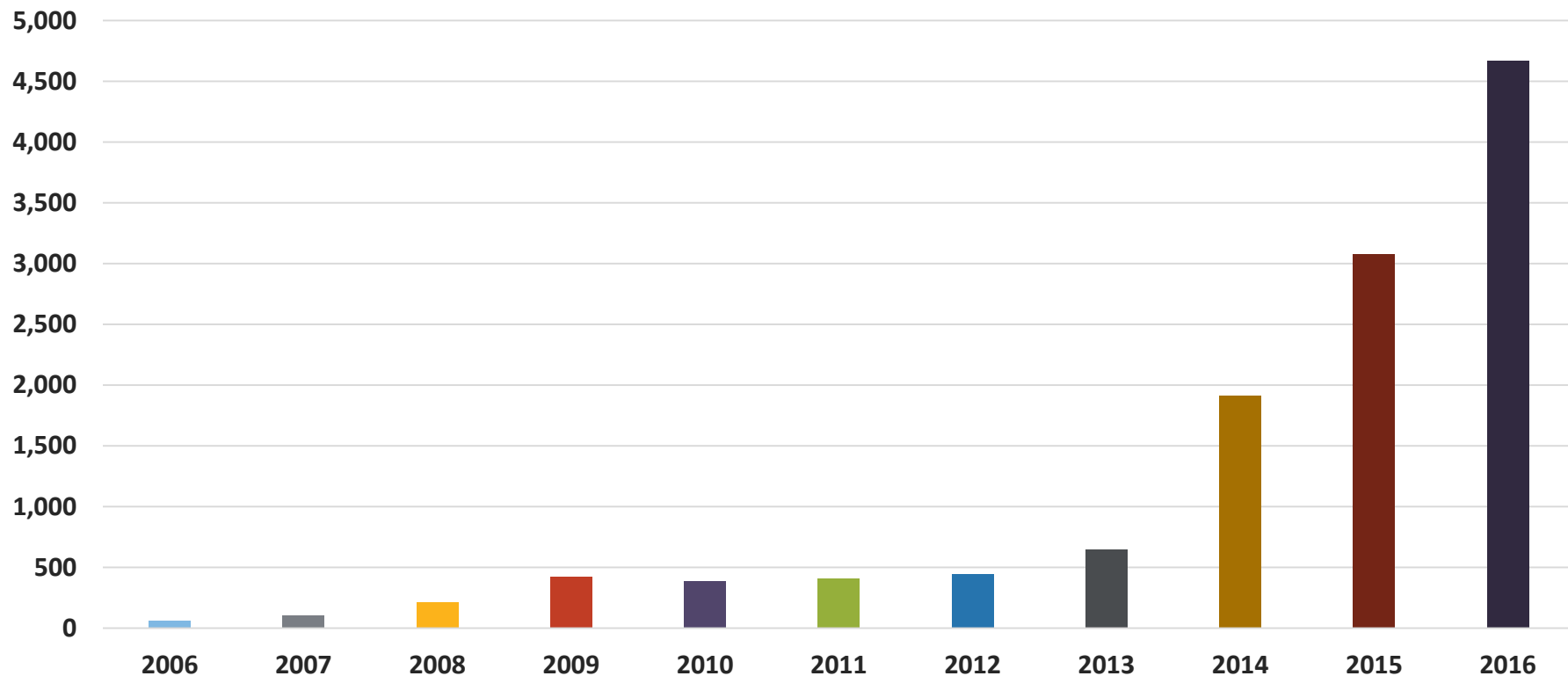
Quantity of Games Released

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



GAME RELEASES - STEAM

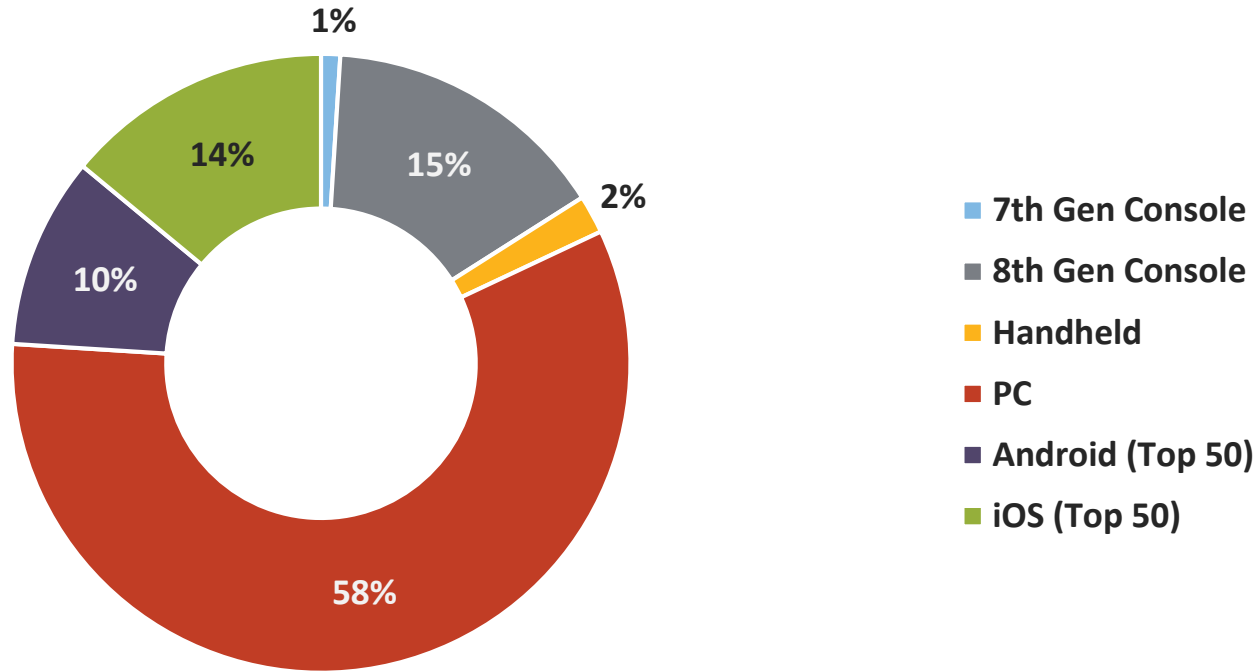
Quantity of Steam Games Released per Year



GAMES RELEASED

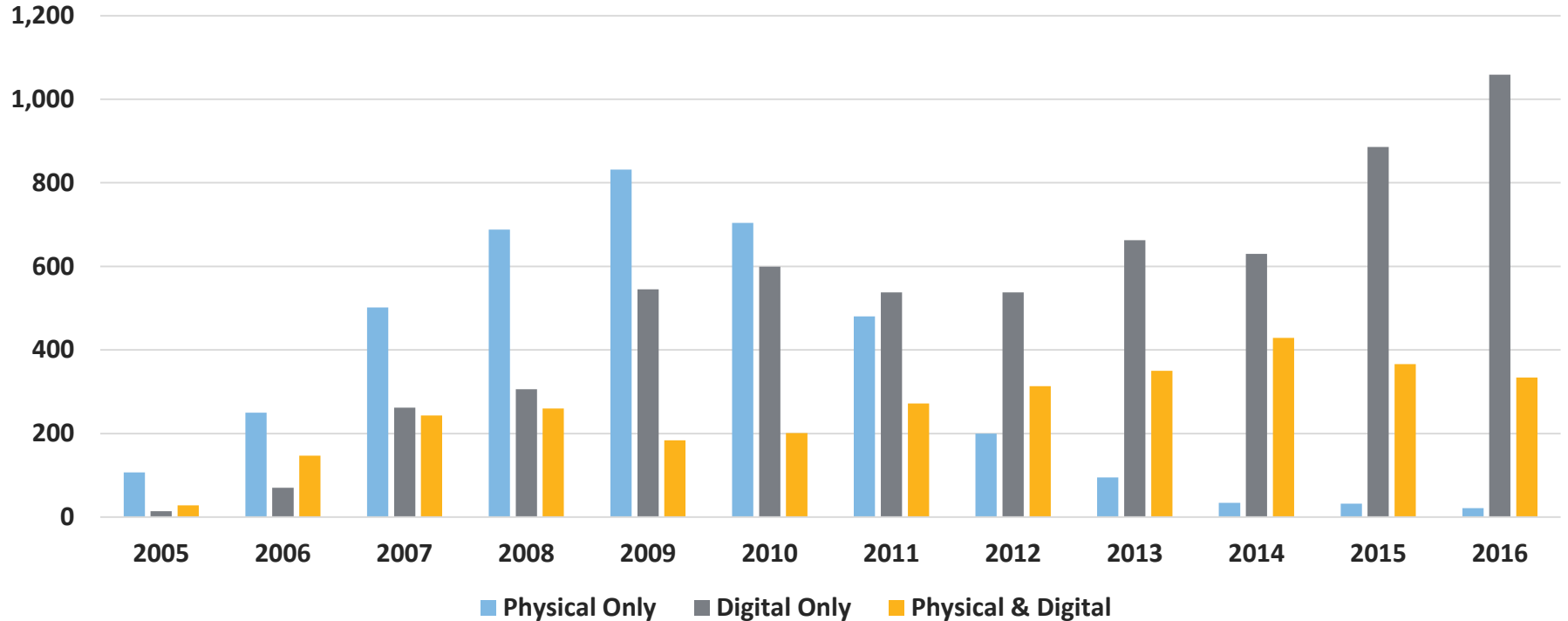


Games Released by % of Market
[2016][Retail & Digital Platform Title Releases][USA]

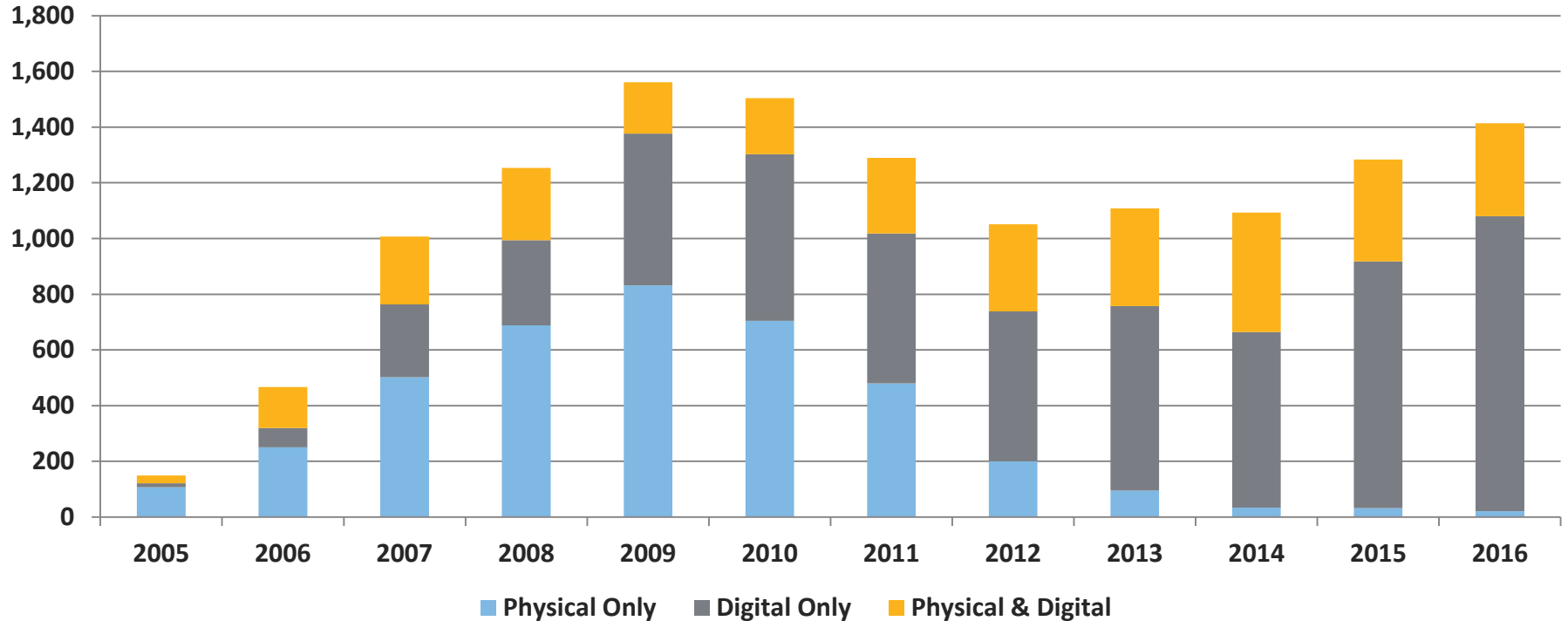


DIGITAL RELEASES

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

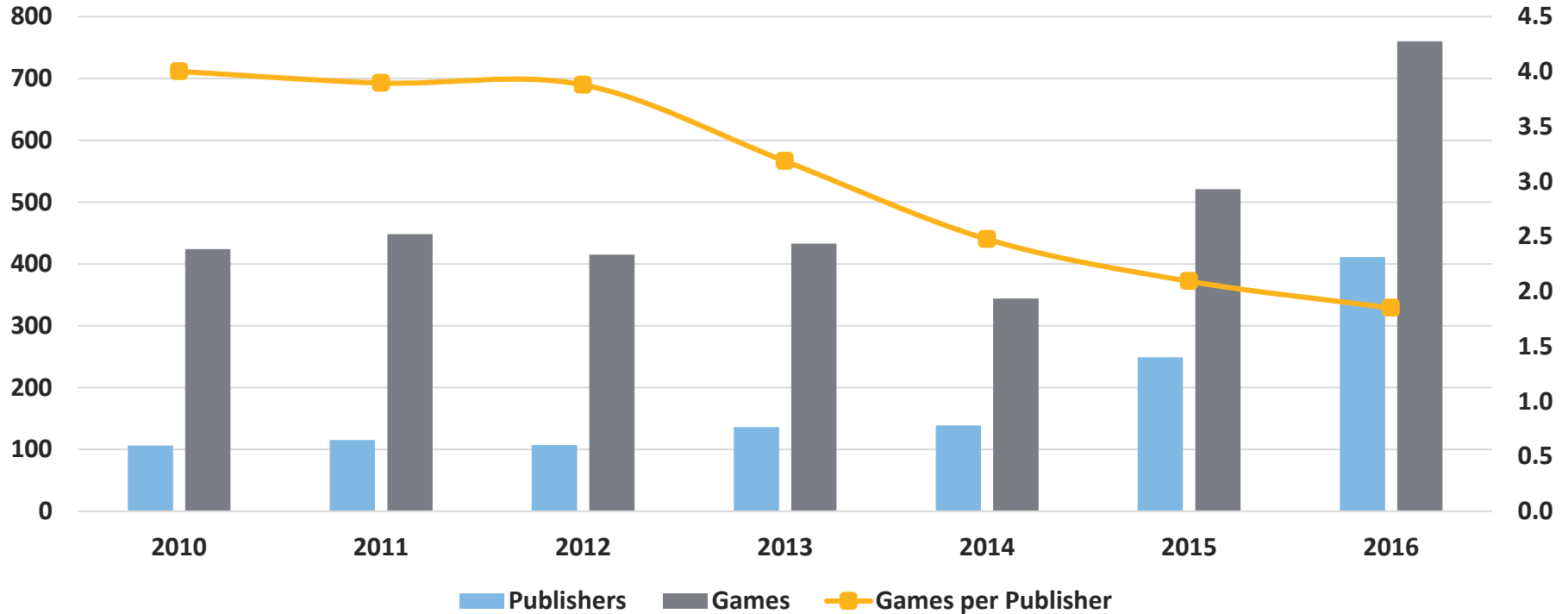


Quantity of Digital and Retail Console Games Over Time 7th & 8th Generation Consoles & Handhelds in the USA

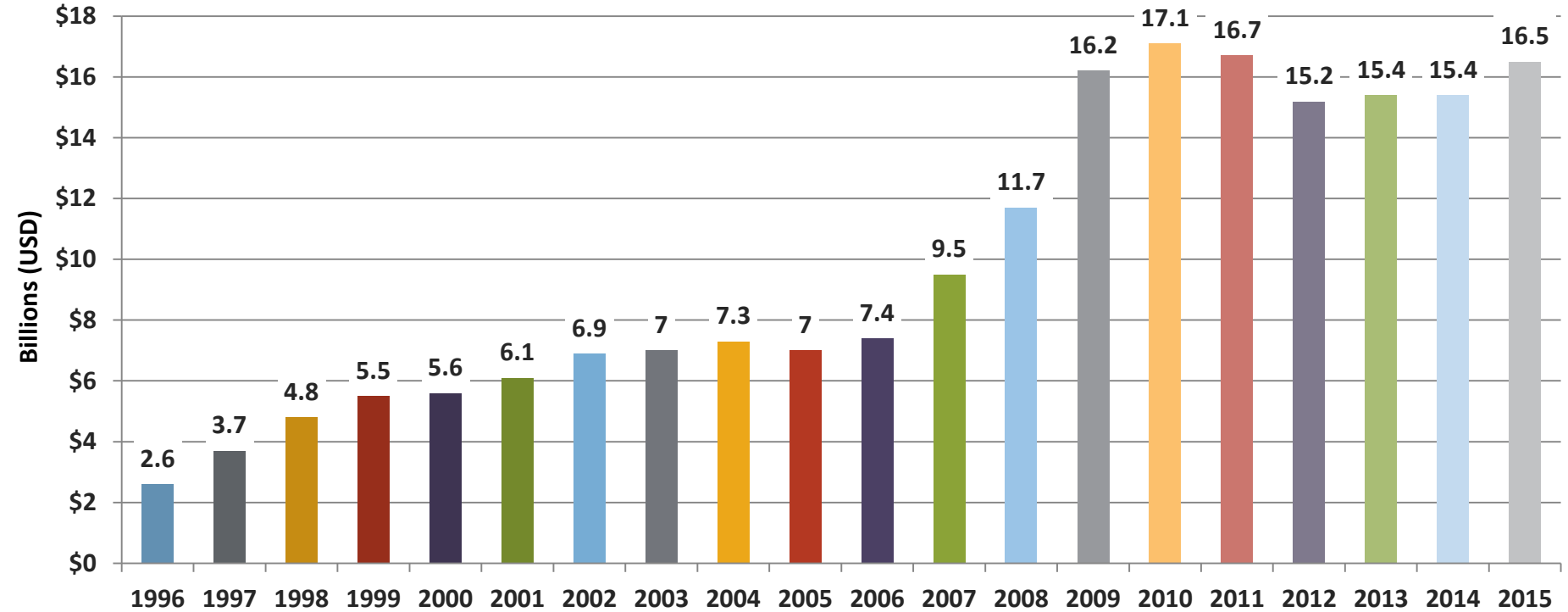


PUBLISHER RELEASES

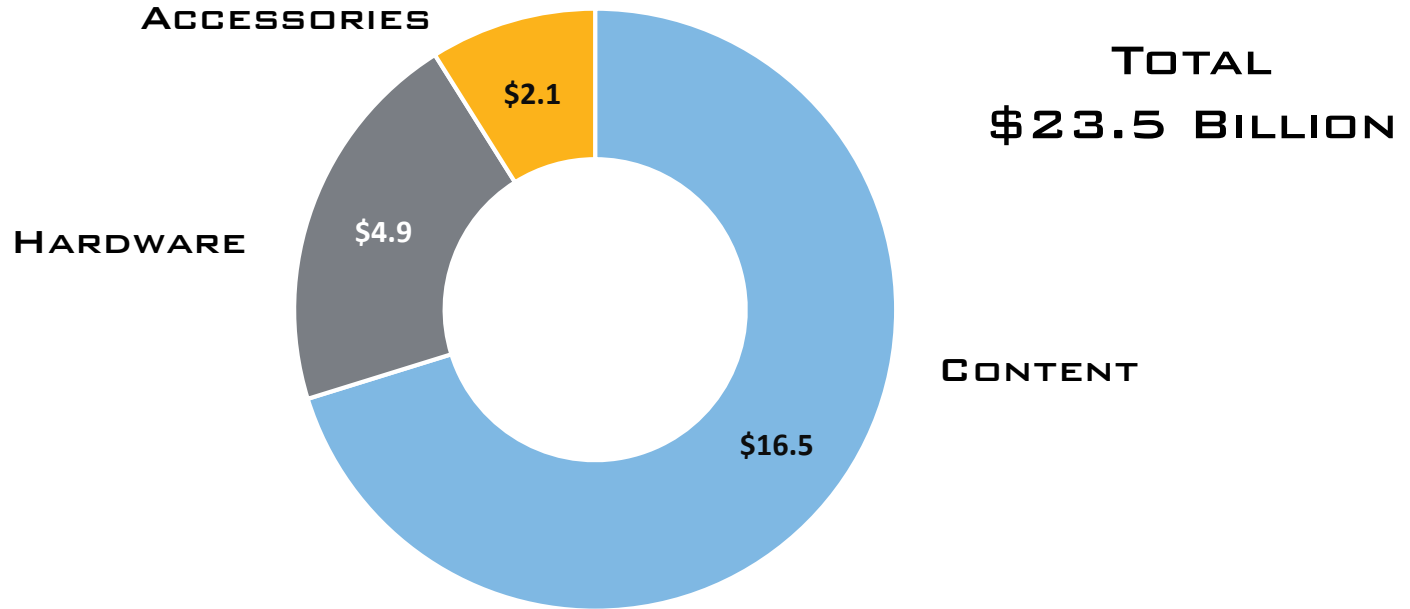
Quantity of Console Games Per Publisher
[PlayStation & Xbox / Core Audience Consoles][2010-2016][NA]



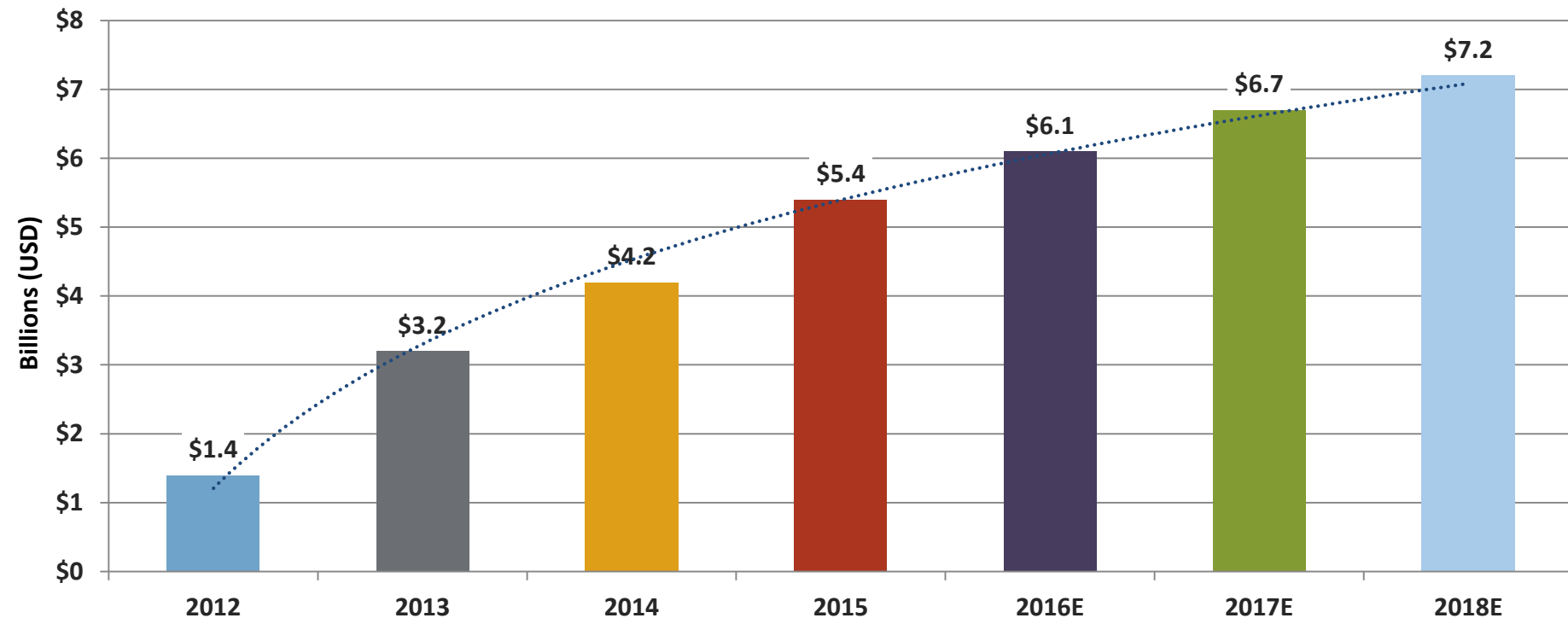
US Video Game Sales Billions of Dollars



Total Consumer Spend on Games Industry [Billions][NA][2015]

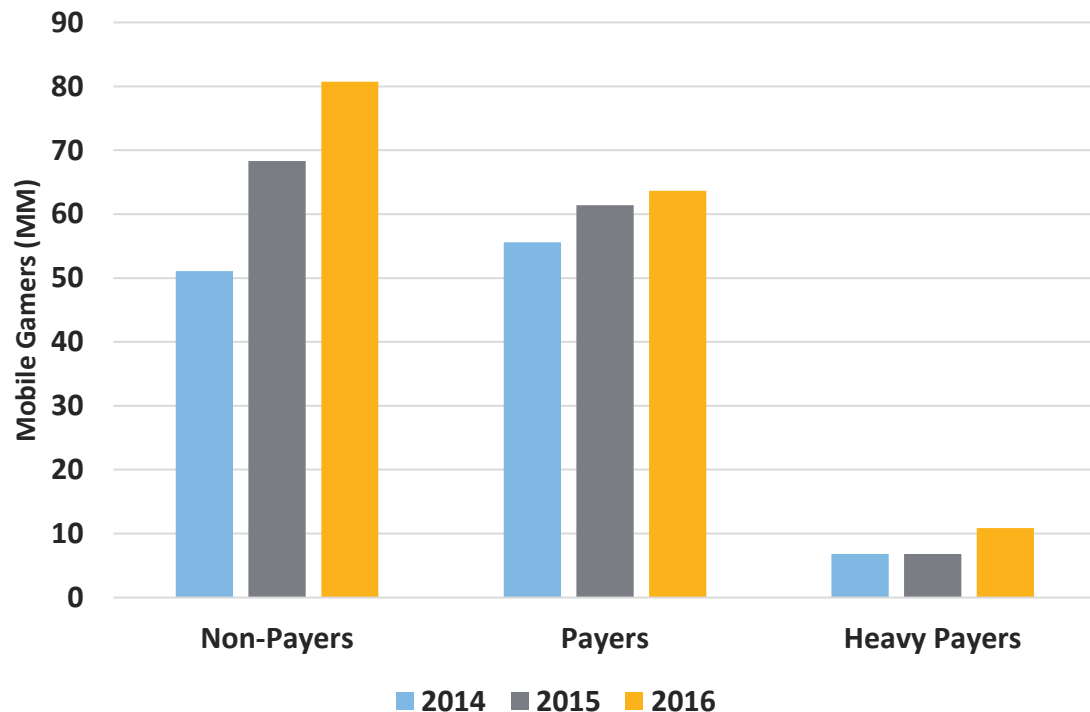


Mobile Game Revenue by Year [iOS and Andriod][NA]



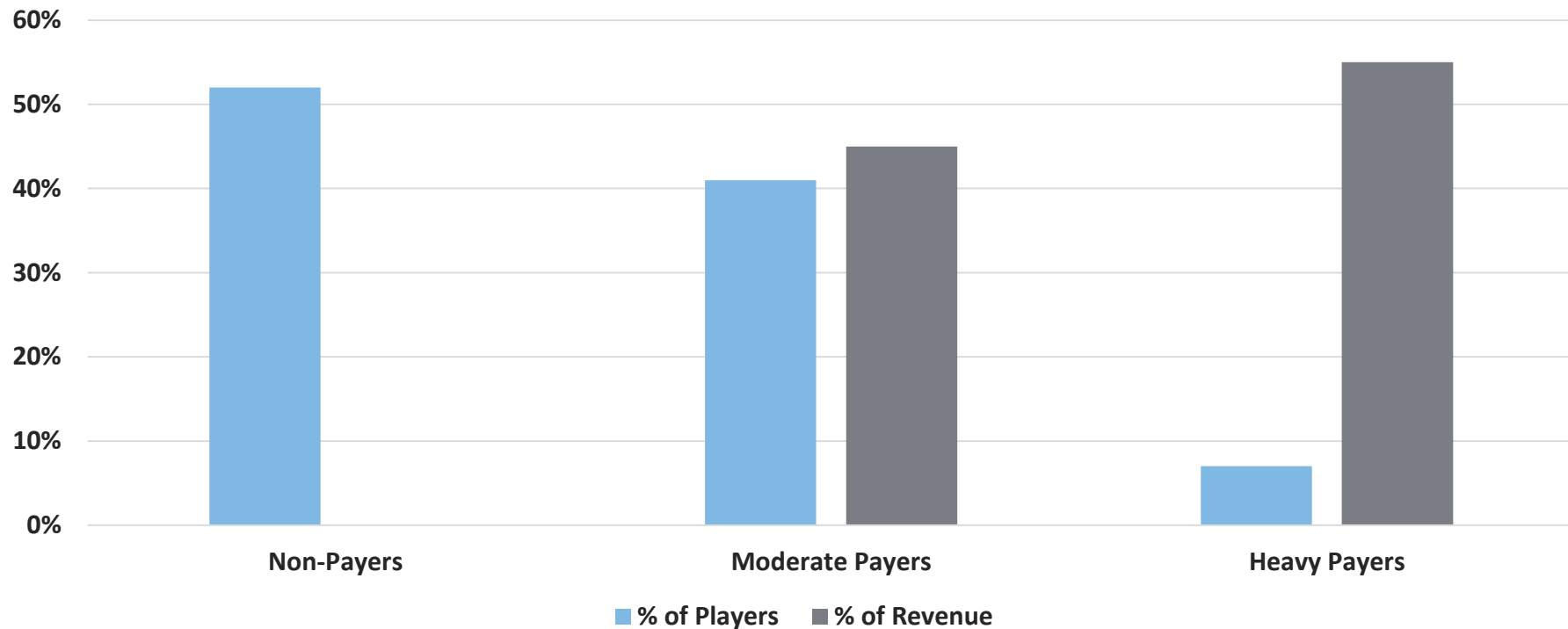
MONETIZING MOBILE

Mobile Gaming Payer Segmentations [2014-2016][NA][Active Mobile Gamers][Age 18+]



PLAYER SEGMENT [total yearly spend]	AVG. YEARLY SPEND		
	2014	2015	2016
NON-PAYERS [\$0]	\$0	\$0	\$0
PAYERS [\$0.01 - \$99.99]	\$33.03	\$44.06	\$42.80
HEAVY PAYERS [over \$100]	\$293.70	\$396.15	\$310.56

Mobile Gamers Revenue Breakdown [Active SmartPhone/Tablet Gamers][NA/Europe]



MONETIZING MOBILE

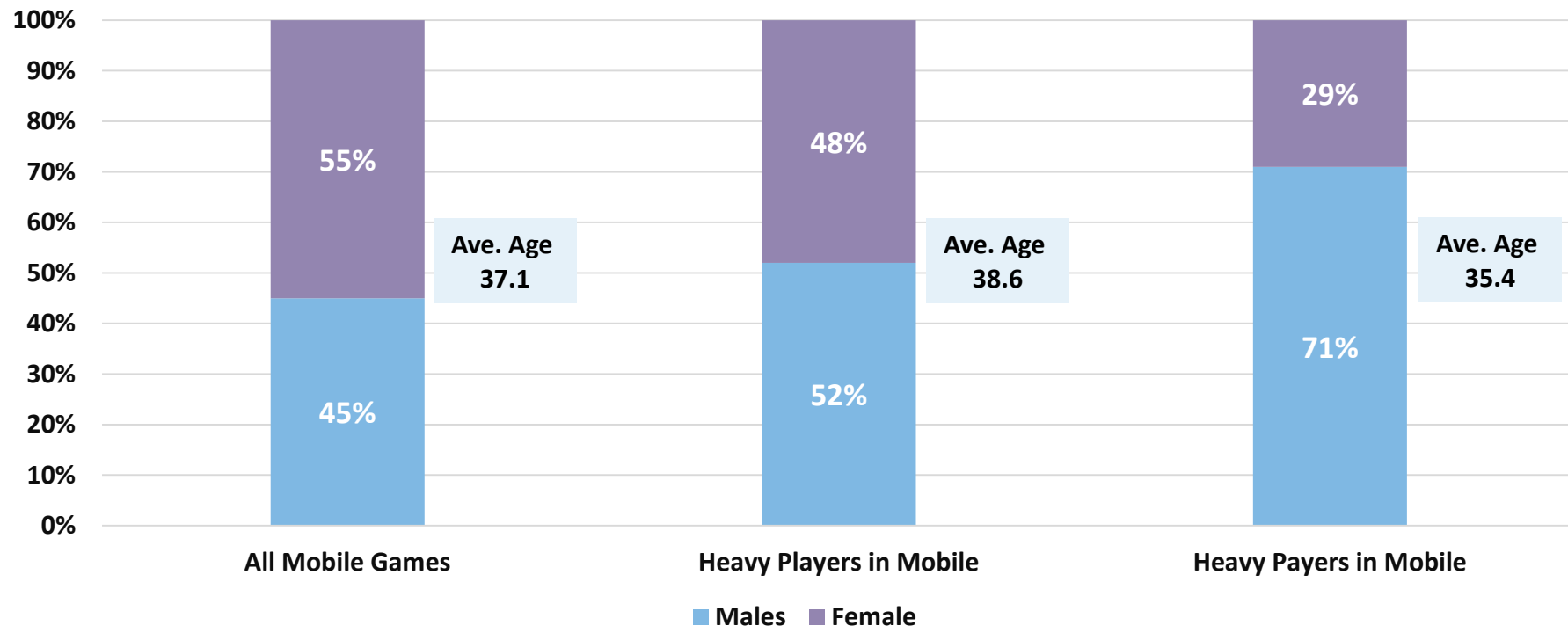


HEAVY OVERLAP BETWEEN PLAYERS AND PAYERS

[NA] [ACTIVE MOBILE GAMERS] [AGE 18+]

	NON-PAYER \$0/YEAR	PAYER \$0.99-\$100/YEAR	HEAVY PAYER >\$100/YEAR
LIGHT PLAYER < 1 HOUR/WEEK	26.8M	4.6M	0.3M
MODERATE PLAYER 1-5 HOURS/WEEK	34.1M	31.4M	4.3M
HEAVY PLAYER > 5 HOUR/WEEK	19.7M	27.6M	6.4M

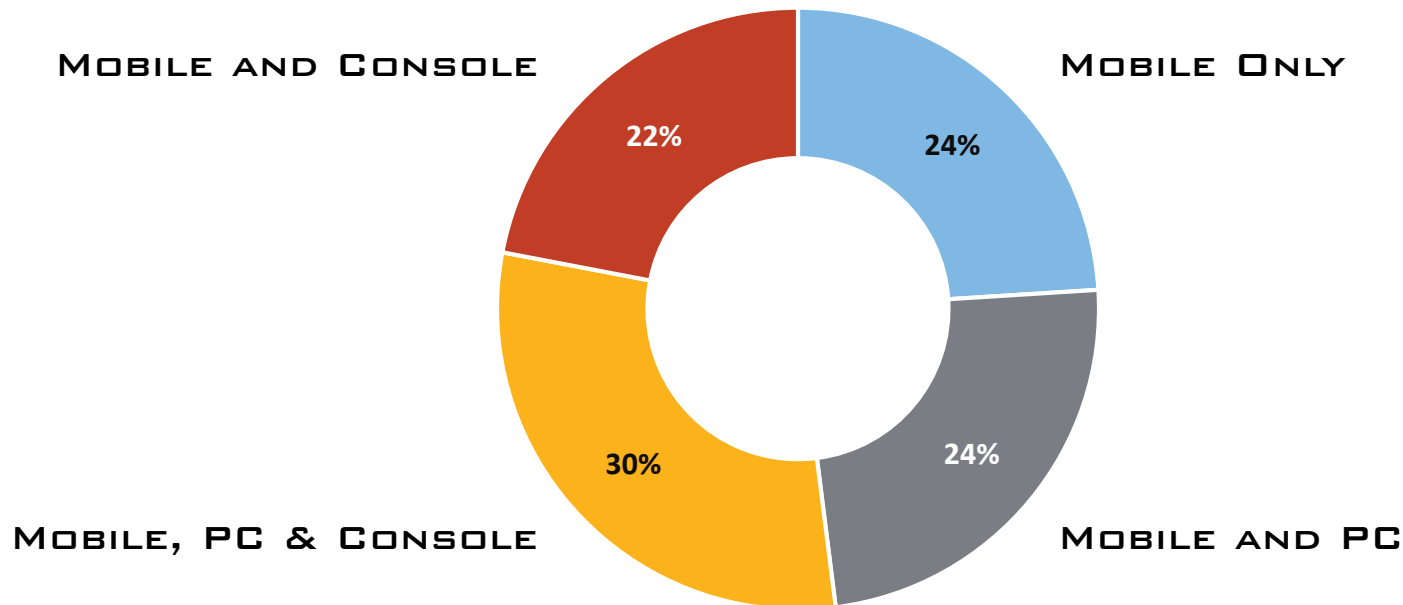
Heavy Players and Heavy Payers by Gender [2016][NA][Active Mobile Gamers][Age 18+]



CROSS PLATFORM OWNERSHIP

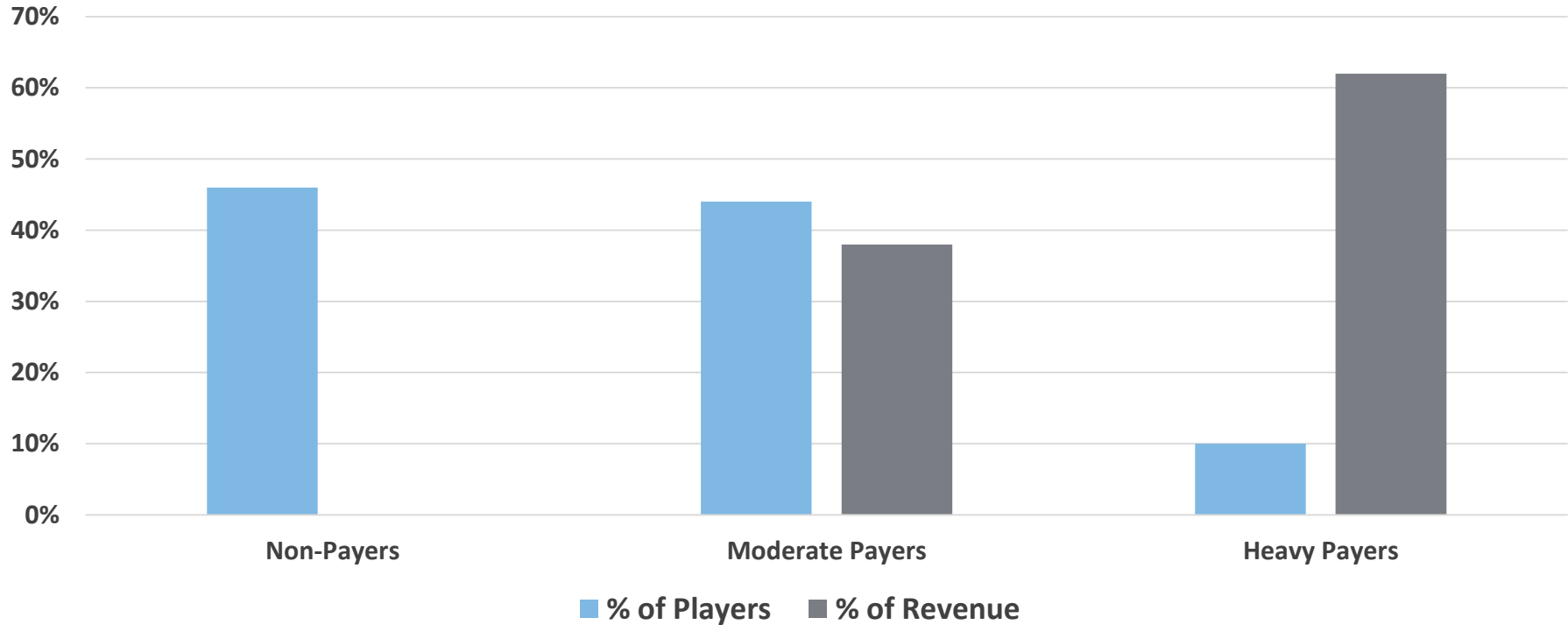
Mobile Cross-Platform Ownership

[NA Mobile Gamers][Age 18+]

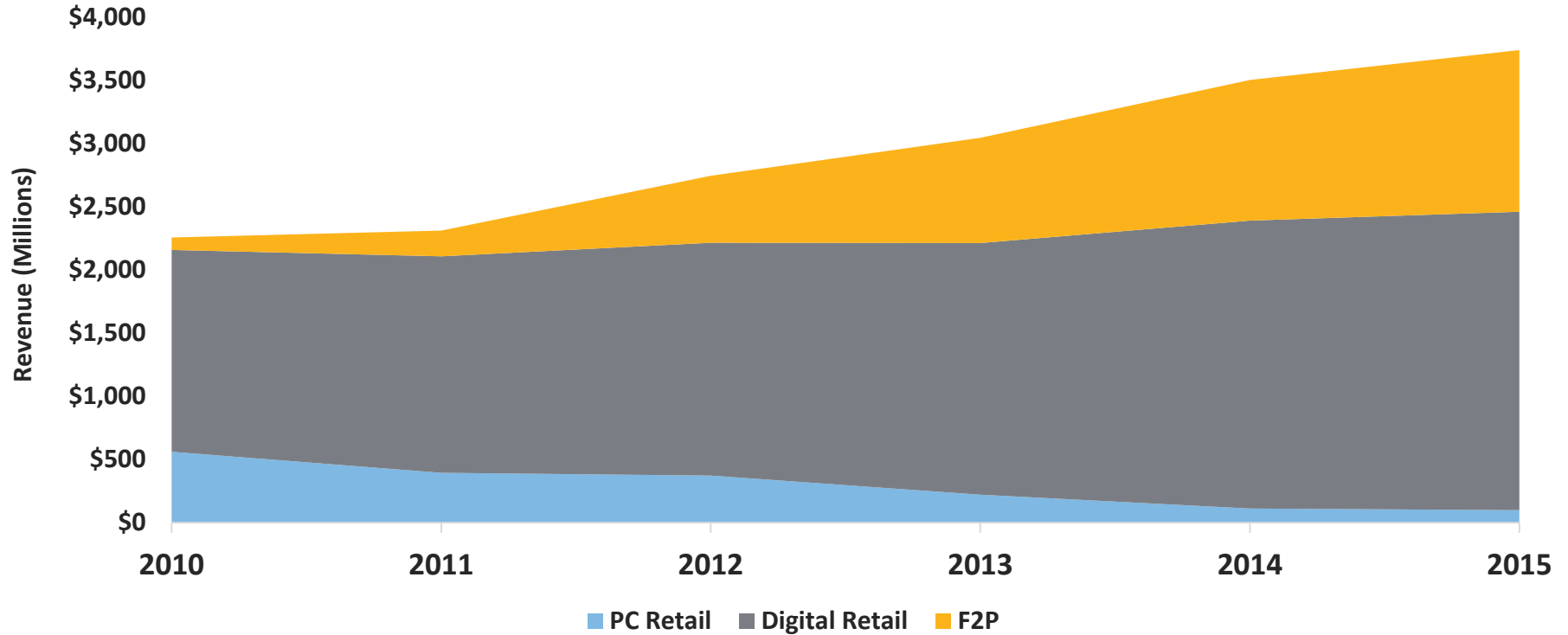


MONETIZING F2P PC

PC F2P Spend Segmentation [NA][PC][2015]



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



BILLION DOLLAR GAMES



The Elder Scrolls V



Console/PC



Premium

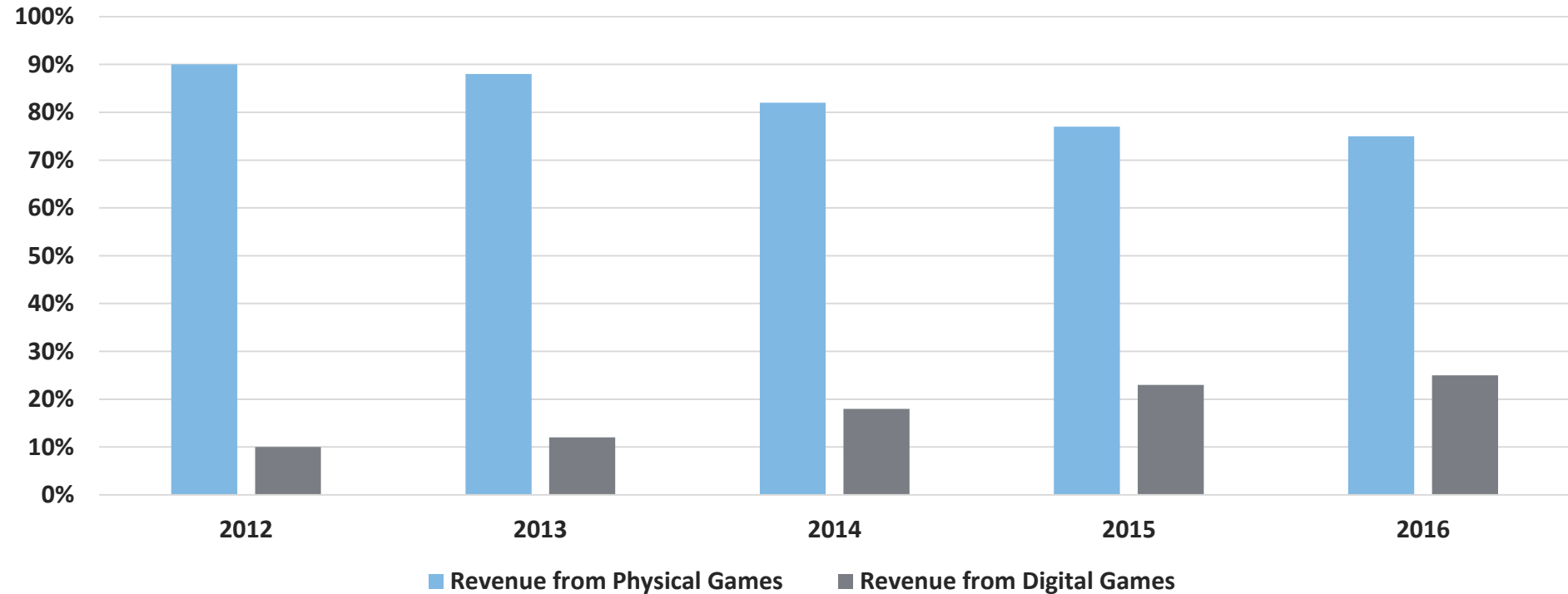
Free to Play



Mobile

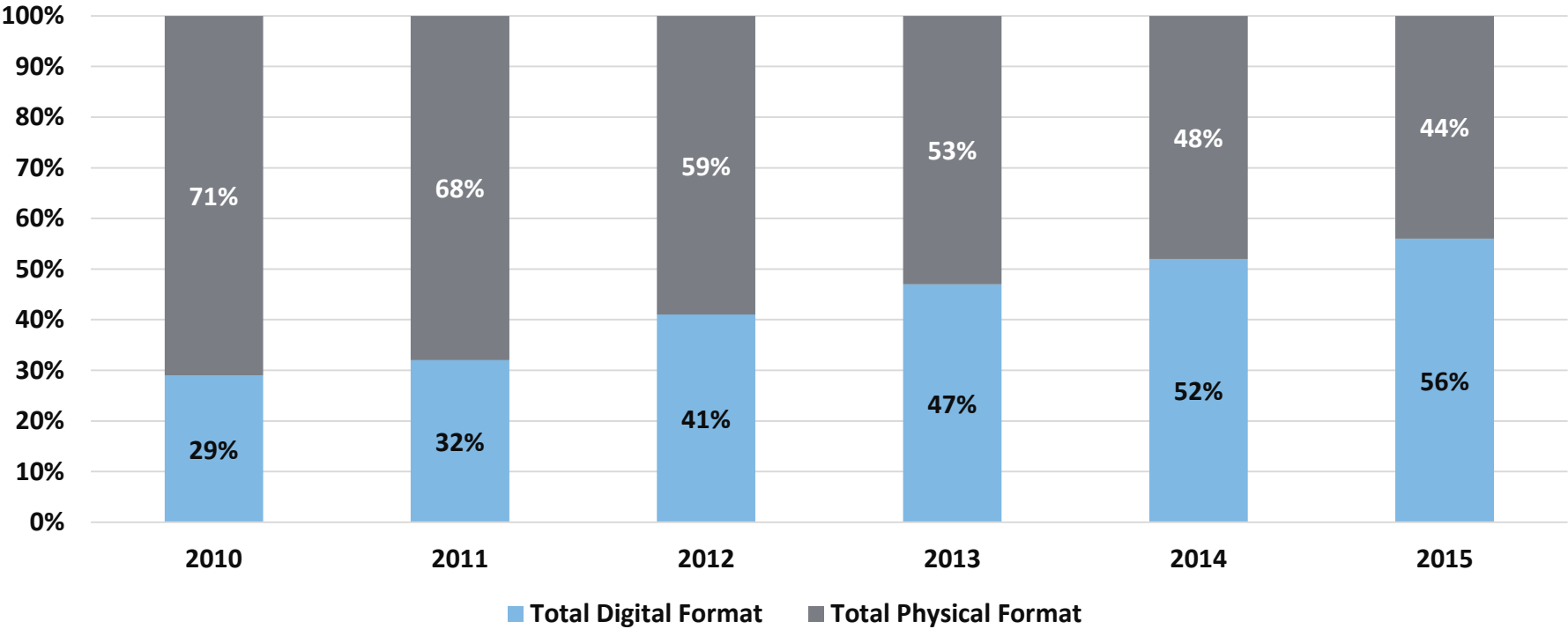
PHYSICAL/DIGITAL RELEASES

Revenue Split of Games Released Simultaneously in Physical & Digital Formats [PlayStation & Xbox / Core Audience Consoles][2012-2016][NA]



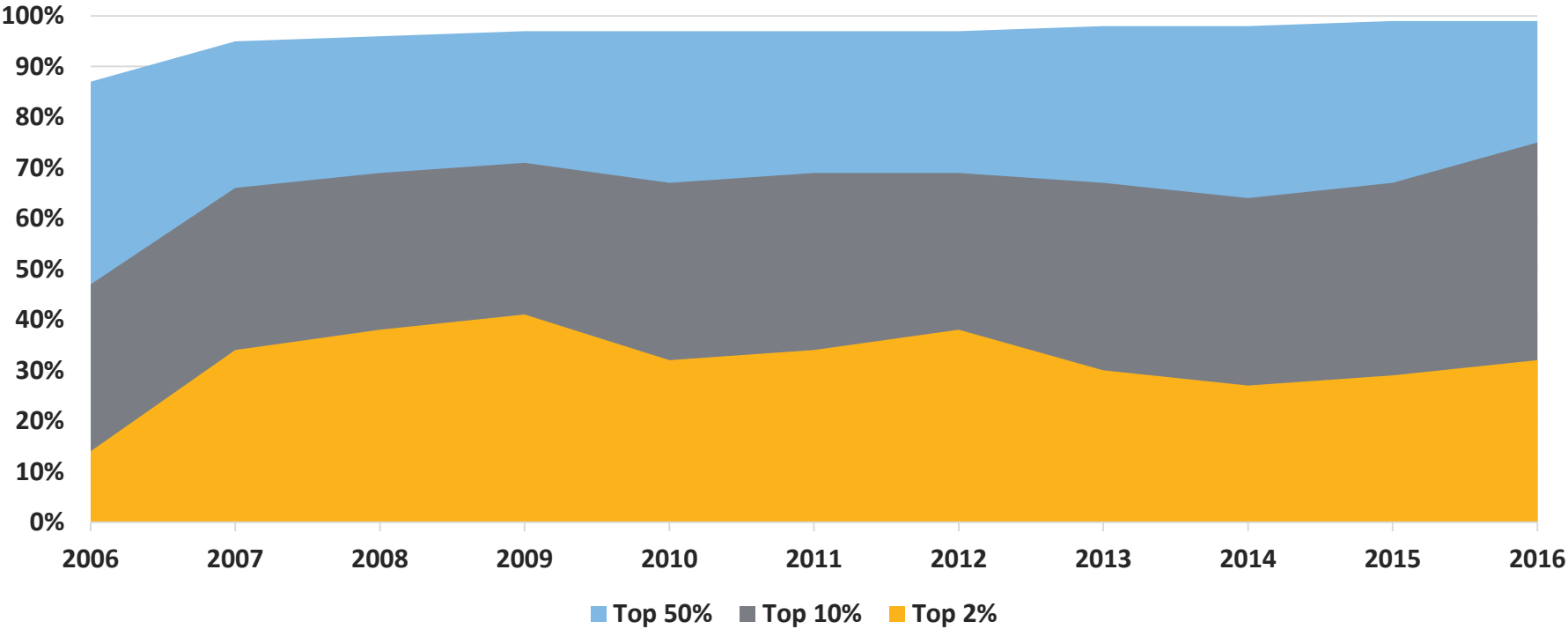
DIGITAL/PHYSICAL SALES

Digital and Physical Sales
[2010-2015][NA]

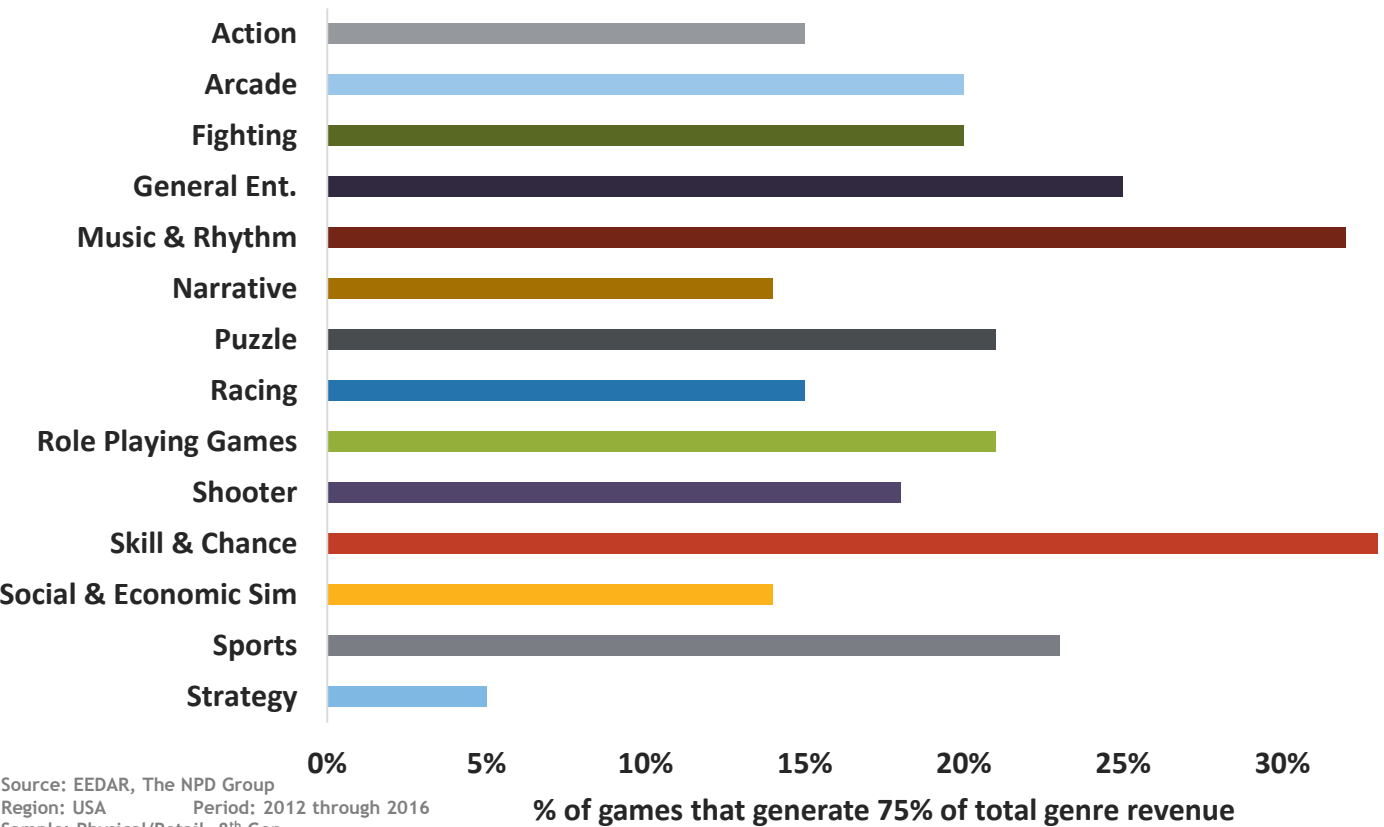


CONSOLE REVENUE

Percentage of Revenue Generated by Top Games
[Physical+Digital][Console][NA][Excludes DLC]



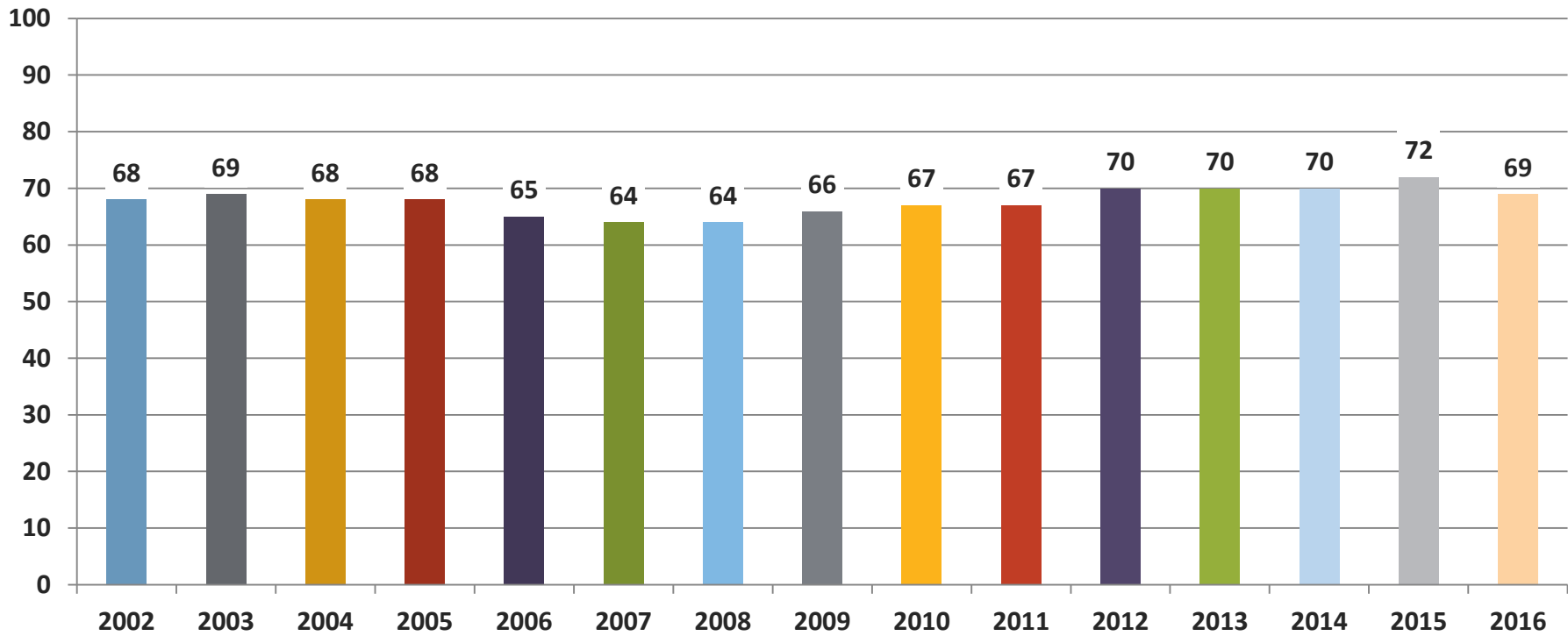
RETAIL REVENUE TITLE SHARE



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

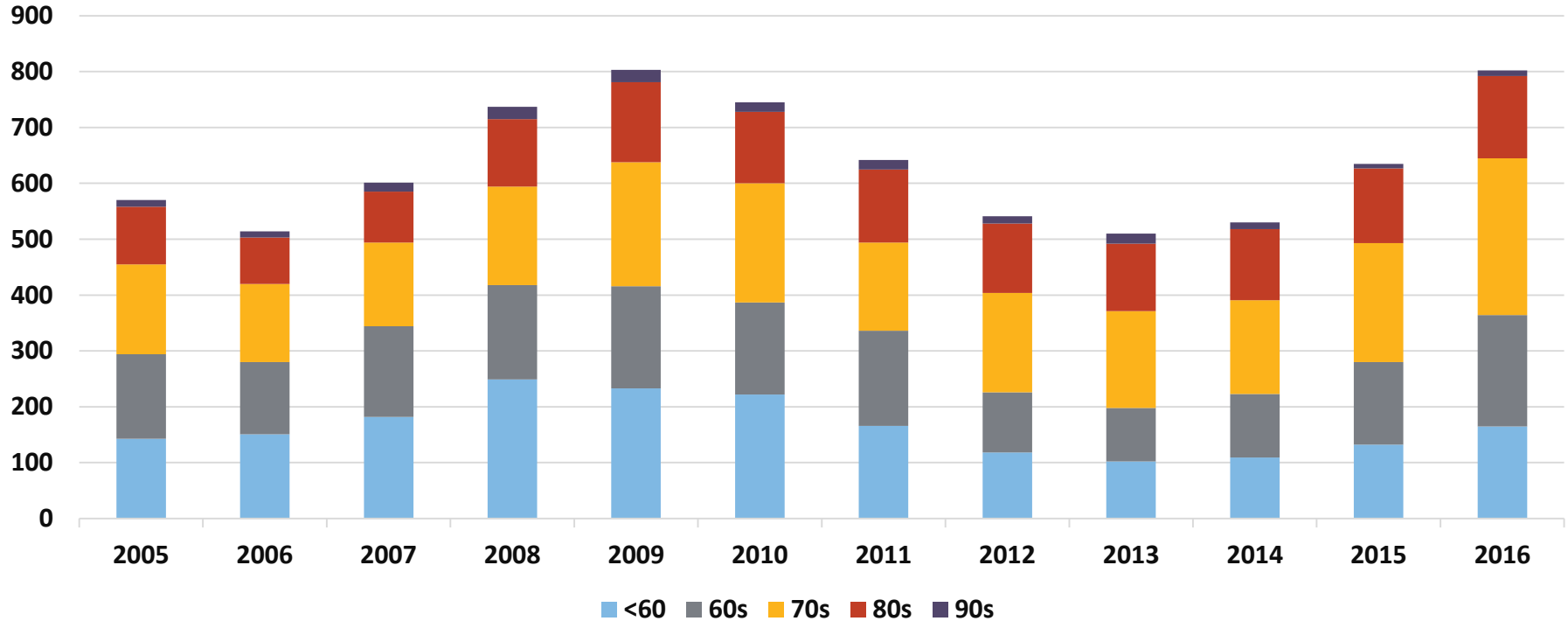
Source: EEDAR, The NPD Group
Region: USA Period: 2012 through 2016
Sample: Physical/Retail, 8th Gen
Units: Distinct Titles

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



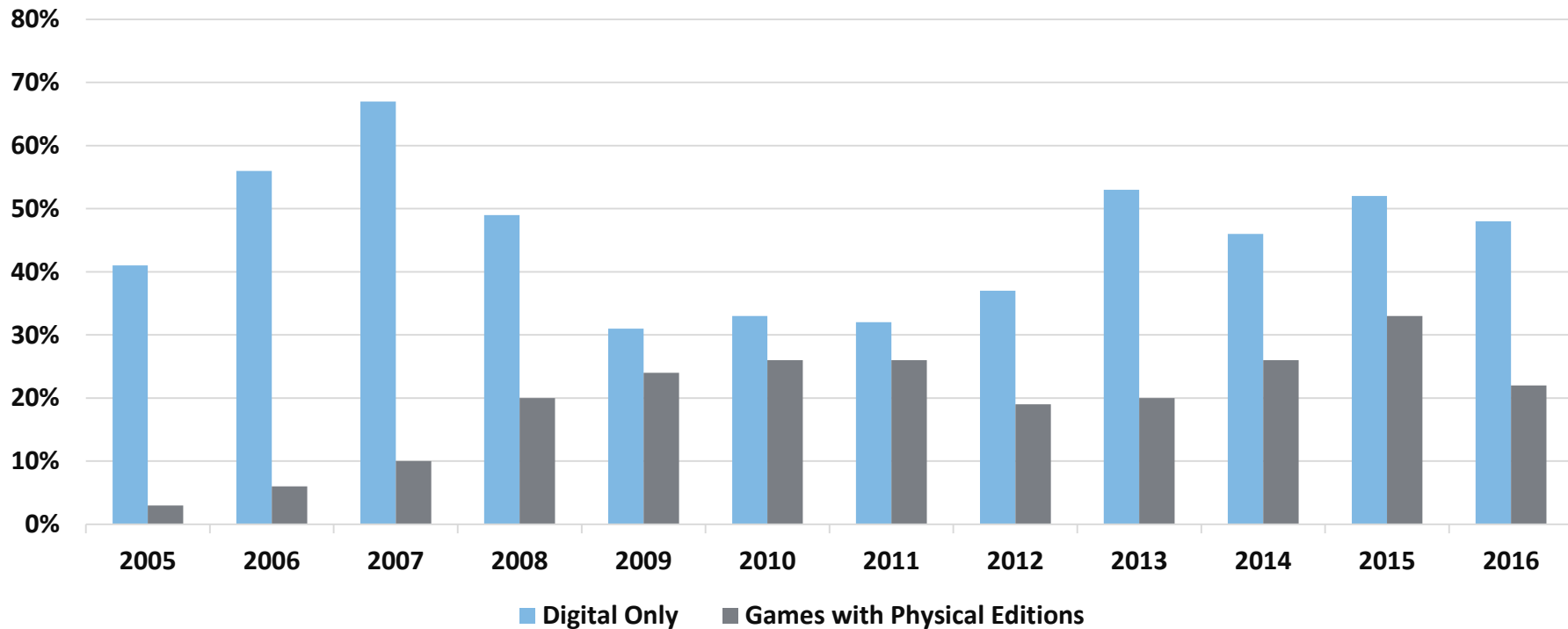
REVIEW SCORES

Quantity of Games Receiving Review Scores
[2005-2016][Retail & Digital Console][NA]



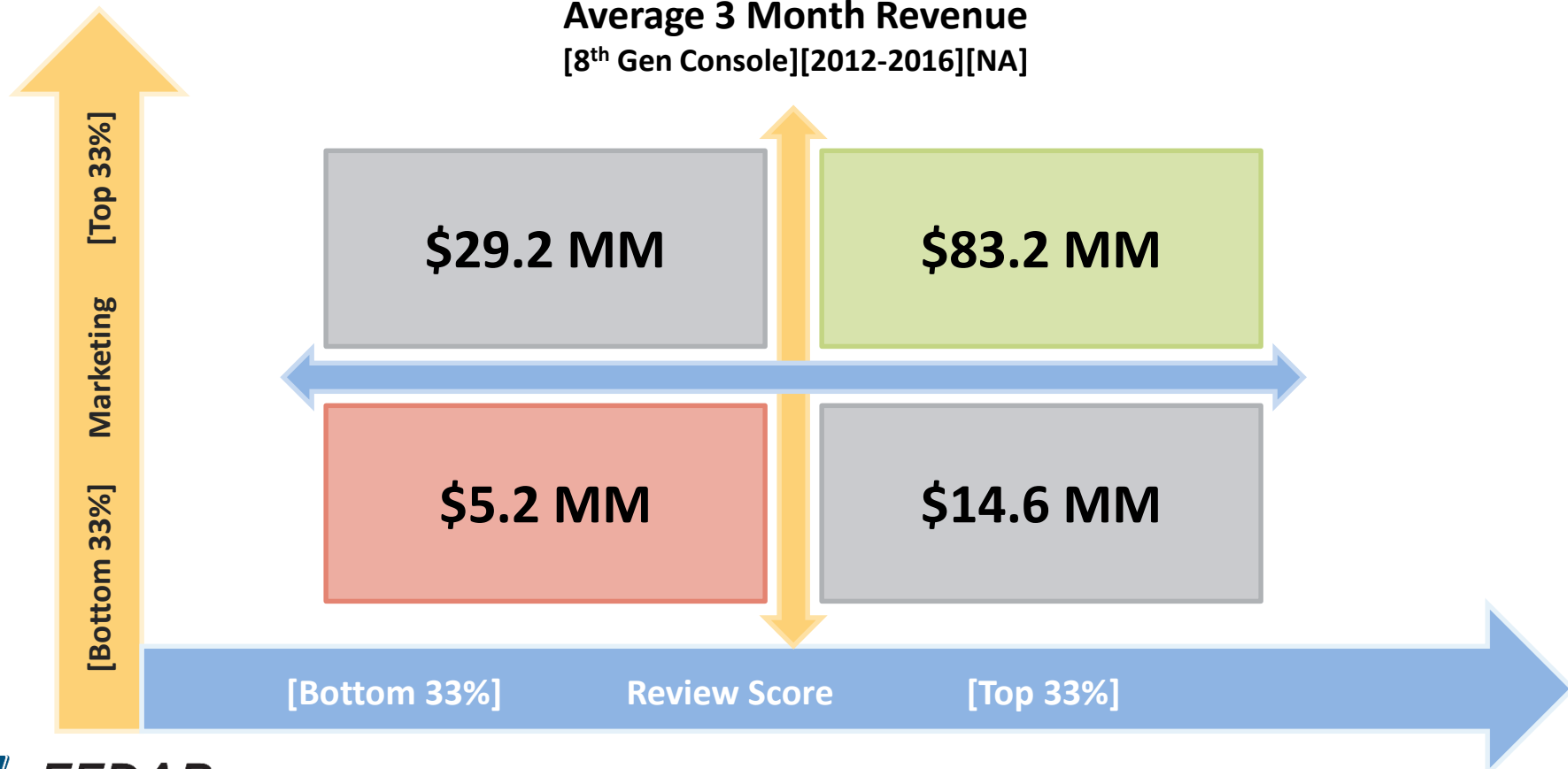
REVIEW SCORES

% of Console Games Not Receiving A Review Score
[2005-2016][Retail & Digital Console][NA]

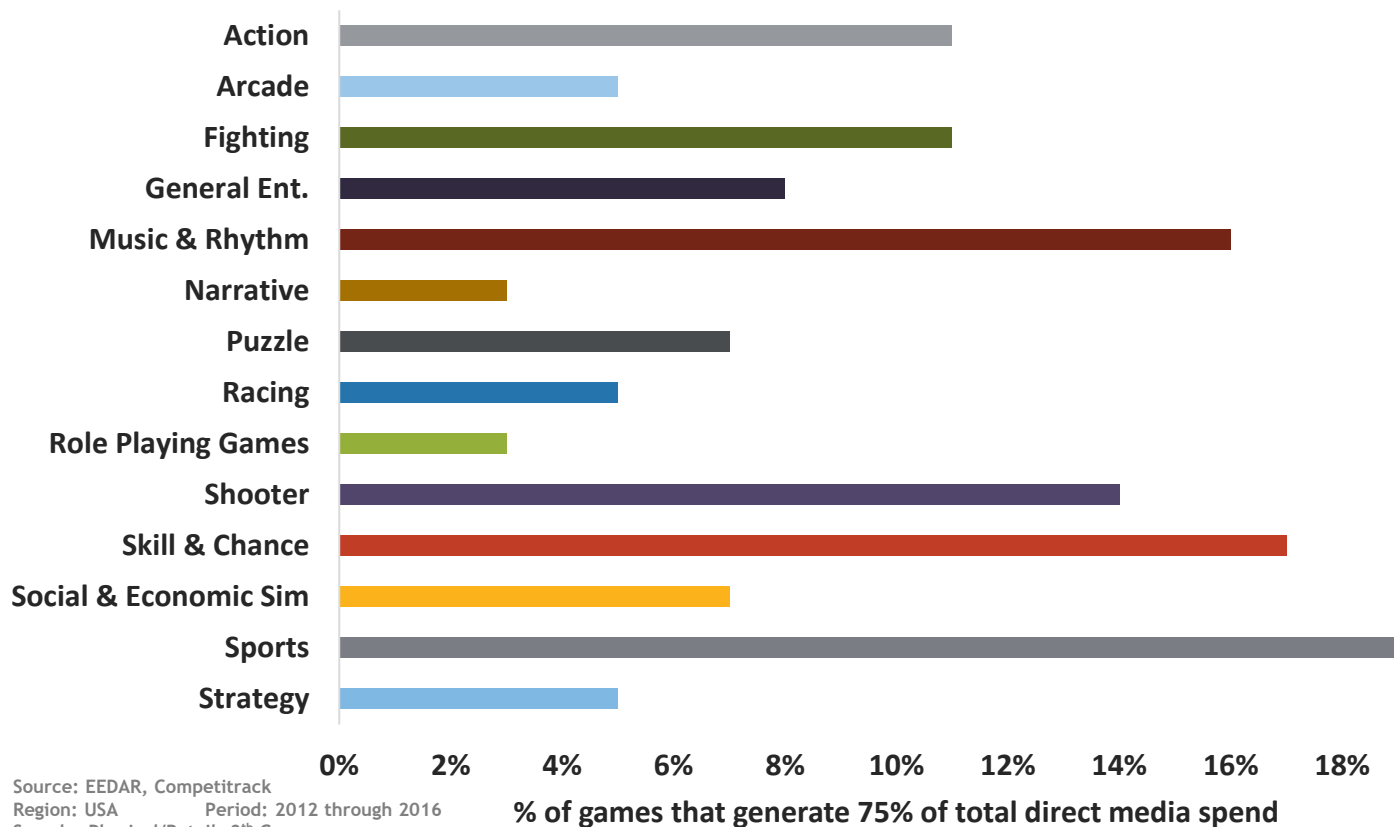


MARKETING VS. GAME QUALITY

Average 3 Month Revenue
[8th Gen Console][2012-2016][NA]



DIRECT MEDIA SPEND SHARE



9%
OF RETAIL TITLES
ACCOUNT FOR
75%
OF DIRECT MEDIA
SPEND SINCE 2012.

Source: EEDAR, Competitrack
Region: USA Period: 2012 through 2016
Sample: Physical/Retail, 8th Gen
Units: Distinct Titles



TOP MOTIVATIONS FOR MOBILE GAMING

#1

Pass the Time

#2

Cheap or Free Entertainment

#3

Playable Anywhere

#4

Easy to Pick Up or Put Down

#5

Convenient



TOP FACTORS AFFECTING DISCOVERY

2015

2016

MOST USED	Social Sources	Ads in Apps, Games, and Social Media
	Ads in Apps, Games, and Social Media	Social Sources
	Storefront Charts/Featured	Ad on Website
		Storefront Charts/Featured
LEAST USED	Ads Not Consumed on Device (Print, TV)	Ads Not Consumed on Device (Print, TV)

ENGAGEMENT



TOP FACTORS AFFECTING ENGAGEMENT

	2015	2016
KEY FACTORS	Genre	Price
	Price	Genre
TOP FACTORS	User Reviews/Star Rating	User Reviews
	Graphics	Theme/Graphics
	Recommended by Others	Recommendations
BOTTOM FACTORS	Storefront Elements	Storefront Elements (Featured, Top Spot, Trailers)



TOP FACTORS LEADING TO CHURN

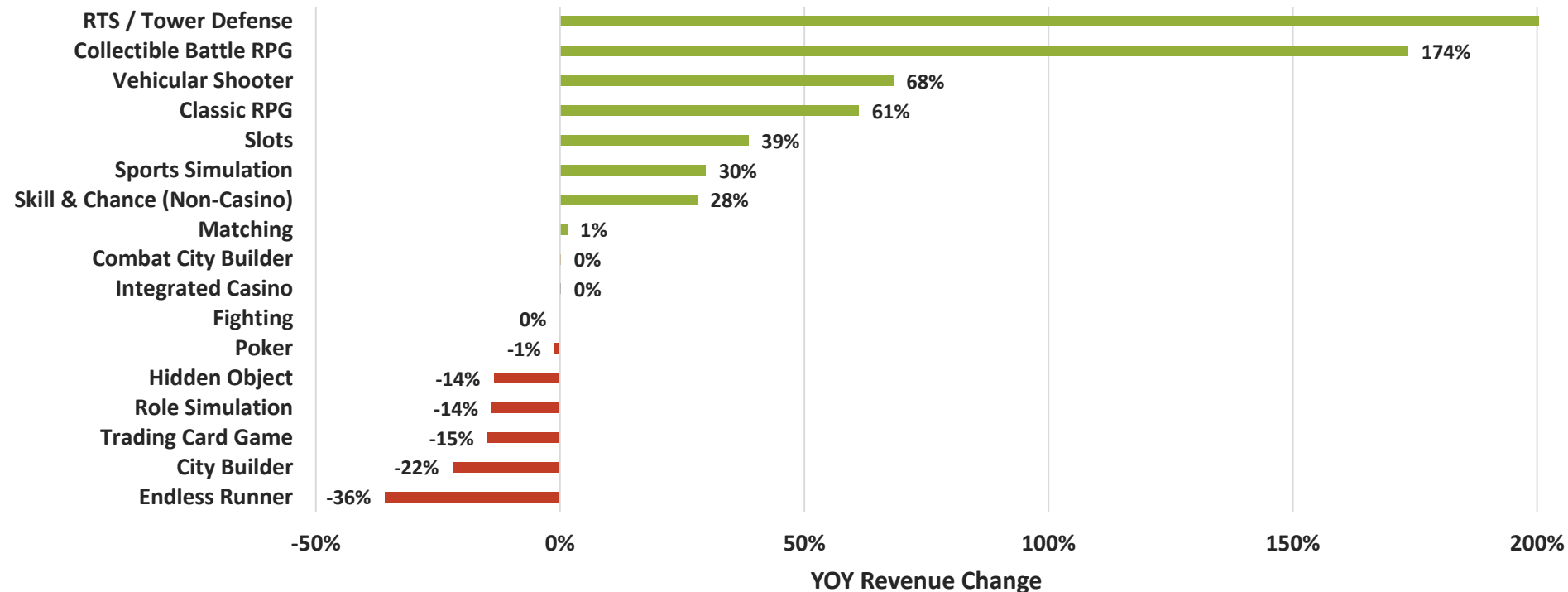
2015

2016

KEY FACTOR	2015	2016
TOP FACTORS	Loss of Interest	General Loss of Interest / Boring
	Fails to Meet Expectations	Had to Pay Real Money to Progress/Compete
BOTTOM FACTORS	Too Much Friction	Game Was Not What Expected
	Social Factors	Social Factors
	Customer Service Issues	Customer Service Issues

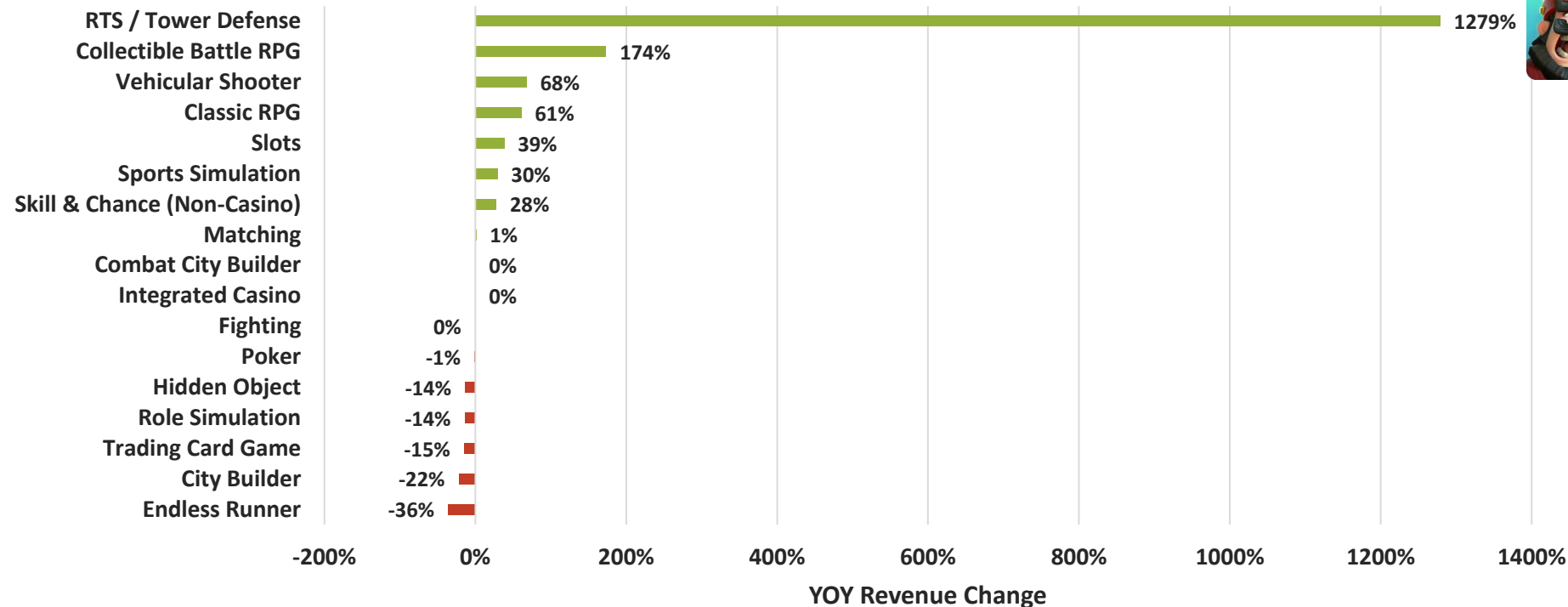
MOBILE OPTIMIZED GENRES

Year On Year Revenue Change by Genre [Past 4 Quarters][Western Markets][Top 200 Grossing][iOS]



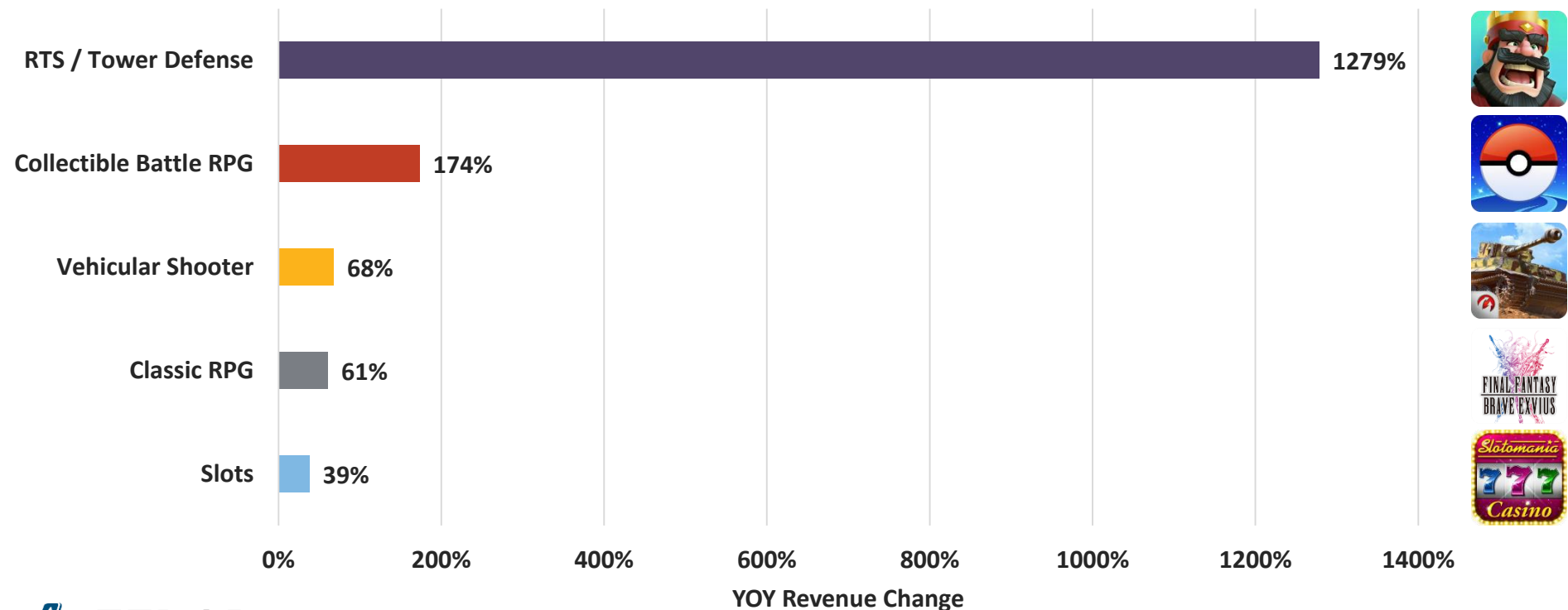
MOBILE OPTIMIZED GENRES

Year On Year Revenue Change by Genre [Past 4 Quarters][Western Markets][Top 200 Grossing][iOS]



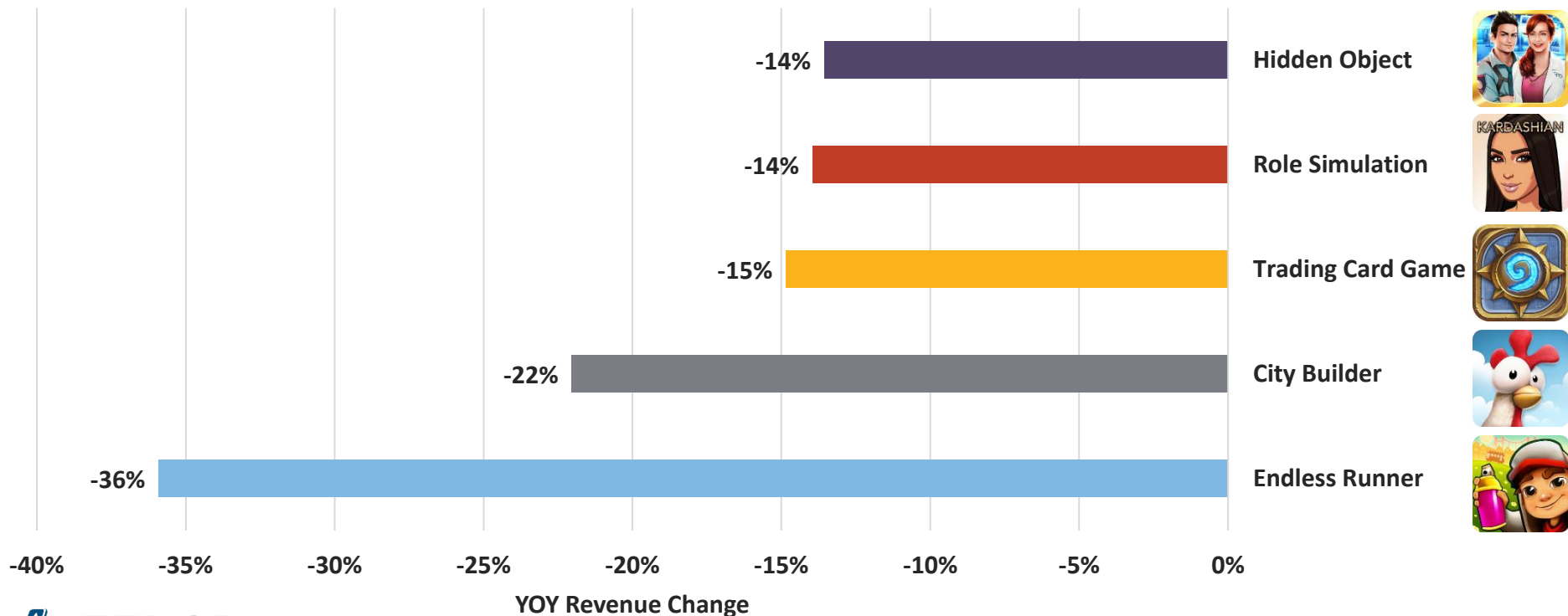
MOBILE OPTIMIZED GENRES

Year On Year Revenue Change by Genre
[Past 4 Quarters][Western Markets][Top 200 Grossing][iOS]



MOBILE OPTIMIZED GENRES

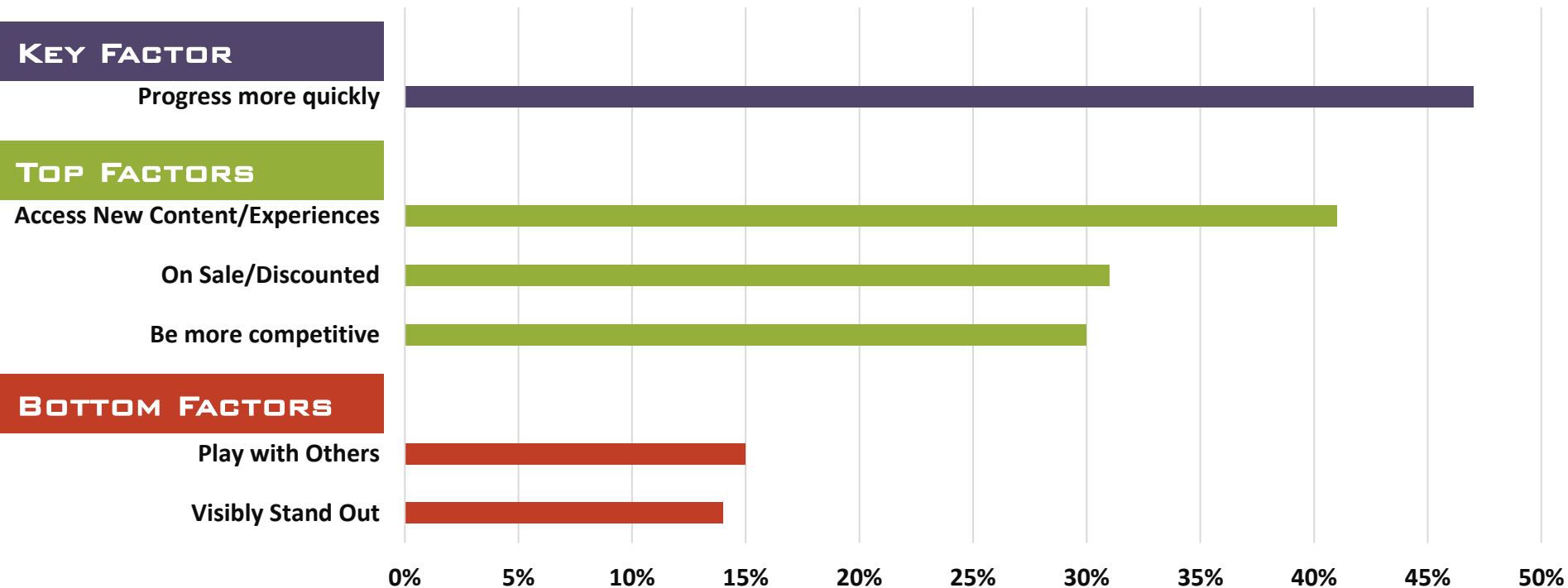
Year On Year Revenue Change by Genre [Past 4 Quarters][Western Markets][Top 200 Grossing][iOS]



MOBILE SPENDING

When are you most likely to consider spending money on a game?

[NA] [Active Mobile Gamers] [Age 18+]



MOBILE GENRES



(NOT PAID) TOP 5 MOST PLAYED MOBILE GENRES

	TOTAL MARKET	NON-PAYER	PAYERS	HEAVY PAYERS
		\$0 / YEAR	\$0.99-\$100 / YEAR	(>\$100 / YEAR
1	Brain Puzzle			
2	Matching Puzzle			
3	Skill & Chance			
4	Casino		Arcade	Casino
5	Arcade		Casino	Arcade

*Feb 2017

KICKSTARTER

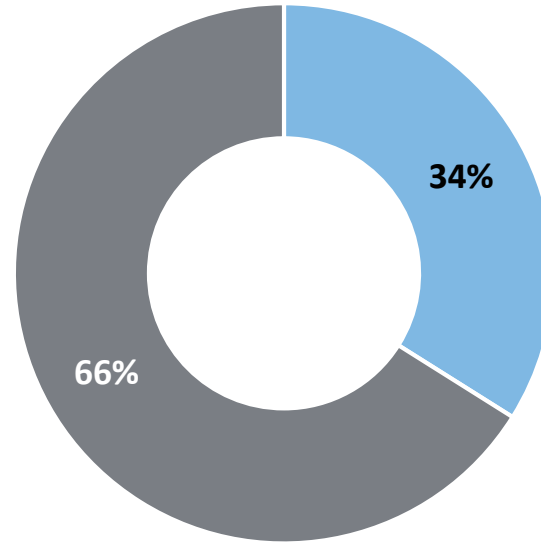
All Categories

\$2.853 Billion Dollars Pledged
119,068 Successfully Funded Projects
12.36 Million Total Backers
3.94 Million Repeat Backers

GAMES

29,216 Successfully Funded Projects
\$593.8 Million Dollars Pledged
\$535.4 Million Successful Dollars
\$52.8 Million Unsuccessful Dollars
\$5.6 Million Live Dollars

Success Rate of Kickstarter Projects Game Category [Feb 6th 2017]

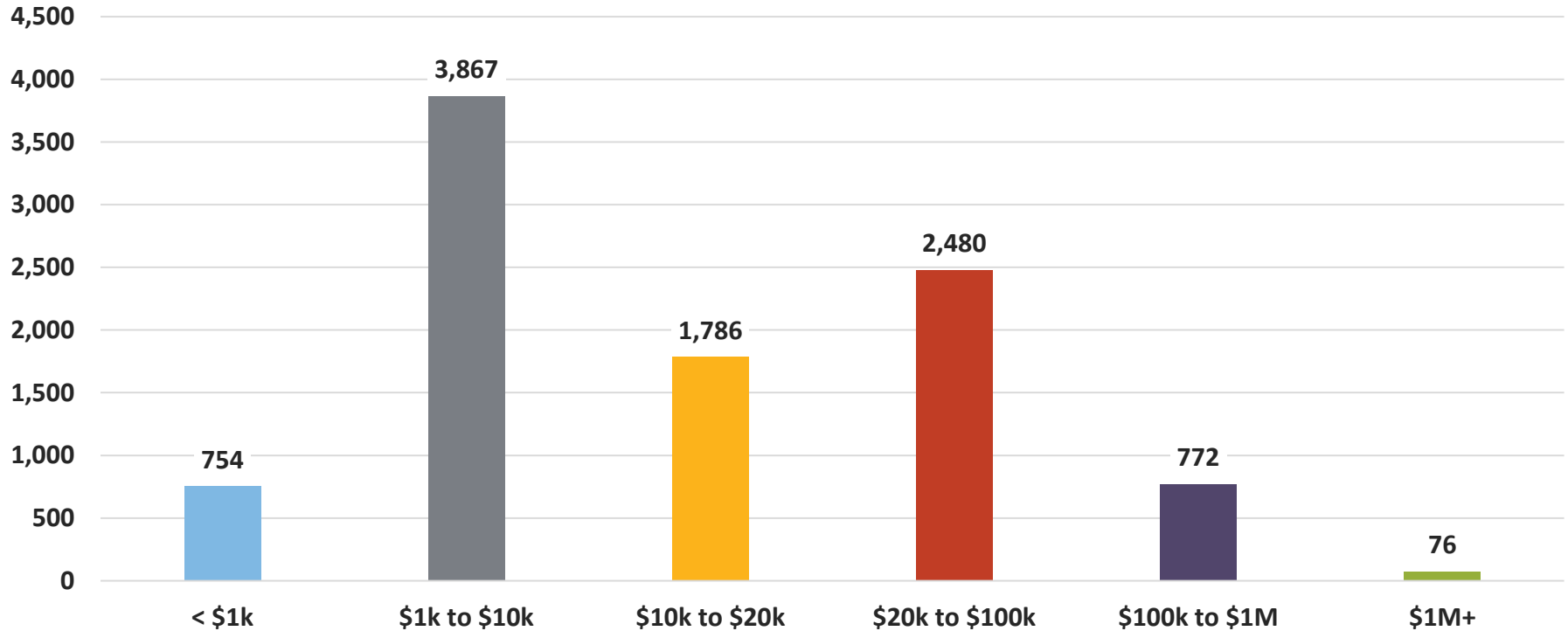


■ Successfully Funded Projects

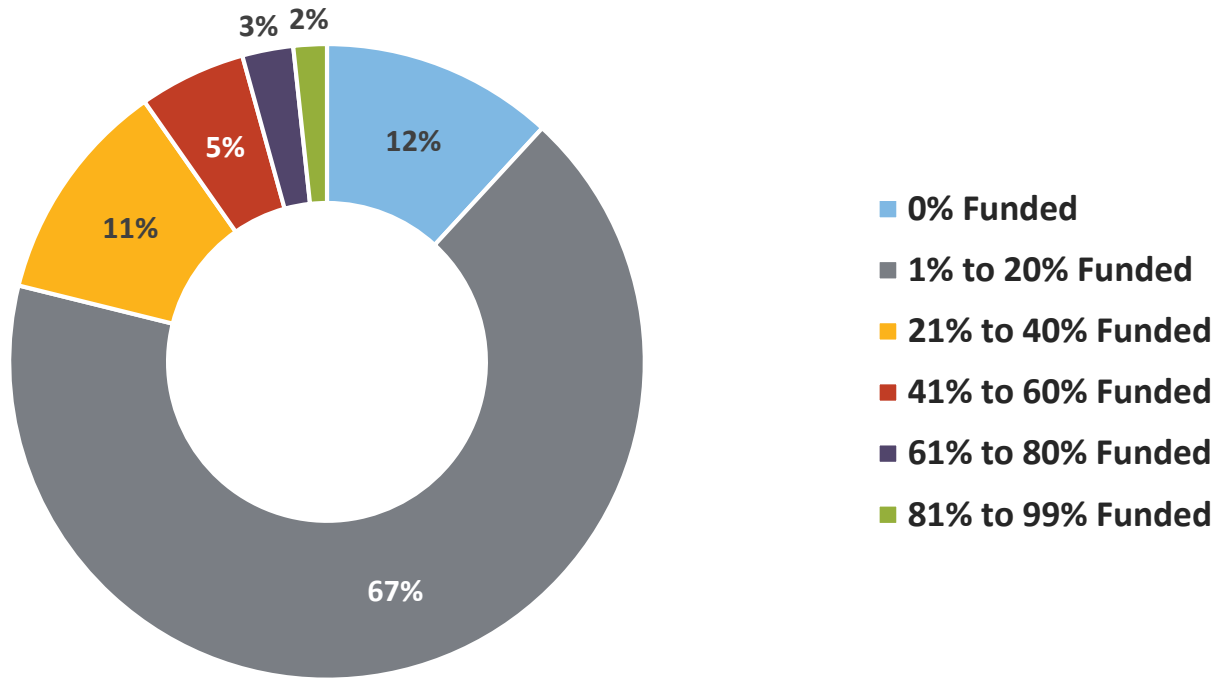
■ Unsuccessfully Funded Projects

Successfully Funded Kickstarter Projects

[Game Category] [by Quantity] [Feb 6th 2017]



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



amazon

Google

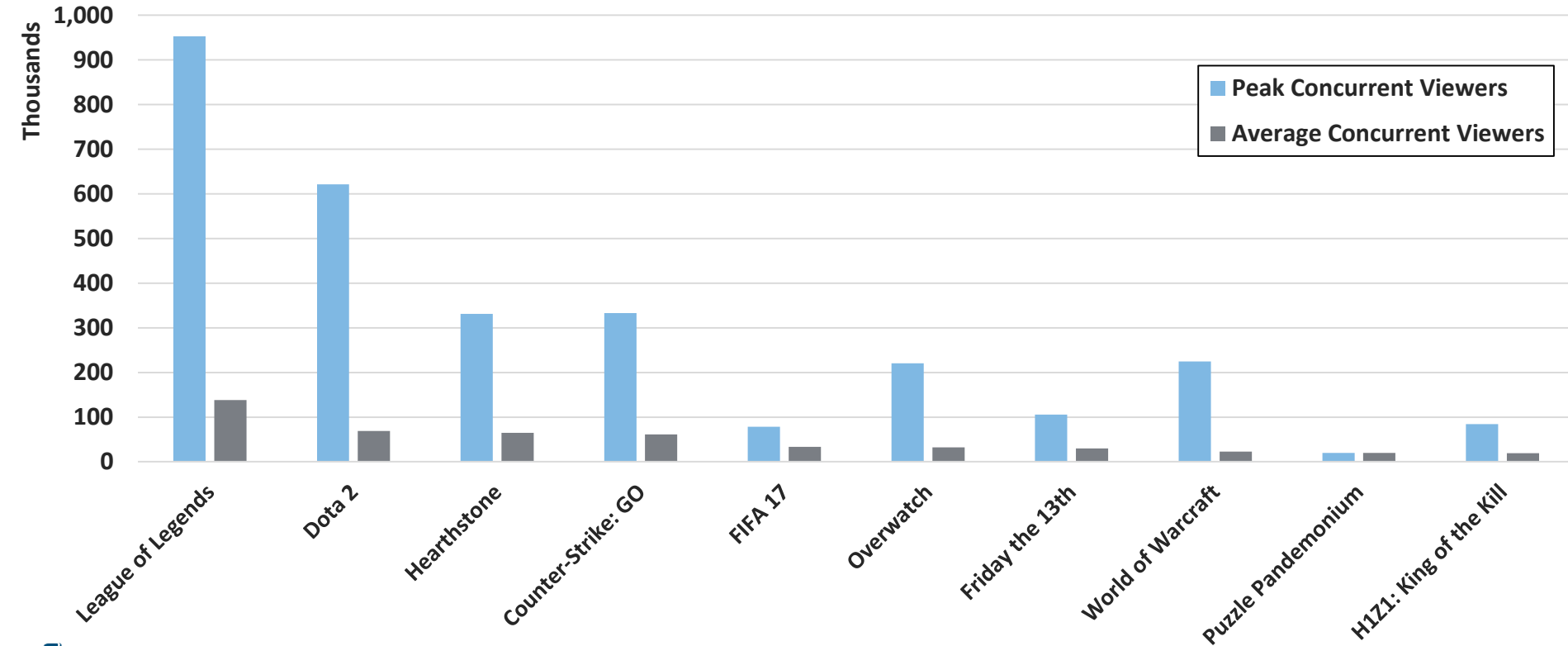
twitch

You



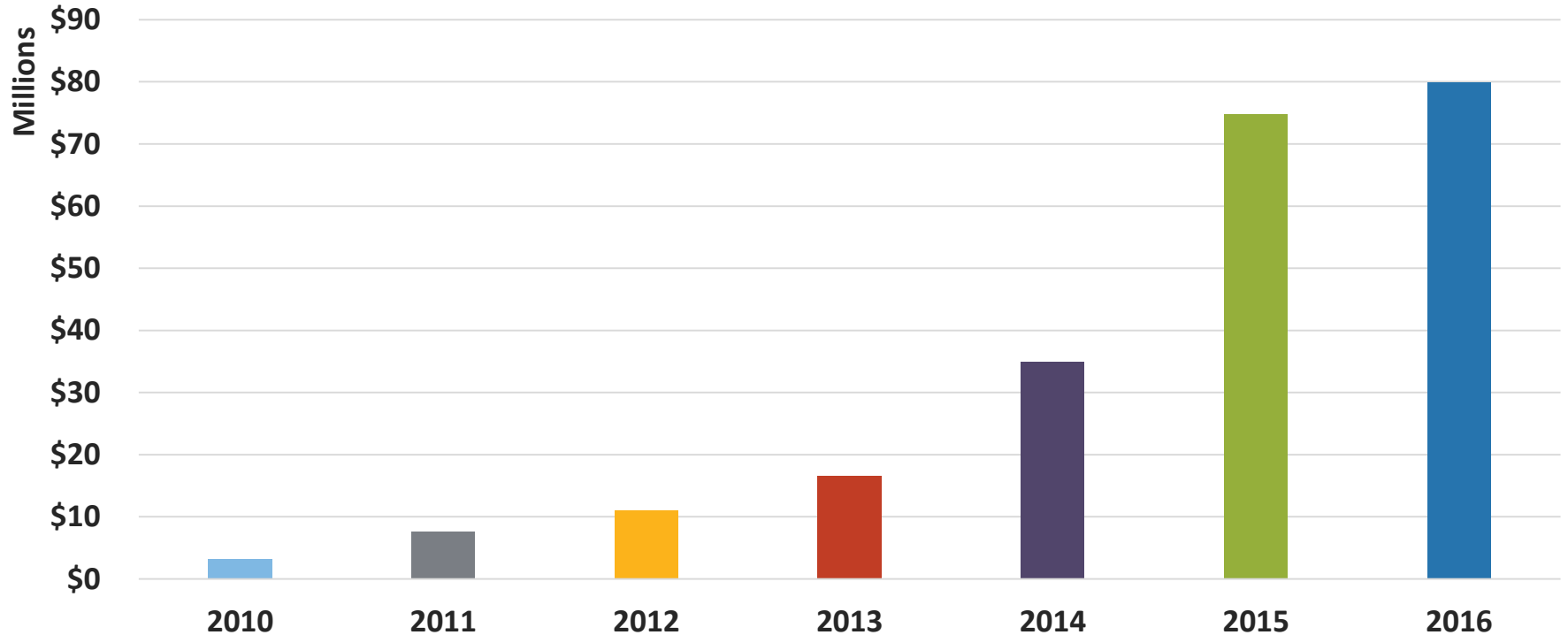
TWITCH: PEAK VIEWERS

Twitch Average and Highest Concurrent Viewers in 2016

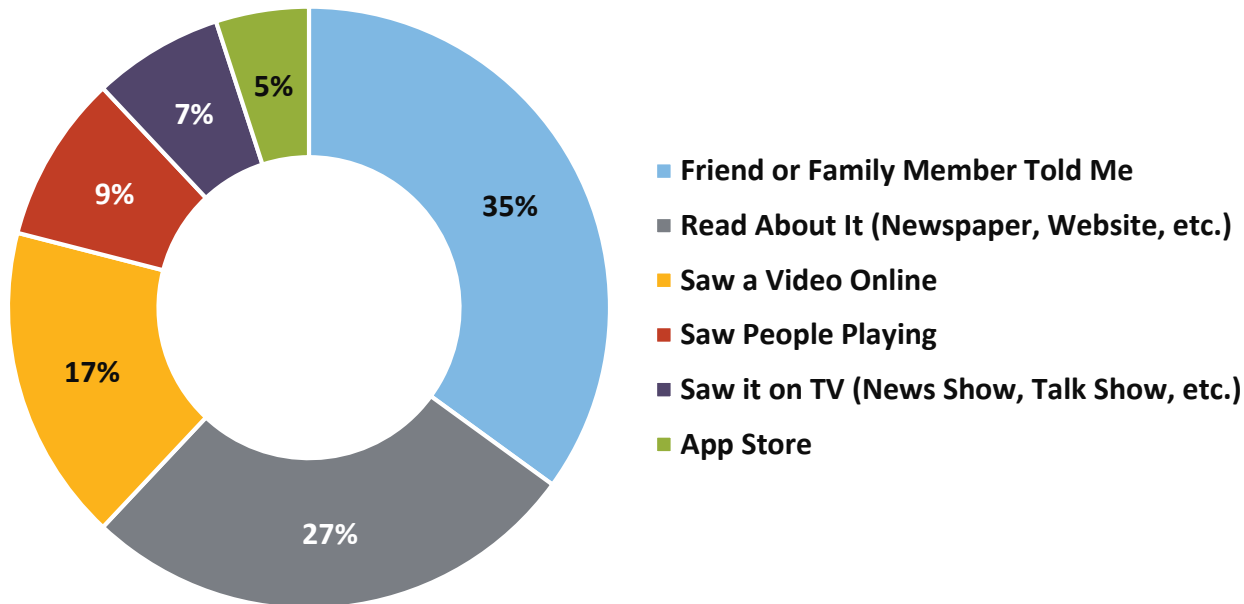


ESPORTS TOURNAMENTS

eSports Prize Pool And Tournaments
[Worldwide]

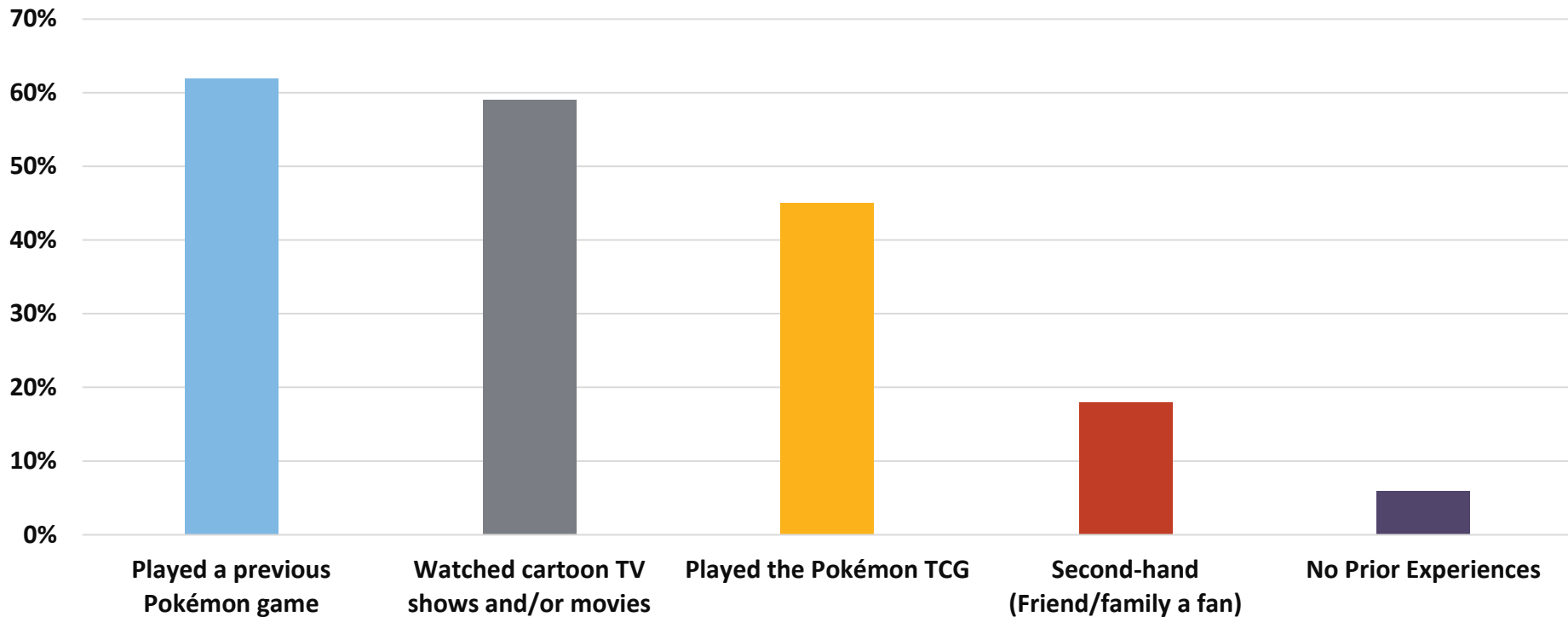


How Did You First Hear About Pokémon GO? [Pokémon Go Players][NA]



Which of the following experiences do you have with the Pokémon Brand?

[Pokémon Go Players][NA]



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