

This deck is for internal use to the disclosed recipient only; this is not a license to distribute or in any way publish any supplied material.

If you are media, please contact EEDAR (pr@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, 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

YOUR PRESENTER



Indie Developer
1991 to 1996



MONOLITH

Lead Designer
2003 to 2005



Sr. / Lead Designer
1997 to 2003



**SONY ONLINE
ENTERTAINMENT**



Founder
2006 to Current

EEDAR

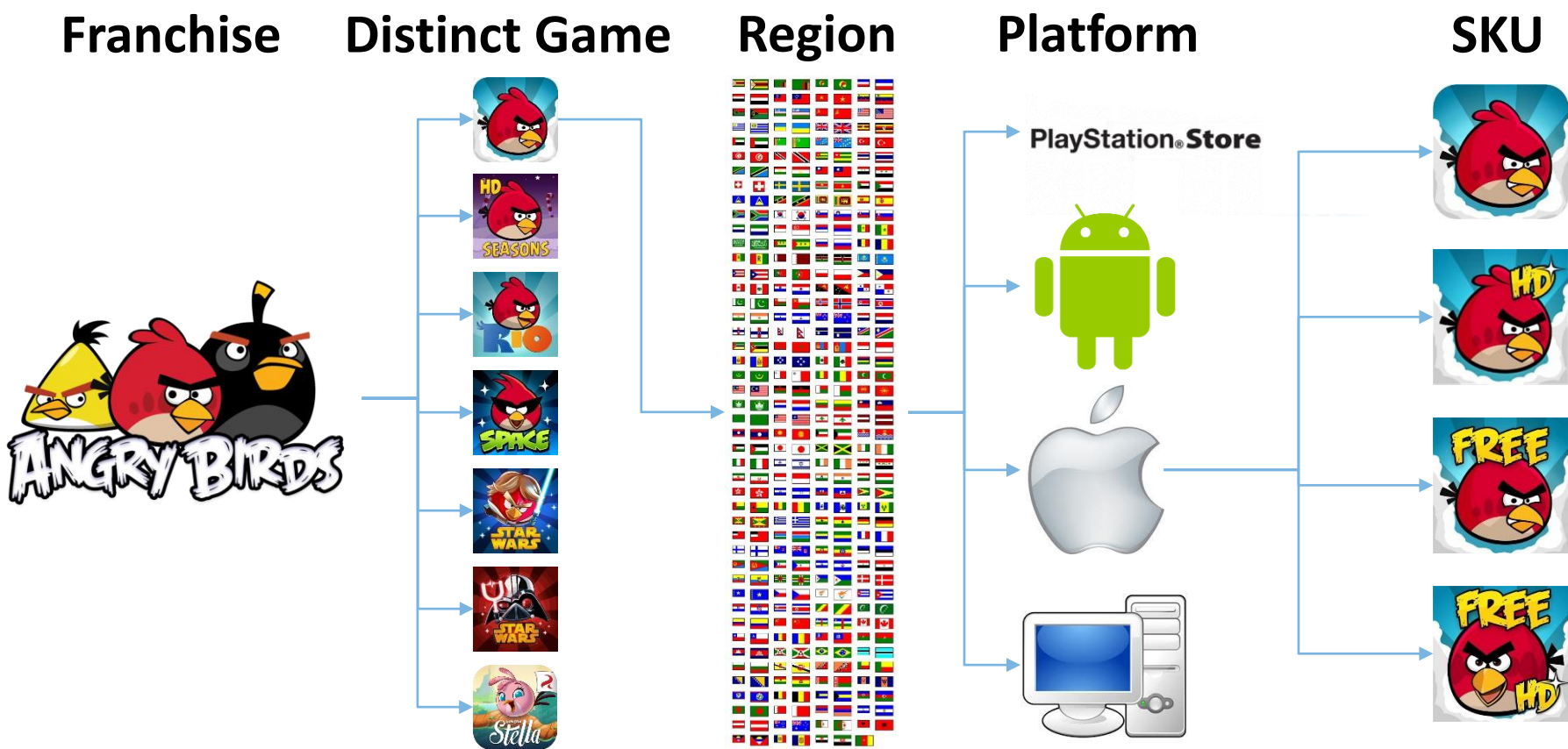
**Geoffrey
"GZ"
Zatkin**



EEDAR

CONTEXT IS EVERYTHING





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											
Edition Type	Developer	Publisher	Genre	Sub-Genre	Genre Elements	Monetization Model	Setting	Camera Perspective	Avatar(s) Used		

2,500+ Objectively Quantifiable Attributes of Video Games (Retail and Digital)



About EEDAR

- Founded in 2006
- Based in Carlsbad California w/ 55 Employees
- Exclusively Servicing the Video Game Industry
- Over a Dozen Industry Data Partners
- Servicing >95% of the top Publishers and >50 Development Studios

EEDAR Data

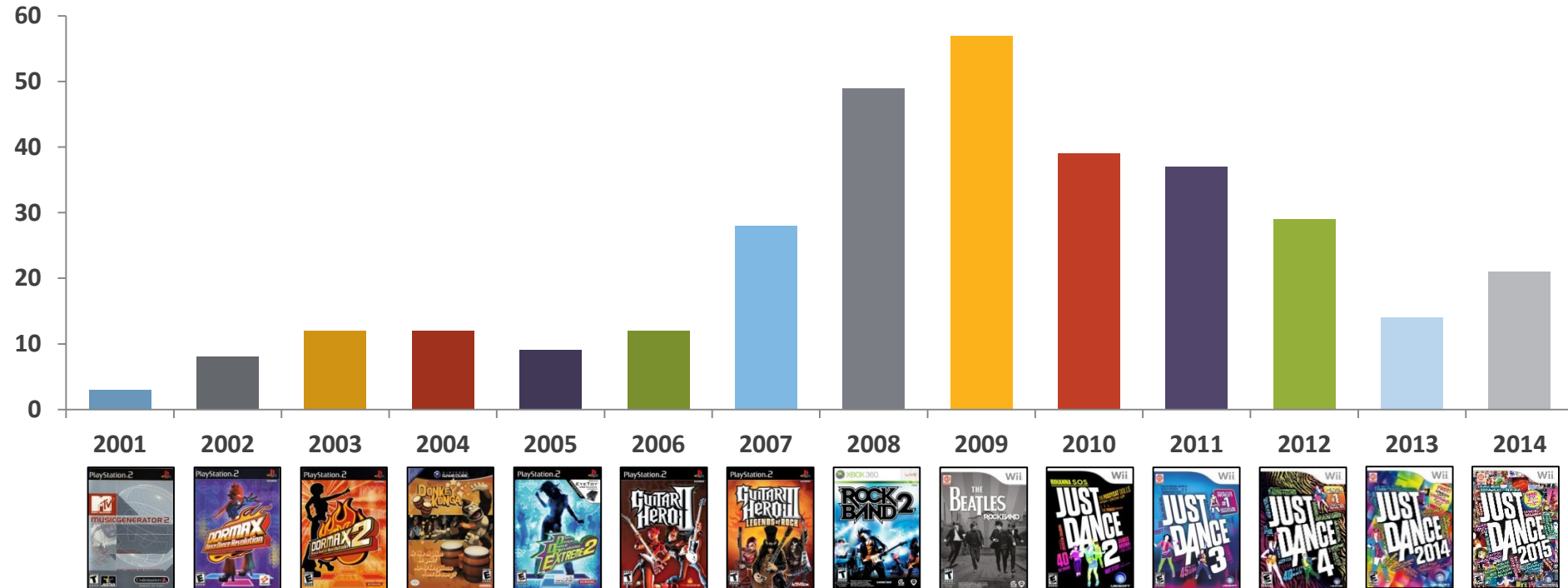
- 120,000+ Products (Games, Accessories, Hardware) Observed To Date
- 160,000,000+ Data Points



FADS: MUSIC & RHYTHM GAMES

Music & Rhythm Genre Games Released by Year

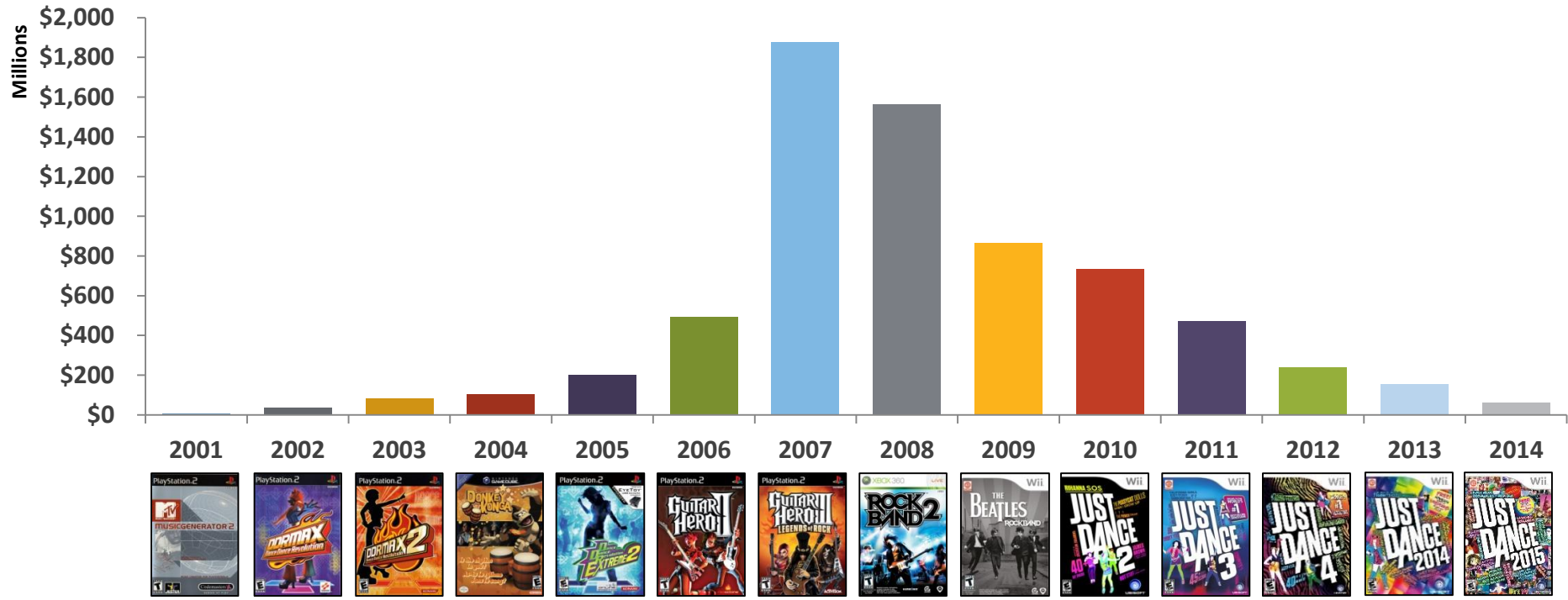
All 6th, 7th and 8th Generation Console, Handheld and PC Distinct Titles in the U.S.A.



FADS: MUSIC & RHYTHM GAMES

Revenue from Music & Rhythm Genre Games

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

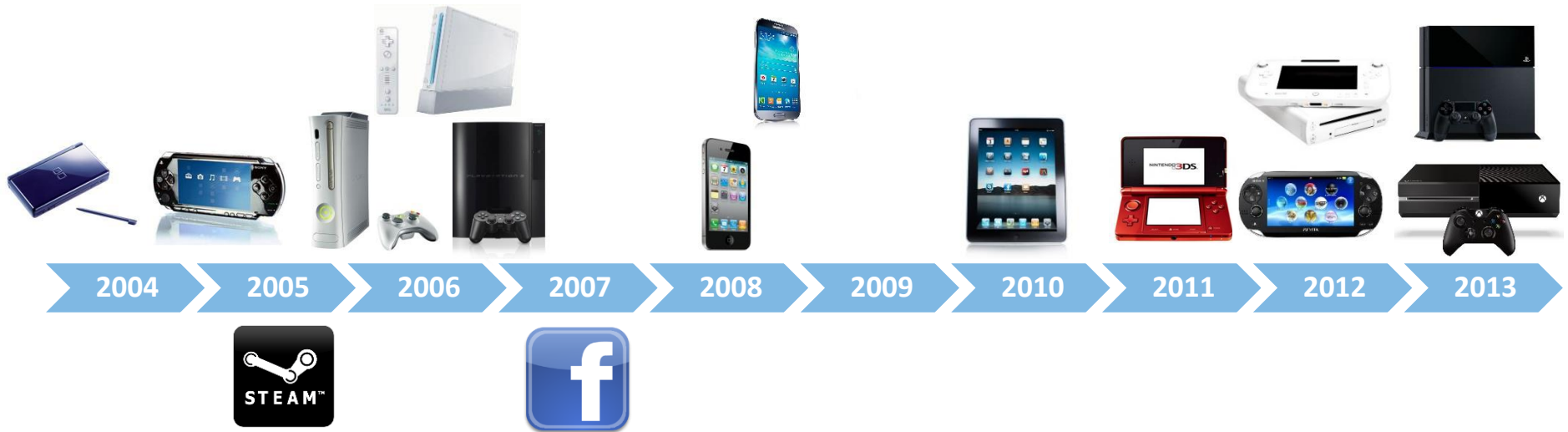


Source: EEDAR & The NPD Group

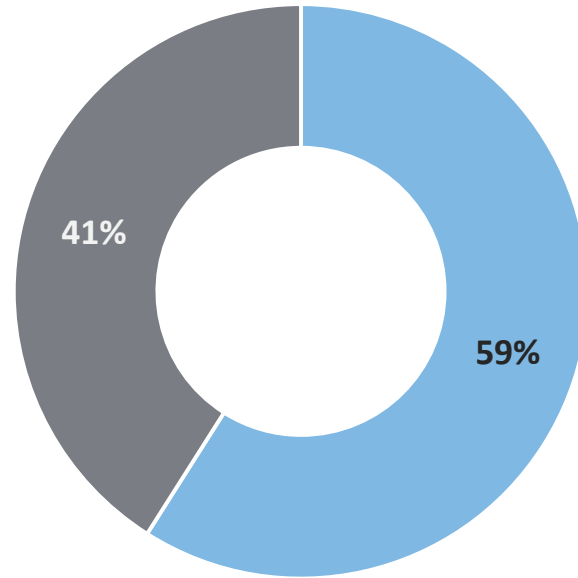
8TH GENERATION

We are at the **beginning** of the **8th generation** of game consoles

as well as the **middle**
of a **grand experiment** in
new **business models** and
monetization methodologies



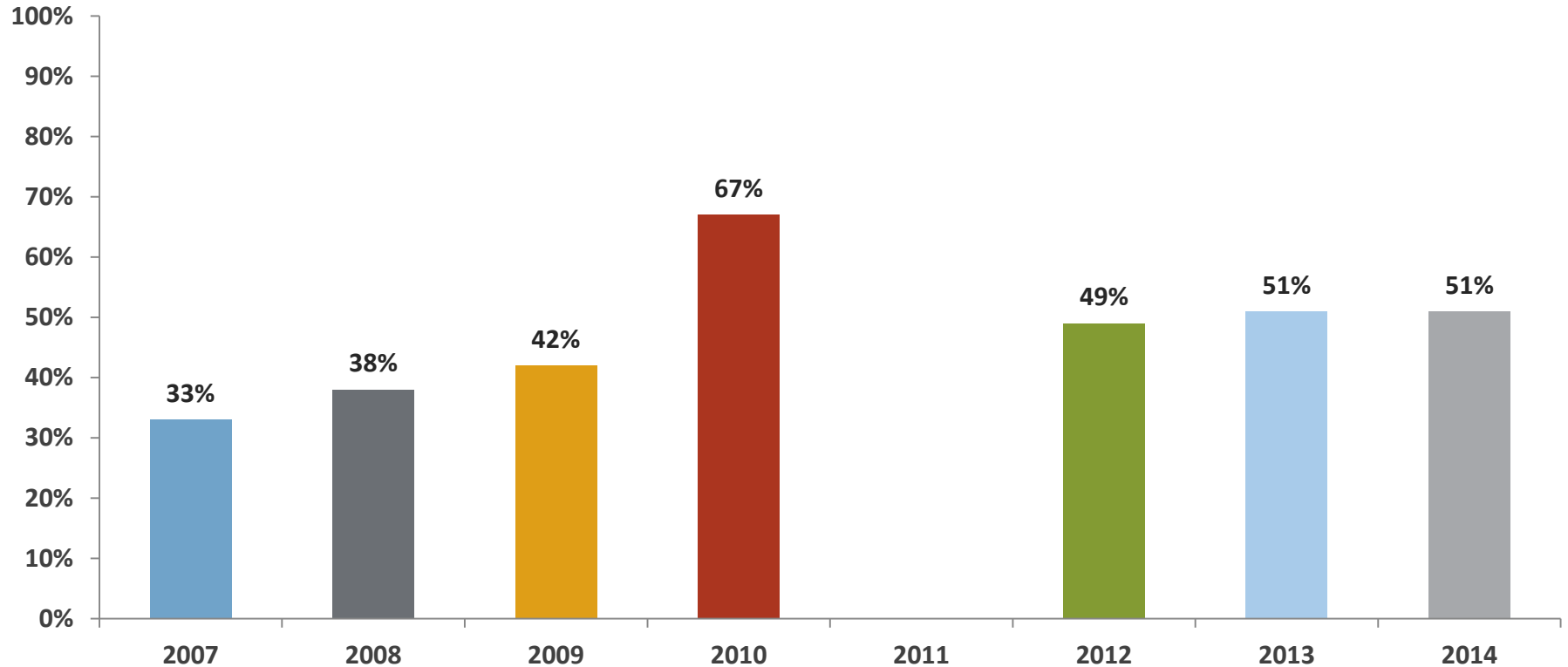
Game Playing Population of the USA



■ Game Players ■ Non Game Players

WHO GAMES?

% of American homes with a video game console



Source: ESA

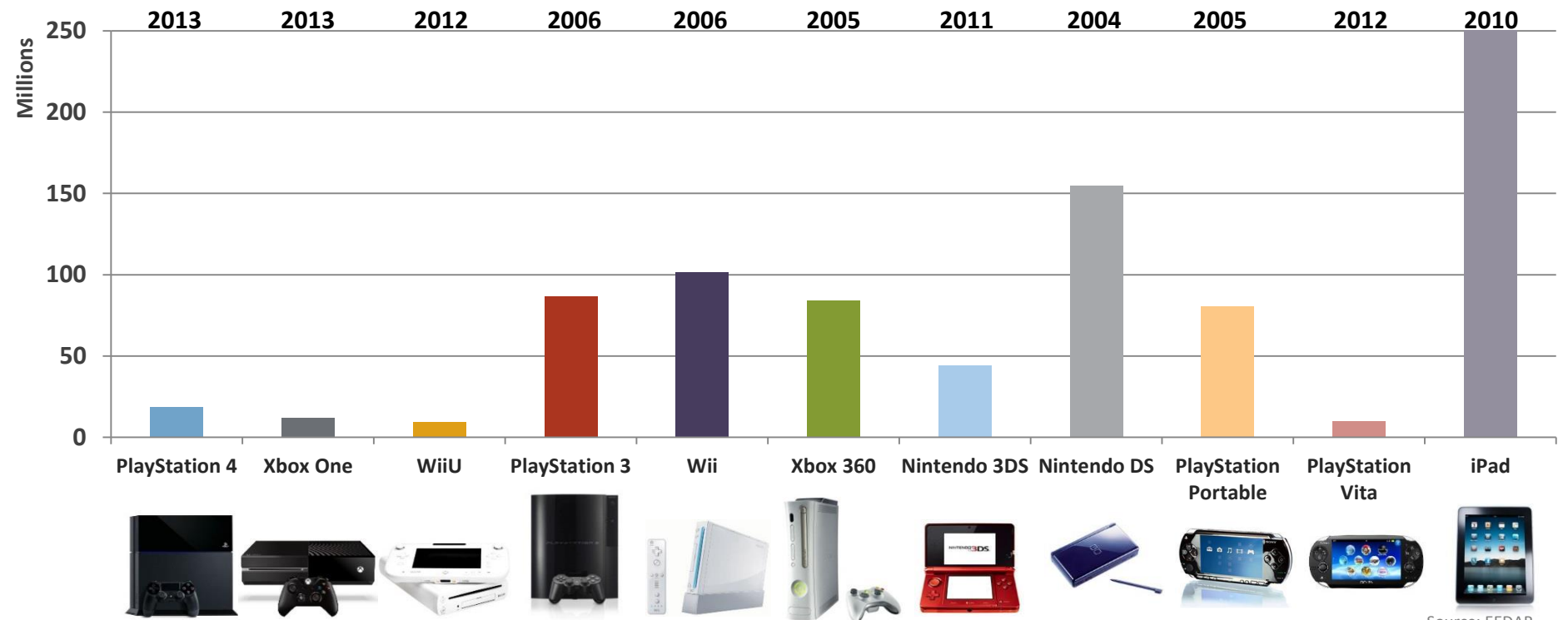


EEDAR

CONTEXT IS EVERYTHING

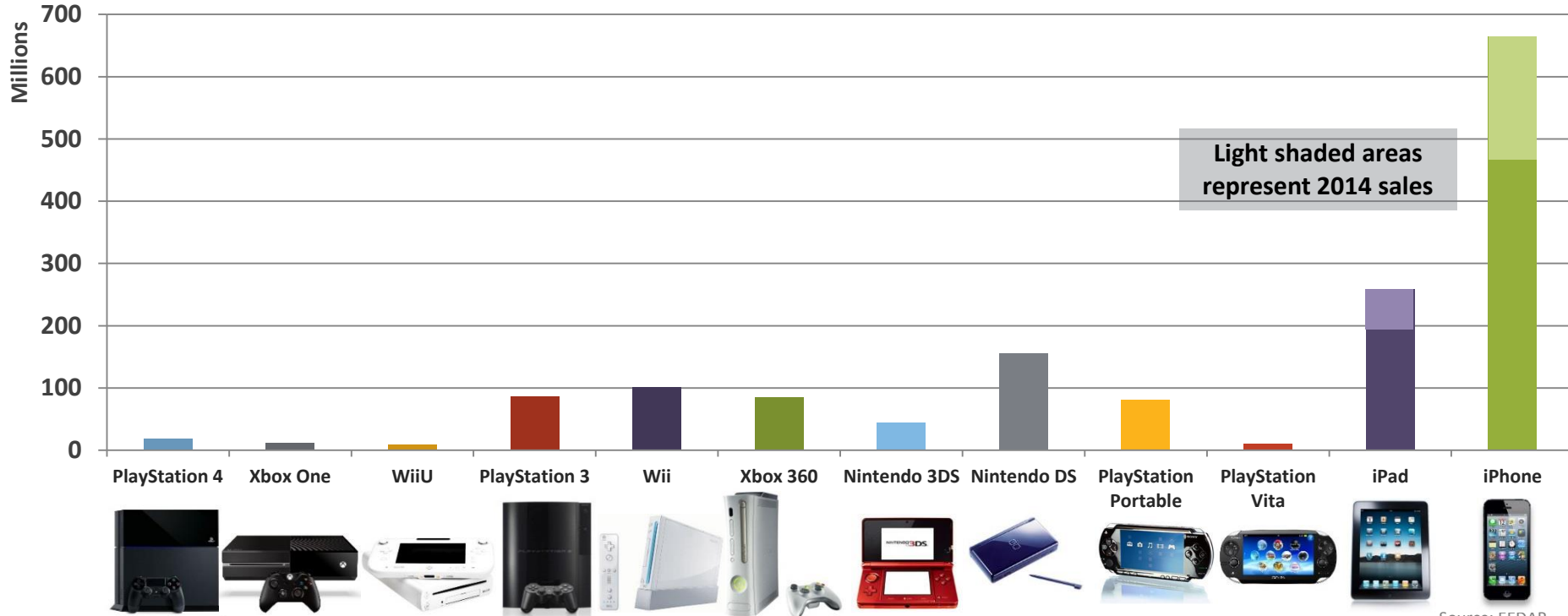
HARDWARE SALES

Platform Sales Worldwide
Through December, 2014



HARDWARE SALES

Platform Sales Worldwide Through December, 2014

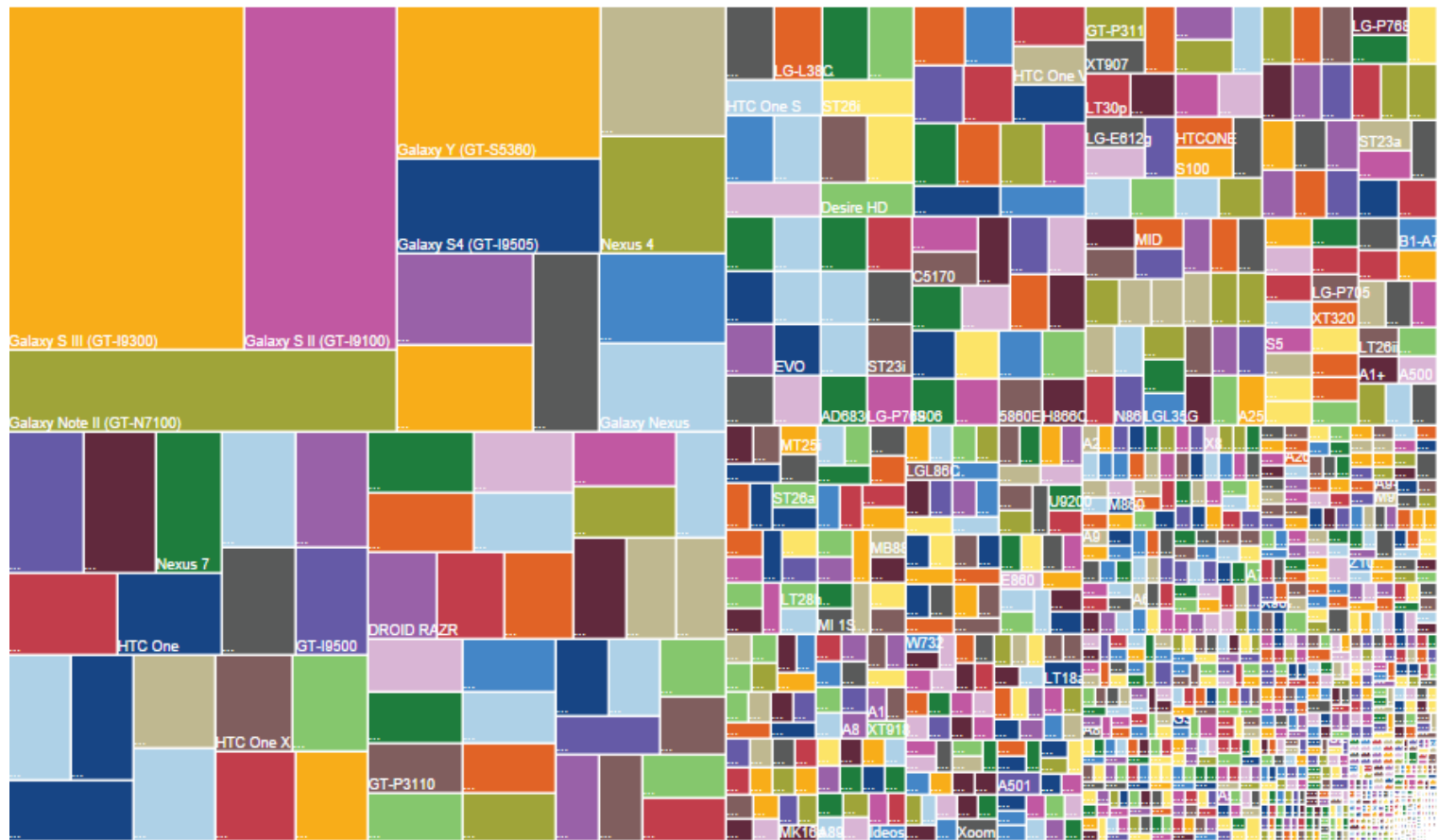


EEDAR

Source: EEDAR

CONTEXT IS EVERYTHING

ANDROID DEVICE FRAGMENTATION



Source: OpenSignal

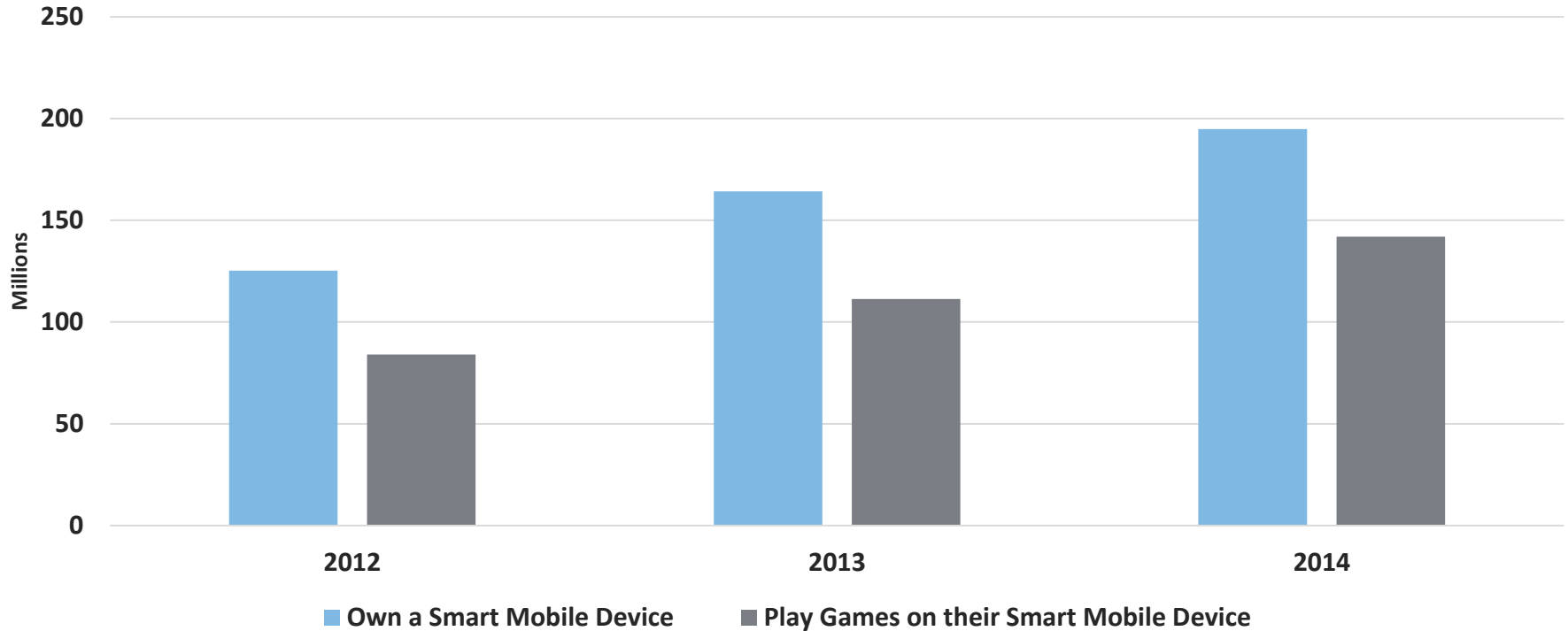


EEDAR

CONTEXT IS EVERYTHING

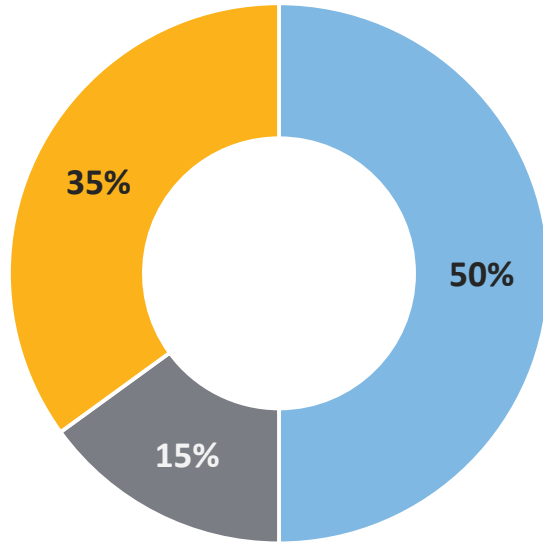


Mobile Gamers [2012-2014] [Active Mobile Gamers][NA]

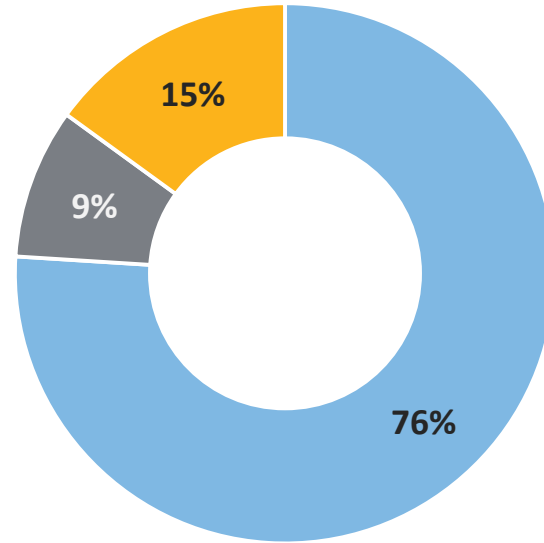


MOBILE GAMERS

Mobile Gamers by Device Ownership
[Active Mobile Gamers][NA/Europe]



Mobile Gaming \$\$\$ by Device Ownership
[Active Mobile Gamers][NA/Europe]

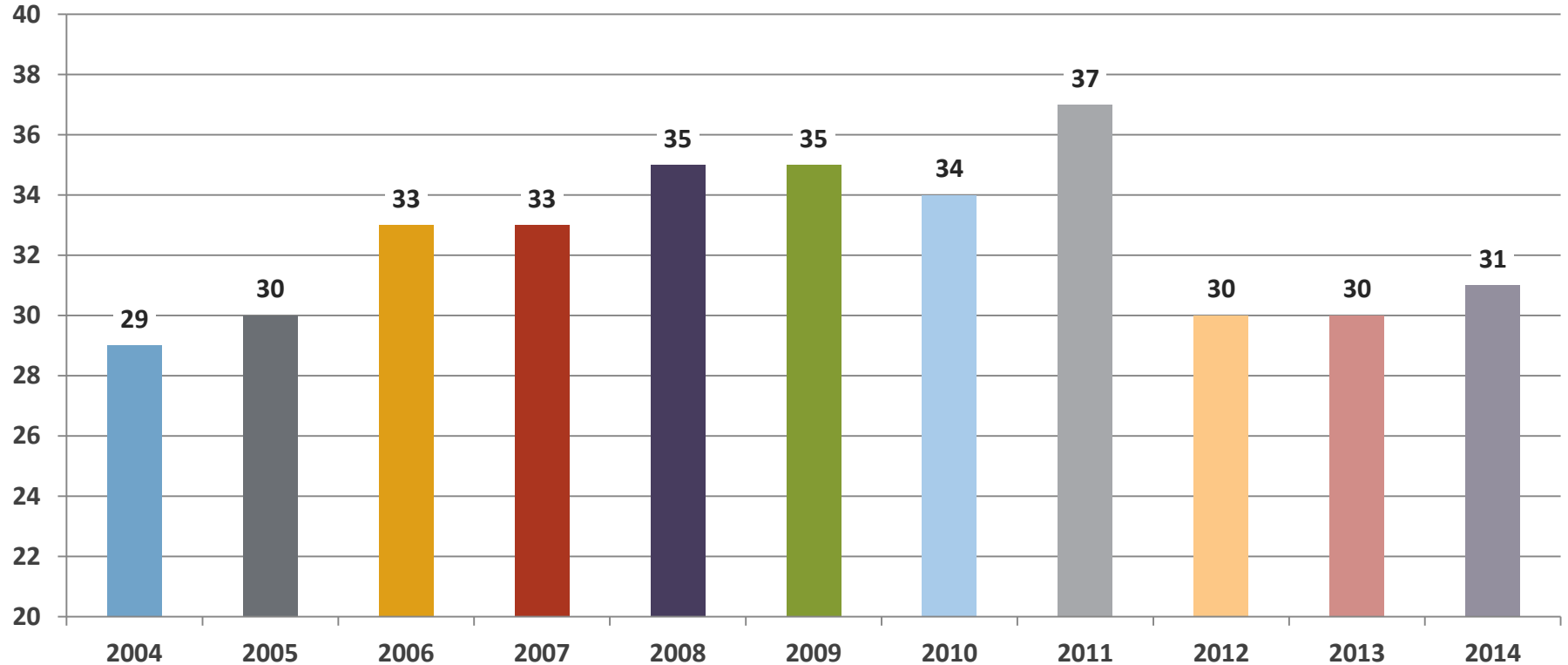


■ Smartphone & Tablet ■ Tablet Only ■ SmartPhone Only

■ Smartphone & Tablet ■ Tablet ■ Smartphone

WHO GAMES?

Average Age of Gamers in the USA



Source: ESA

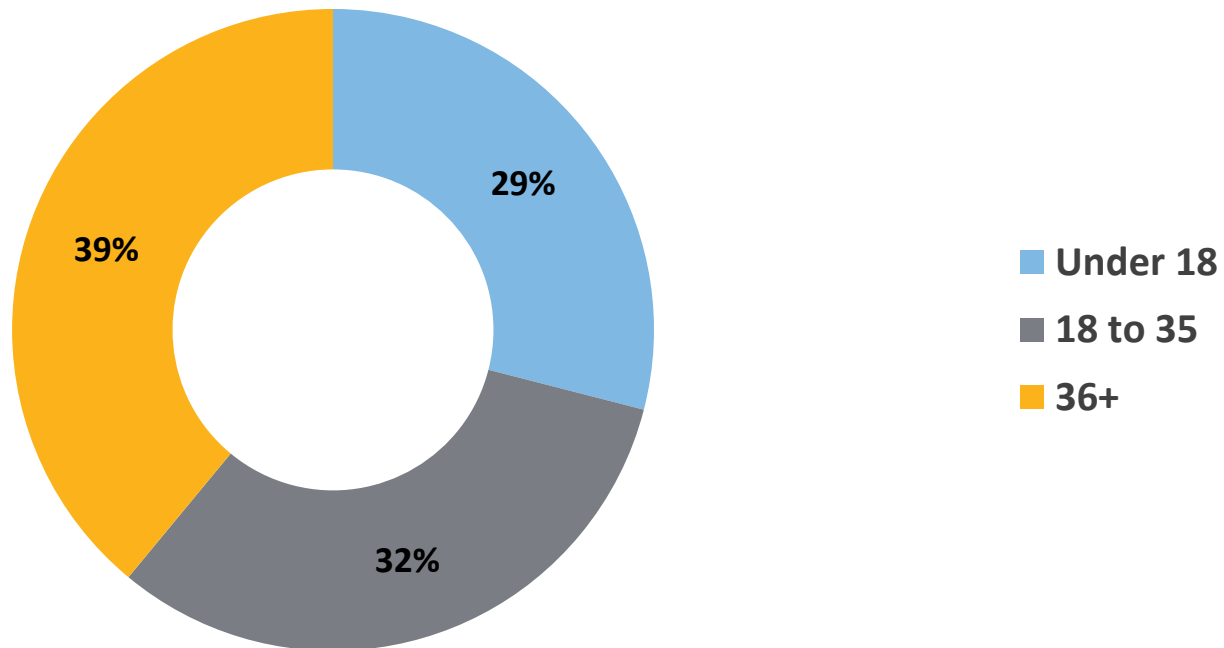


EEDAR

CONTEXT IS EVERYTHING

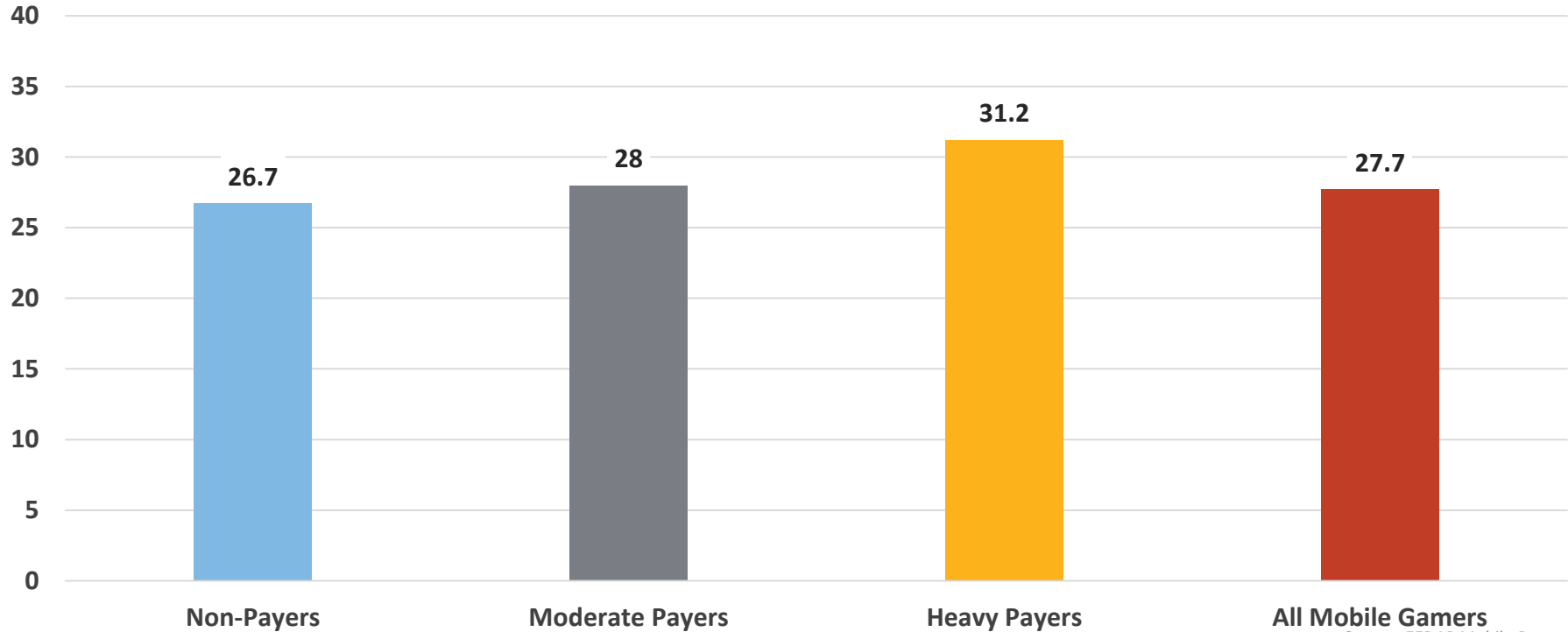
WHO GAMES?

Age of Gamers

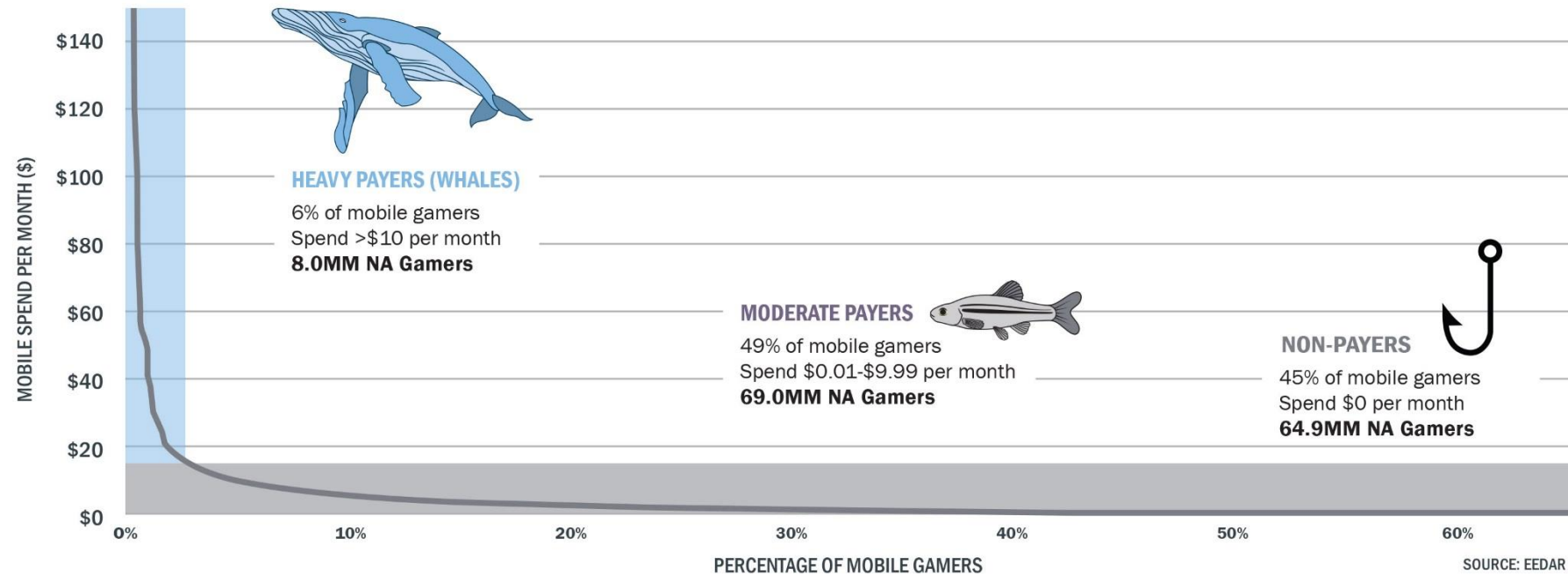


WHO GAMES?

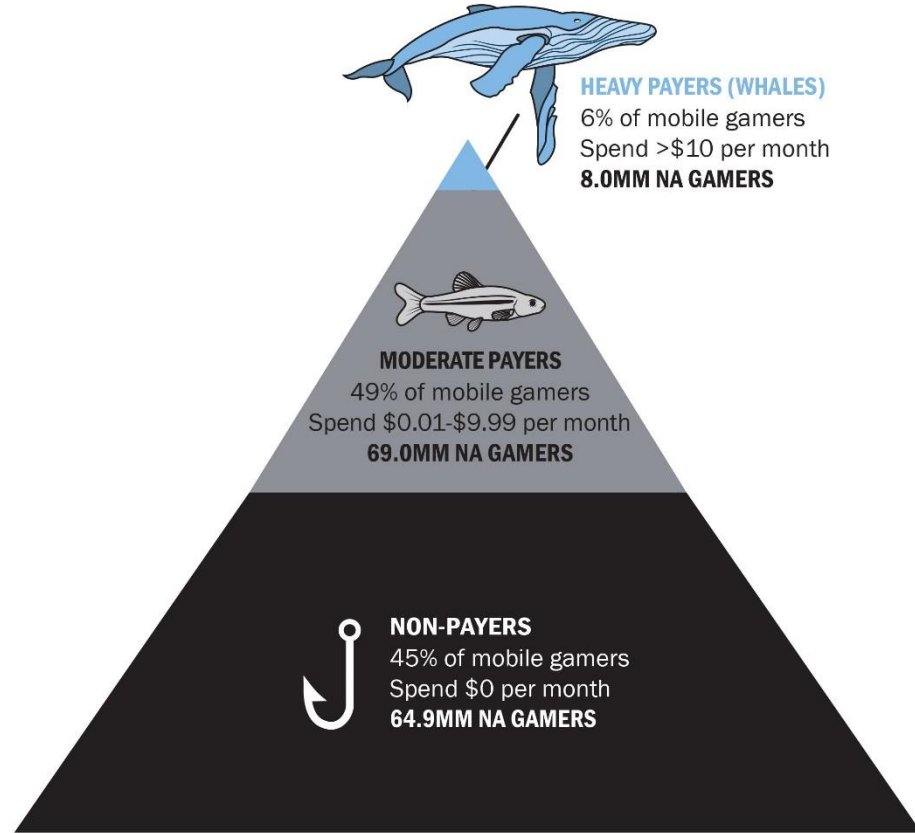
Age by Mobile Spending Segment [Active Mobile Users][NA/Europe]



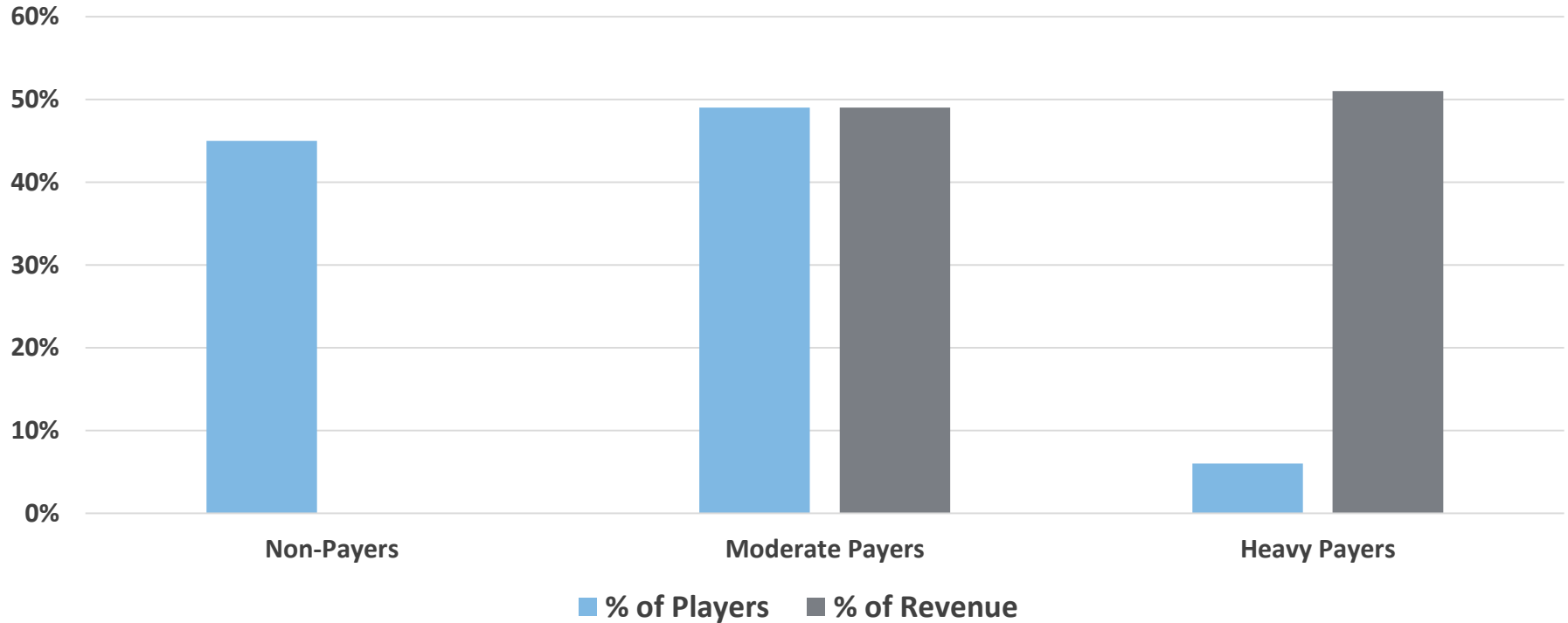
MONETIZING MOBILE



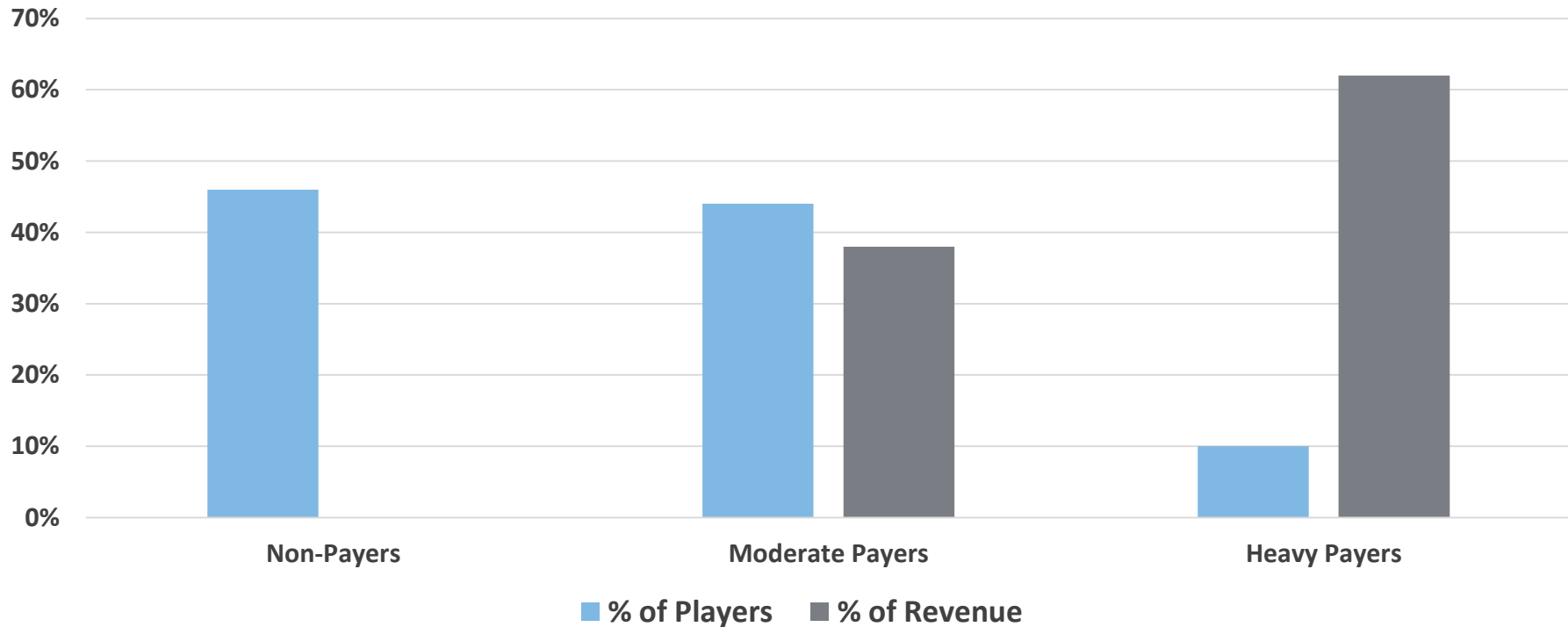
MONETIZING MOBILE



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

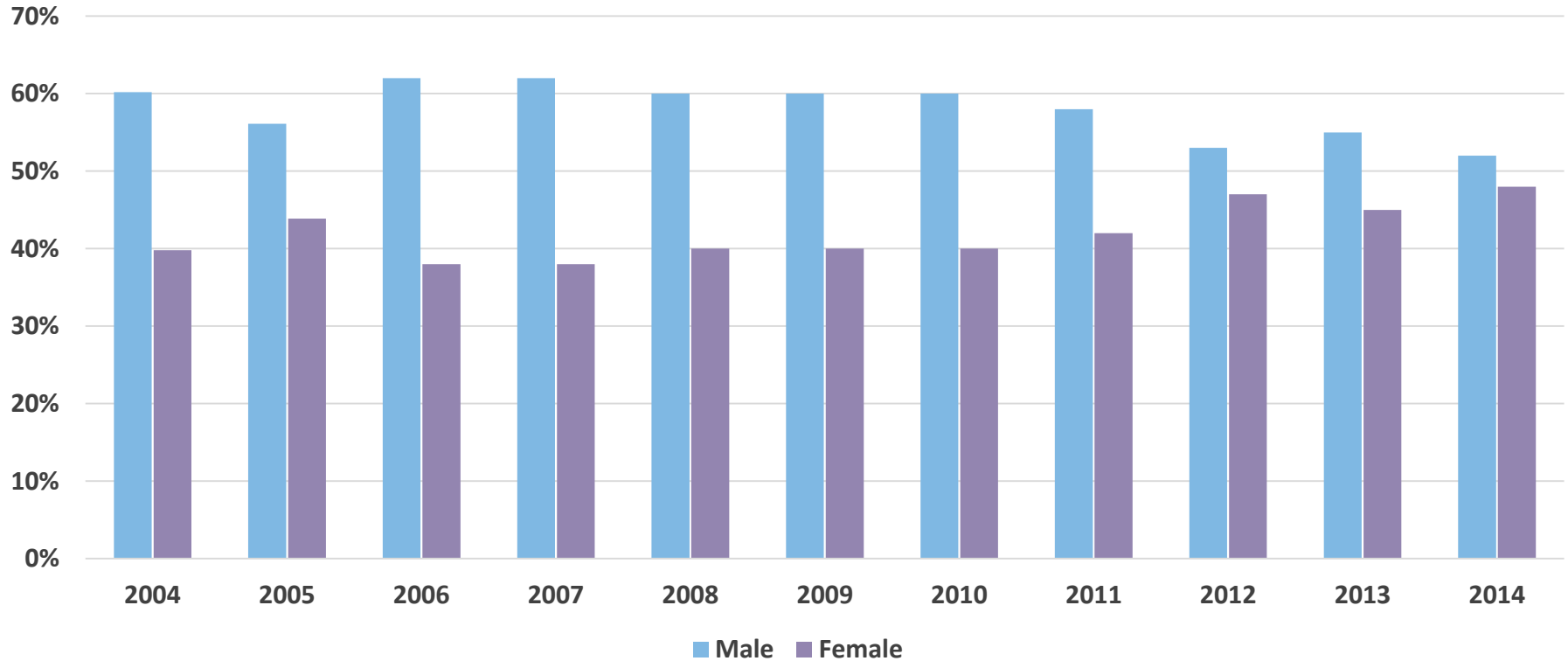


PC F2P Spend Segmentation [NA/Europe][PC][2014]



WHO GAMES?

Gender of Game Players

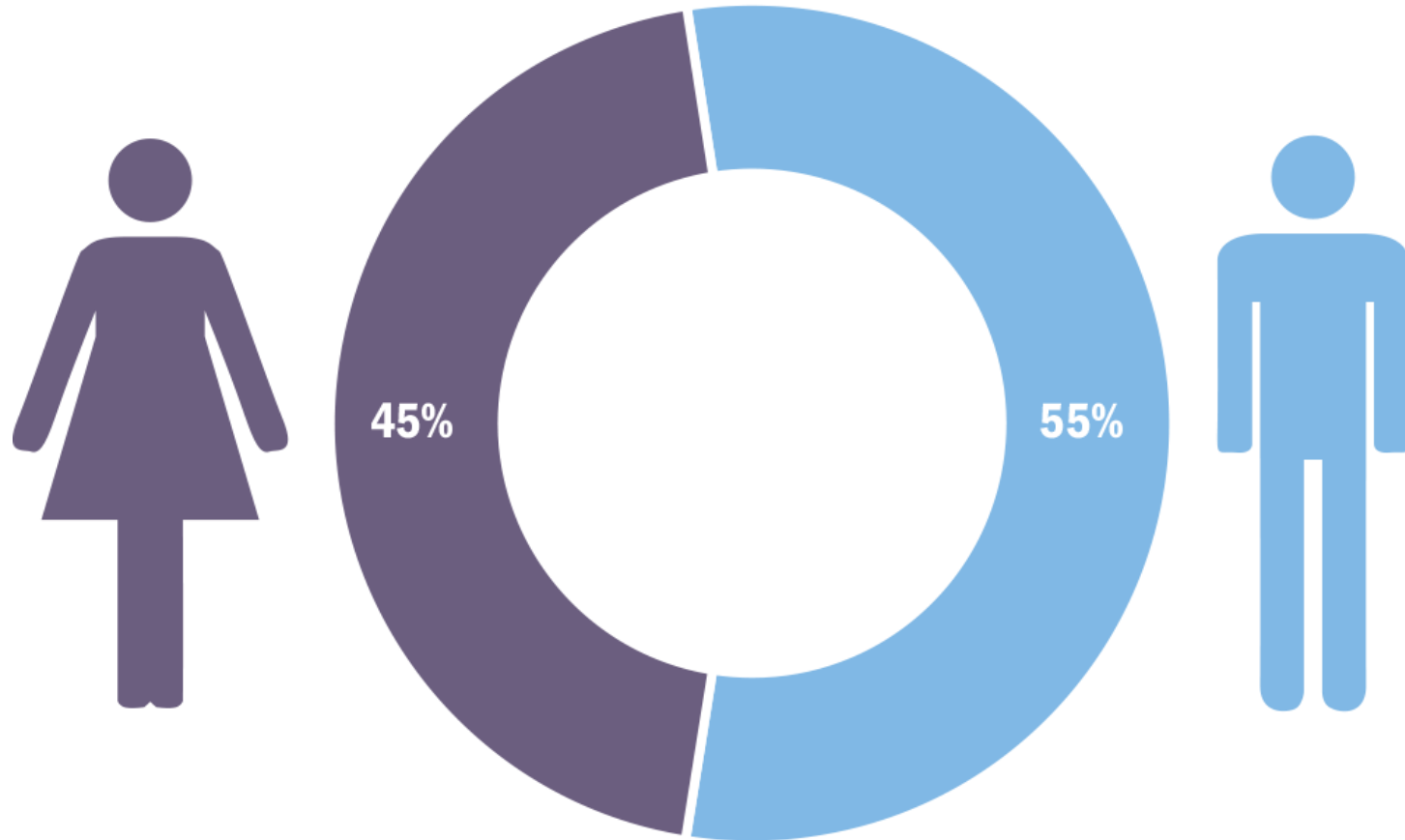


EEDAR

Source: ESA

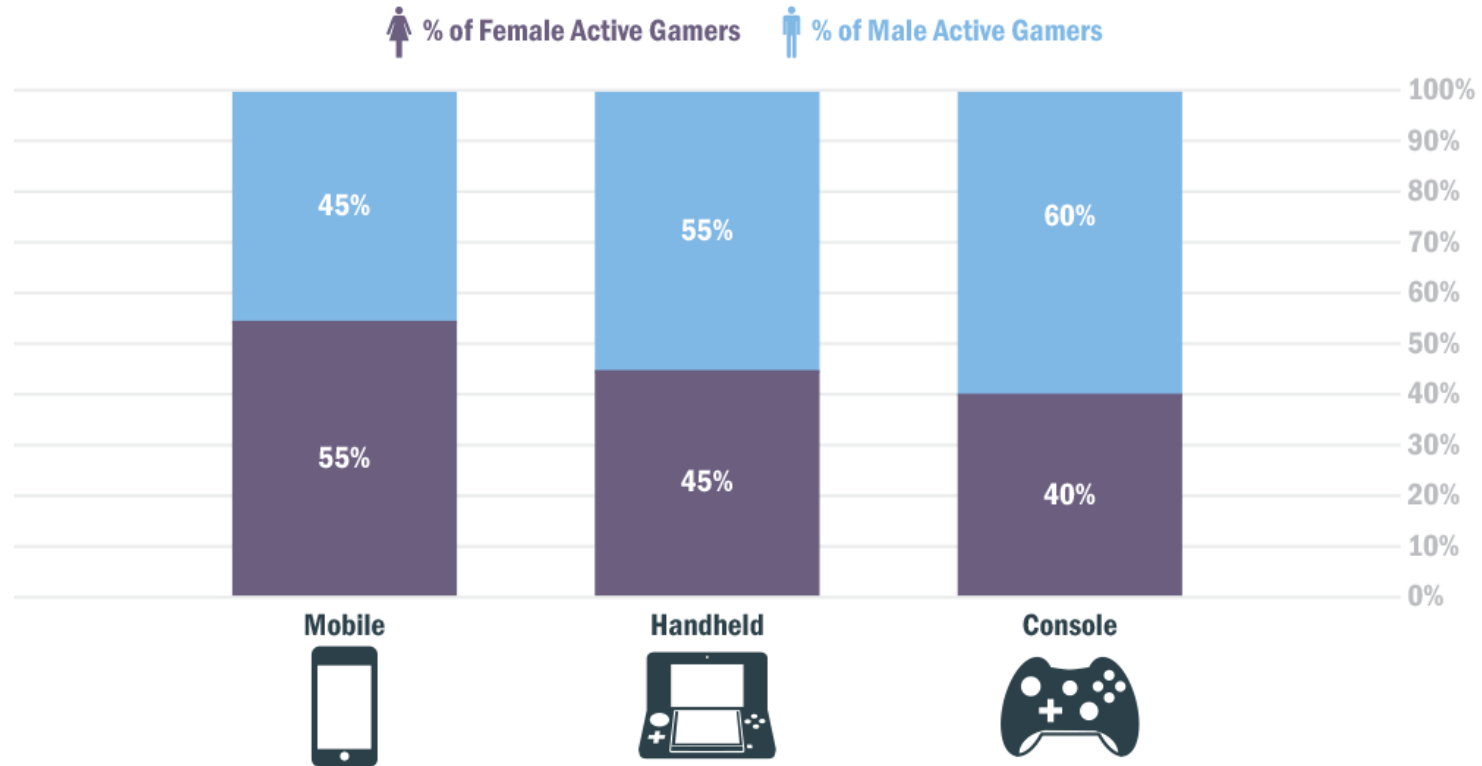
CONTEXT IS EVERYTHING

WHO GAMES?



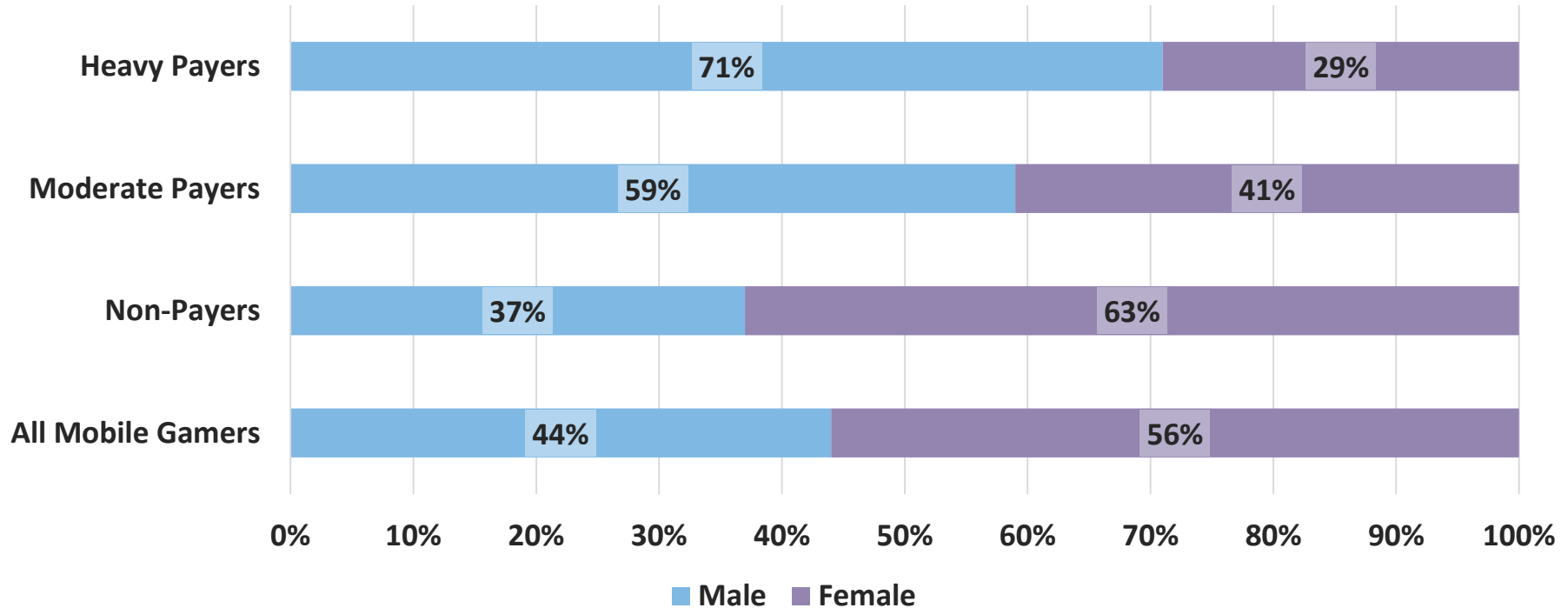
WHO GAMES?

ACTIVE GAMERS ACROSS PLATFORMS



Gender by Mobile Spending Segment in North America

Of users that indicated they engage in daily mobile gaming activities

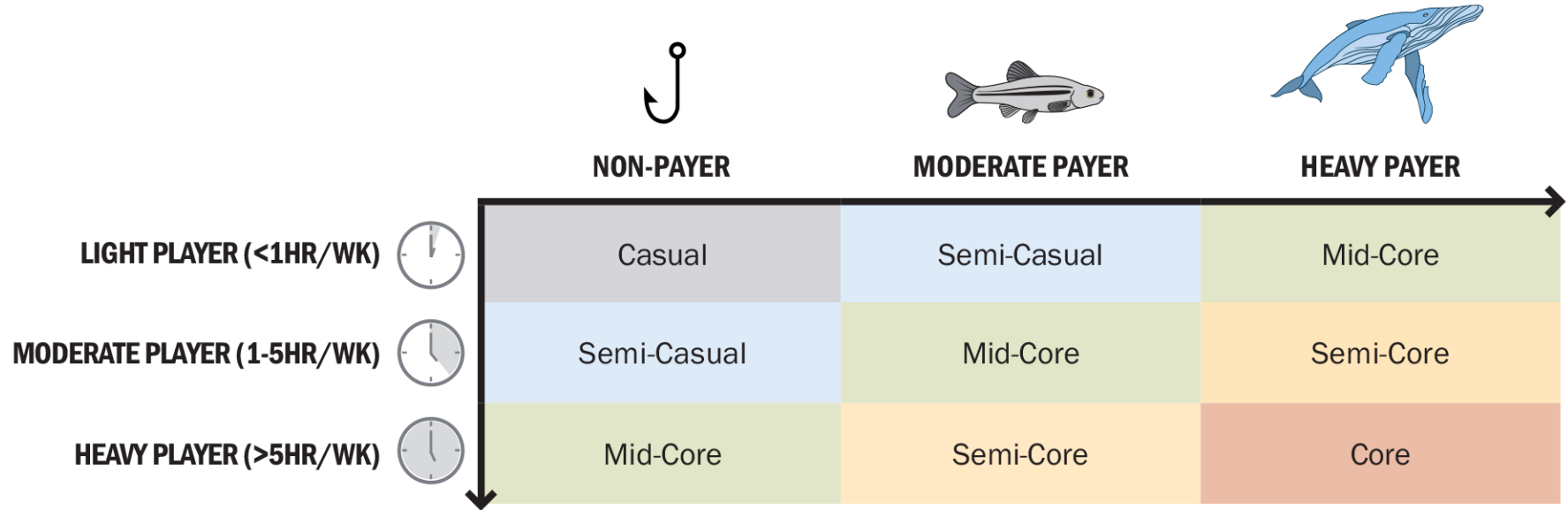


THE NEW "CORE"



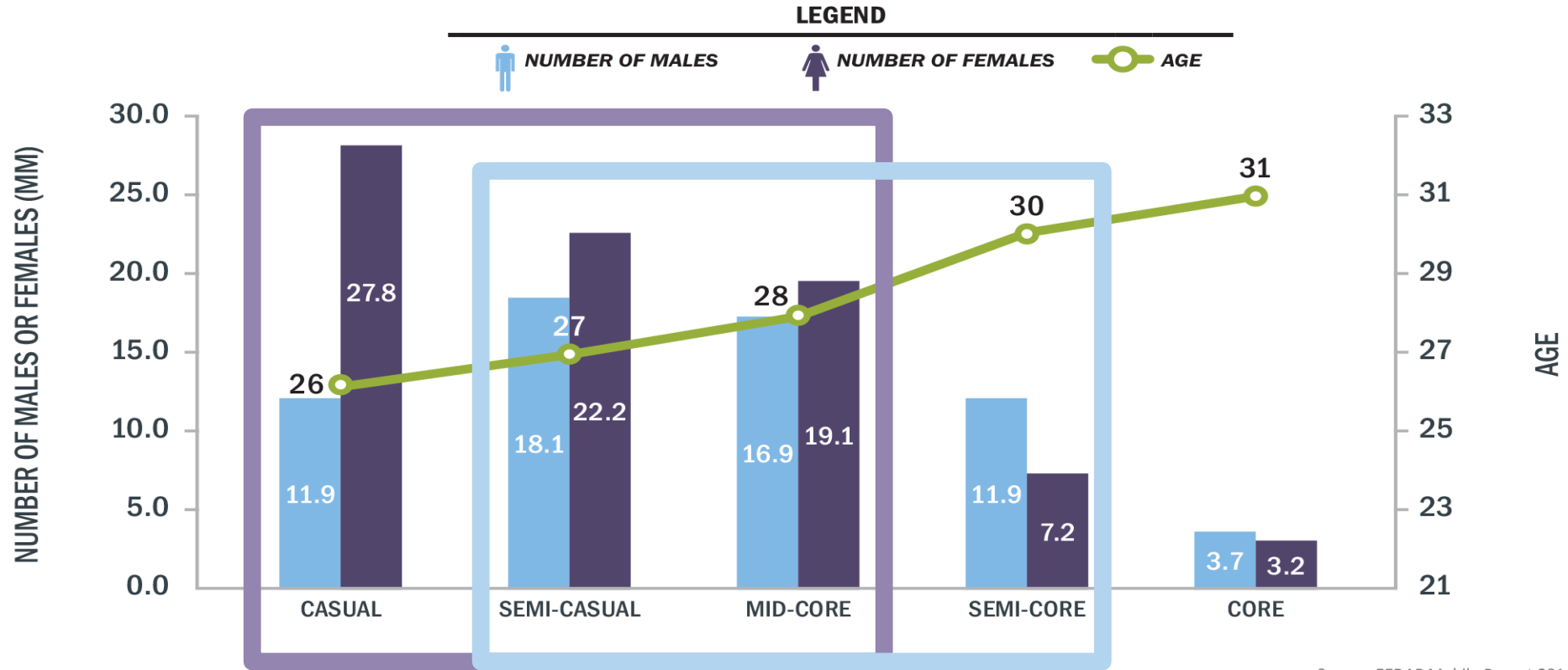
THE NEW "CORE"

INVESTMENT SCALE BREAKDOWN



WHO GAMES?

NA MOBILE GAMER DEMOGRAPHICS BY INVESTMENT LEVEL



EEDAR

Source: EEDAR Mobile Report 2014

CONTEXT IS EVERYTHING

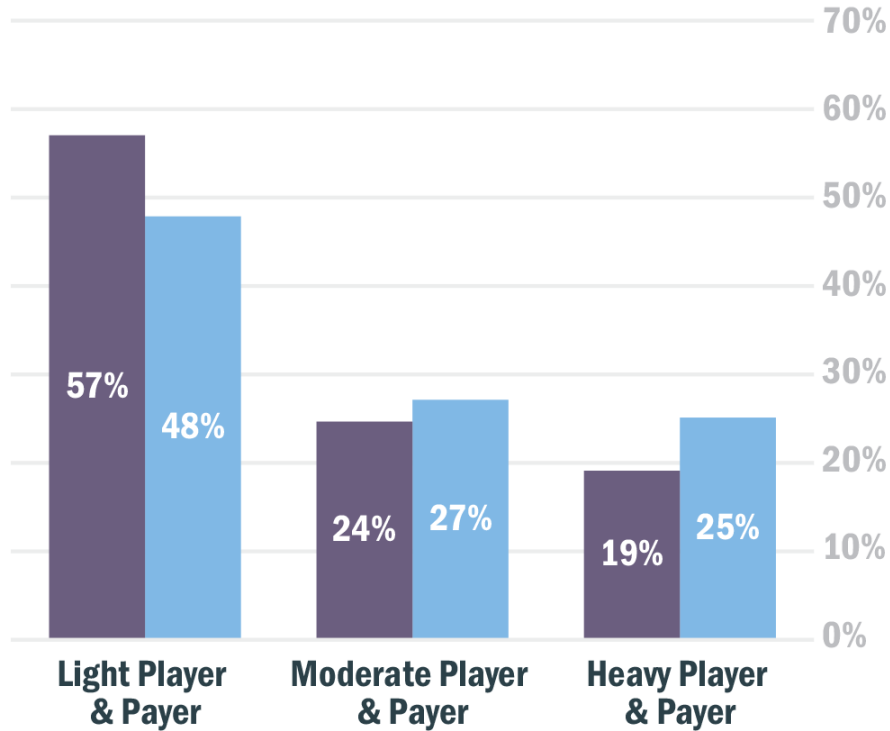
WHO GAMES?



% of Female Active Gamers



% of Male Active Gamers



Mobile represents
the most accessible
platform on the market

FEMALE FAVORITE MOBILE GAMES

1. Matching Puzzle
2. Brain Puzzle
3. RPG
4. Endless Runner
5. Simulation

MALE FAVORITE MOBILE GAMES

1. Matching Puzzle
2. Brain Puzzle
3. Combat City Builder
4. Sports
5. Shooter



EEDAR

Source: EEDAR

CONTEXT IS EVERYTHING

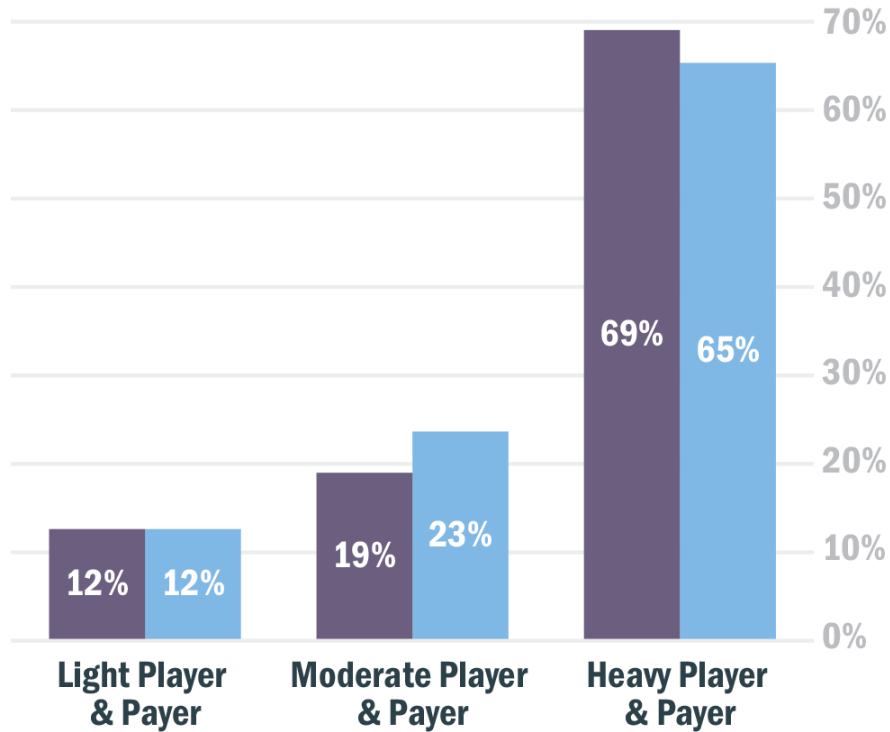
WHO GAMES?



% of Female Active Gamers



% of Male Active Gamers



Gaming **consoles** tend to cater to more invested players by providing deeper and longer gaming experiences

FEMALE FAVORITE CONSOLE GAMES	MALE FAVORITE CONSOLE GAMES
1. RPG	1. Action
2. Action	2. Shooter
3. Shooter	3. RPG
4. Arcade	4. Fighting
5. Fighting	5. Arcade



EEDAR

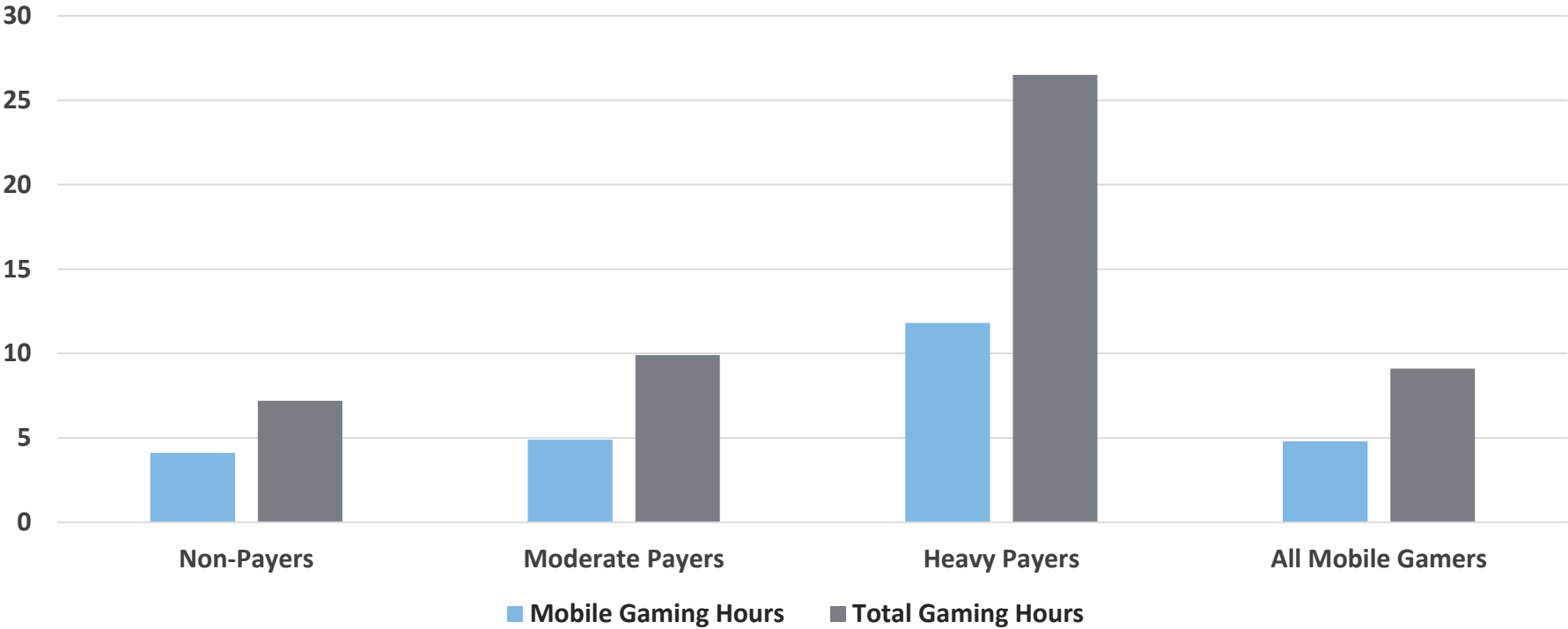
Source: EEDAR

CONTEXT IS EVERYTHING

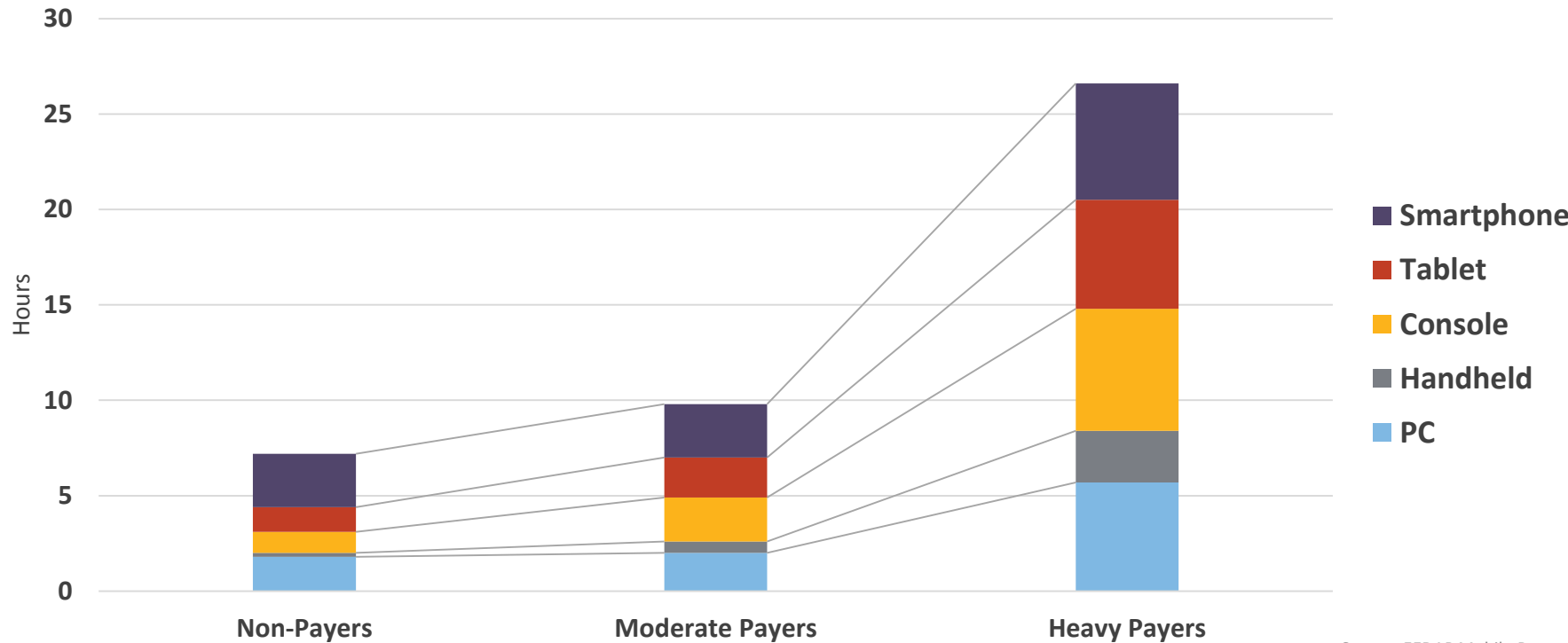
THE 'GAMERS' OF TODAY ARE ENTERTAINMENT CONSUMERS



Total Gaming Hours Per Week by Mobile Spending Segment
[NA Mobile Gamers][North America]



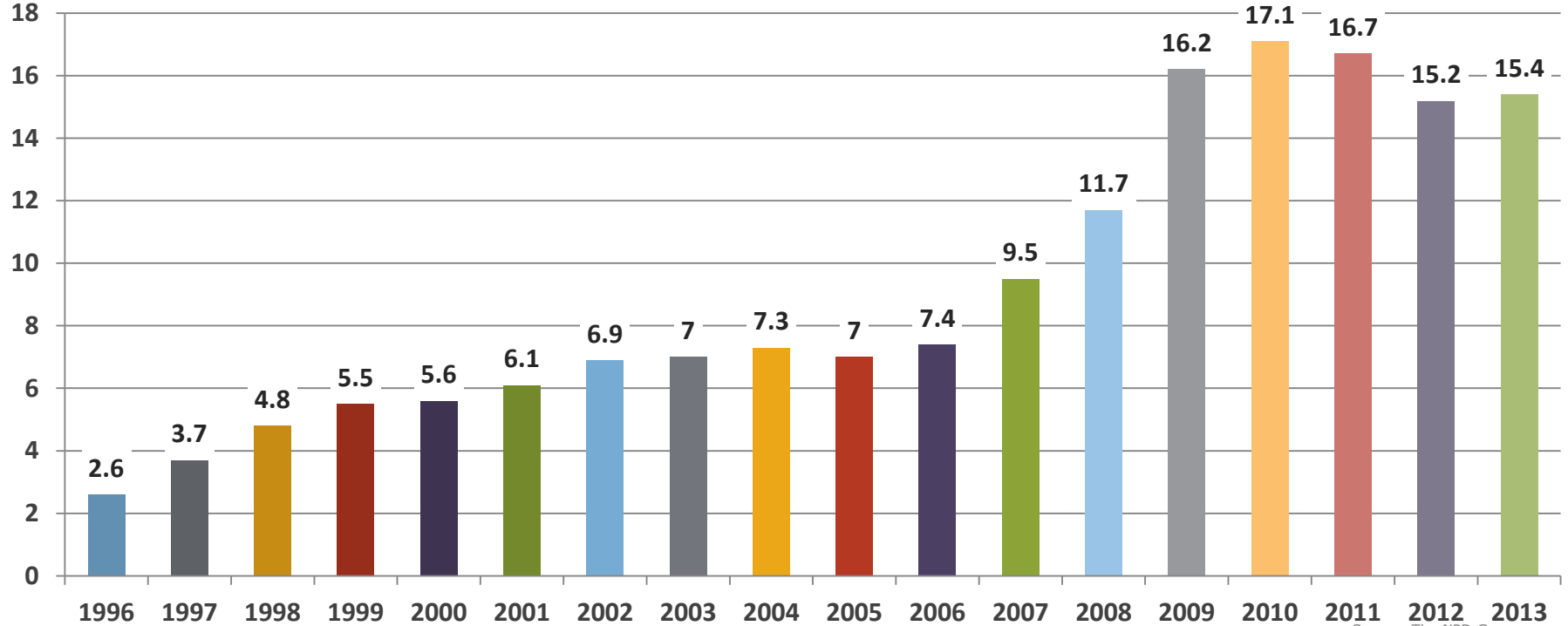
Weekly Gaming Timeshare by Mobile Spending Segment [NA Mobile Gamers][Hours Per Week]



Source: EEDAR Mobile Report 2013

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

US Video Game Sales Billions of Dollars



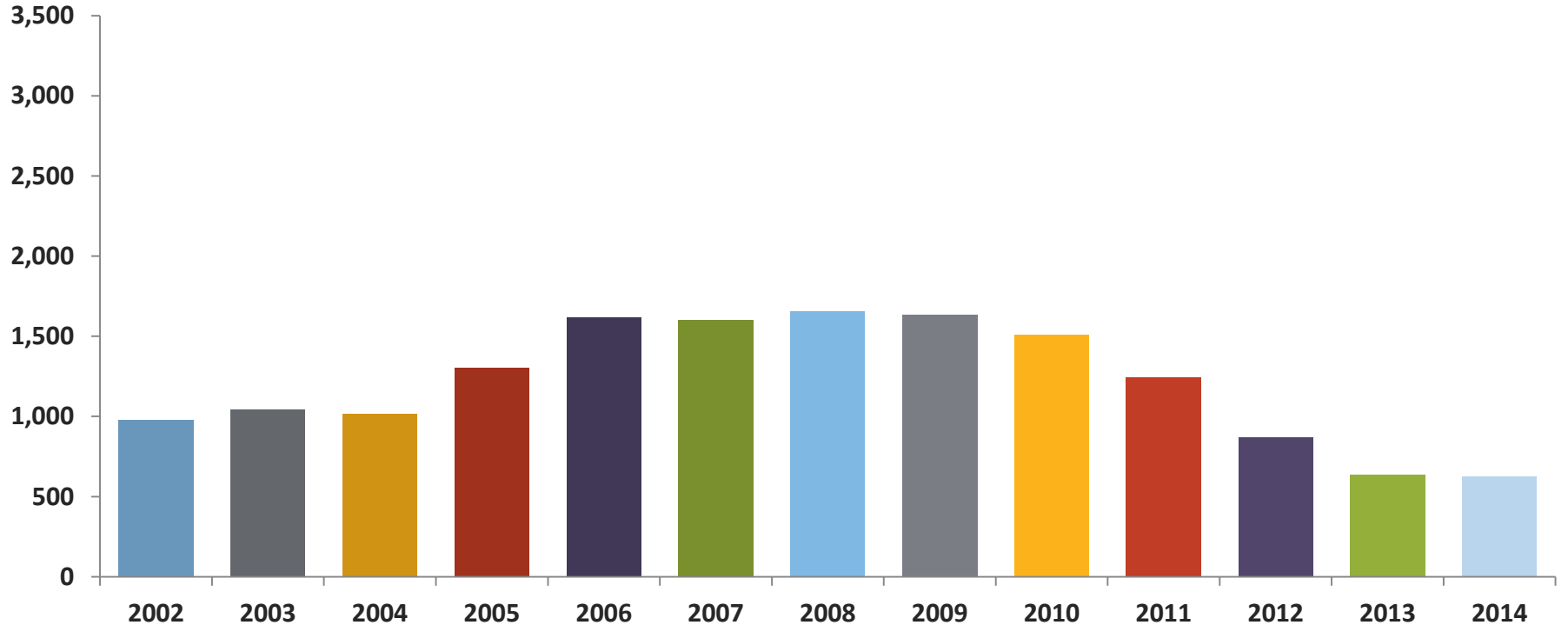
Source: The NPD Group



This has led to a Renaissance in game creation...

Release Quantities

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



Source: EEDAR

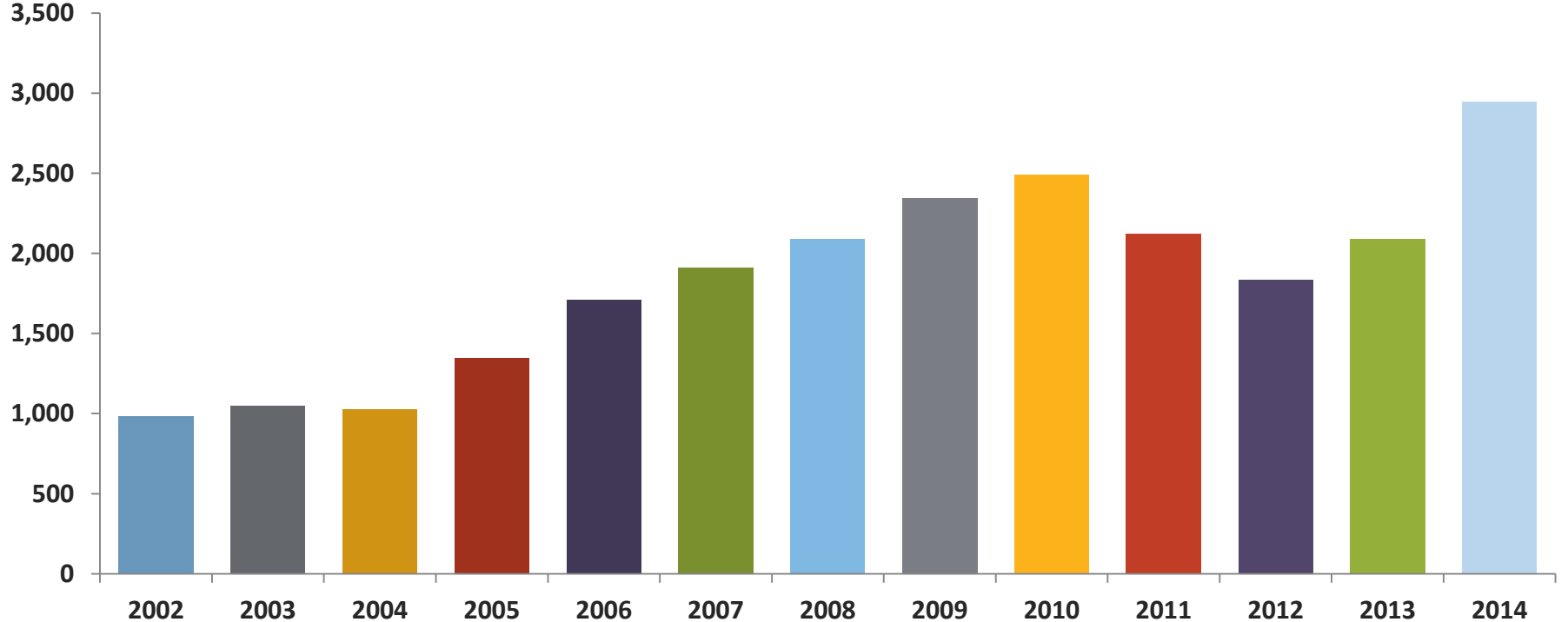


EEDAR

CONTEXT IS EVERYTHING

Release Quantities

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



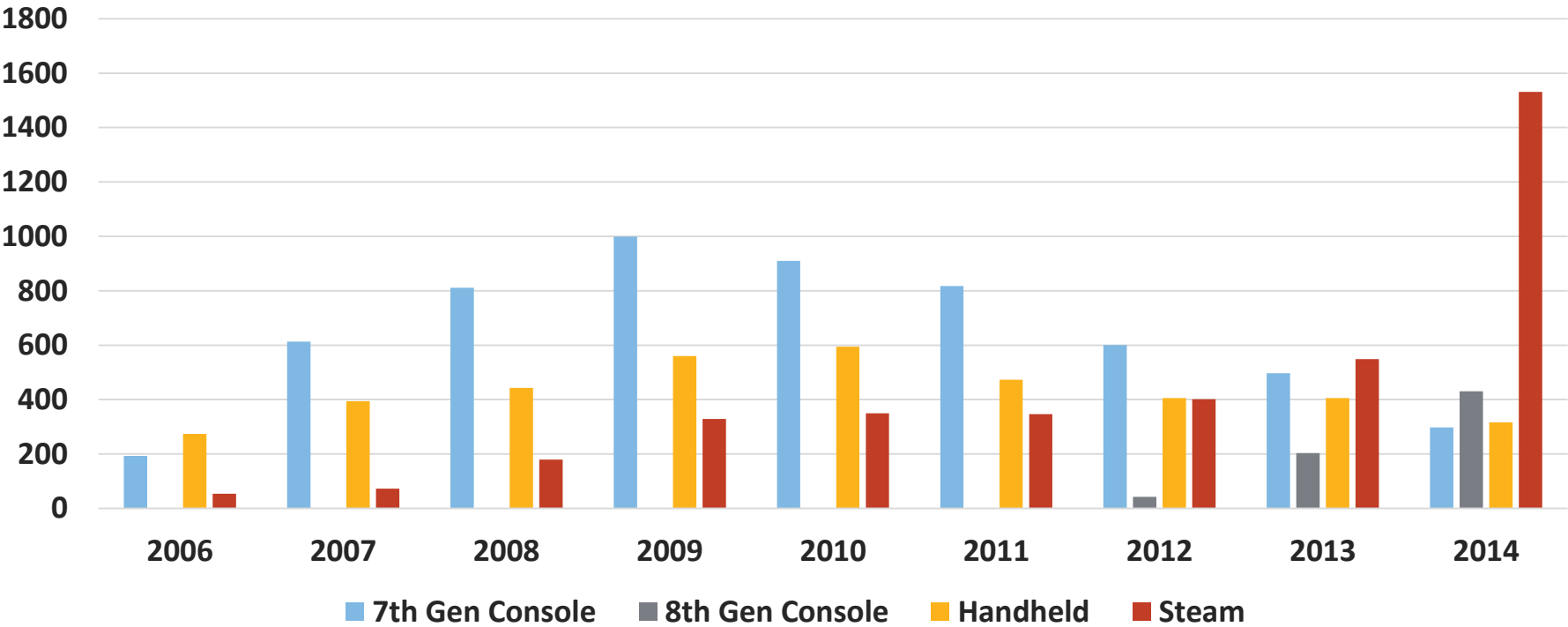
Source: EEDAR



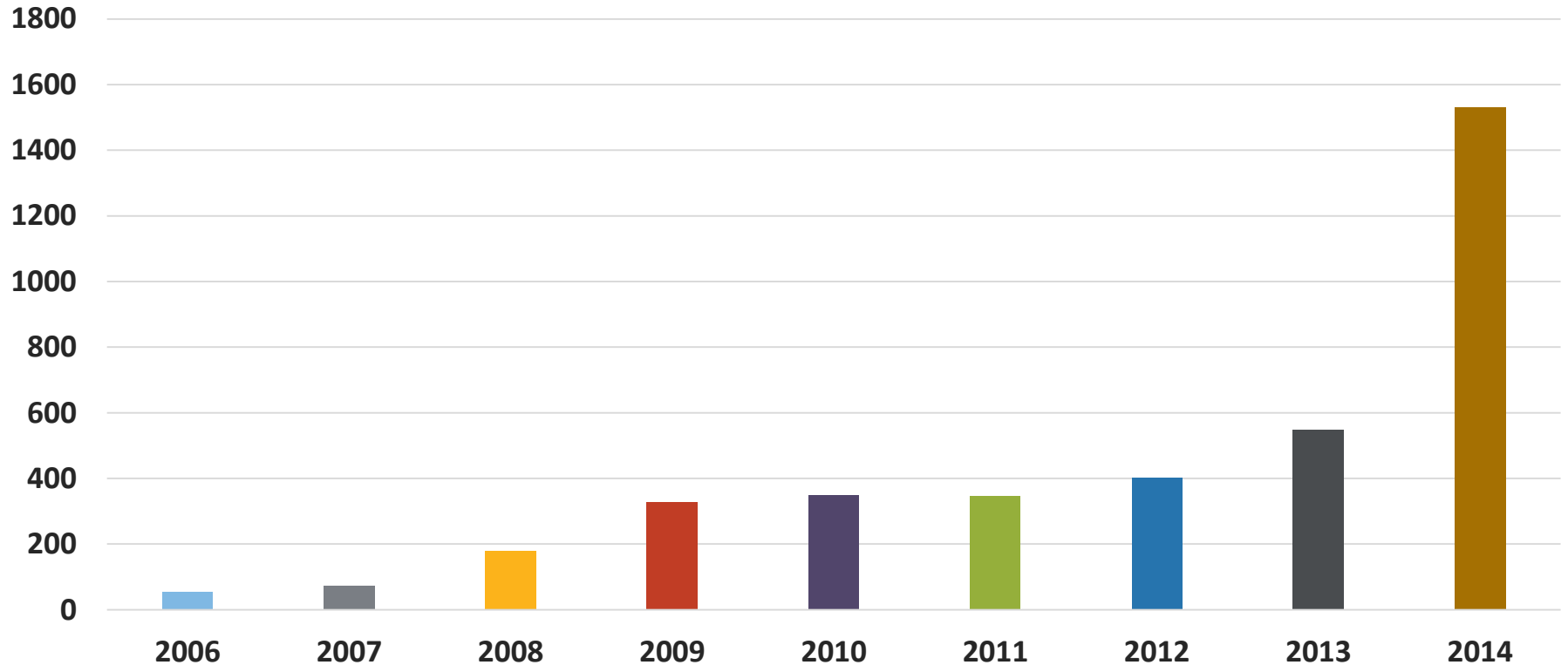
EEDAR

CONTEXT IS EVERYTHING

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

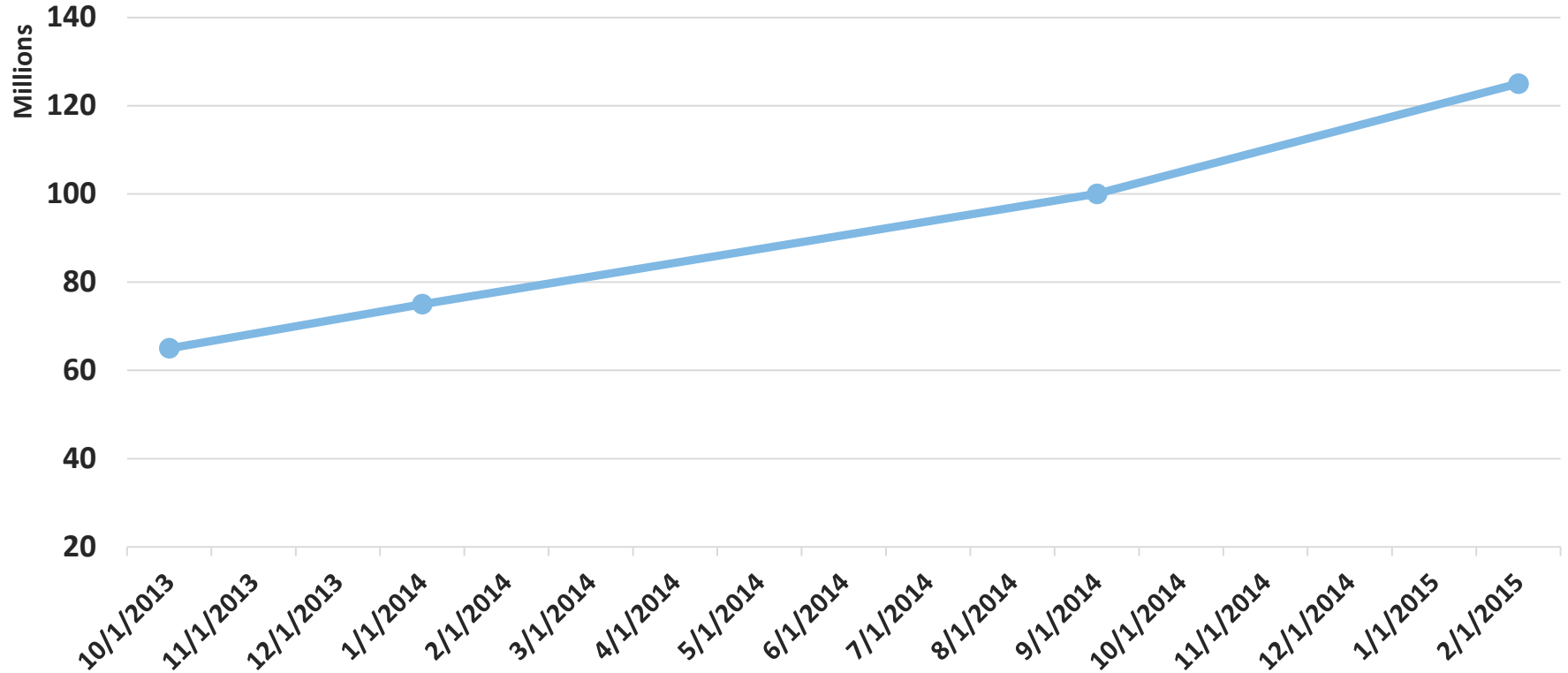


Release Quantity of Steam Games per Year



Source: EEDAR

Steam Active Users Over Time



Source: EEDAR & Valve



EEDAR

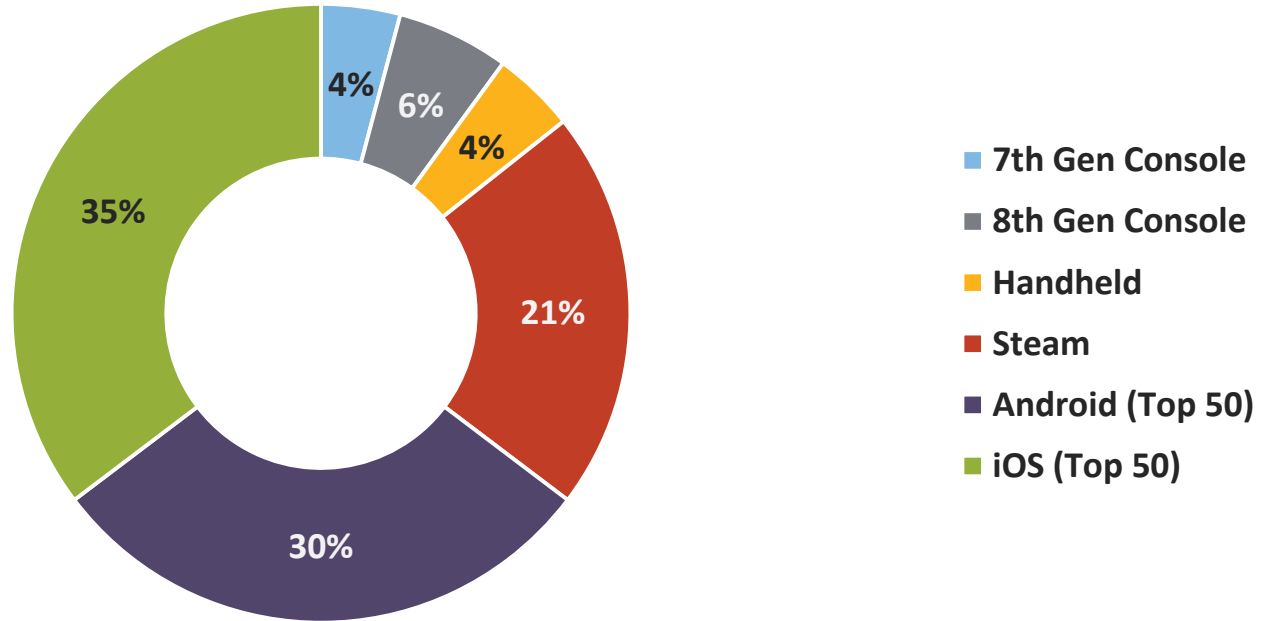
CONTEXT IS EVERYTHING



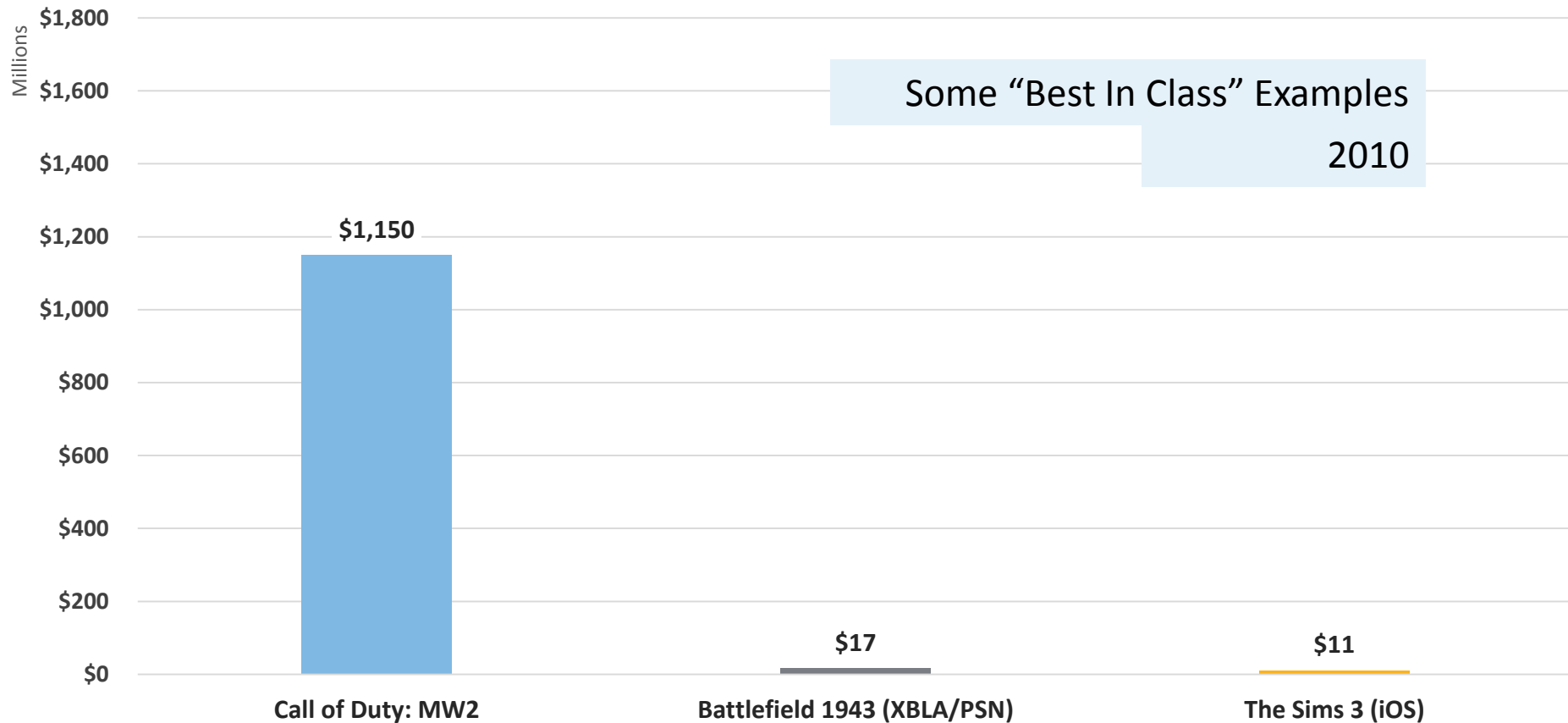
GAMES RELEASED



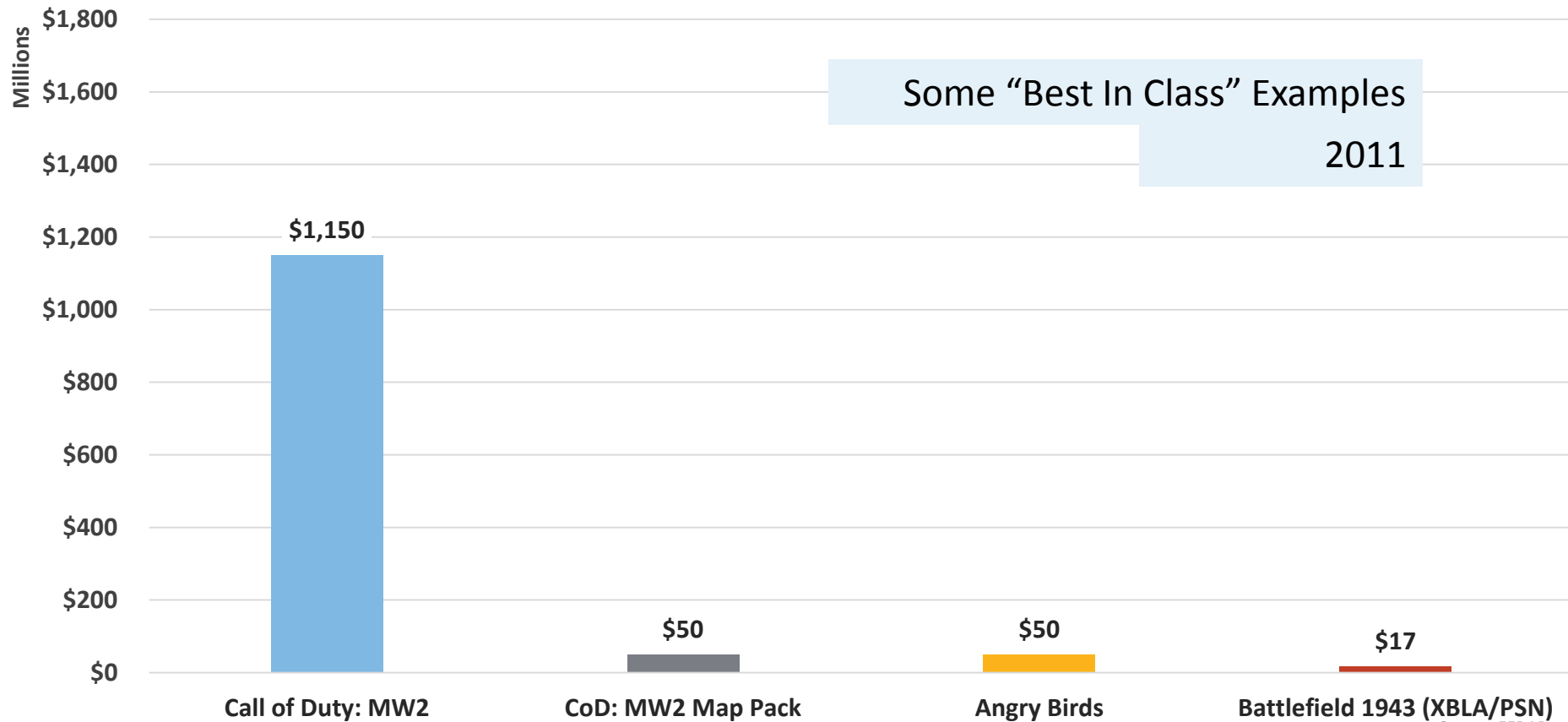
Games Released by % of Market
[2014][Retail & Digital Platform Title Releases][USA]



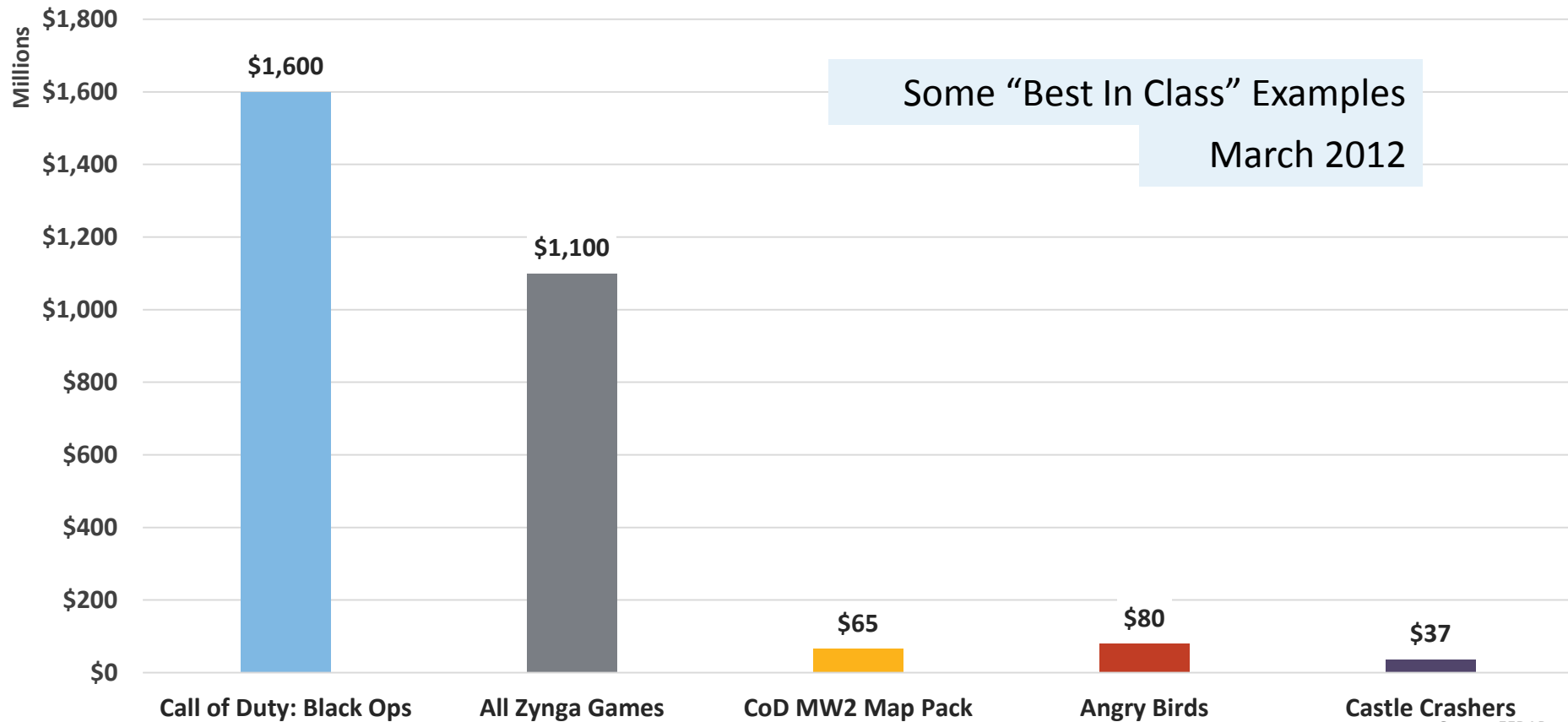
WHY DO I STILL TALK ABOUT CONSOLE?



WHY DO I STILL TALK ABOUT CONSOLE?



WHY DO I STILL TALK ABOUT CONSOLE?



WHY DO I STILL TALK ABOUT CONSOLE?

Some “Best In Class” Examples
March 2015



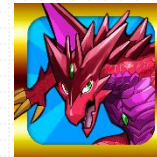
\$2 Billion+



\$1.5 Billion+



\$1 Billion+

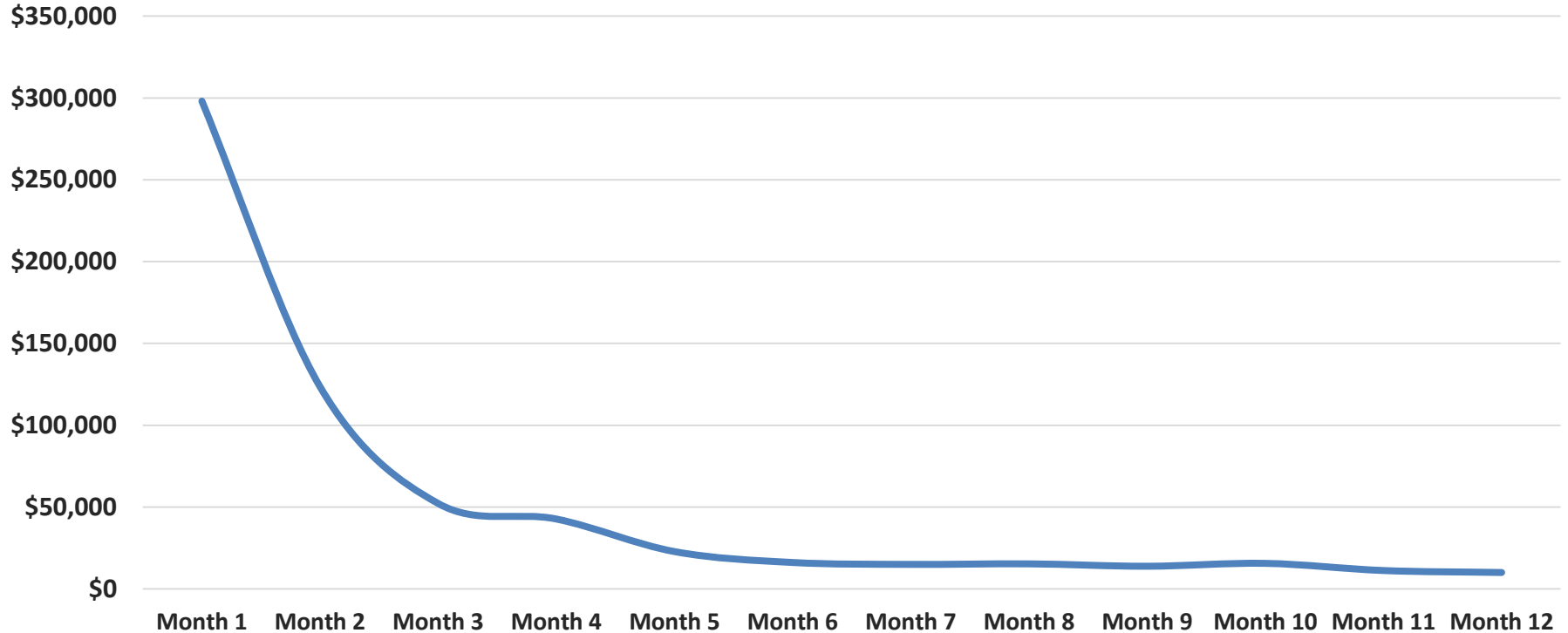


[\$500 Million+]

SALES CURVE

All PlayStation and Xbox Games

Ave. [Unit Sales] of [US] [Retail] [Action, Fighting, RPG, Shooter, Strategy] Games [Nov 2005] to [Dec 2013]



Source: EEDAR & The NPD Group

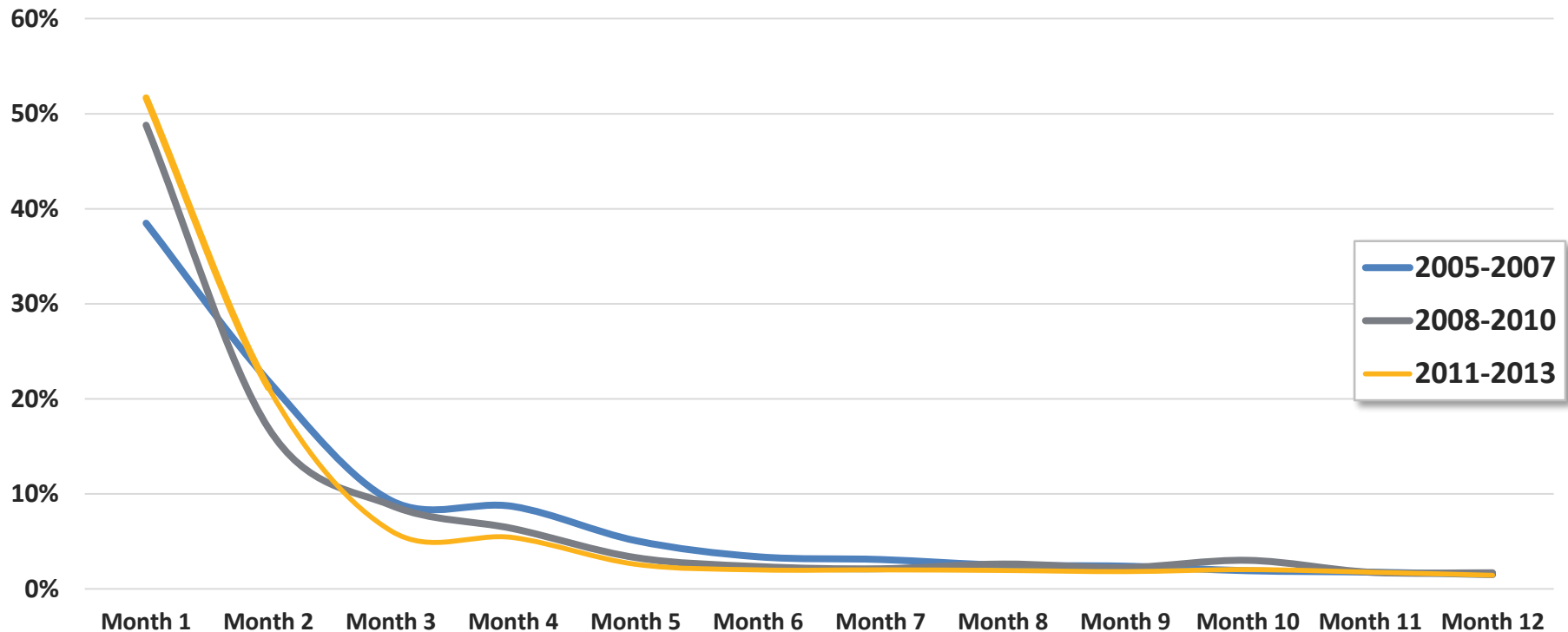


EEDAR

CONTEXT IS EVERYTHING

Frontloading of Sales by Core Console Genres over Time

[Genres: Action, Fighting, RPG, Shooter, Strategy] [USA] [% of Total 12 Month Unit Sales]



Source: EEDAR & The NPD Group

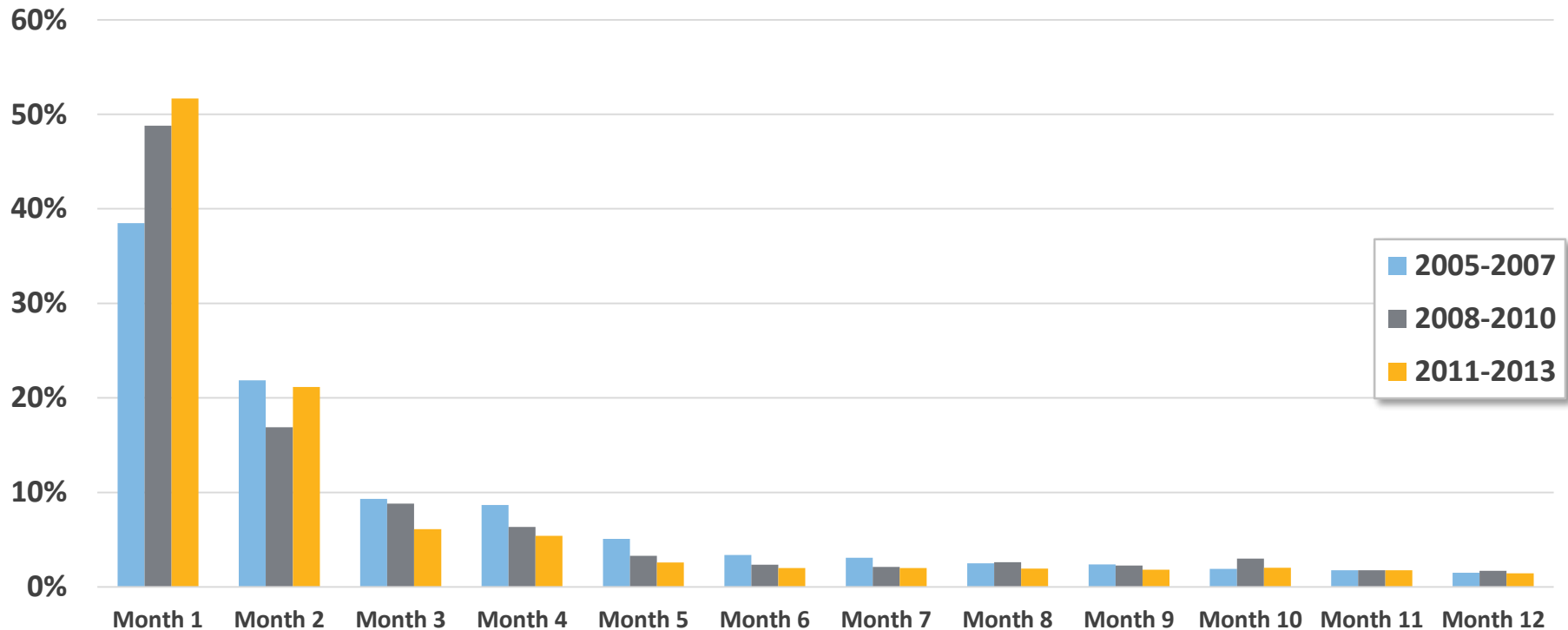


EEDAR

CONTEXT IS EVERYTHING

Frontloading of Sales by Core Console Genres over Time

[Genres: Action, Fighting, RPG, Shooter, Strategy] [USA] [% of Total 12 Month Unit Sales]



Source: EEDAR & The NPD Group

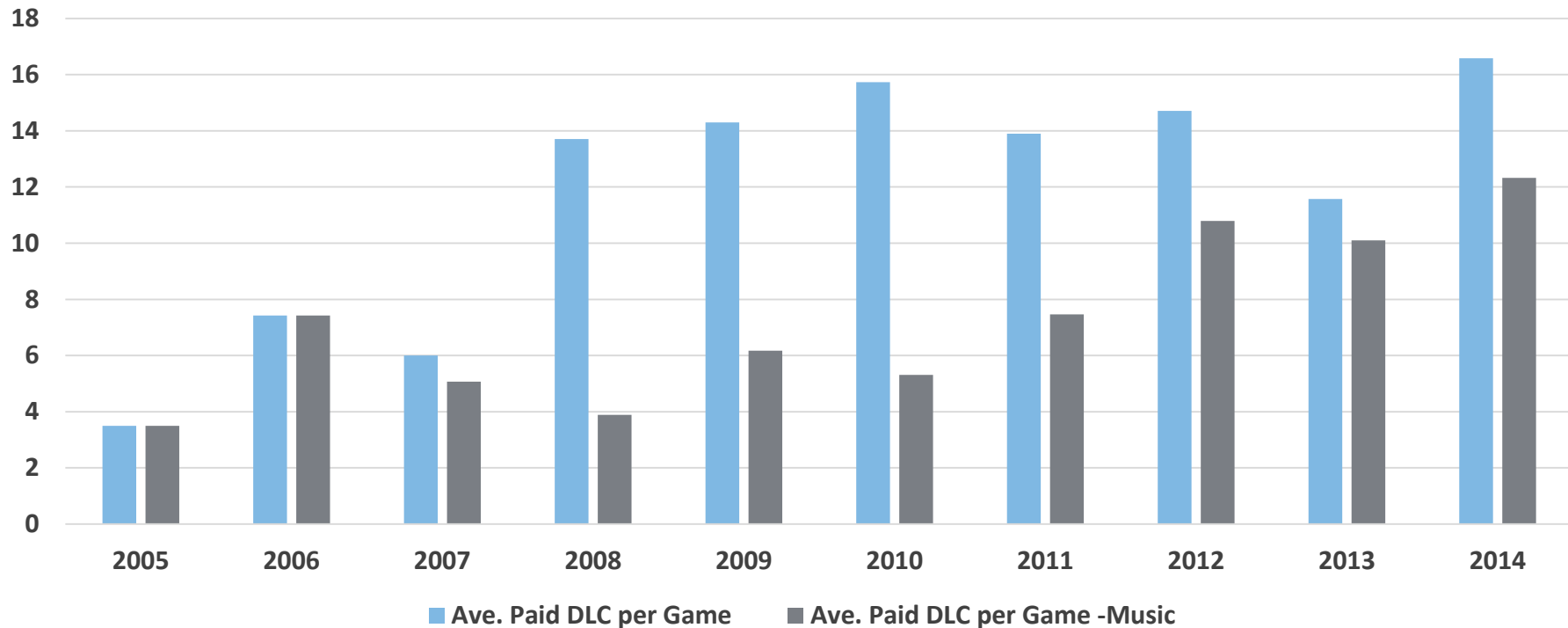


EEDAR

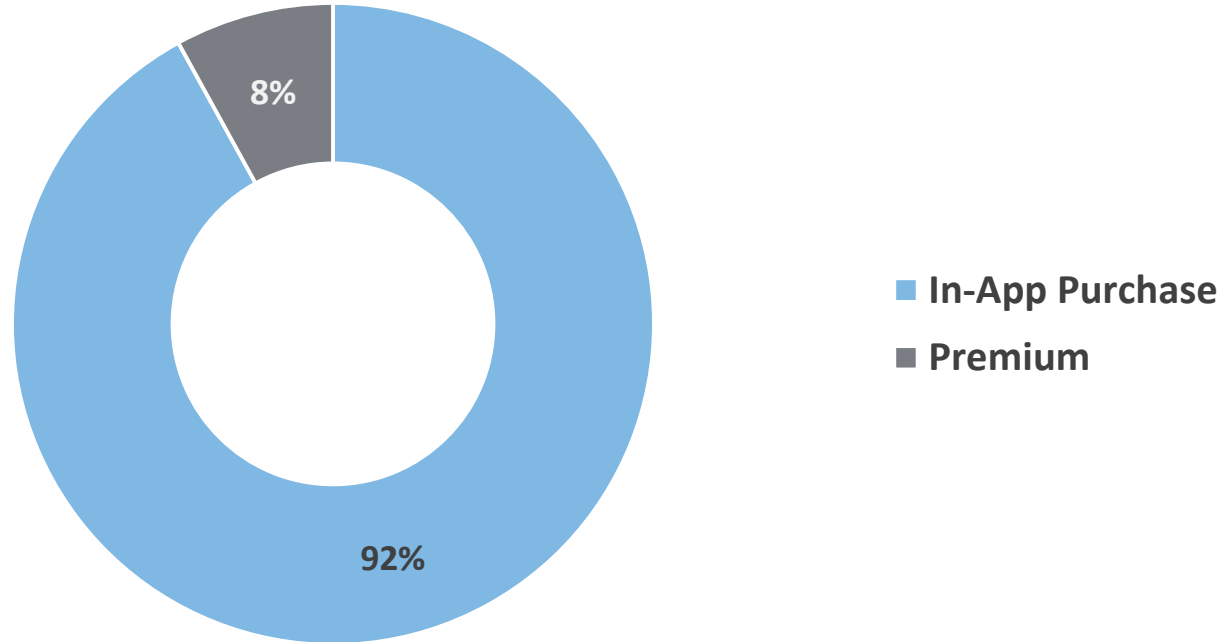
CONTEXT IS EVERYTHING

GAME AFFECTING DLC

Average Quantity of Paid Game Affecting DLC per Game
All PS3 & Xbox 360 Platform Titles

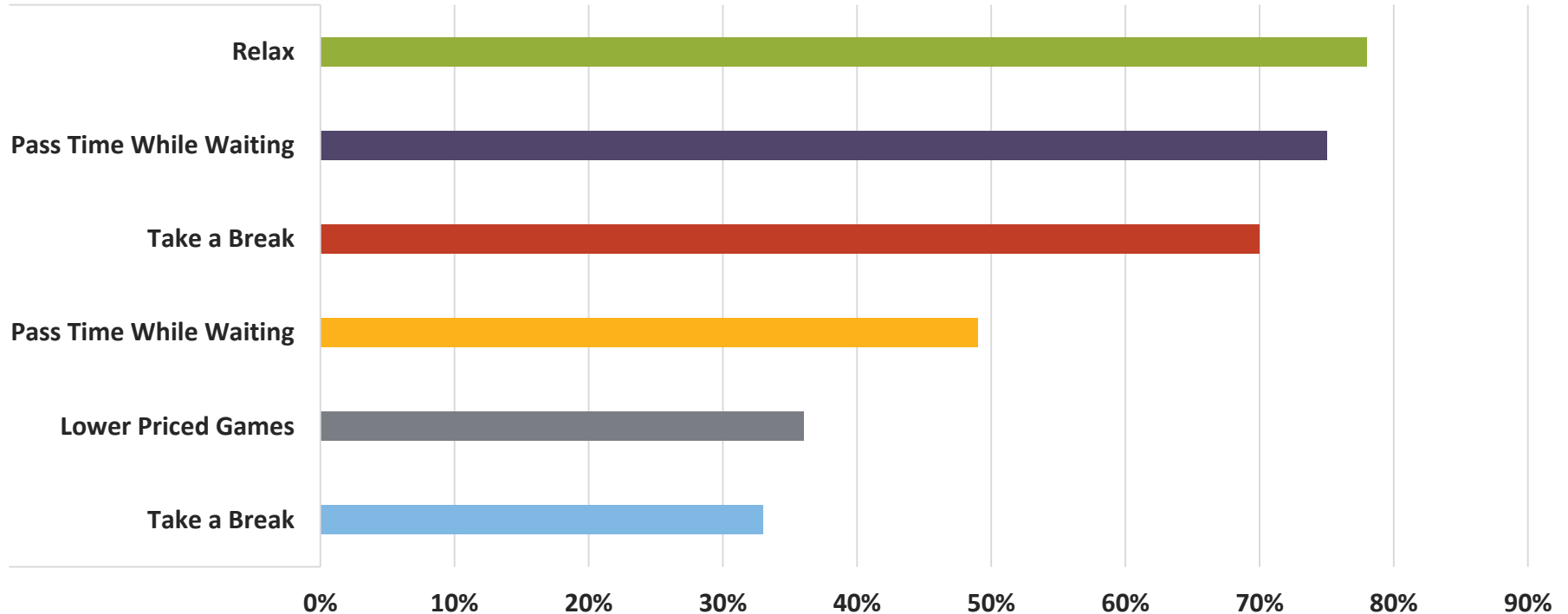


NA Mobile Gaming Revenue by Monetization Type



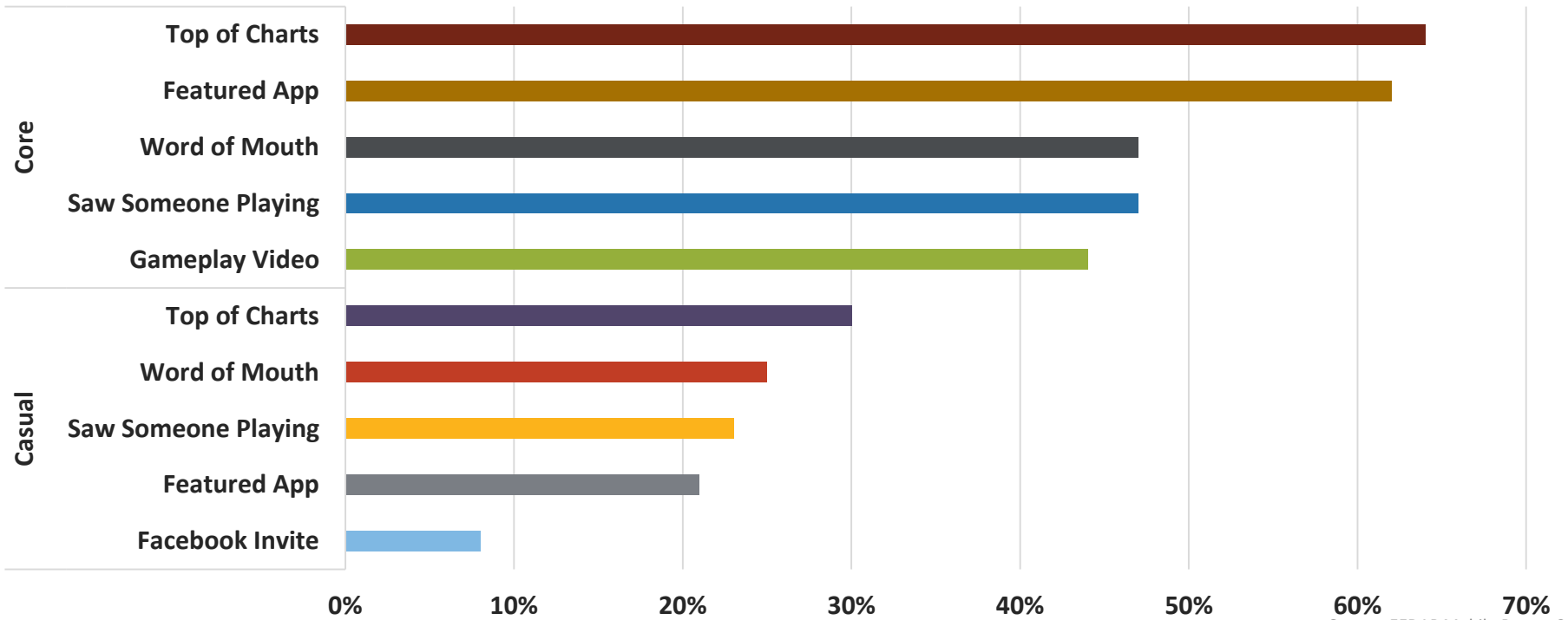
Top 3 Reasons Mobile Gamers Play Mobile Games

[Core vs. Casual][Active Mobile Gamers][NA/Europe]



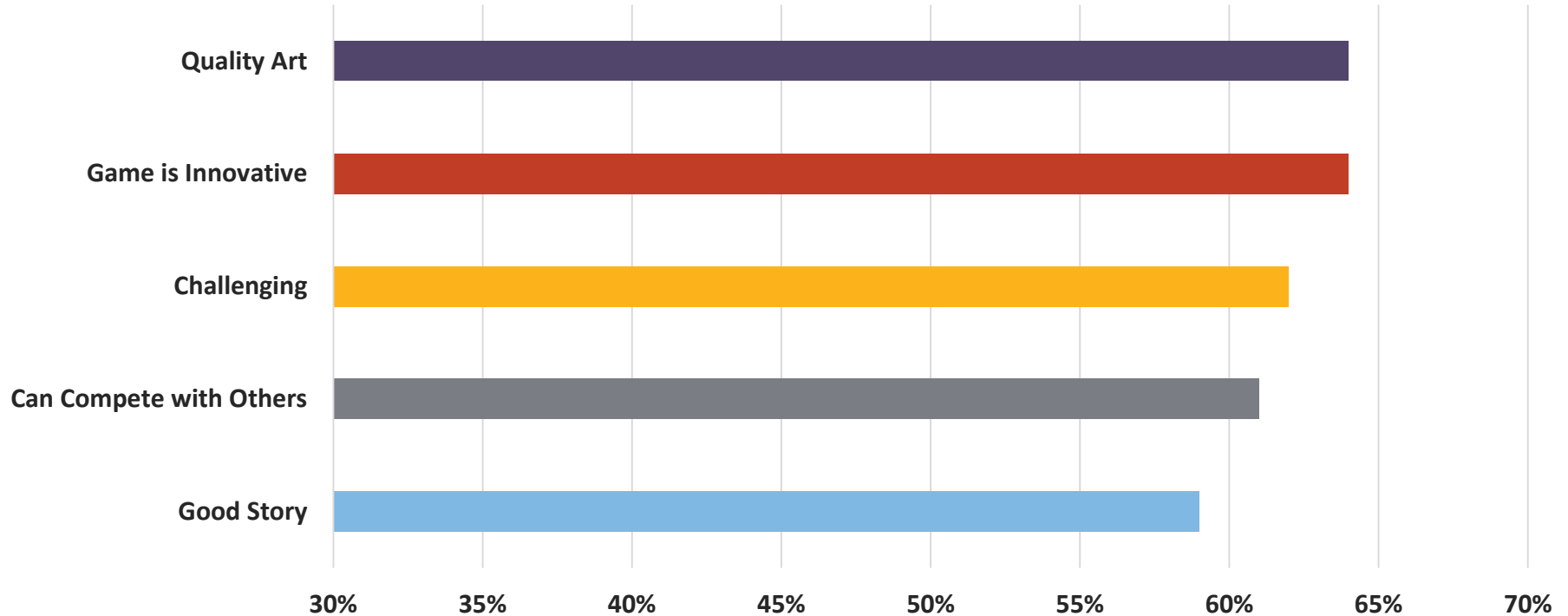
Source: EEDAR Mobile Report 2014

Sources Mobile Gamers Use to Discover Mobile Games
[Core vs. Casual][Active Mobile Gamers][NA/Europe]



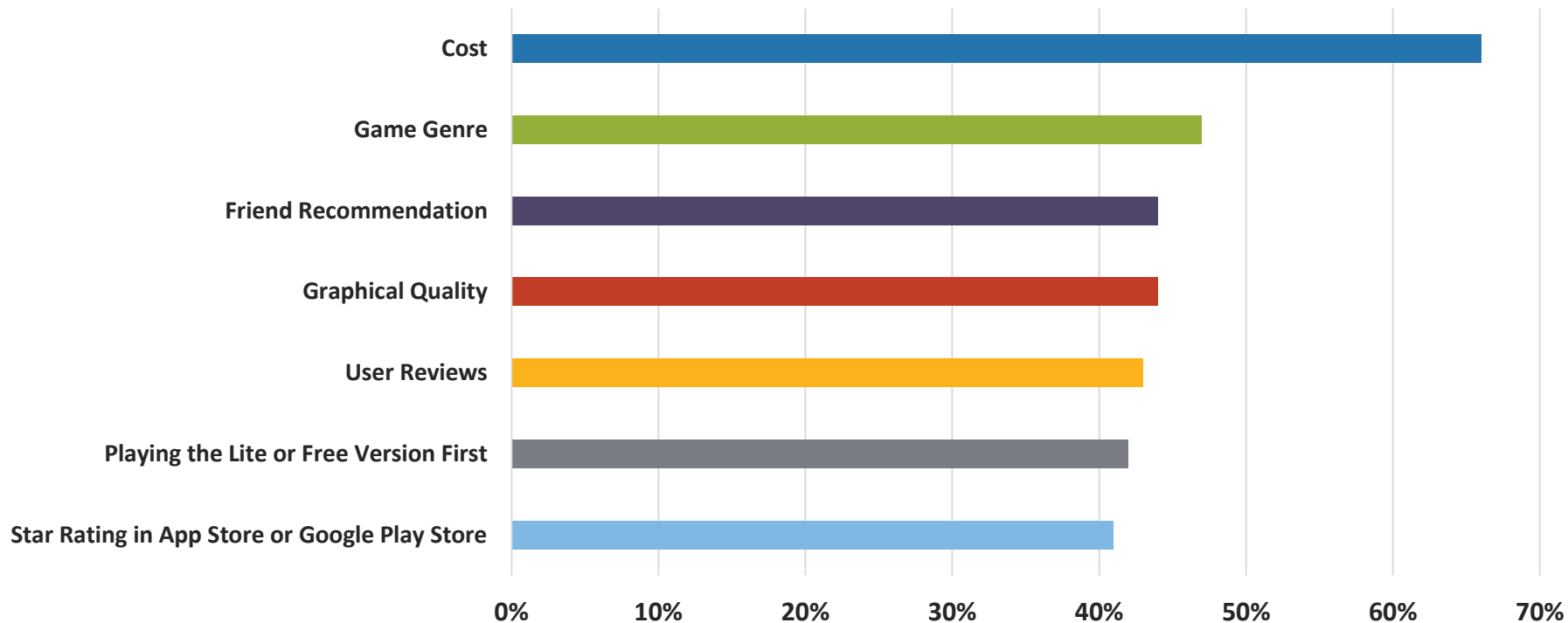
Source: EEDAR Mobile Report 2014

Features “Core” Mobile Games Share [Active Mobile Gamers][NA/Europe]



Source: EEDAR Mobile Report 2014

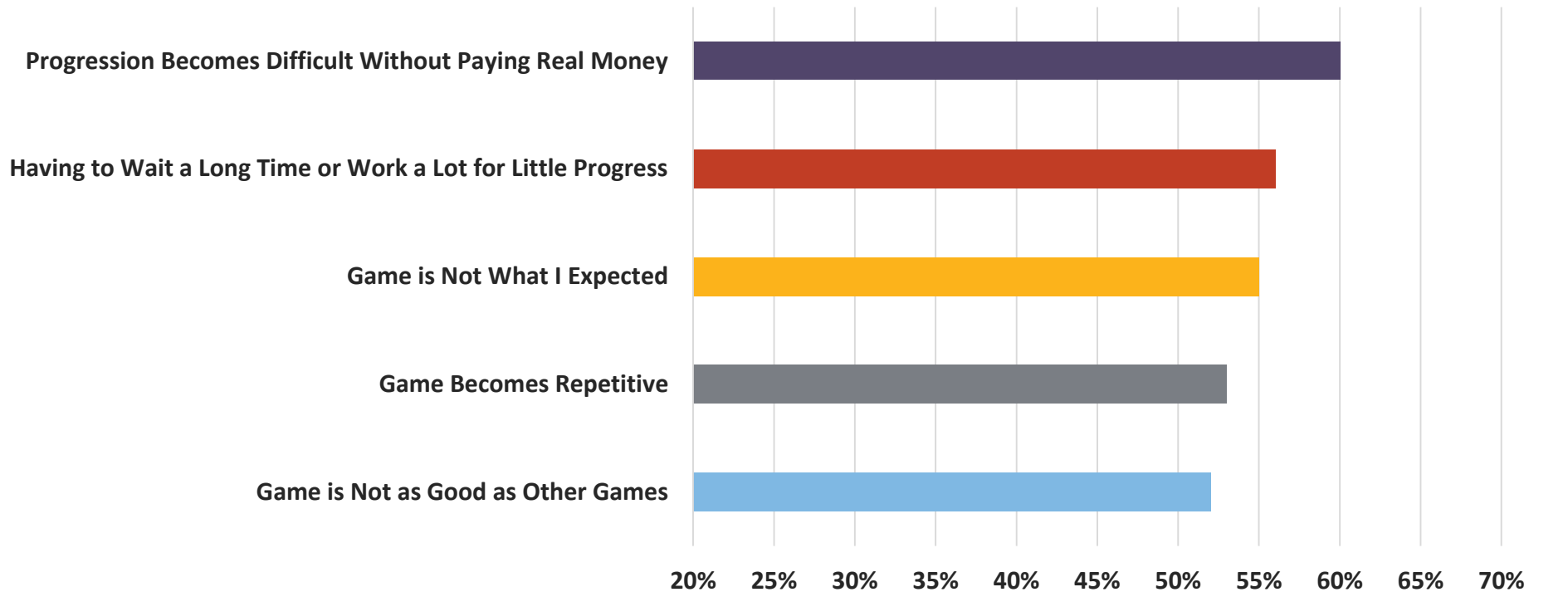
Top Endorsed Reasons Mobile Gamers Download Mobile Games [Active Mobile Gamers][NA/Europe]



Source: EEDAR Mobile Report 2014

Reasons “Core” Mobile Gamers Stop Playing Mobile Games

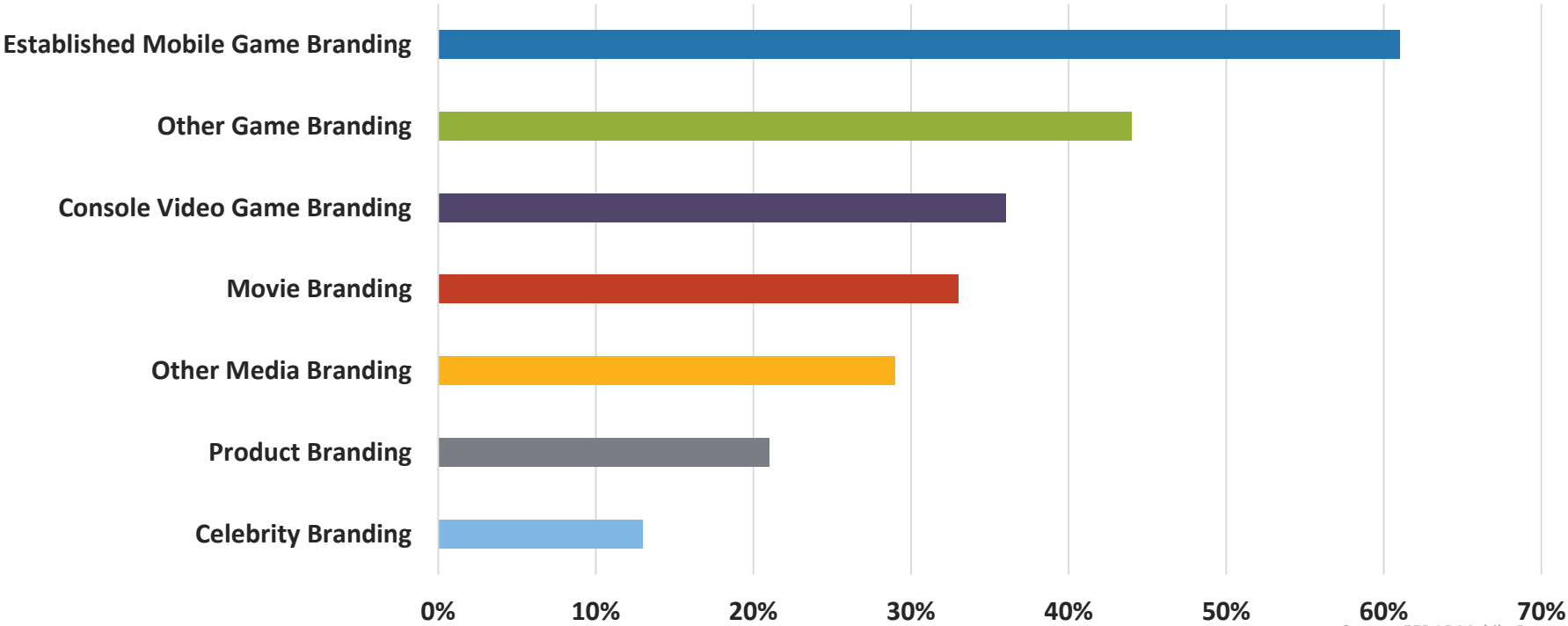
[Active Mobile Gamers][NA/Europe]



Source: EEDAR Mobile Report 2014

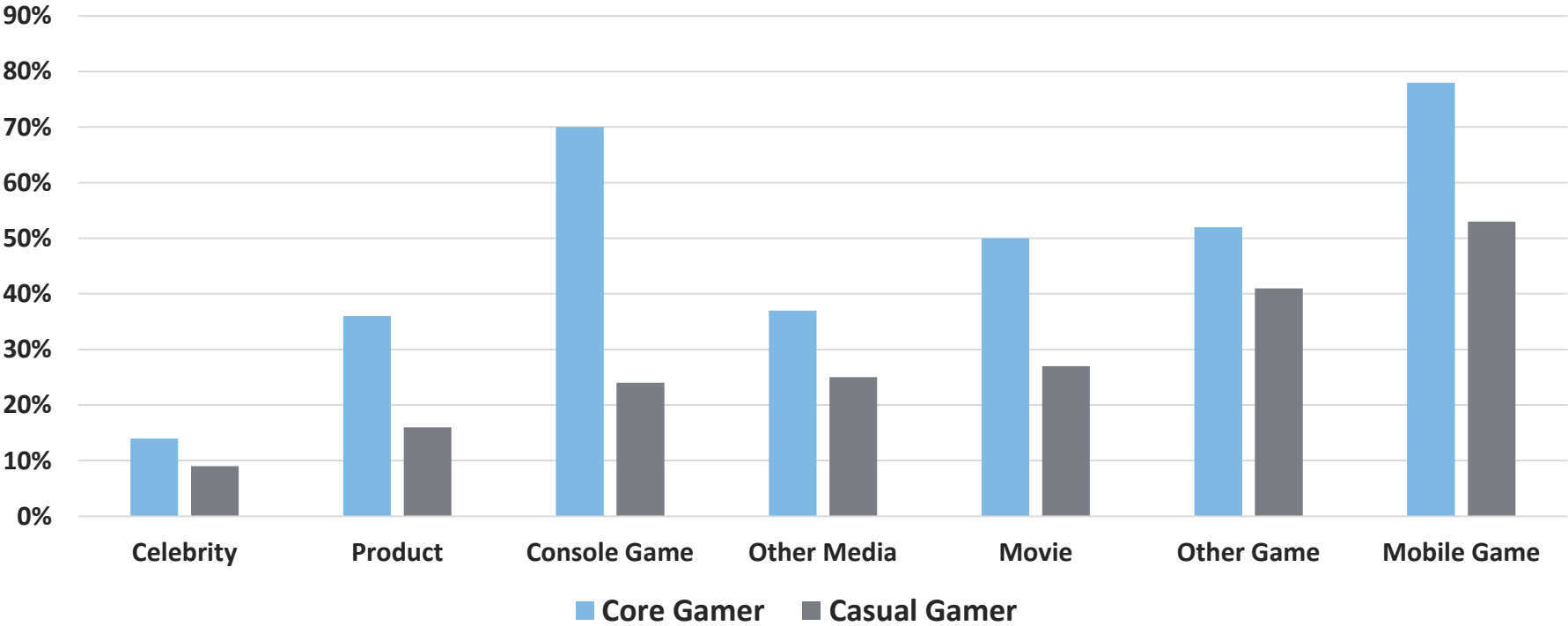


Influence of Brand on Mobile Game Downloads
[Active Mobile Gamers][NA/Europe]



Source: EEDAR Mobile Report 2014

Influence of Brand on Mobile Game Downloads
[Core vs. Casual][Active Mobile Gamers][NA/Europe]



DIGITAL STOREFRONTS



App Store



amazon.com[®]



Google play



Origin[™]
Powered by EA



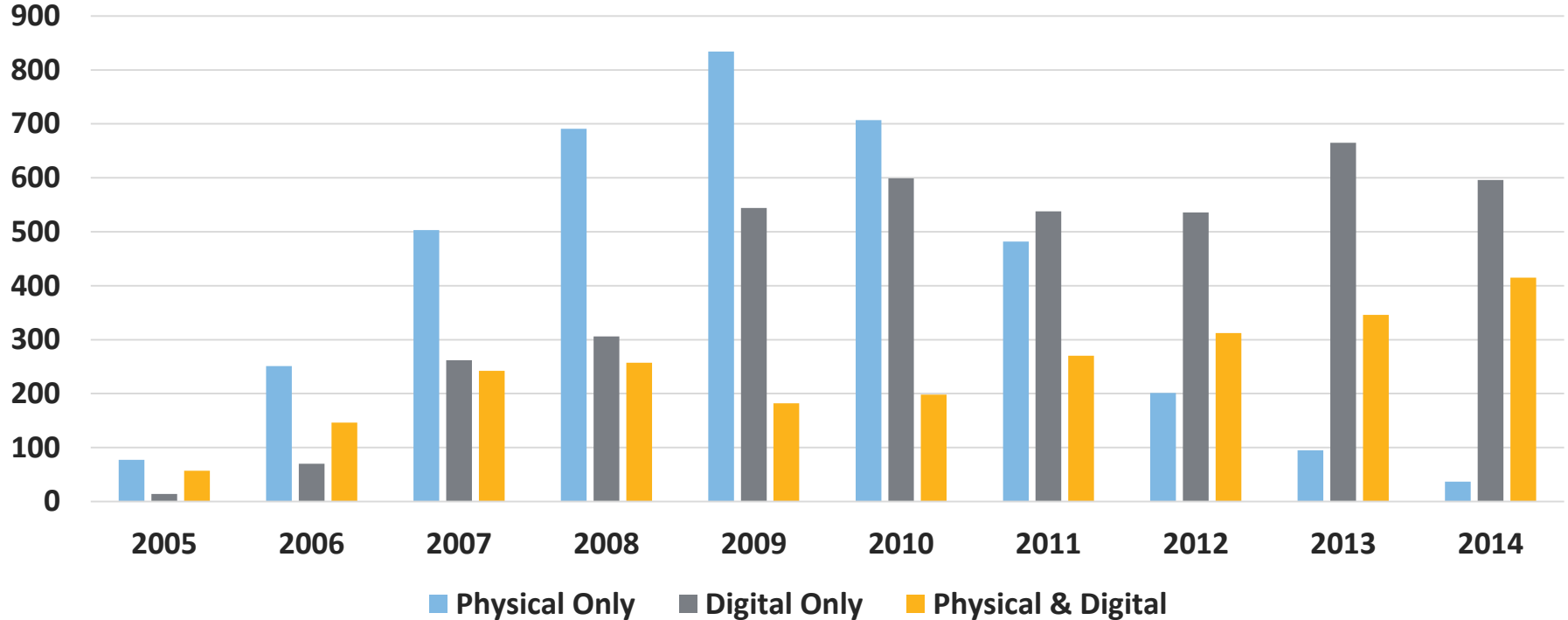
EEDAR

CONTEXT IS EVERYTHING

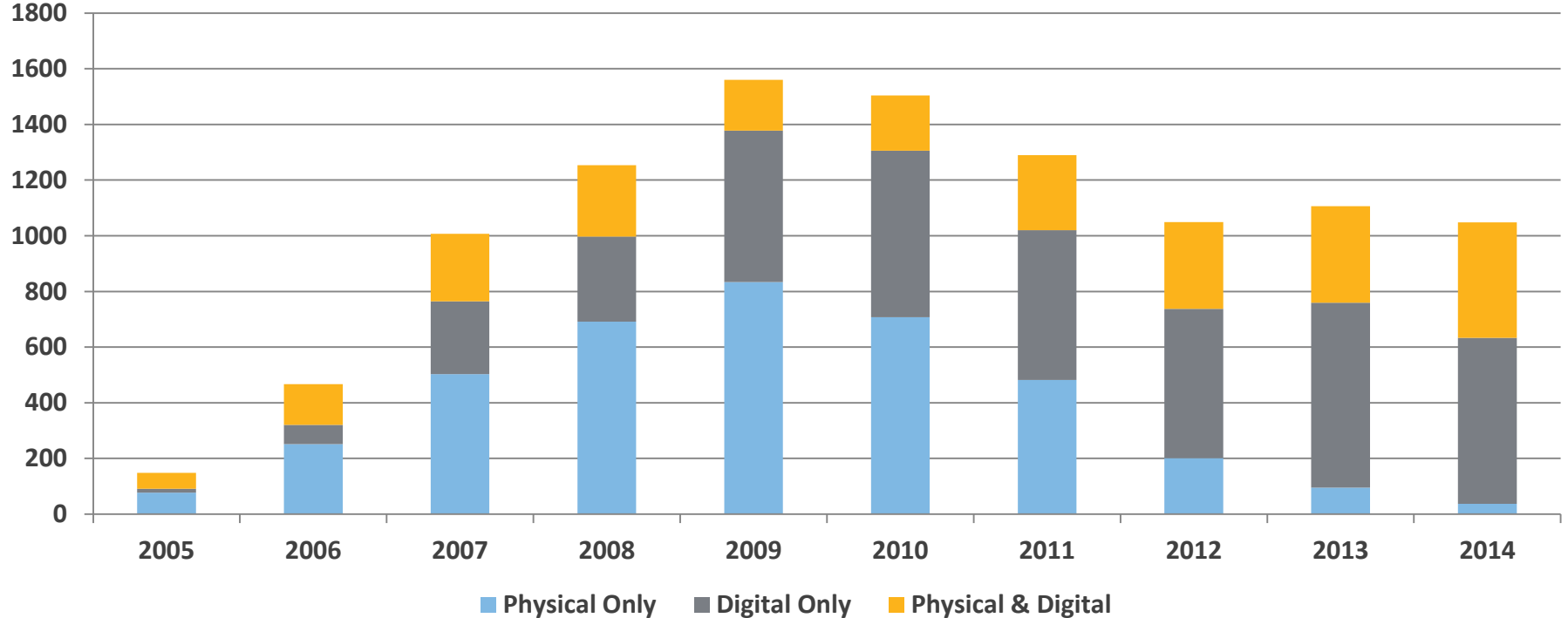
CONSOLE STOREFRONTS



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

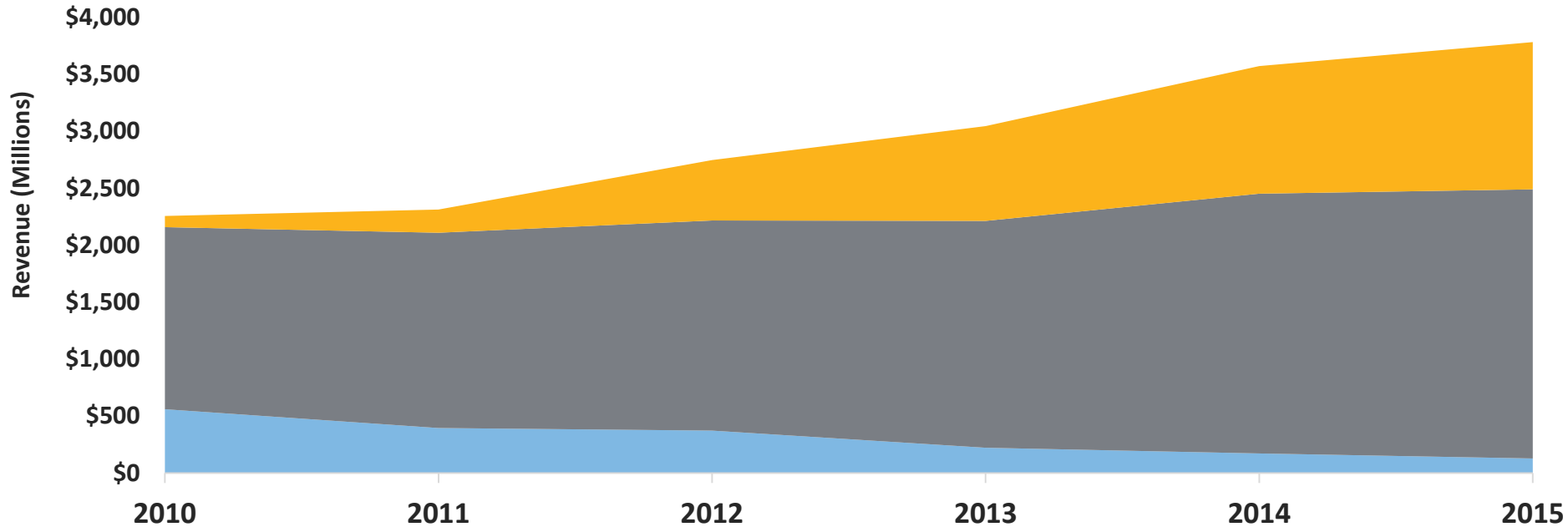


Digital and Retail Console Games Over Time 7th & 8th Generation Consoles & Handhelds in the USA



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

PC Retail Digital Retail F2P



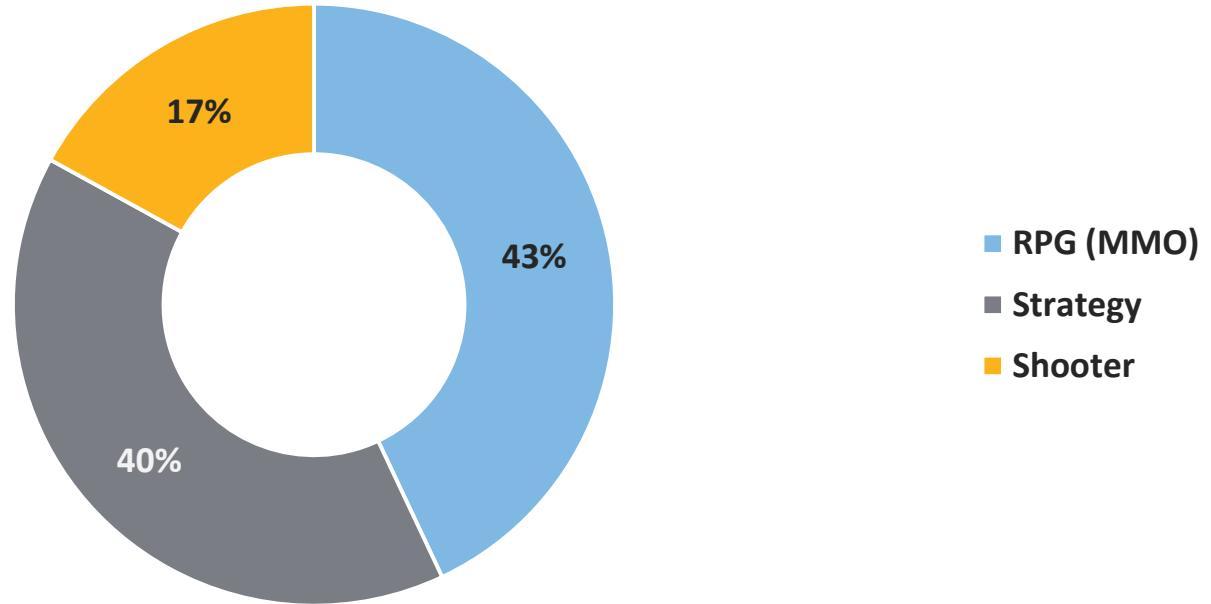
Source: EEDAR PC F2P Report 2015



EEDAR

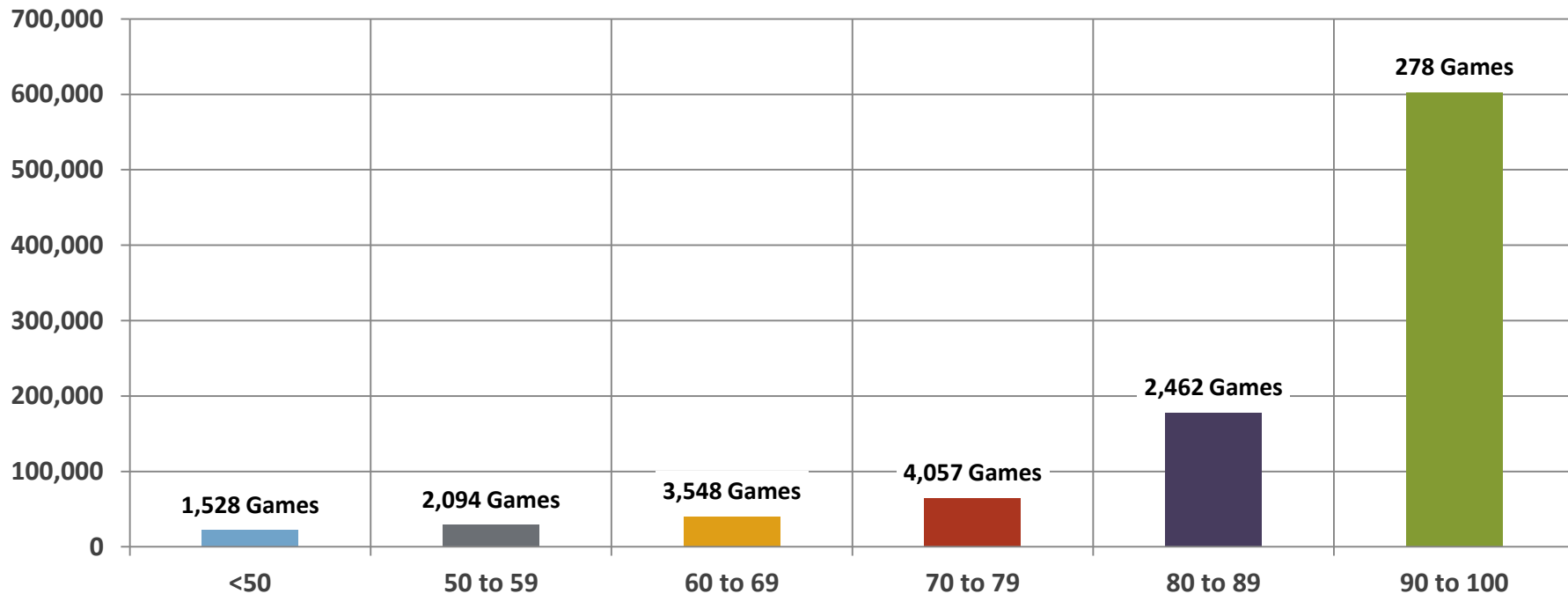
CONTEXT IS EVERYTHING

PC F2P Genre Revenues [NA][2014]



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 2014]



Source: The NPD Group & EEDAR

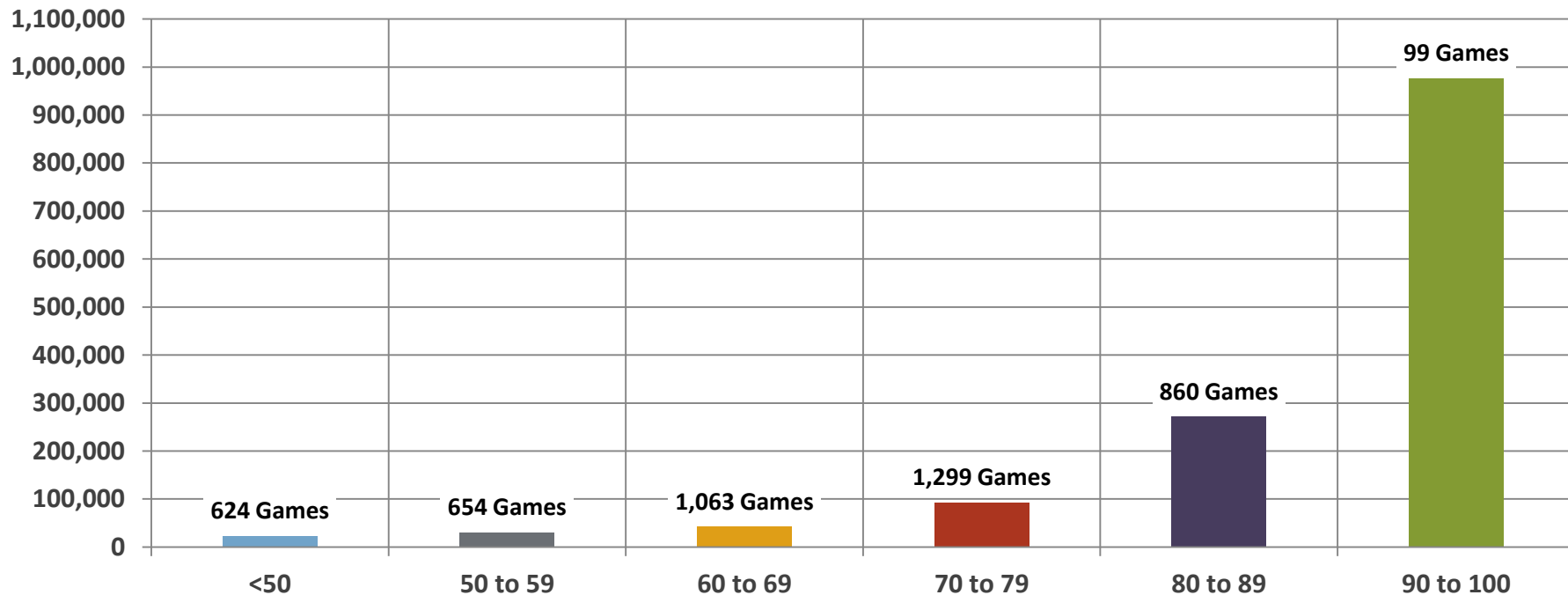


EEDAR

CONTEXT IS EVERYTHING

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 2014]

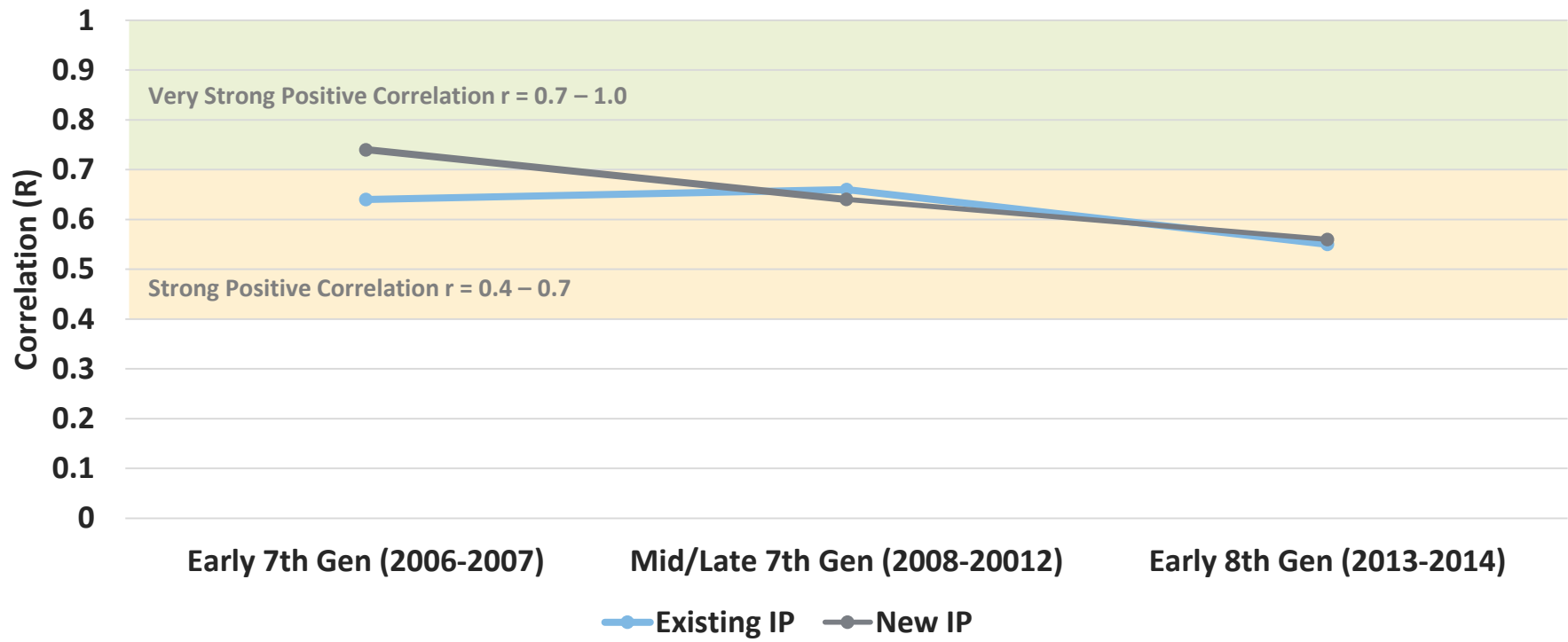


Source: The NPD Group & EEDAR



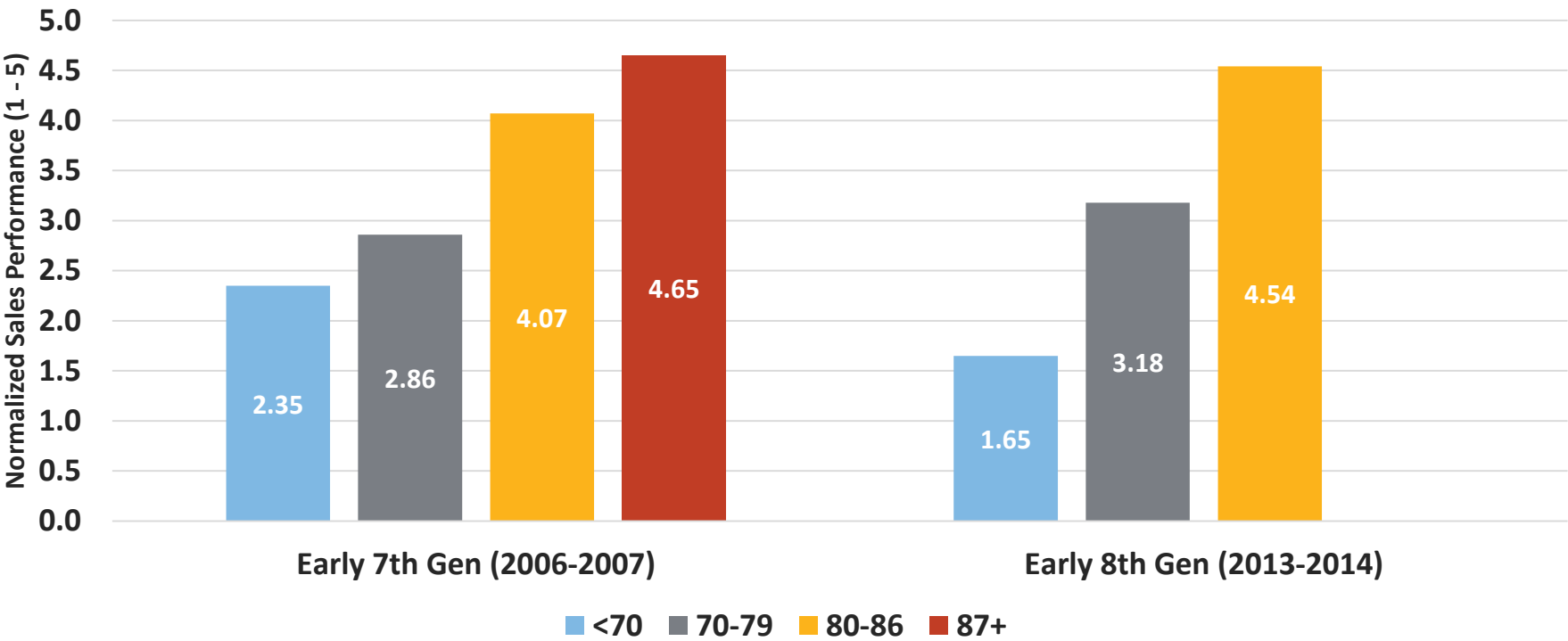
Correlation Between Average Review Score and 6 Month Unit Sales

[HD Console][NA Physical & Digital][Excludes Casual Genres][Unit Sales Normalized][Released by 9/30/14]



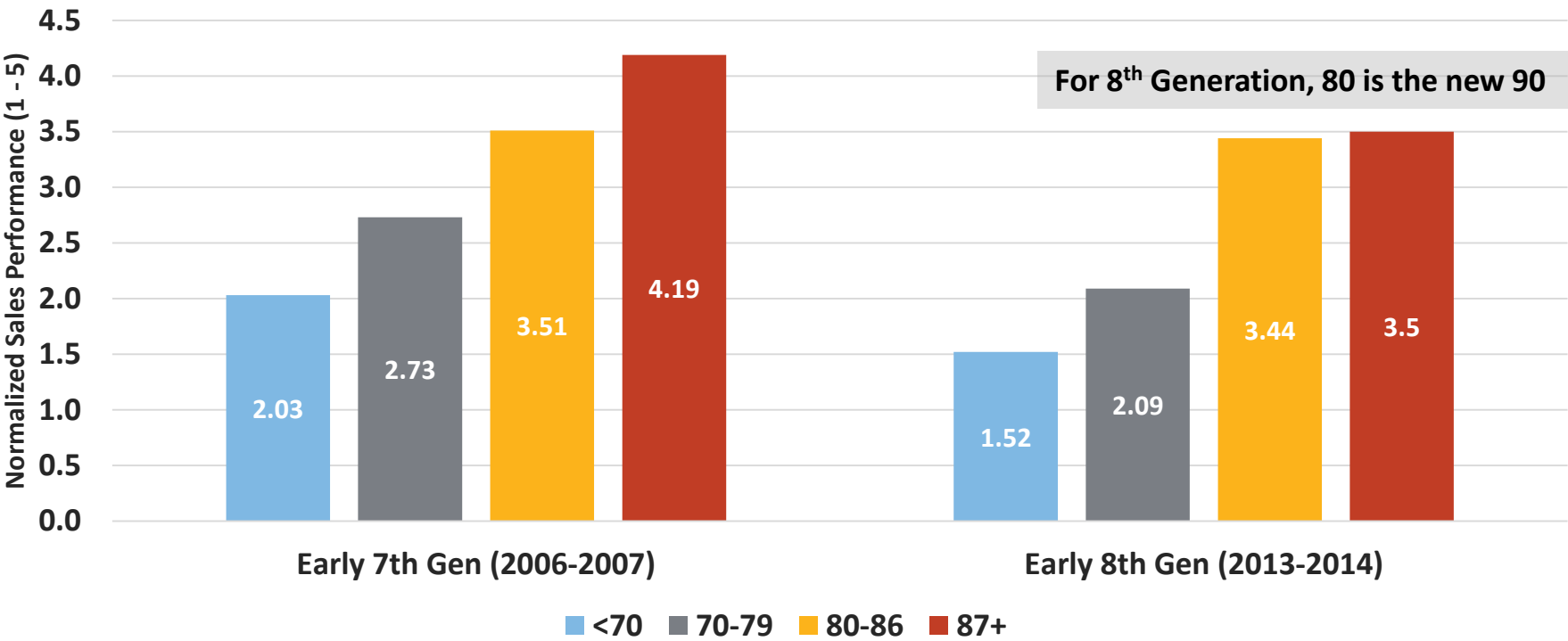
New IP Unit Sales Performance by Review Score Band

[HD Console][NA Physical & Digital][Excludes Casual Genres][Unit Sales Normalized][Released by 9/30/14]



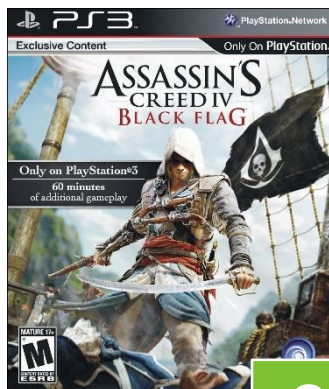
Existing IP Unit Sales Performance by Review Score Band

[HD Console][NA Physical & Digital][Excludes Casual Genres][Unit Sales Normalized][Released by 9/30/14]

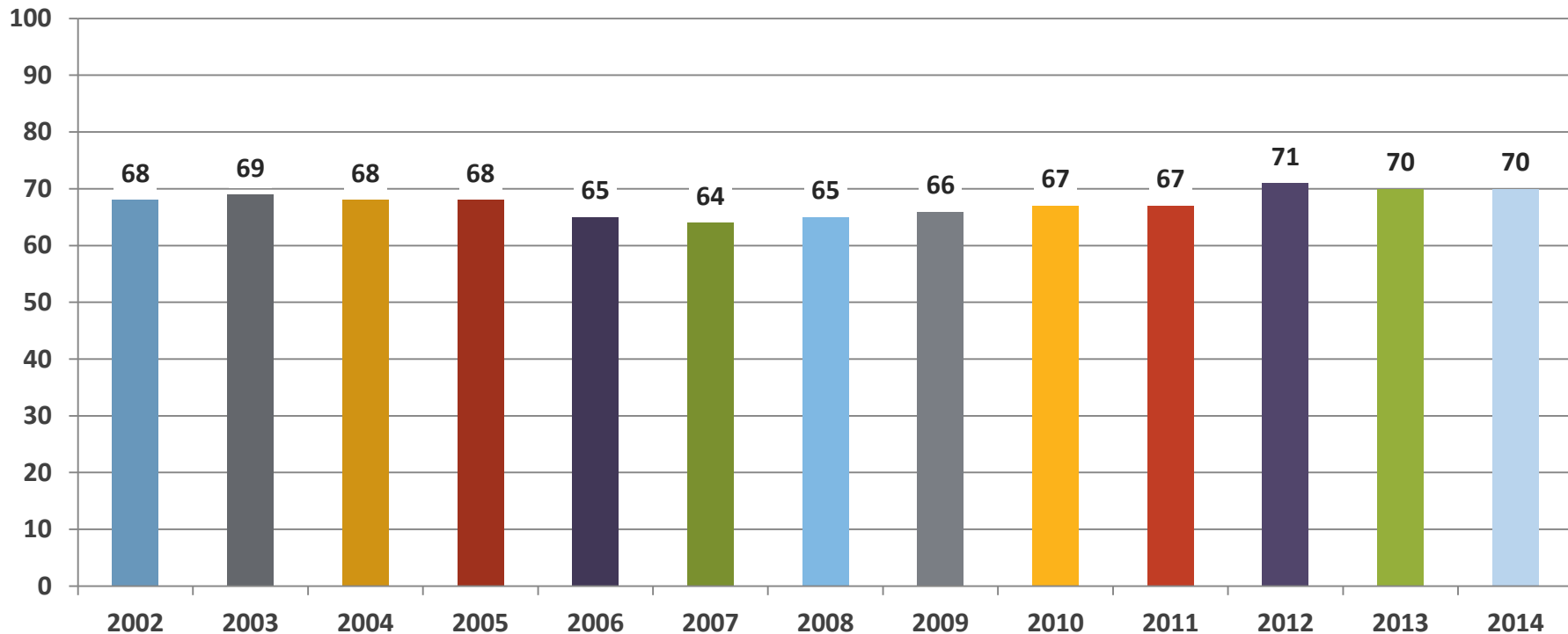


THE QUALITY THRESHOLD

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



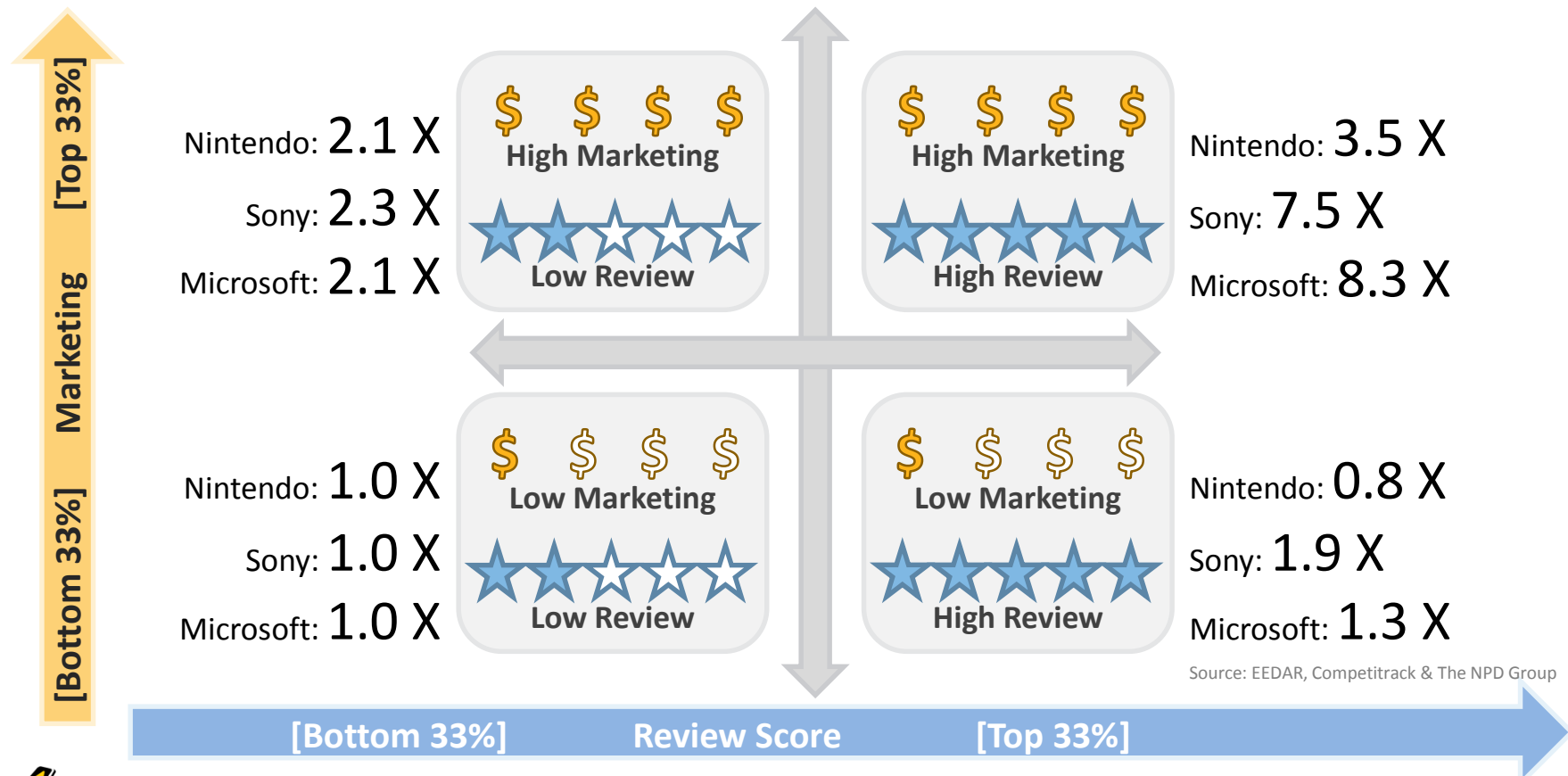
Average Review Score Retail Console, Handheld & PC Title Releases in the USA



Source: EEDAR



MARKETING VS. GAME QUALITY



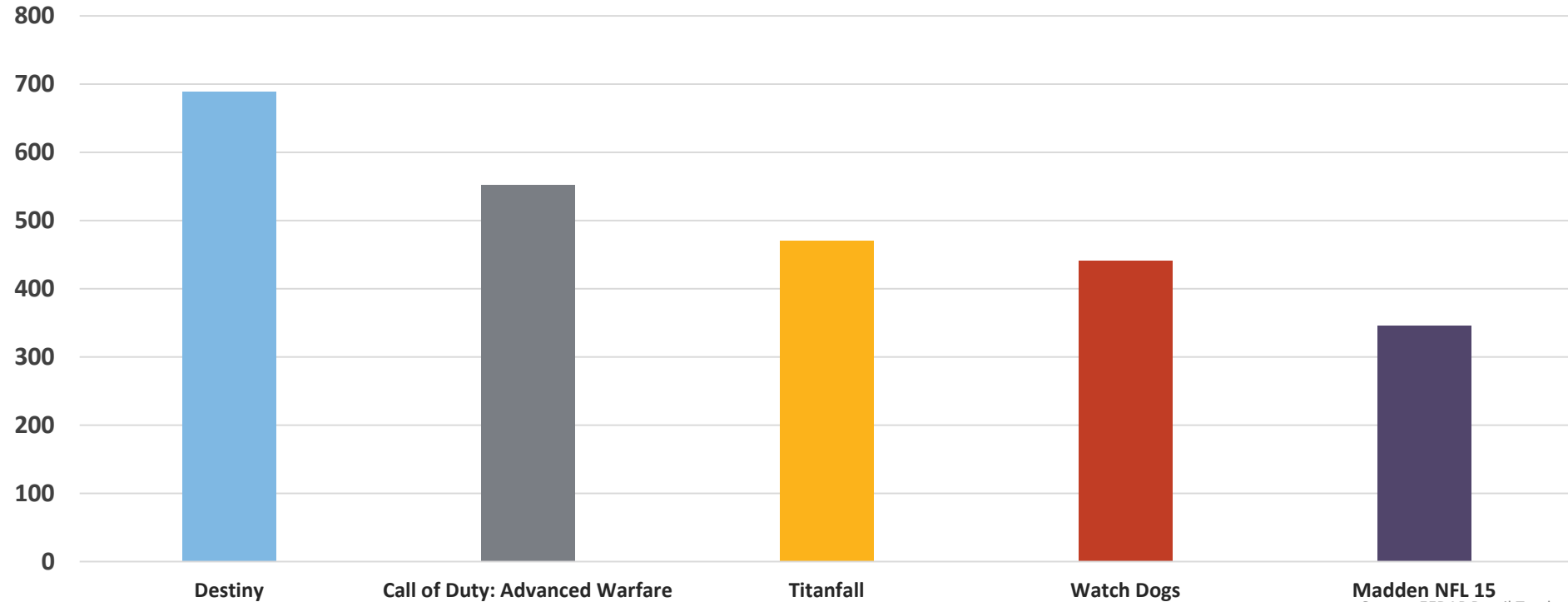
Source: EEDAR, Competitrack & The NPD Group

There are **so many** games out there...
That if your game isn't **really** good...
AND doesn't spend a lot on **marketing**...
Nobody hears about it...
Which means that **nobody** buys it.

IN-STORE ADVERTISING

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

[Best Buy, GameStop, Target, Toys R Us, WalMart] [2014] [USA]



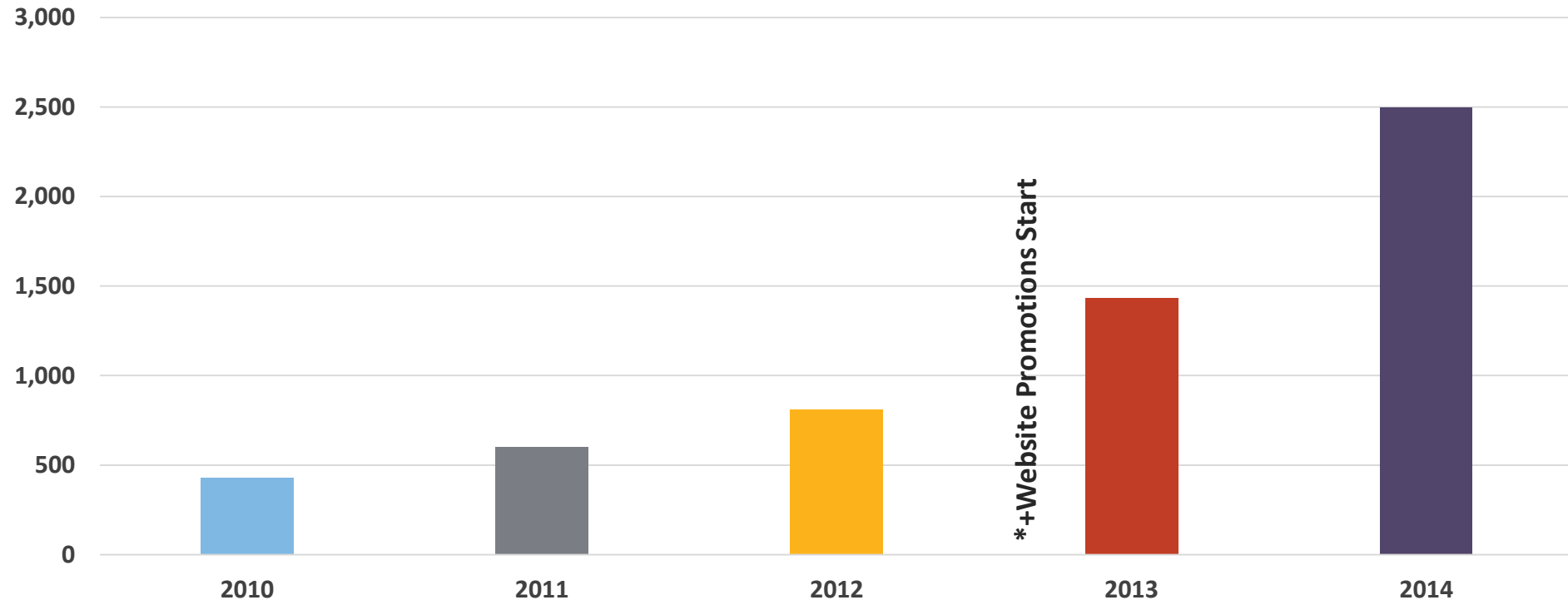
EEDAR

Source: EEDAR Retail Tracker

CONTEXT IS EVERYTHING

IN-STORE ADVERTISING

Top 5 Video Games by Quantity of In-Store (+Website*) Advertising by Year
[Best Buy, GameStop, Target, Toys R Us, WalMart] [USA]



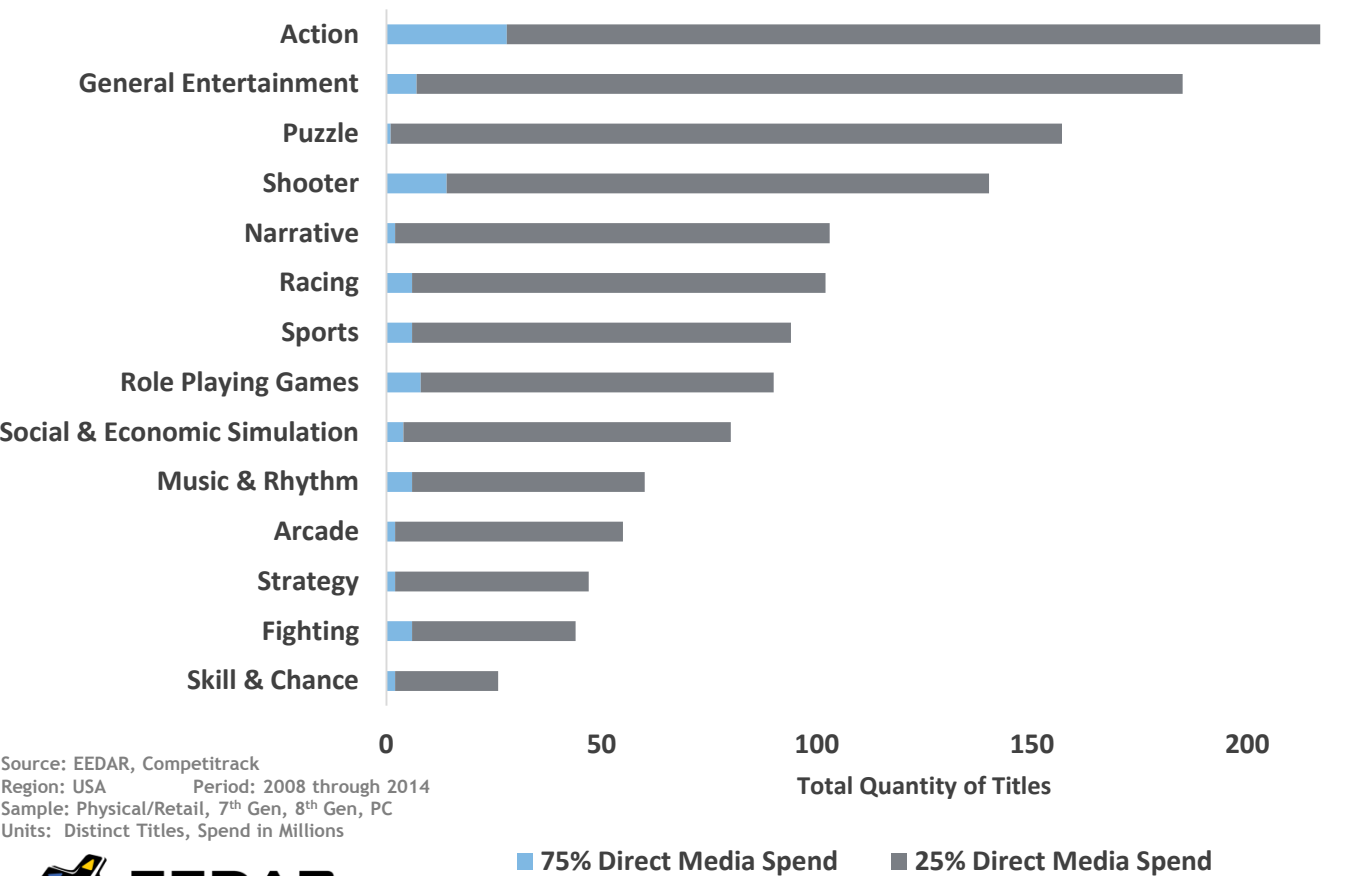
EEDAR

Source: EEDAR Retail Tracker

CONTEXT IS EVERYTHING

Go **BIG** or Go Home

DIRECT MEDIA SPEND SHARE



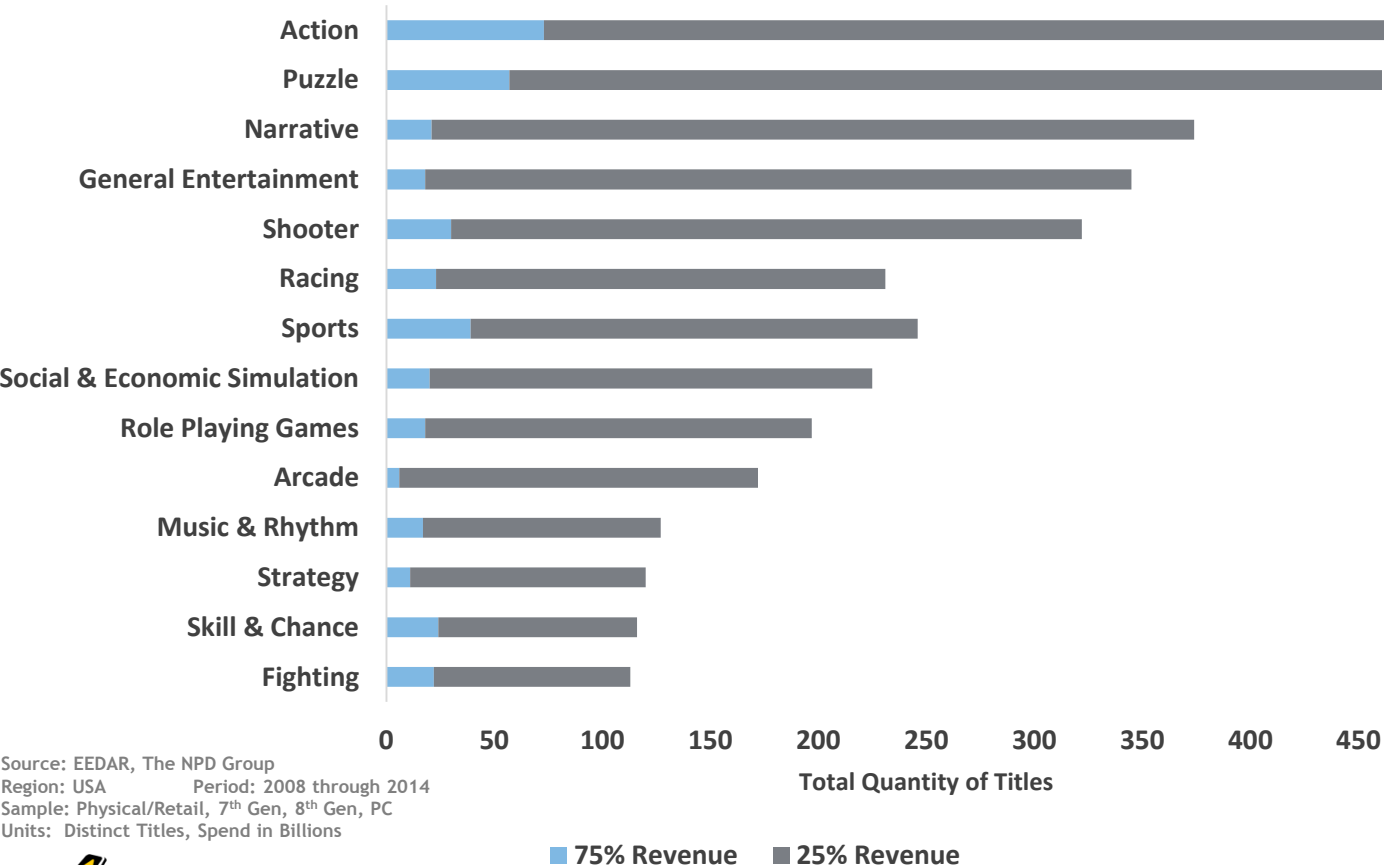
6%
OF RETAIL TITLES
ACCOUNT FOR
75%
OF DIRECT MEDIA
SPEND SINCE 2008.

Source: EEDAR, Competitrack
Region: USA Period: 2008 through 2014
Sample: Physical/Retail, 7th Gen, 8th Gen, PC
Units: Distinct Titles, Spend in Millions



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

RETAIL REVENUE TITLE SHARE



8%
OF RETAIL TITLES
HAVE GENERATED
75%
OF RETAIL REVENUE
SINCE 2008.

Source: EEDAR, The NPD Group
Region: USA Period: 2008 through 2014
Sample: Physical/Retail, 7th Gen, 8th Gen, PC
Units: Distinct Titles, Spend in Billions



■ 75% Revenue ■ 25% Revenue

KICKSTARTER



STEAM



KICKSTARTER

All Categories

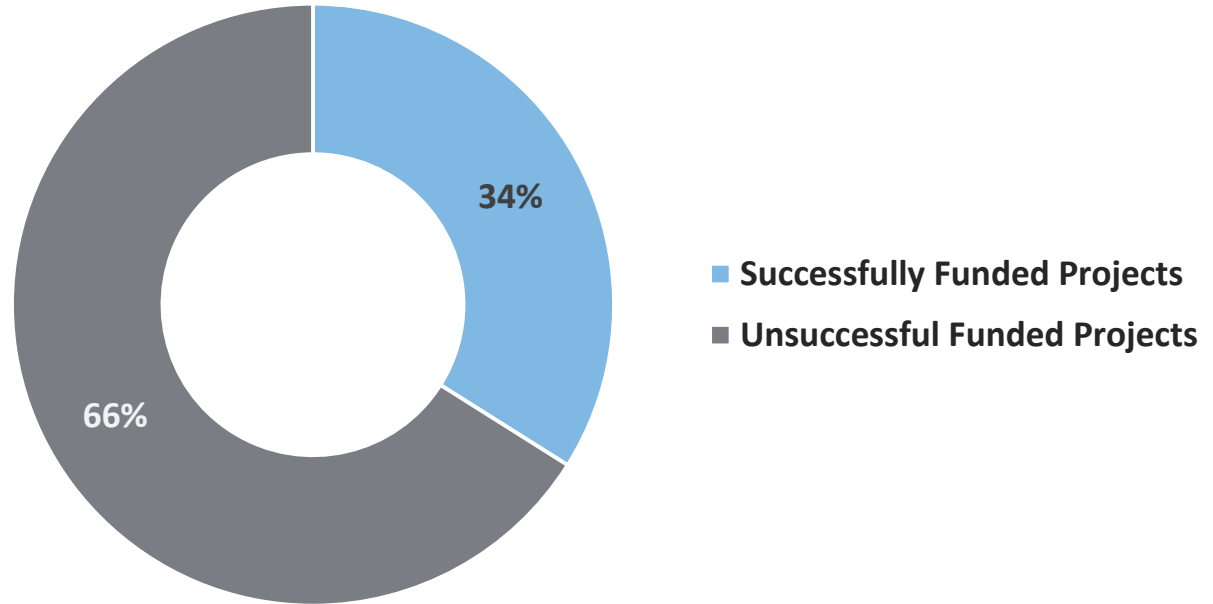
\$1.535 Billion Dollars Pledged
78,756 Successfully Funded Projects
8 Million Total Backers
2.4 Million Repeat Backers

GAMES

15,146 Successfully Funded Projects
\$317 Million Dollars Pledged
\$270 Million Successful Dollars
\$33 Million Unsuccessful Dollars
\$13.5 Million Live Dollars

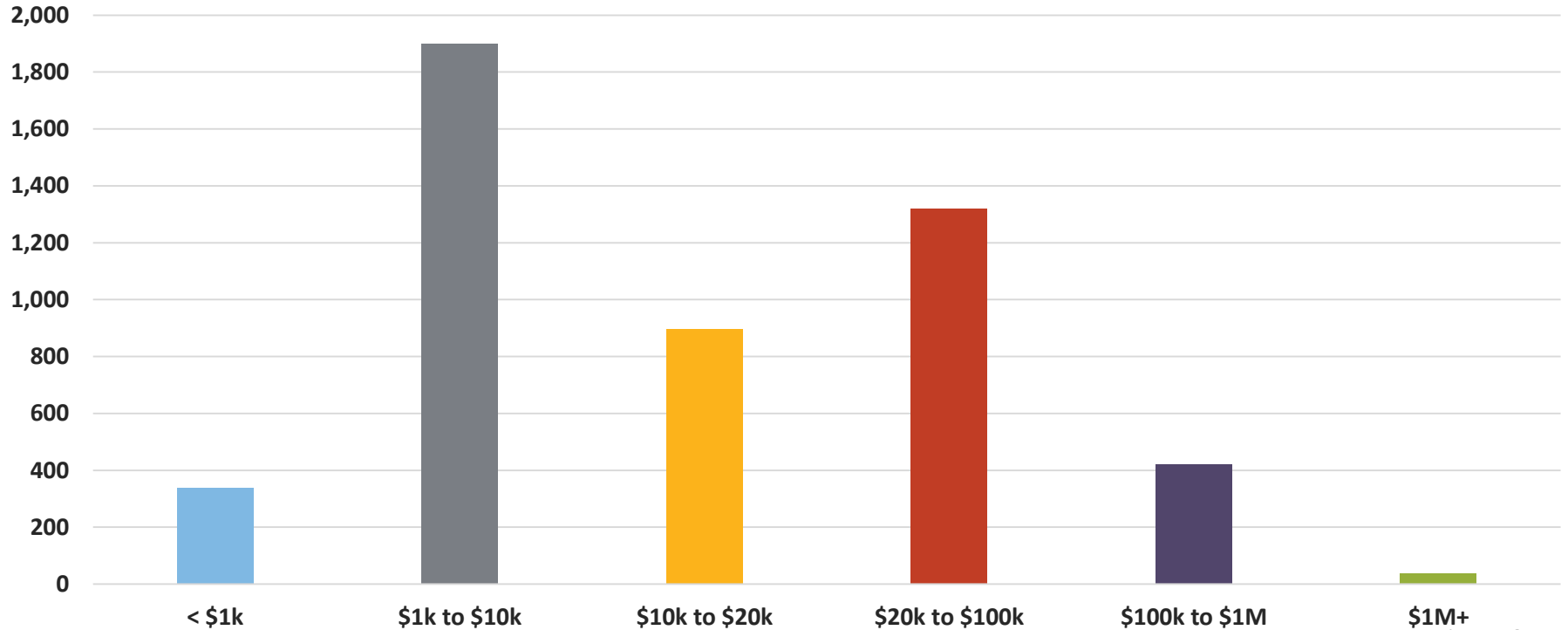


Success Rate of Kickstarter Projects Game Category [Feb 2015]



Successfully Funded Kickstarter Projects

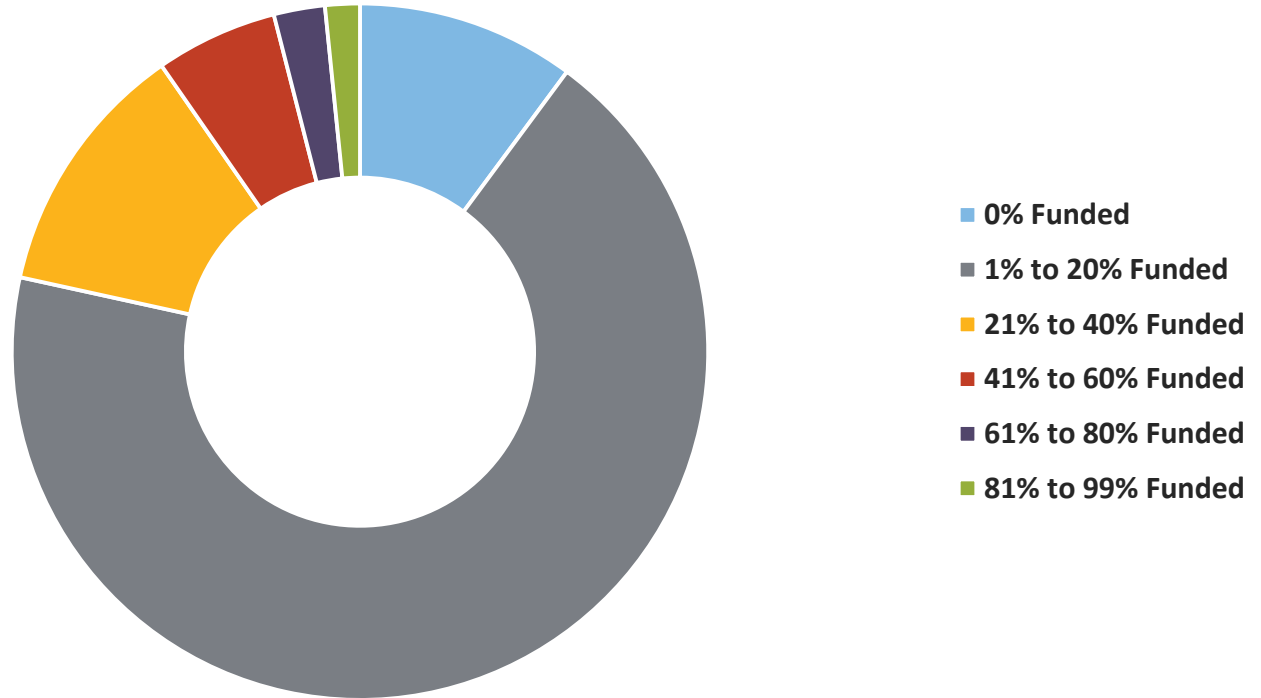
[Game Category] [by Quantity] [Feb 2015]



Source: Kickstarter & EEDAR



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





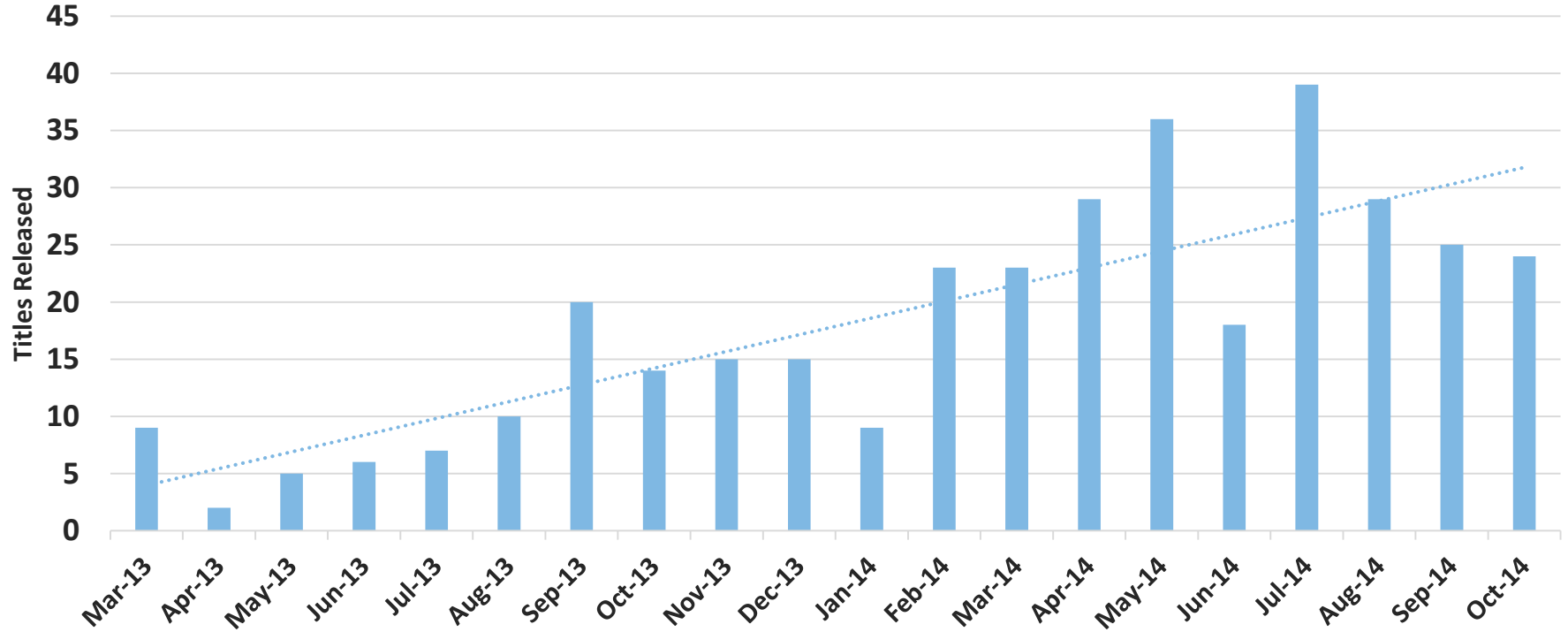
Steam Early Access

Official Launch: March 2013

85% New IP Titles

Keeping pace with increasing quantity of Steam games released

Early Access Titles [Steam][March 2013 - October 2014]



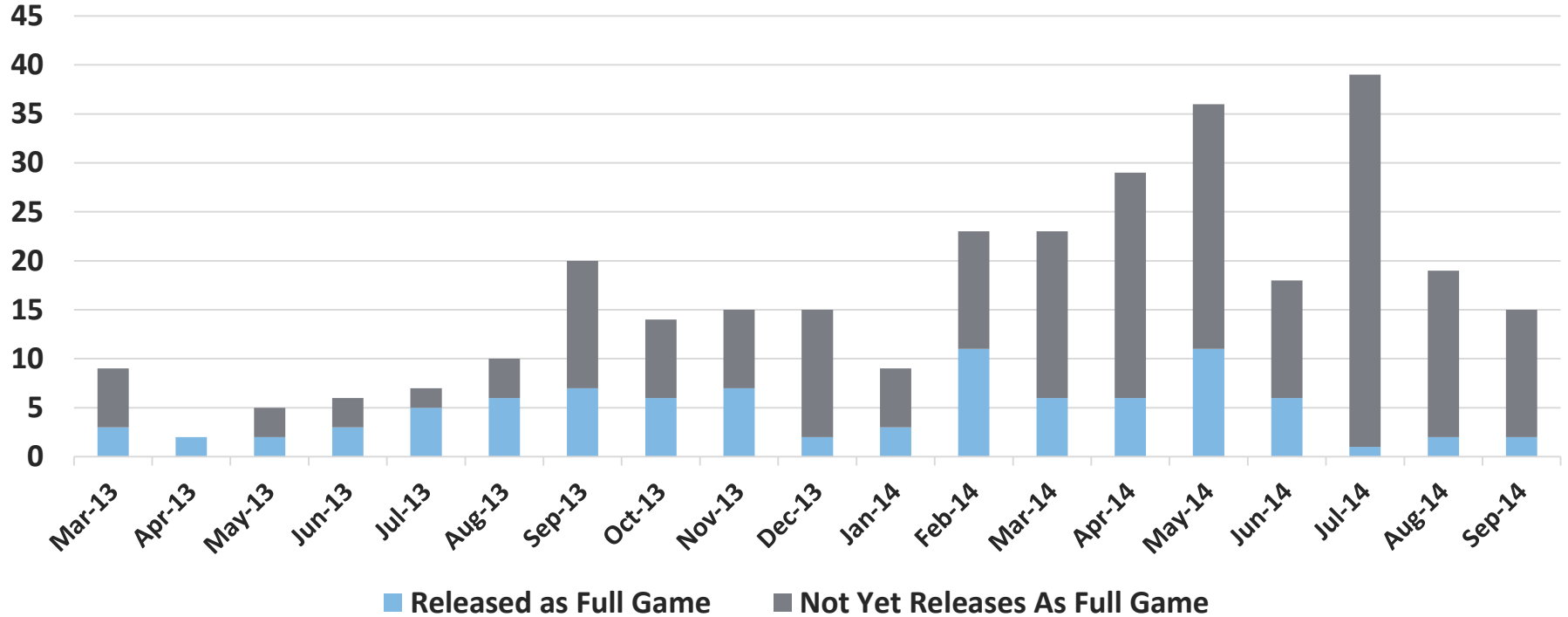
Source: EEDAR



EEDAR

CONTEXT IS EVERYTHING

Early Access Titles Released As Full Games [Steam][March 2013 - September 2014]



TWITCH

twitch

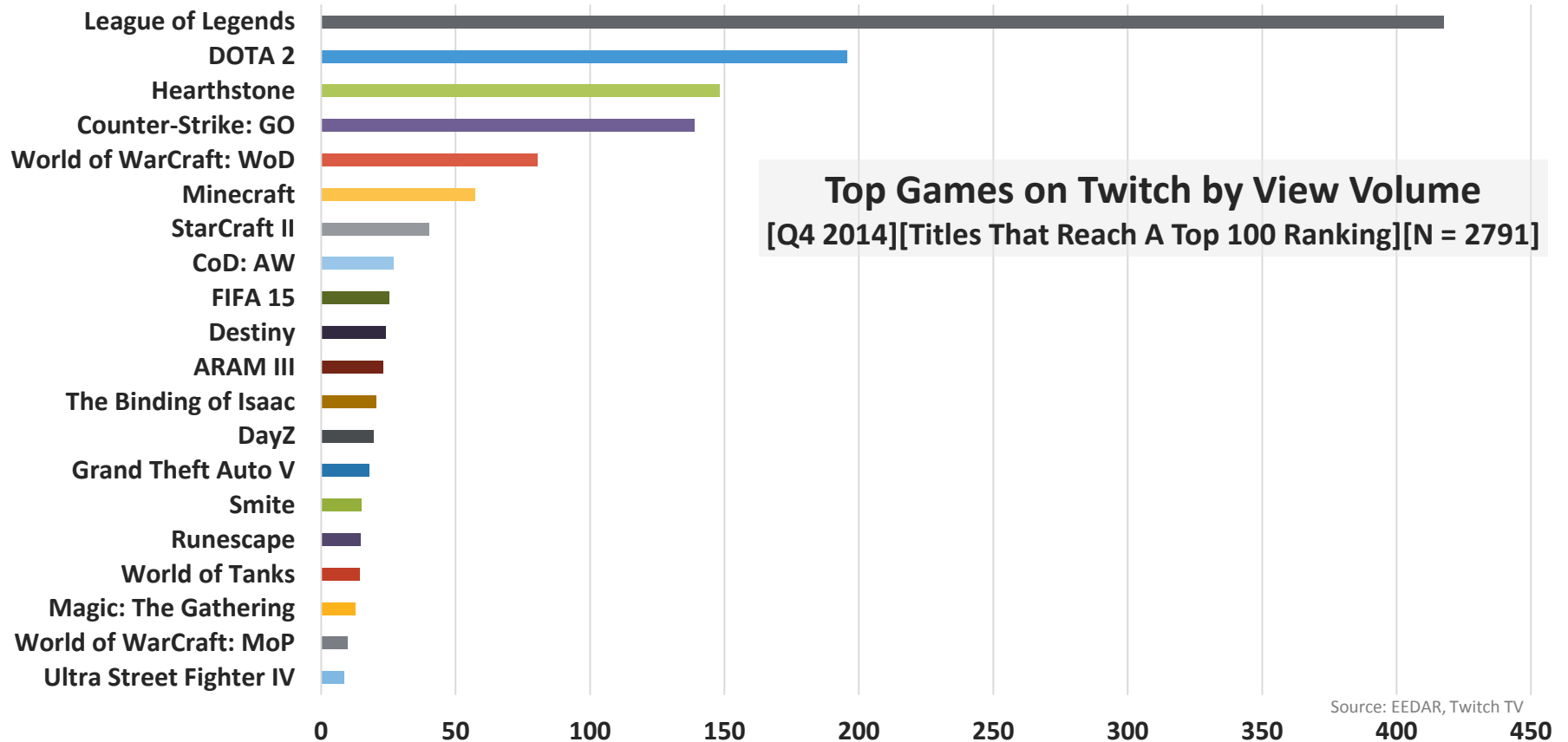


EEDAR

CONTEXT IS EVERYTHING

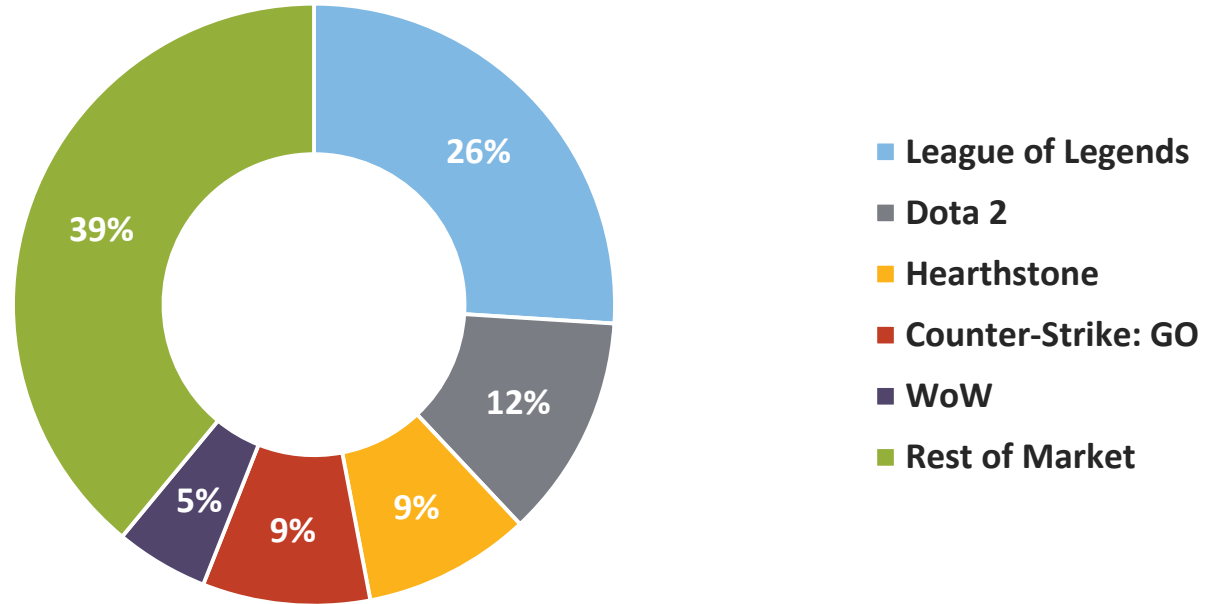


TWITCH: NOT JUST ESORTS



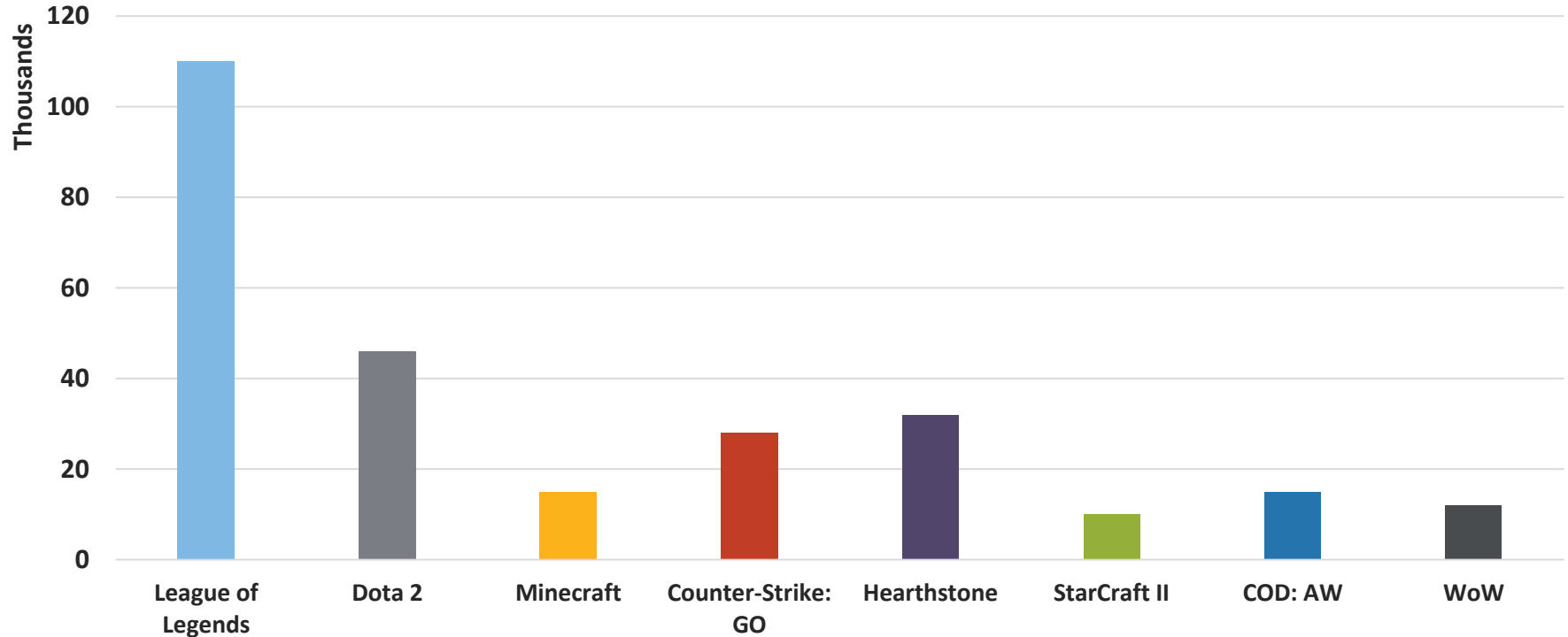
TWITCH: COMPETITIVE MULTIPLAYER

Percentage of Twitch View Volume
[Q4 2014][Titles That Reached A Top 100 Ranking][N = 2791]



TWITCH: CONCURRENT VIEWERS

Twitch Average Concurrent Viewers
[Sept.2014 - Nov.2014]



Source: EEDAR, Twitch TV



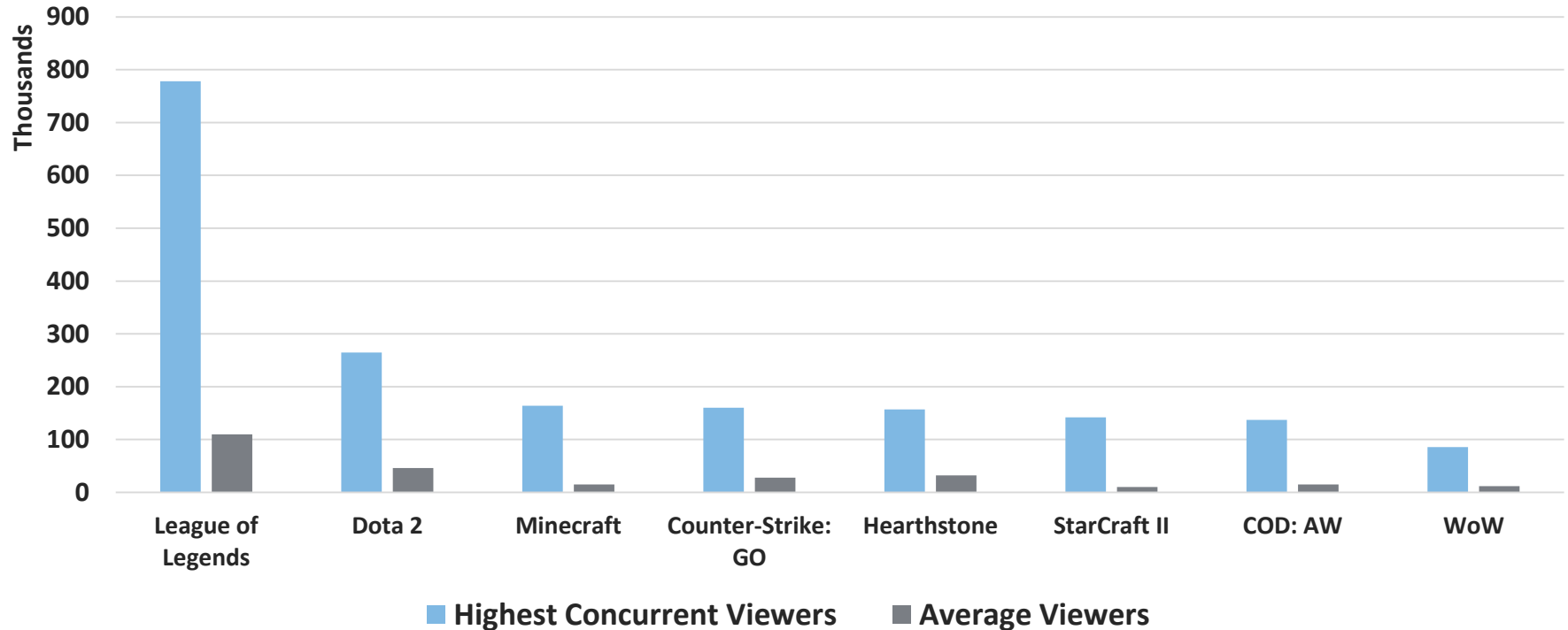
EEDAR

CONTEXT IS EVERYTHING

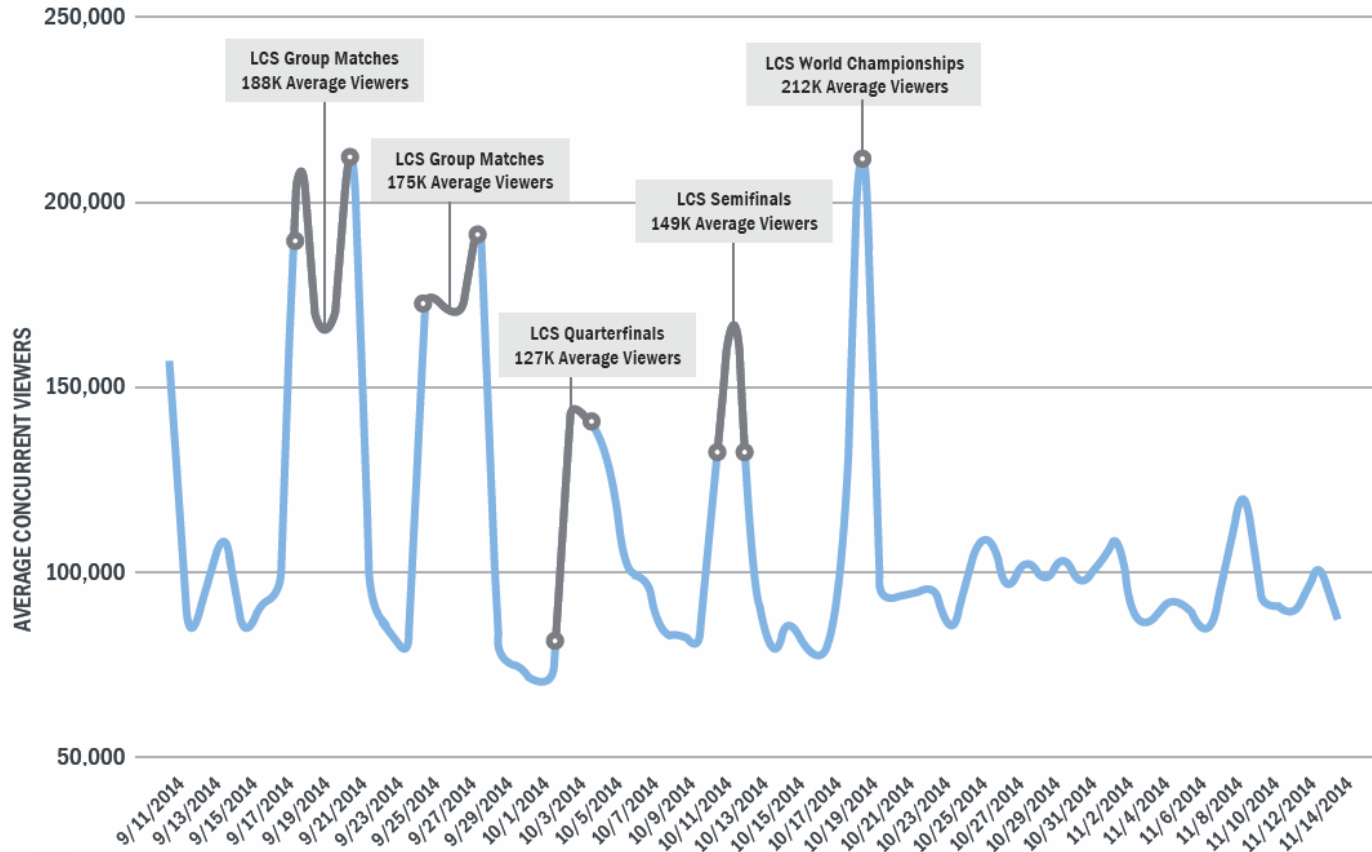
TWITCH: PEAK VIEWERS

Twitch Average and Highest Concurrent Viewers

[Sept.2014 - Nov.2014]



TWITCH: LoL FINALS



League of Legends On Twitch

Daily Average Concurrent
Viewers, with callouts for
LCS Finals & Championship

778k

Highest Concurrent Viewers

110k

Average Concurrent Viewers

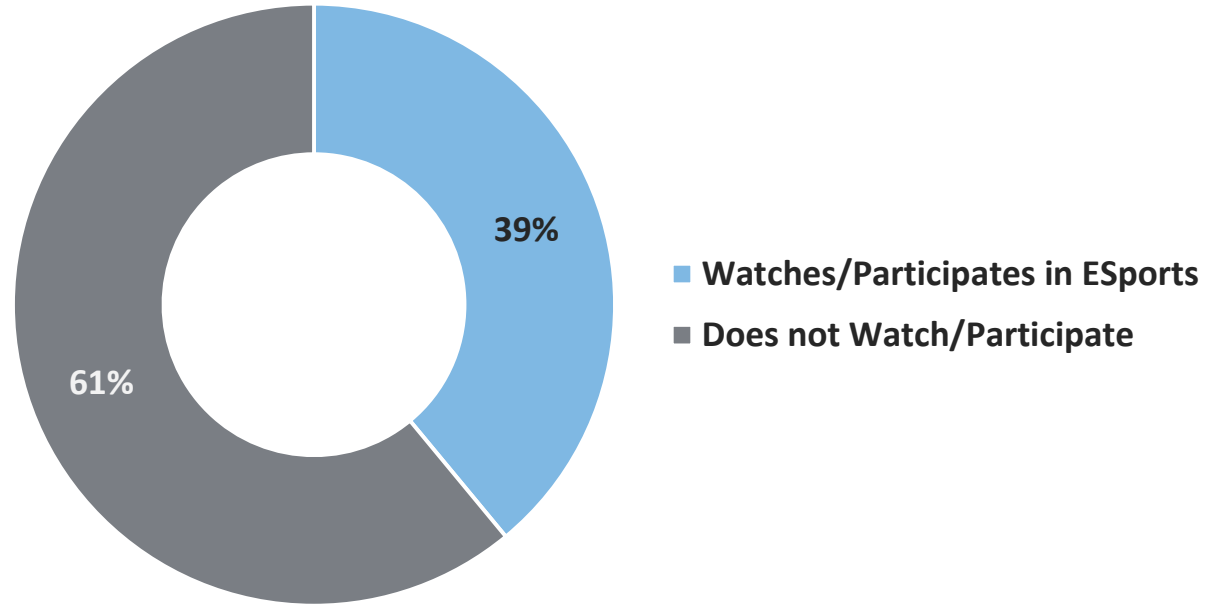
Source: EEDAR, Twitch TV



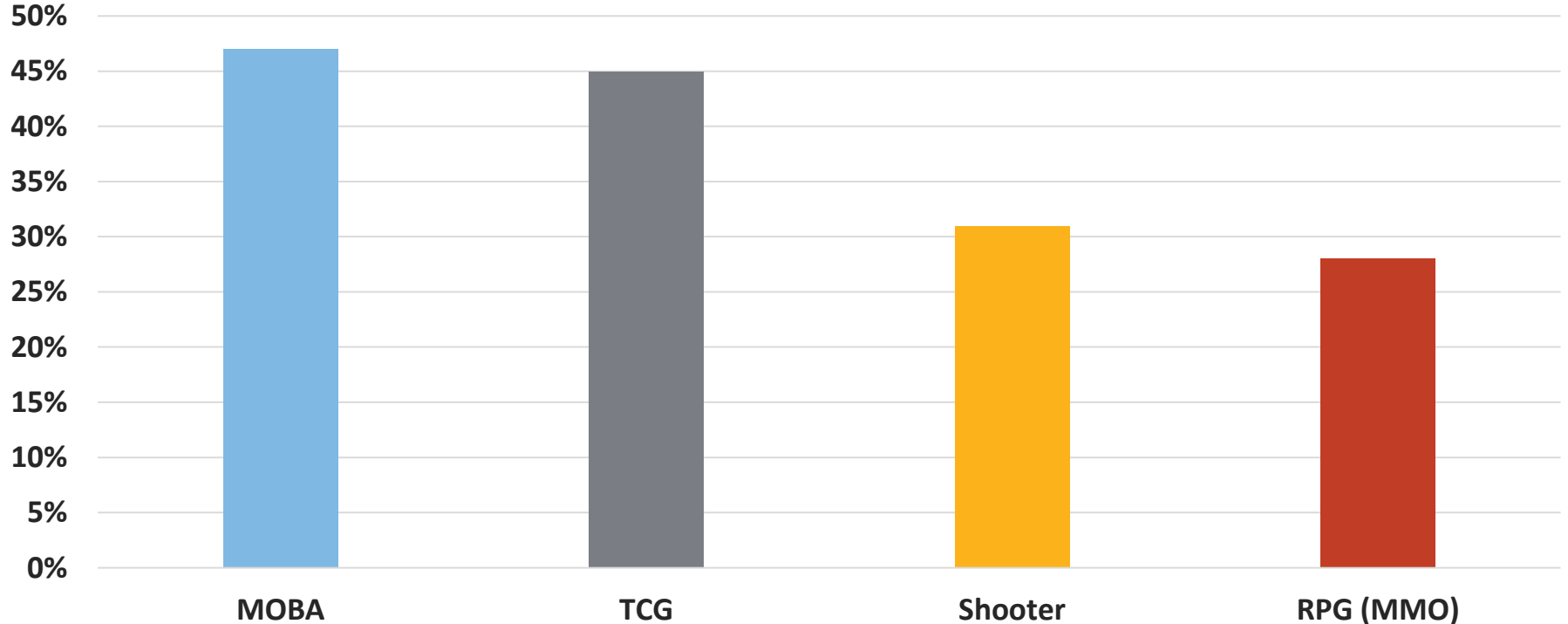
EEDAR

CONTEXT IS EVERYTHING

F2P Players that Watch/Participate in eSports [NA][PC][2014]

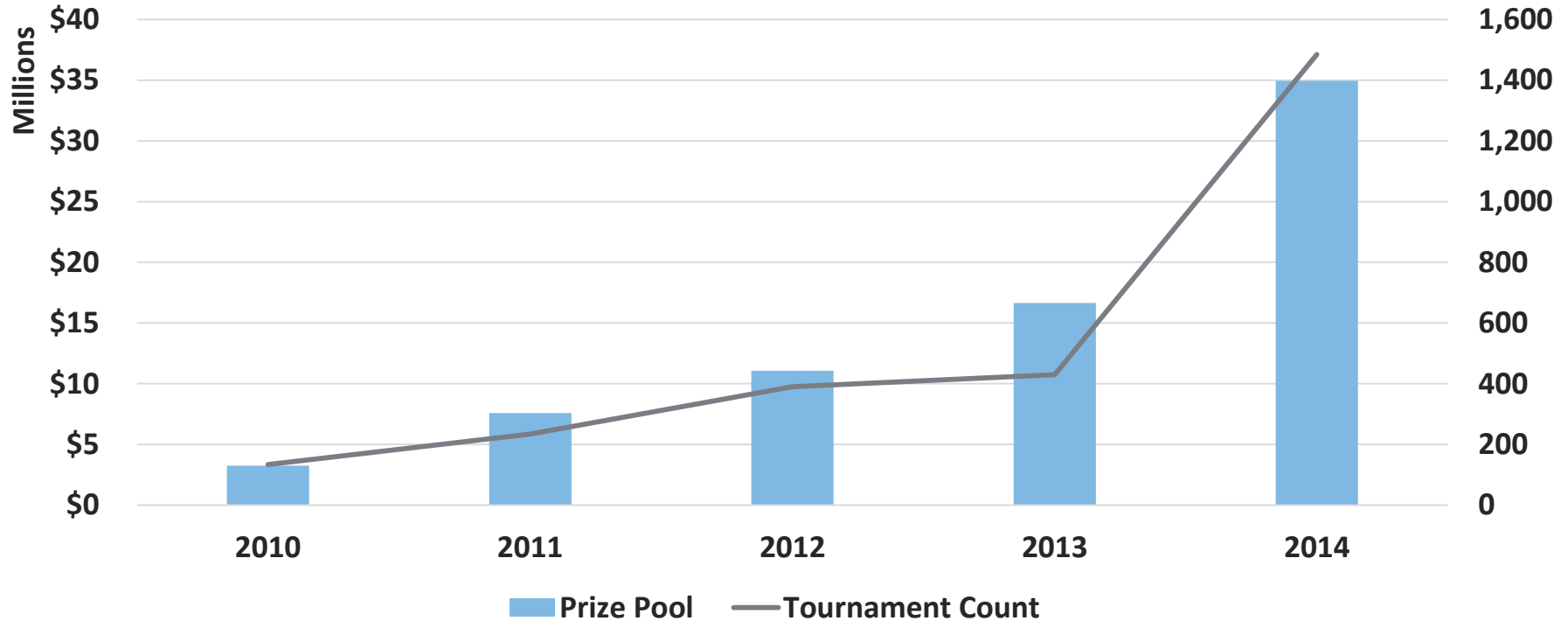


F2P Players that Watch/Participate in ESports by F2P Segment [NA][PC][2014]



ESPORTS TOURNAMENTS

eSports Prize Pool And Tournaments
[Worldwide]



THANKS FOR COMING

AWESOME VIDEO GAME DATA



GEOFFREY ZATKIN

FOUNDER

GZATKIN@EEDAR.COM