Understanding Engagement in the Rapidly Expanding Gaming Universe

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Growing game revenues fueled by experience expansion

2015 - $90B Worldwide

New Gaming Experiences

PC/Console

Game as a Service

Mobile

Wearable

Virtual/Aug. Reality

New Ways to Consume

Retail

Digital

Streaming

Pay up Front

Pay as You Play

New Ways to Engage

Player

Viewer

Content Creator

Financer

Professional

2010 - $50B Worldwide

PC/Console/HH
Retail
Brand Marketing

Gaming is expanding both wider and deeper

There are 185MM active US gamers ages 13+. Half are women.

+ Breadth of Experiences

Mobile Players

154 MM

Console/HH Players

72 MM

PC Players

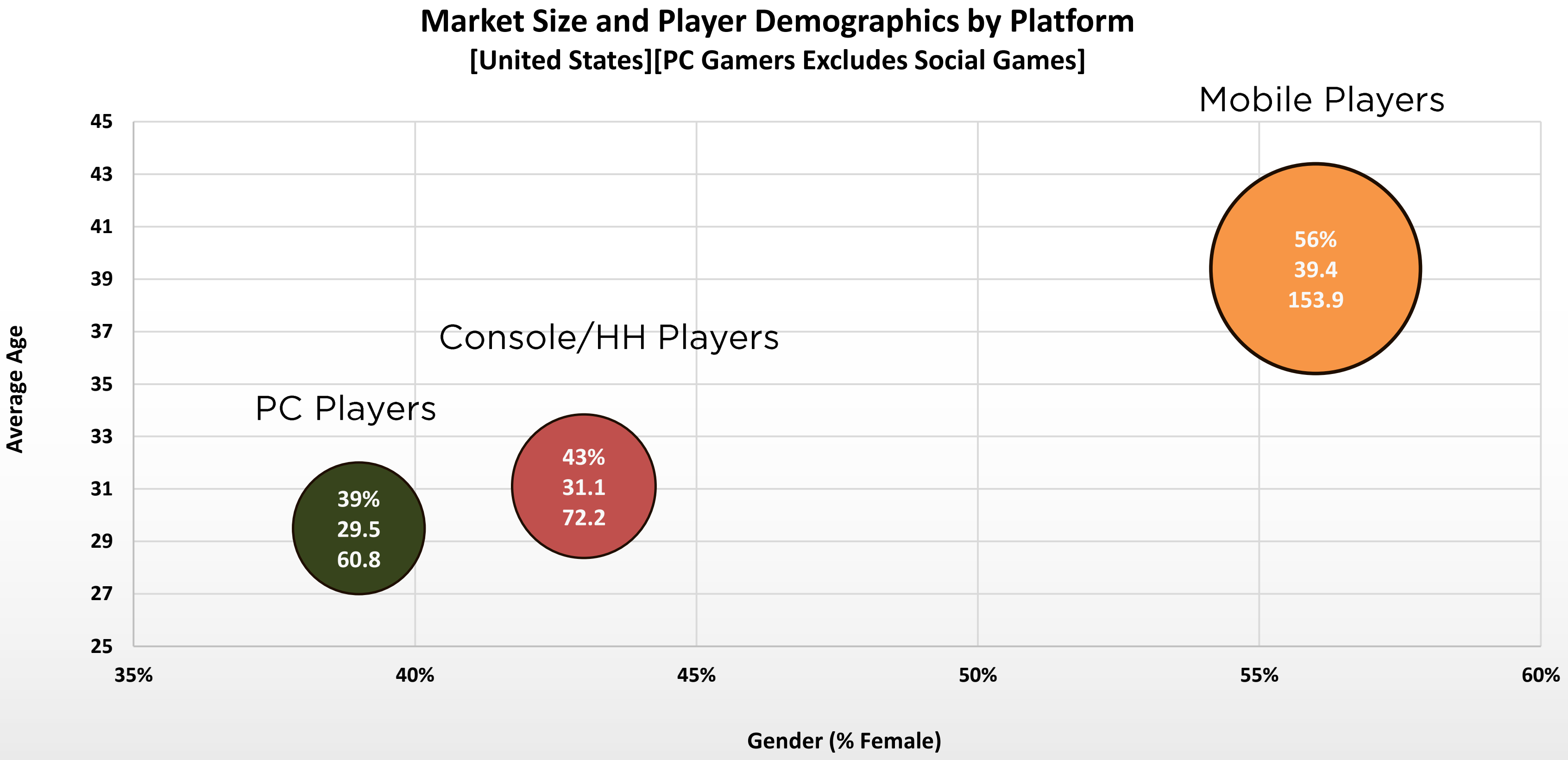
61 MM

+ Depth of Engagement

Funding
Greenlight
Early Access
Beta

GaaS
eSports
Content Creation
Sharing

Mobile has added new gamers to the market



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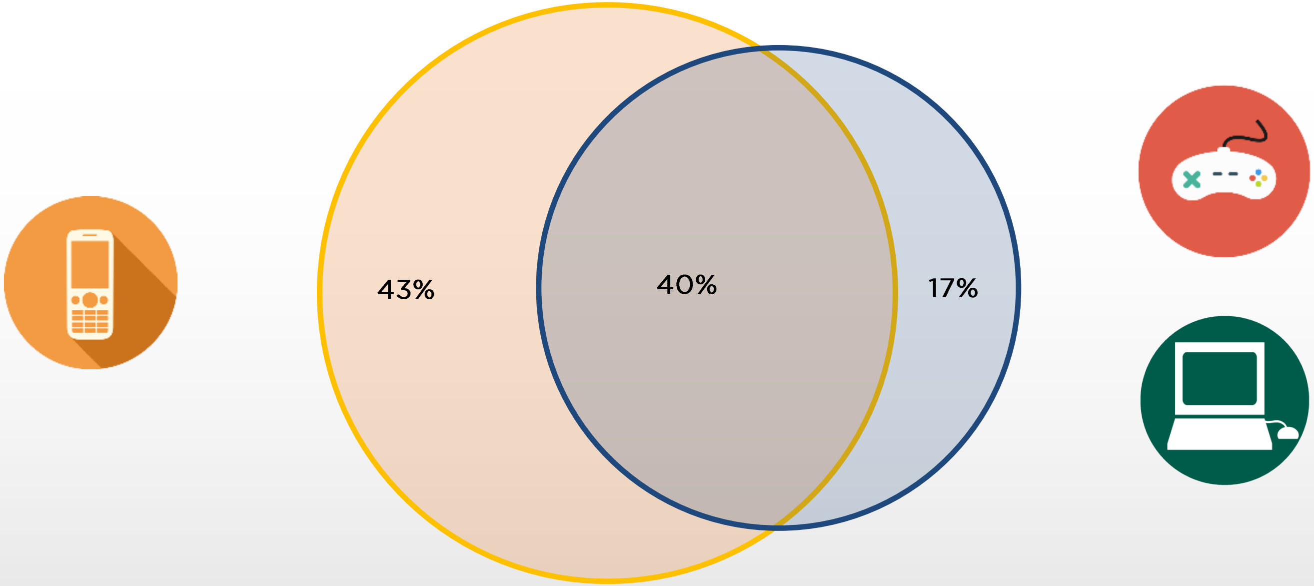
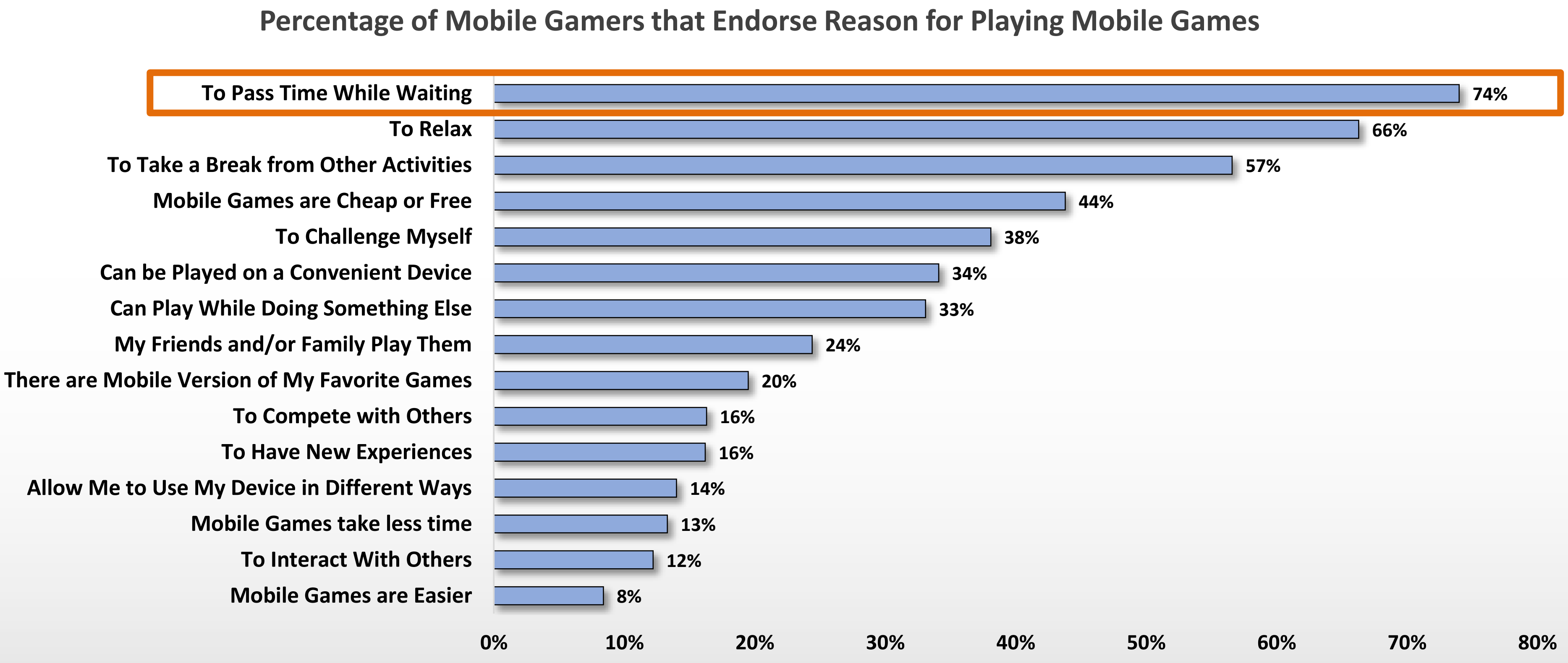
Console and PC gamers also play on mobile

Overlap of Active US Gamers By Platform



Mobile Accessibility Has Added Diversity to the Market

Reasons for playing mobile = short session lengths



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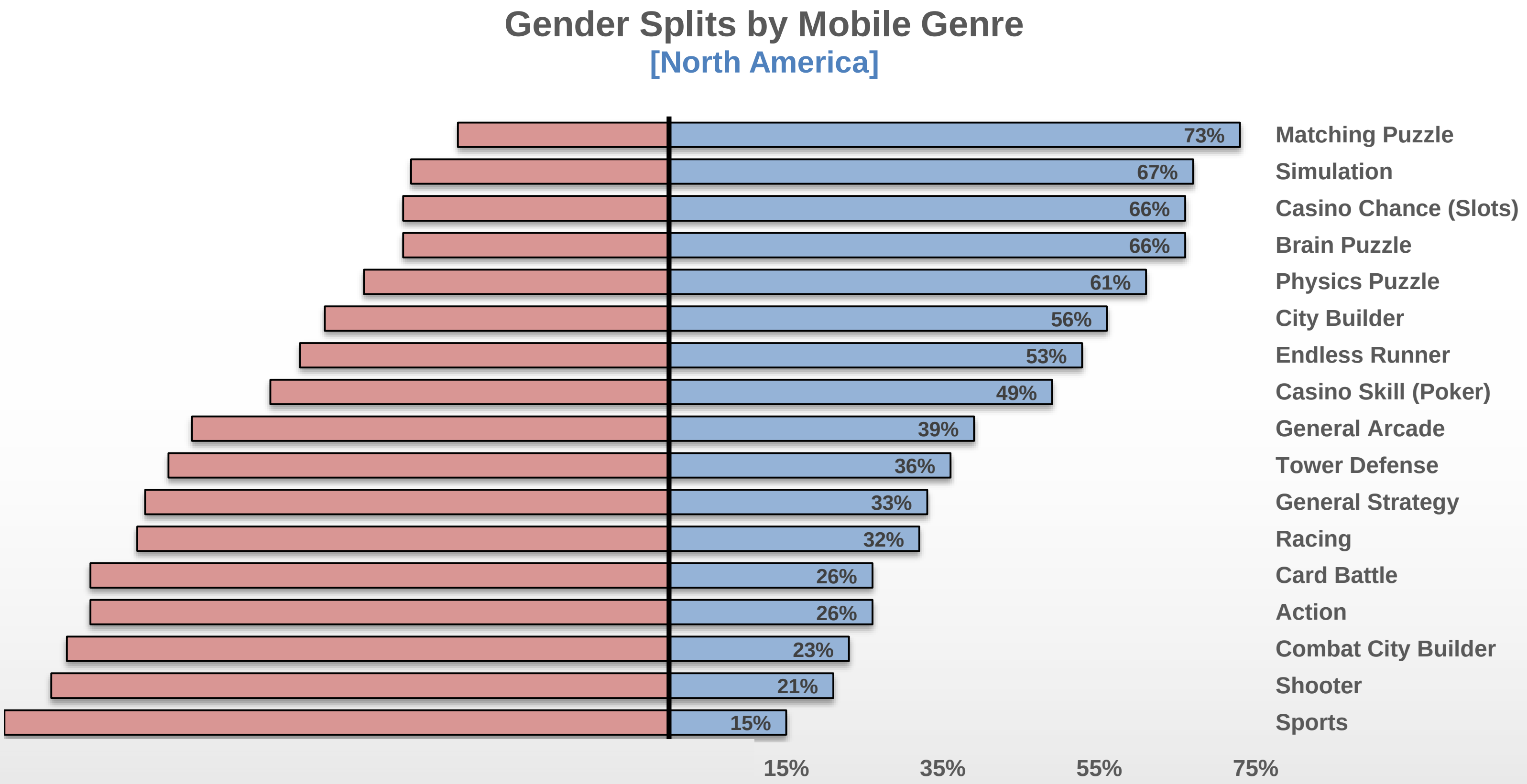
GREAT DIVERSITY WITHIN MOBILE MARKET



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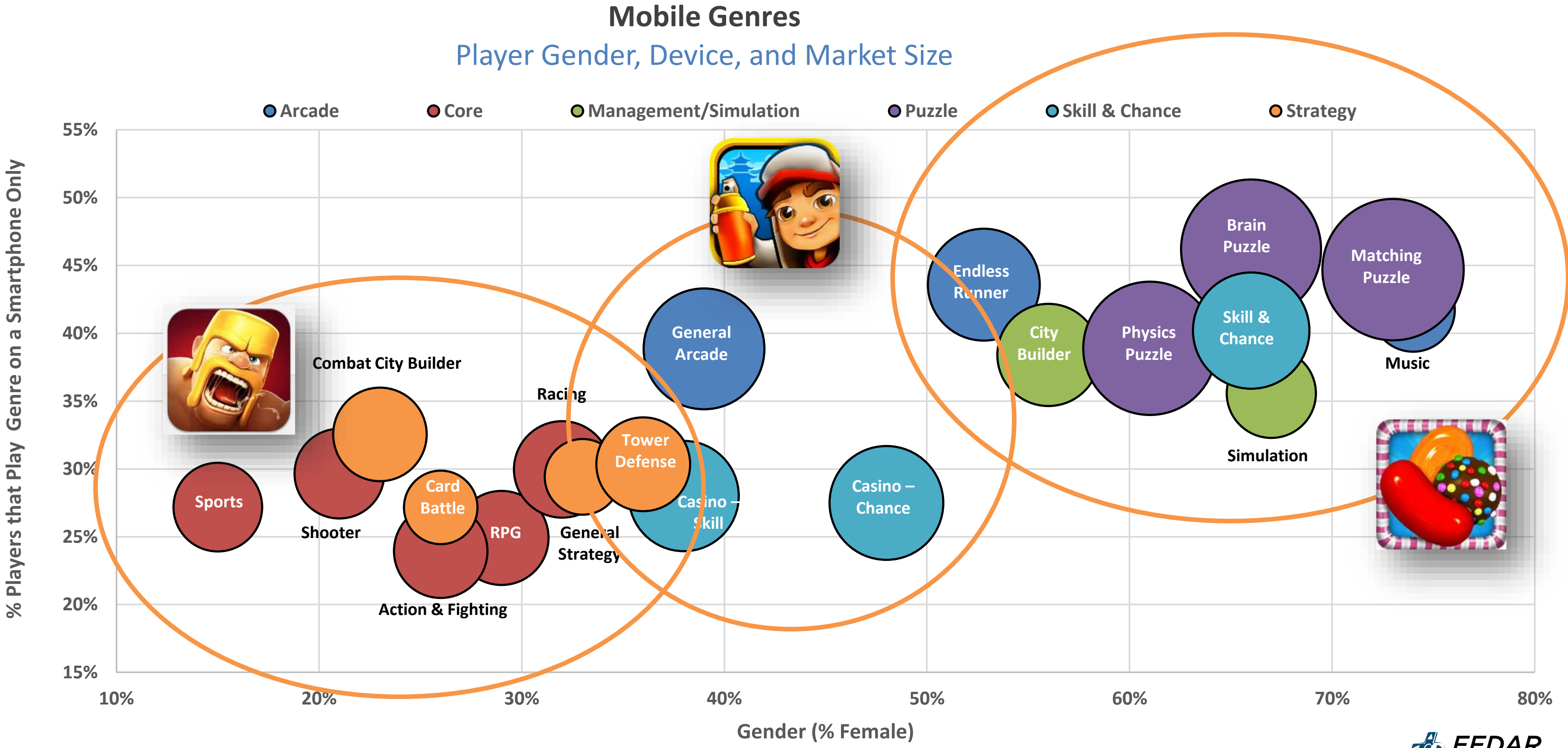
Genre relates to market size and player base



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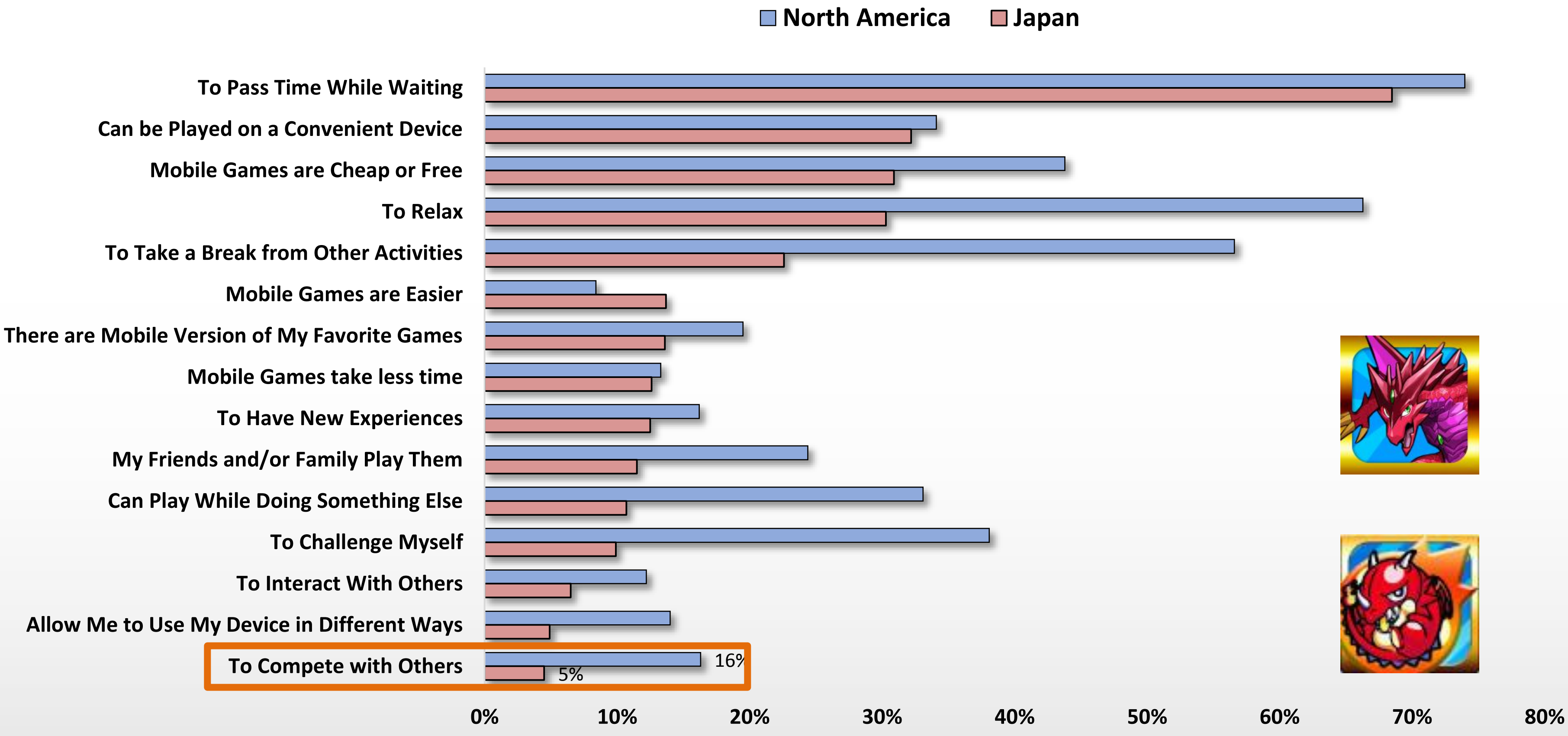
Japan is less interested in competitive PvP than US



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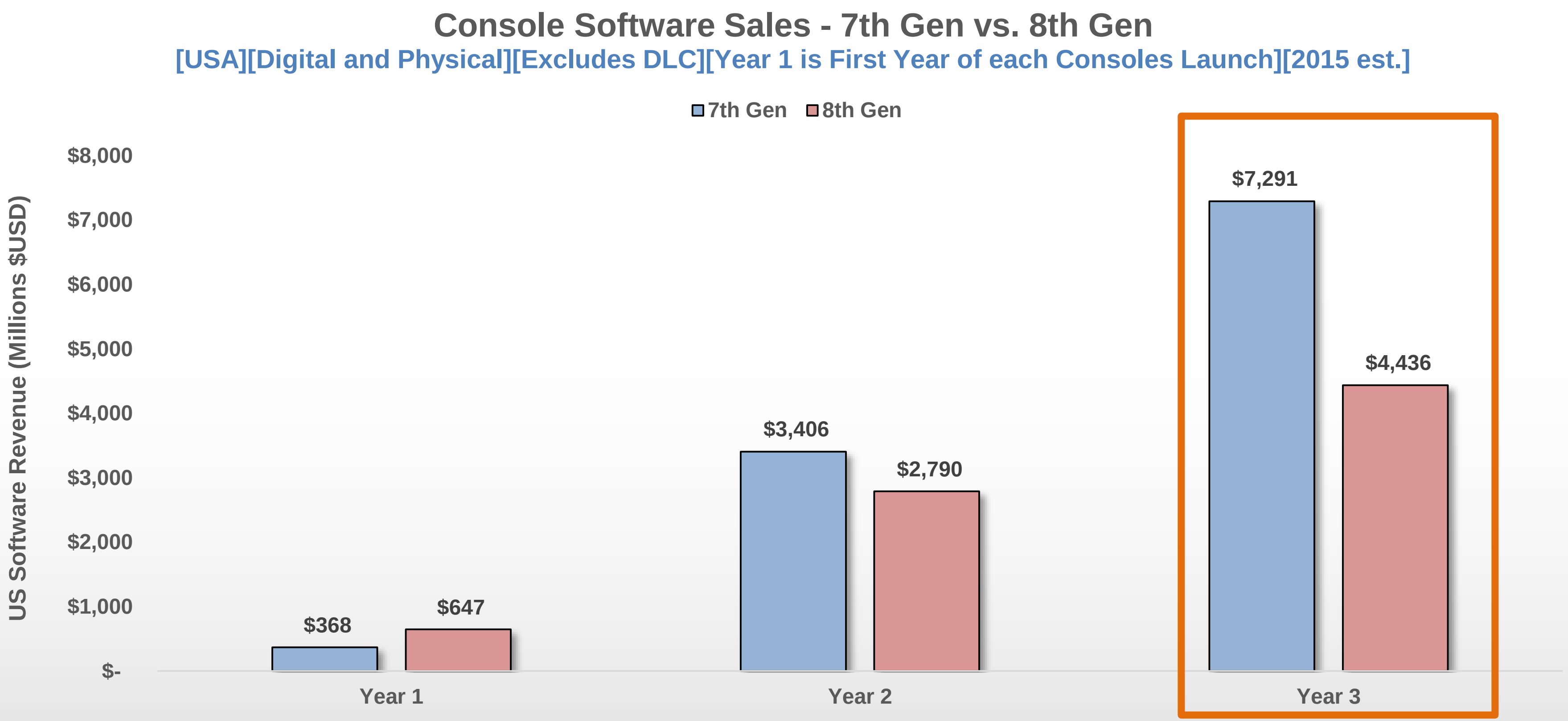
It turns out console gaming is pretty hard to kill

8TH Generation Console Software Sales Appear Down



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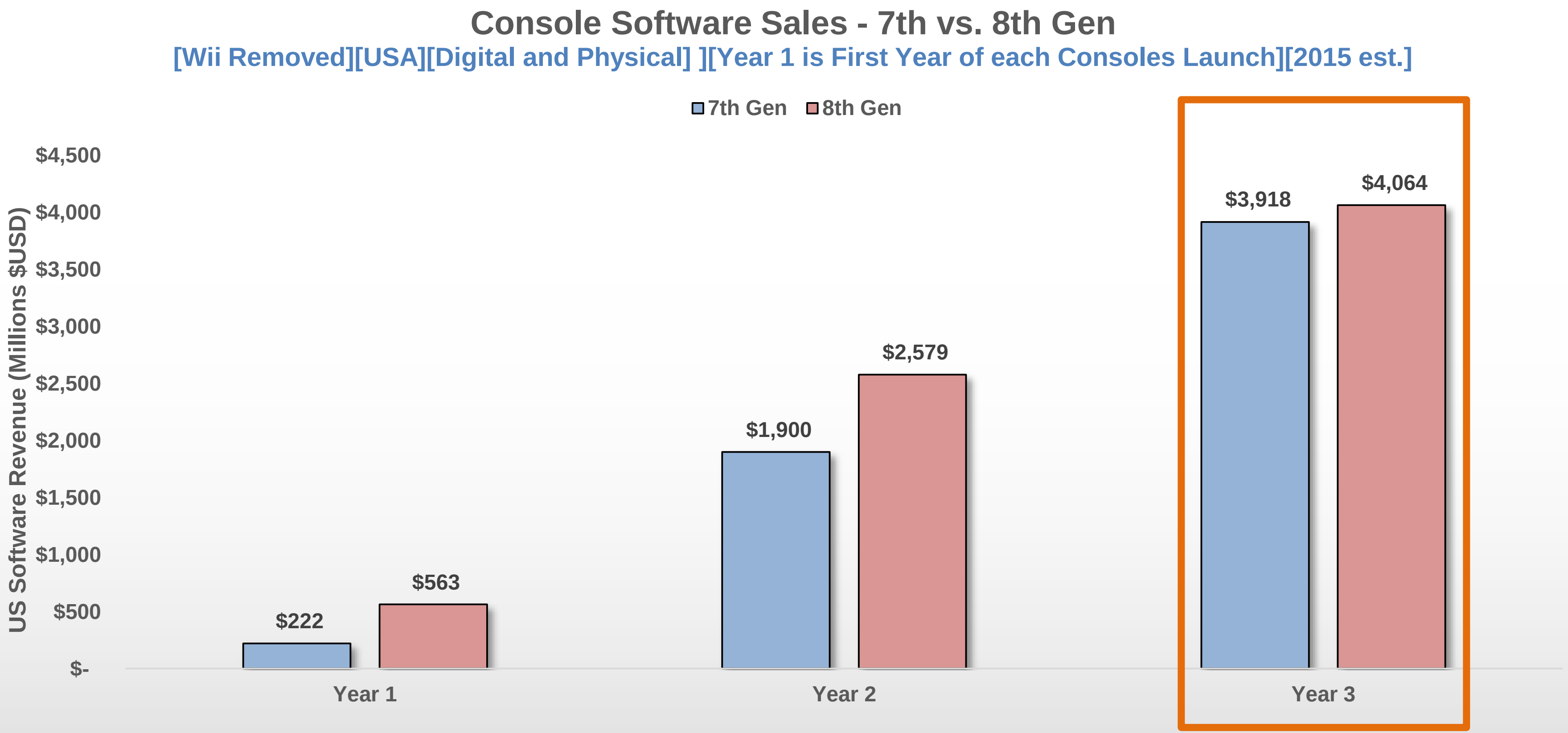
But - removing the Wii bubble tells different story



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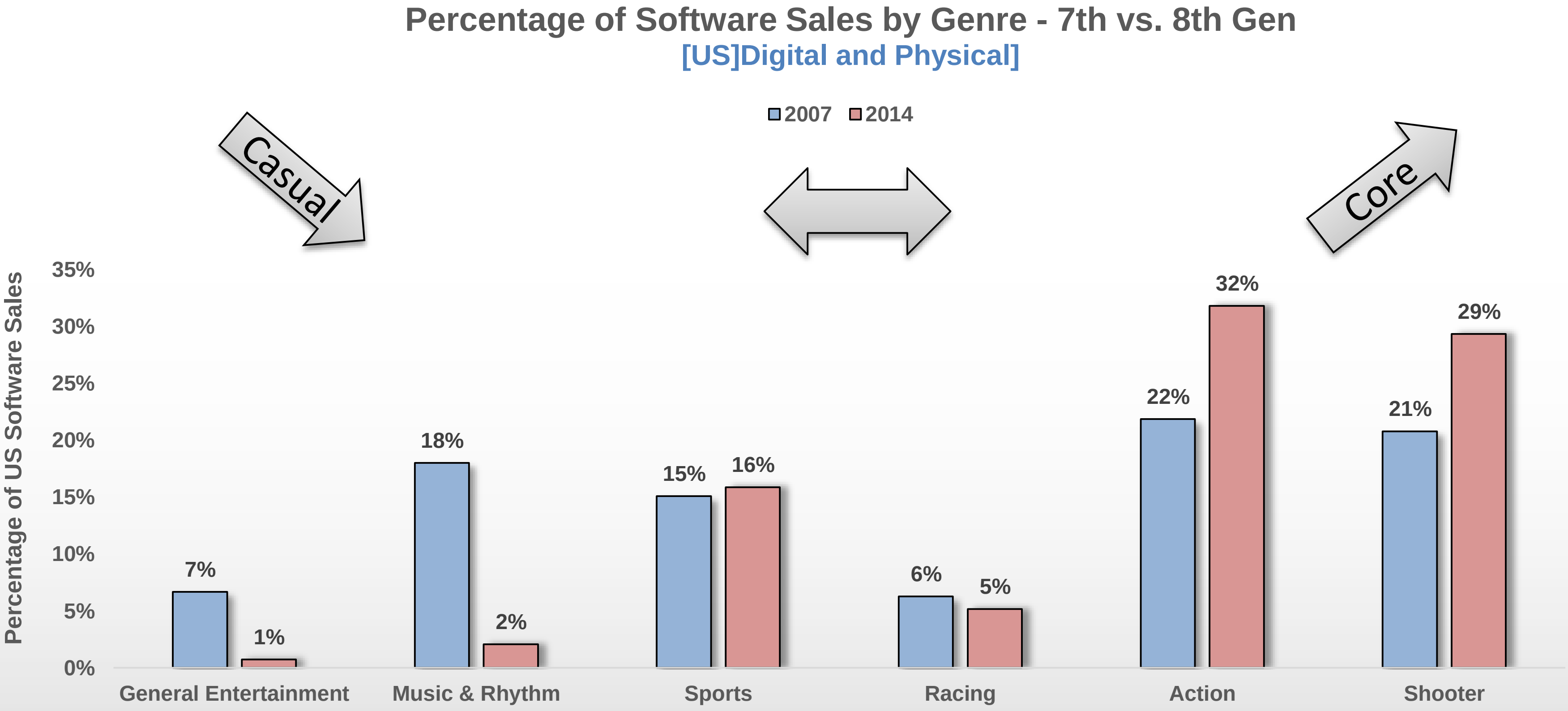
The casual console experience was cannibalized



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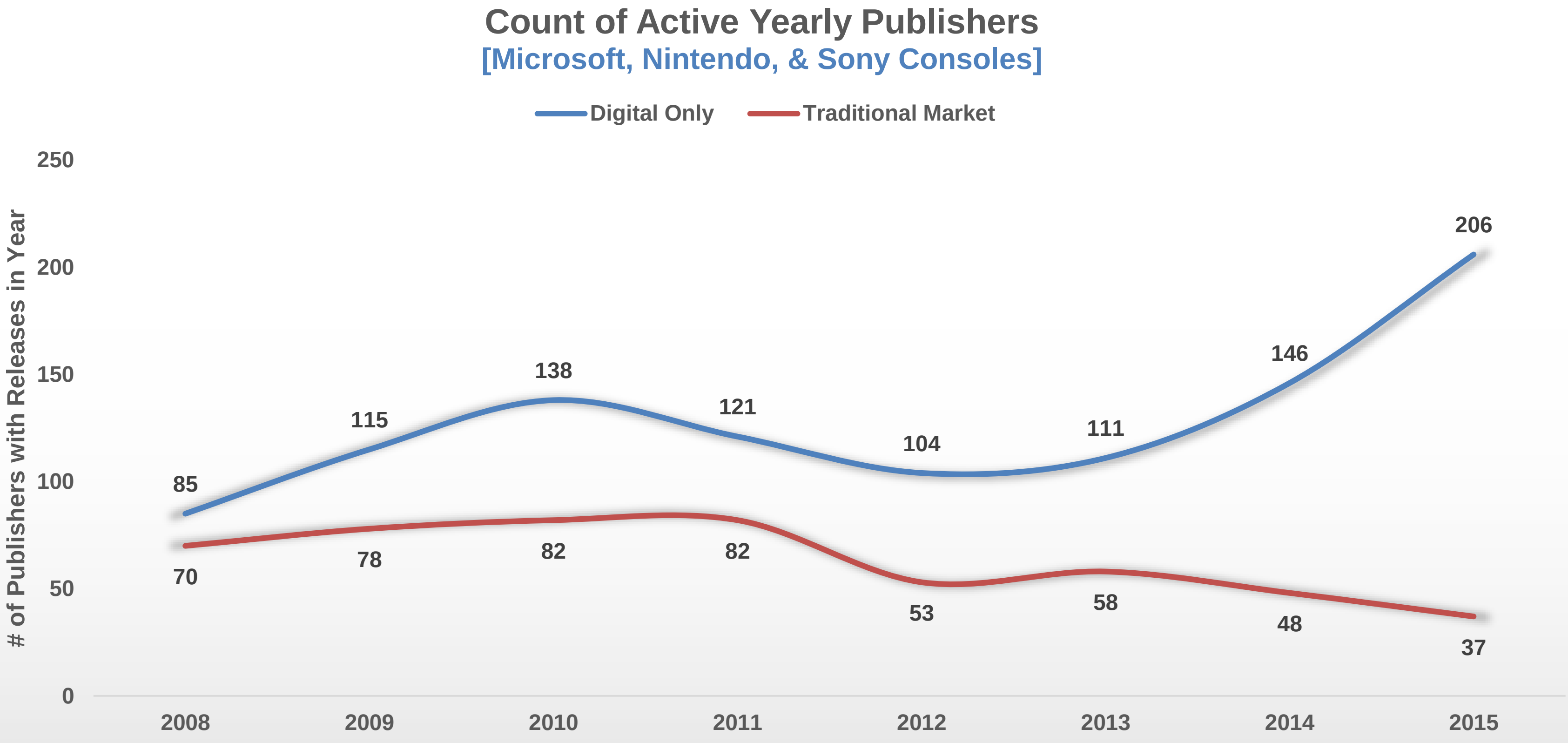
Digital is driving diversity on the consoles



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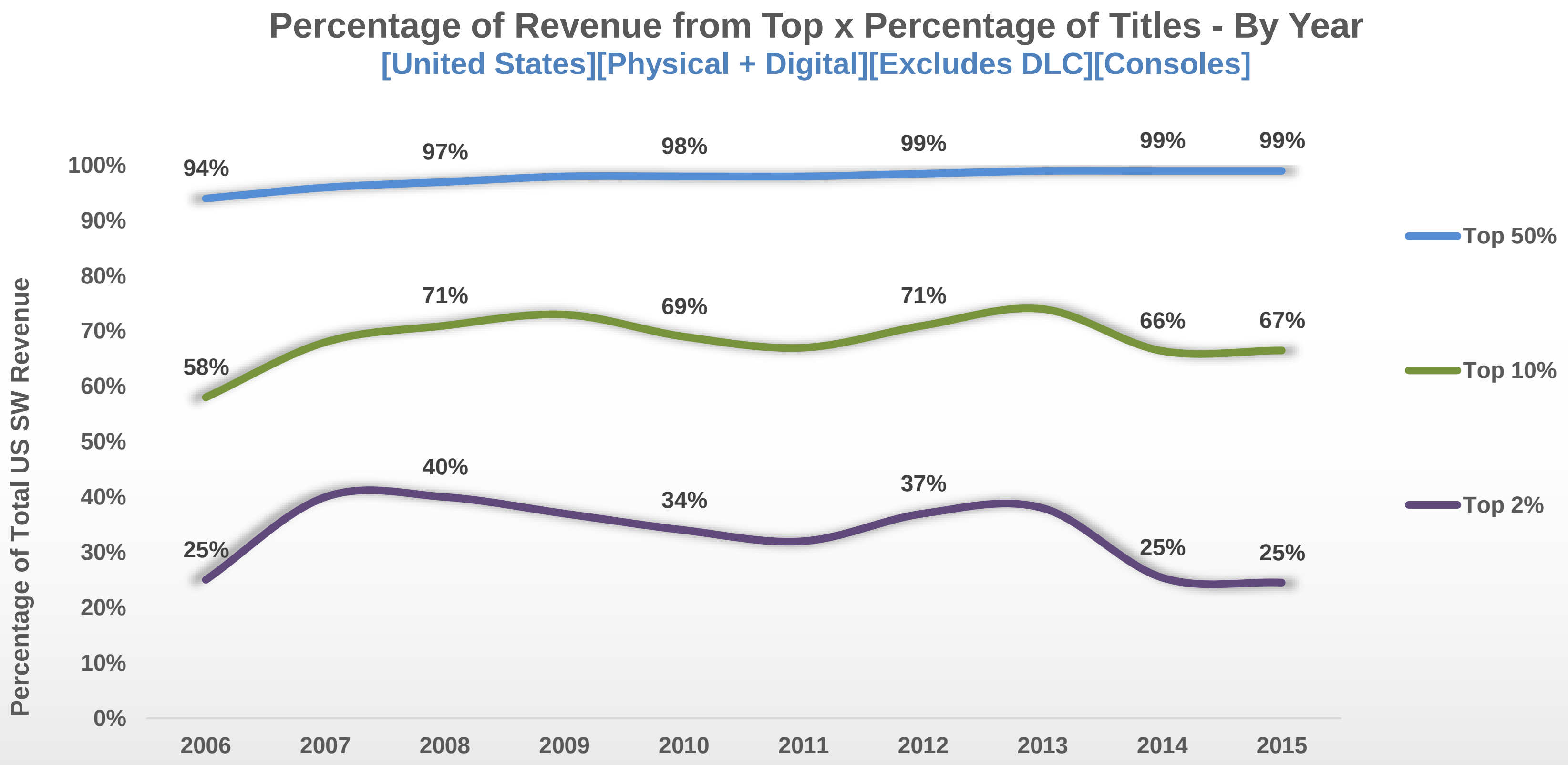
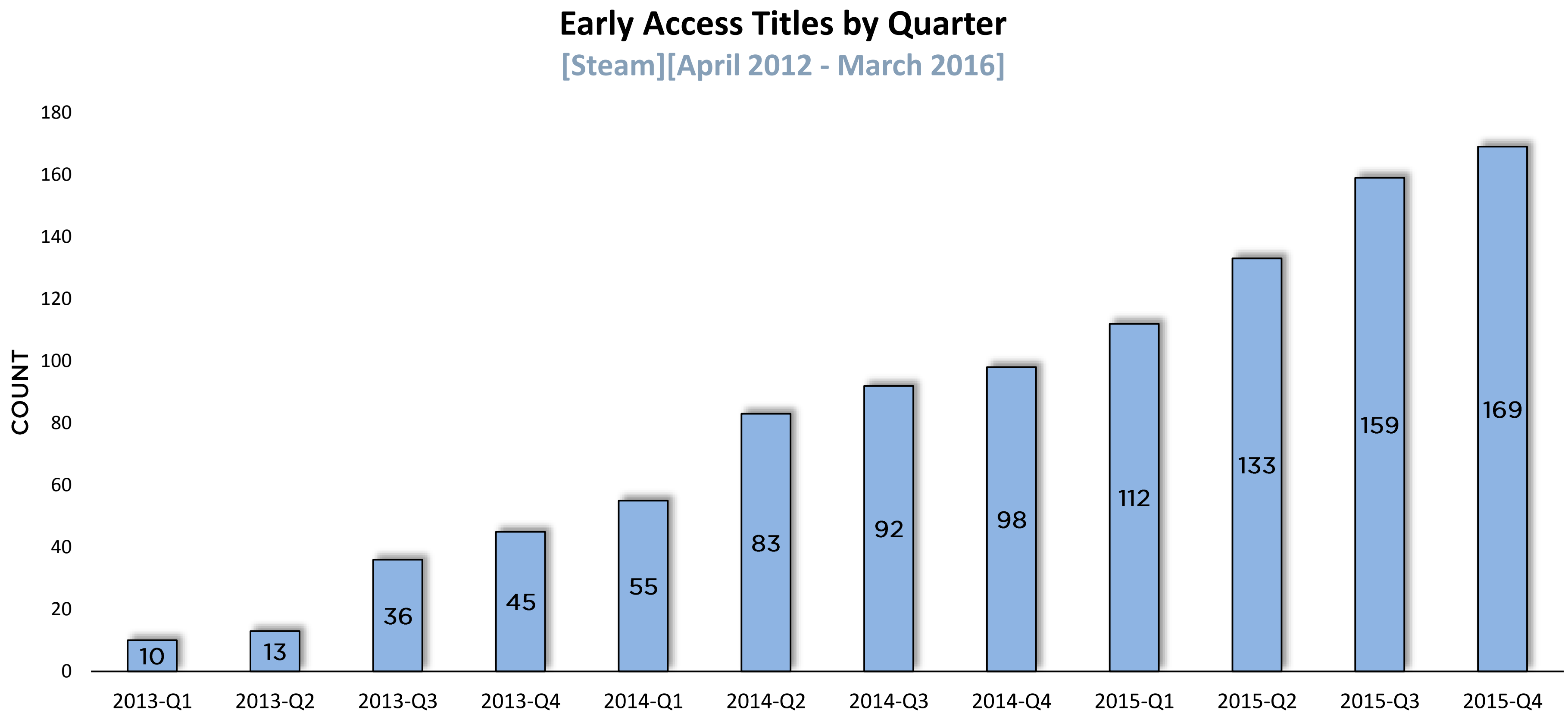
And less revenue is driven by top Publishers

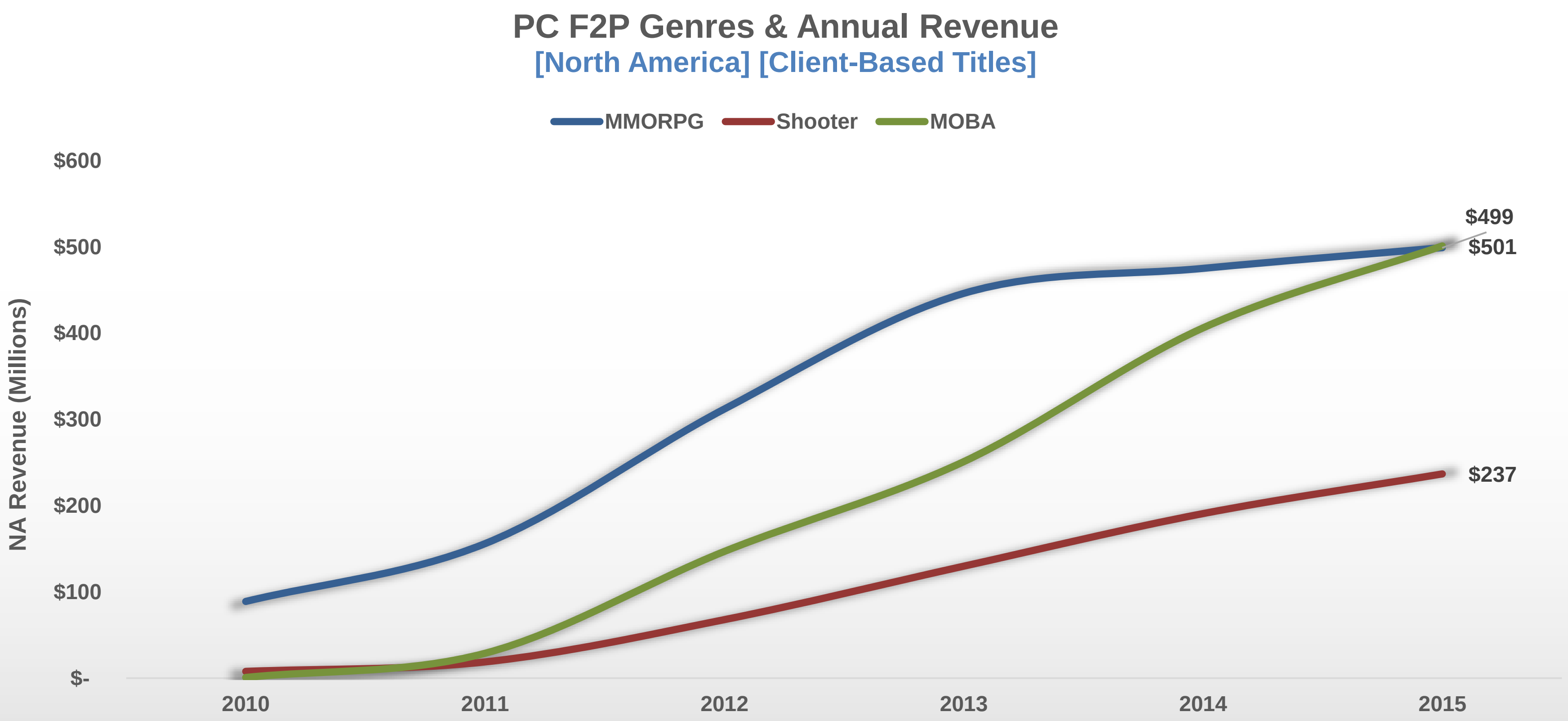


PC GAMING IS A HUB OF INNOVATION FOR GAMING EXPERIENCES

Early access is still growing rapidly



MOBA HAS GROWN RAPIDLY IN PAST 3 YEARS



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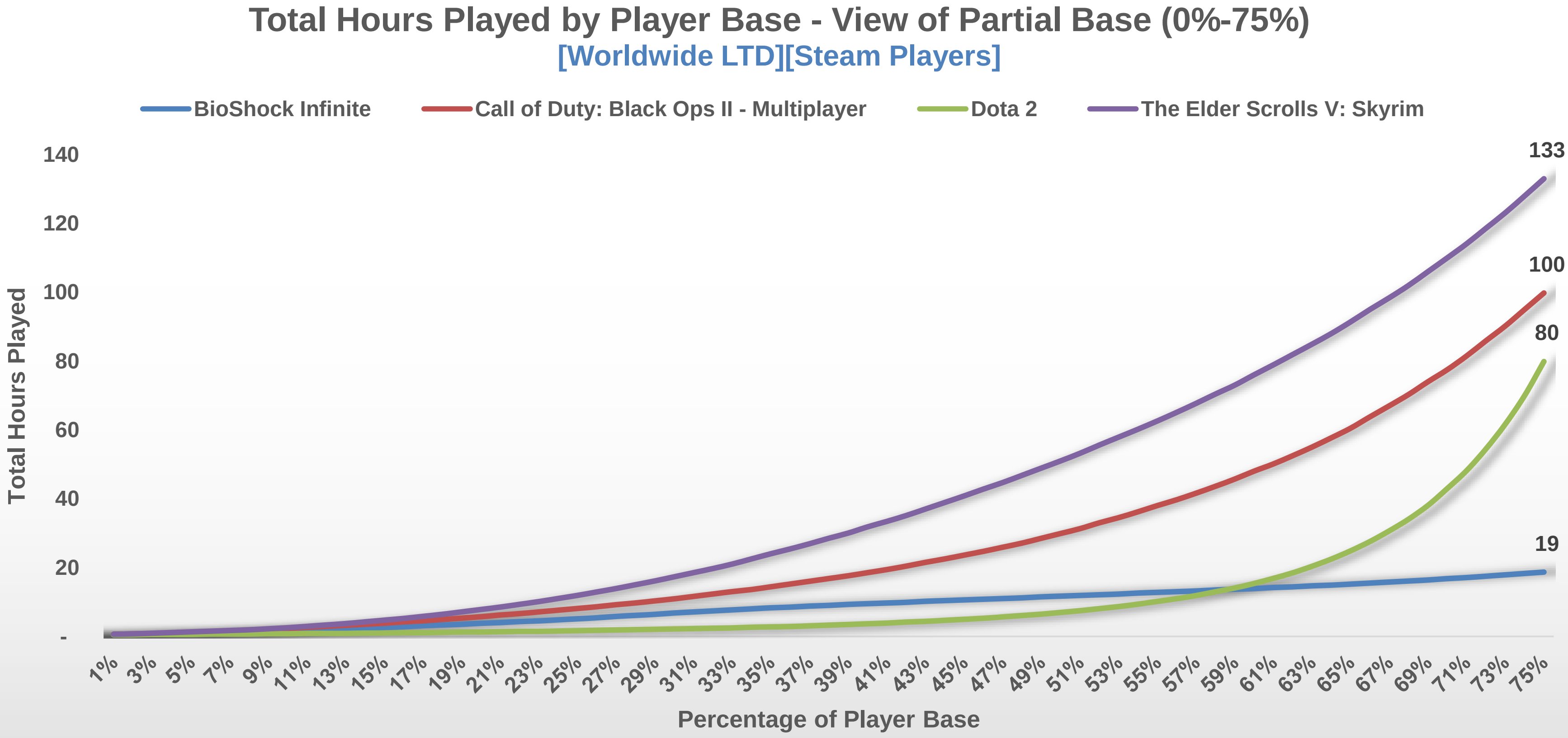
GaaS model is increasing engagement outside of F2P



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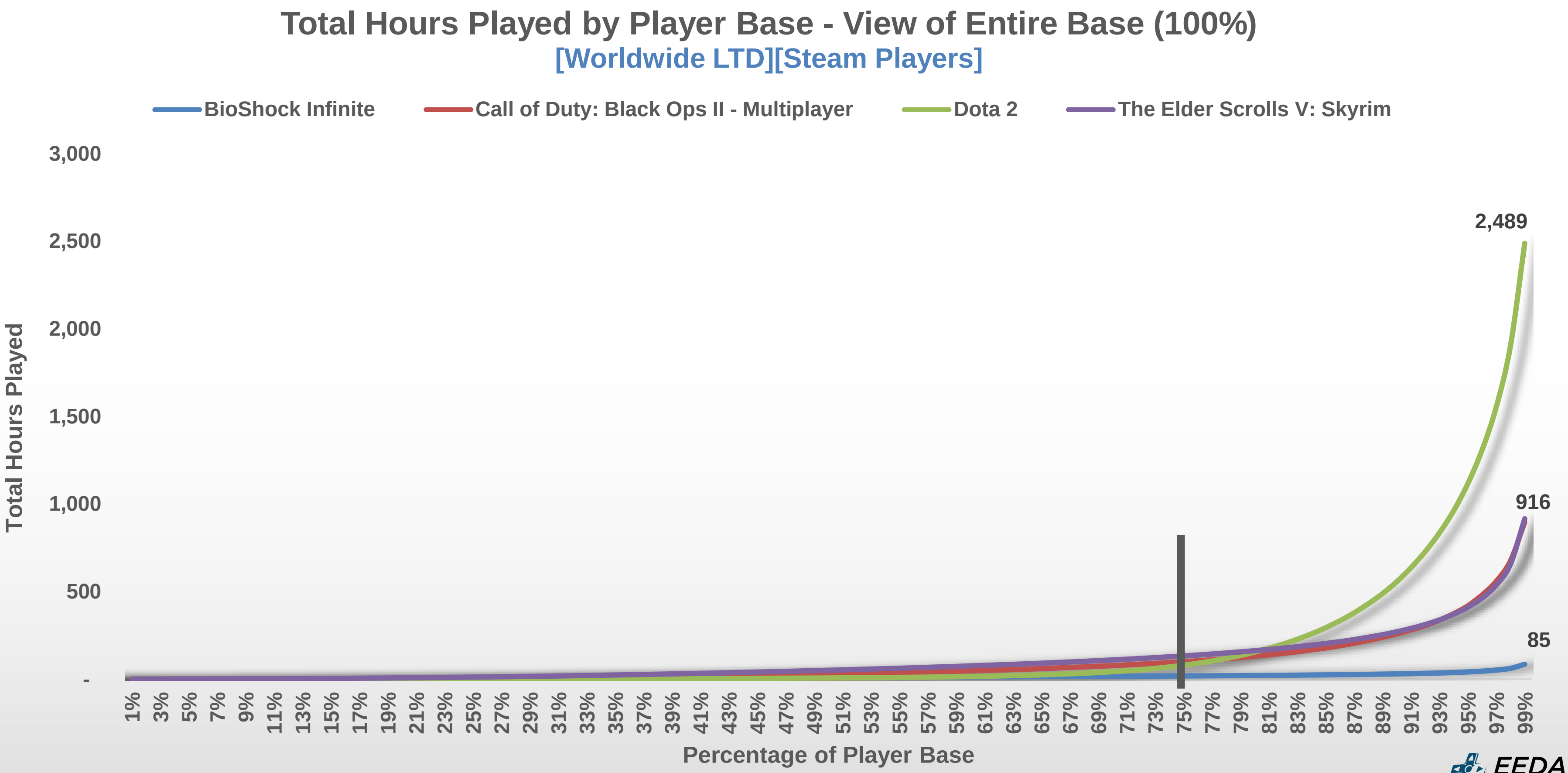
PC F2P LONG TERM ENGAGEMENT IS HIGH



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Gaming is now more than playing games

ESPORTS TOURNAMENT PRIZE POOLS ARE GROWING RAPIDLY

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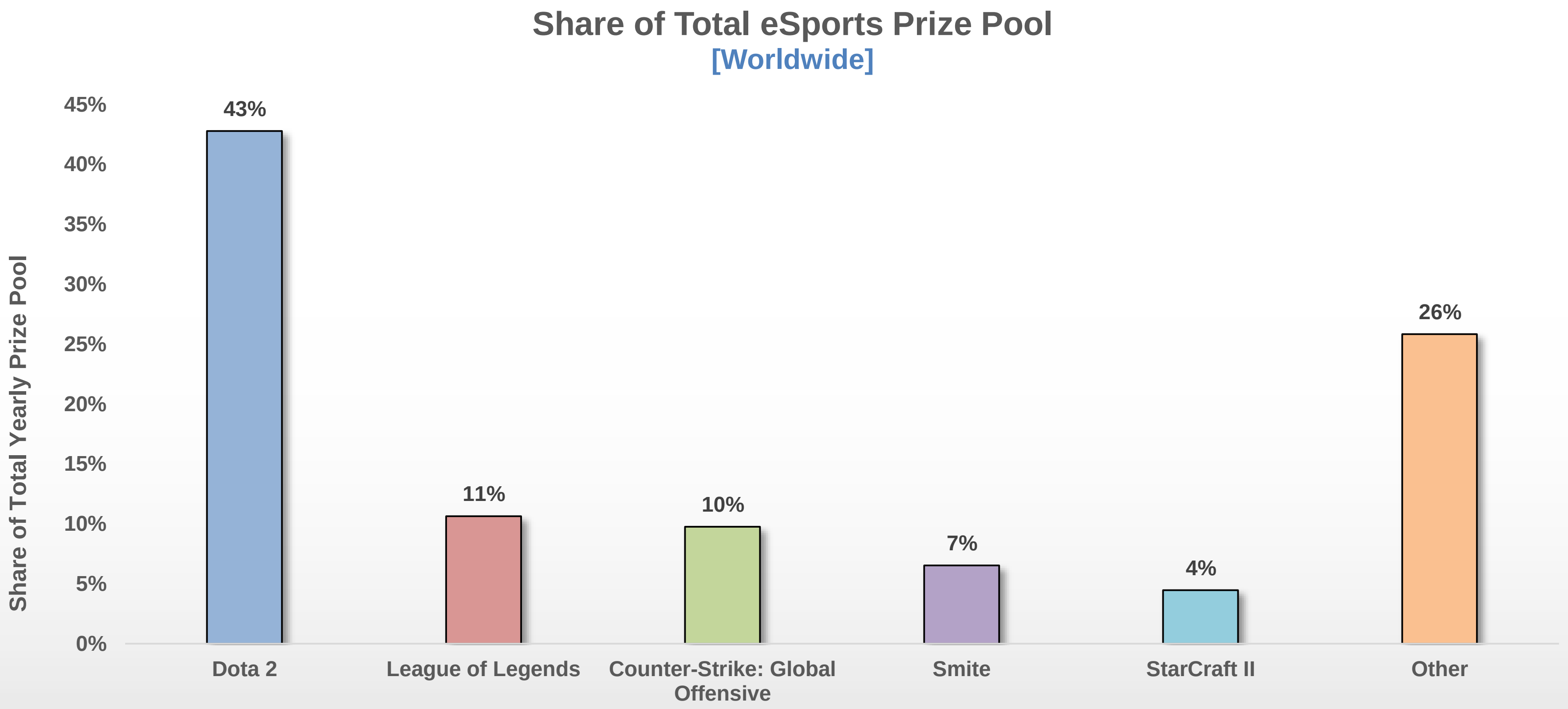
PLAYERS ARE FUNDING THE PRIZE POOL GROWTH



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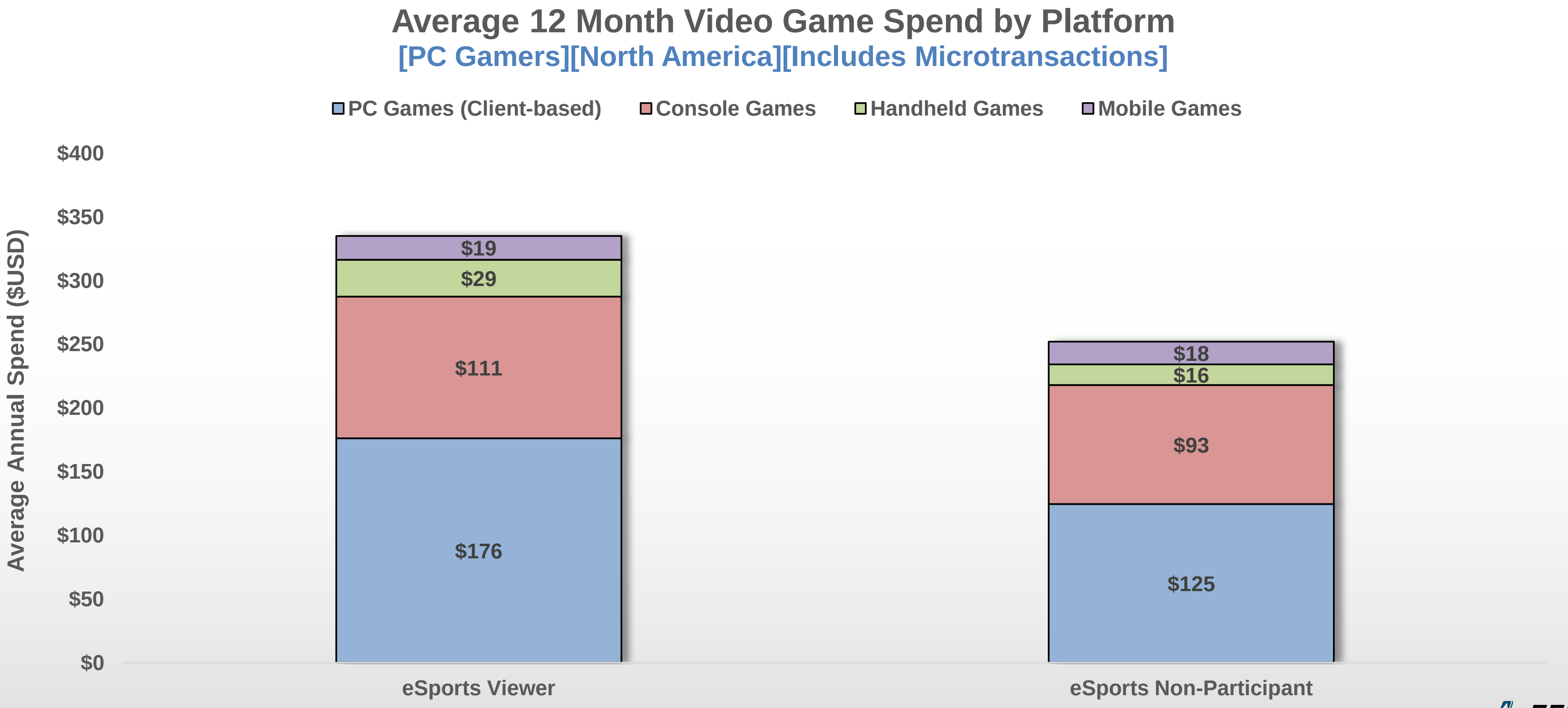
eSports Audience is a Valuable Consumer Base



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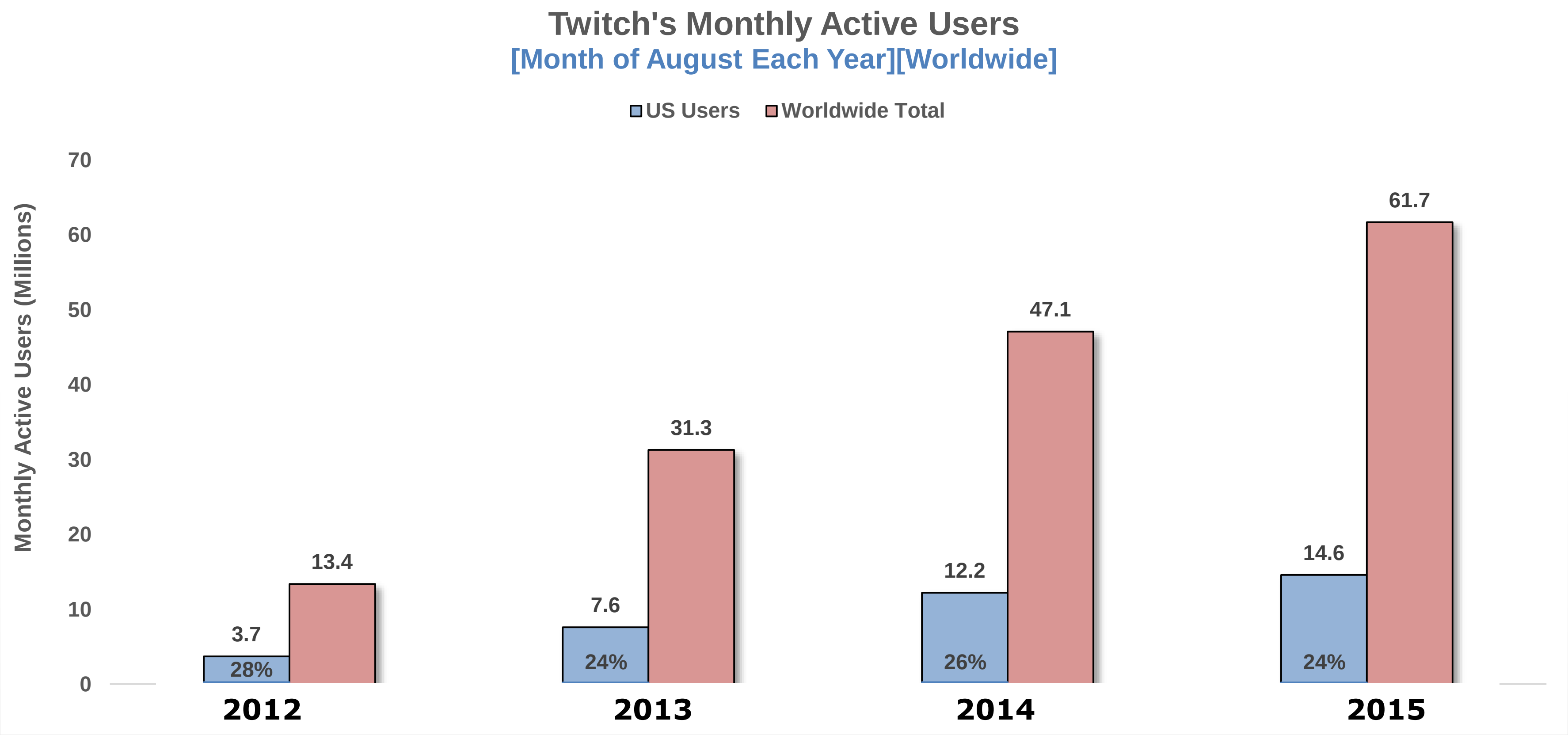
Streaming provides a new way to share and consume



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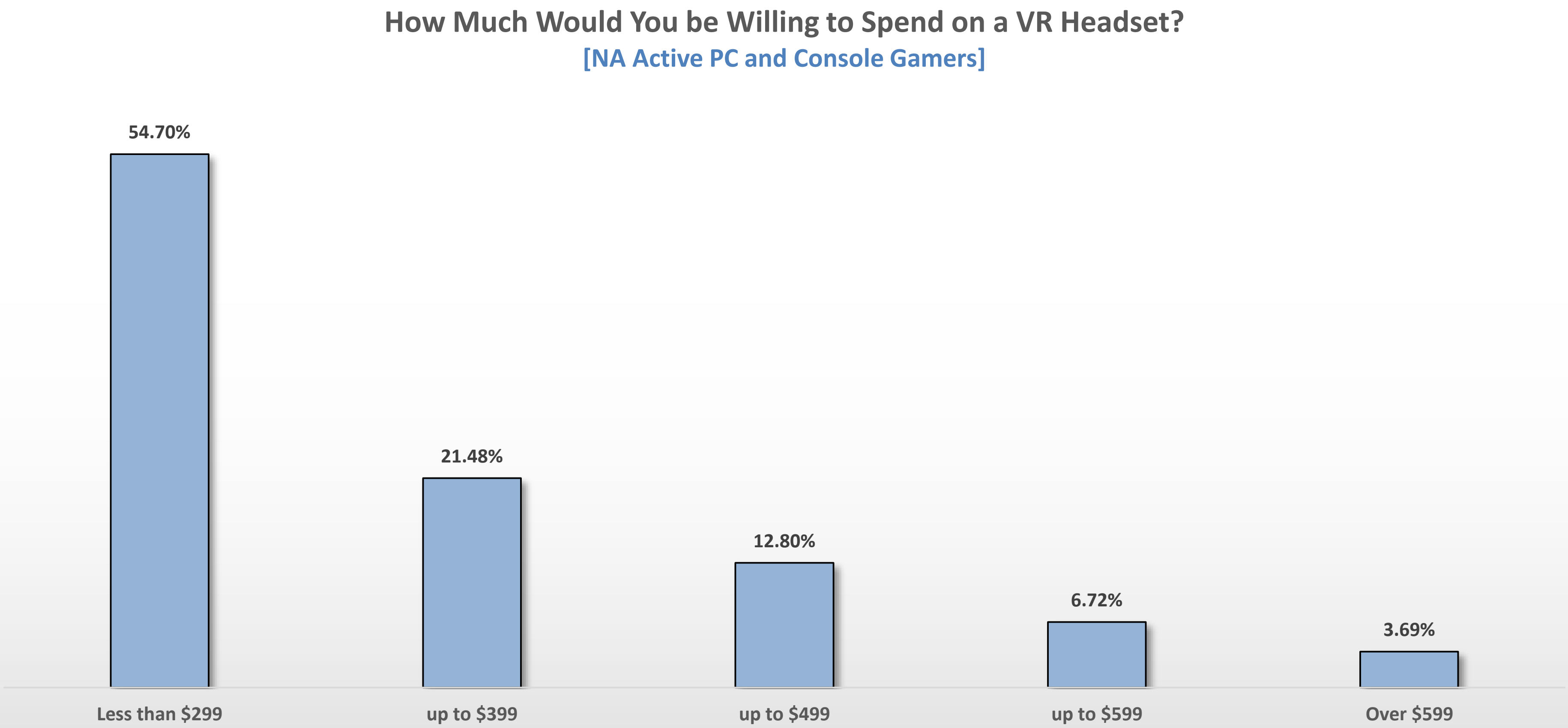
VR adds an even greater range of possible experiences

Pricing is an initial barrier to mainstream penetration



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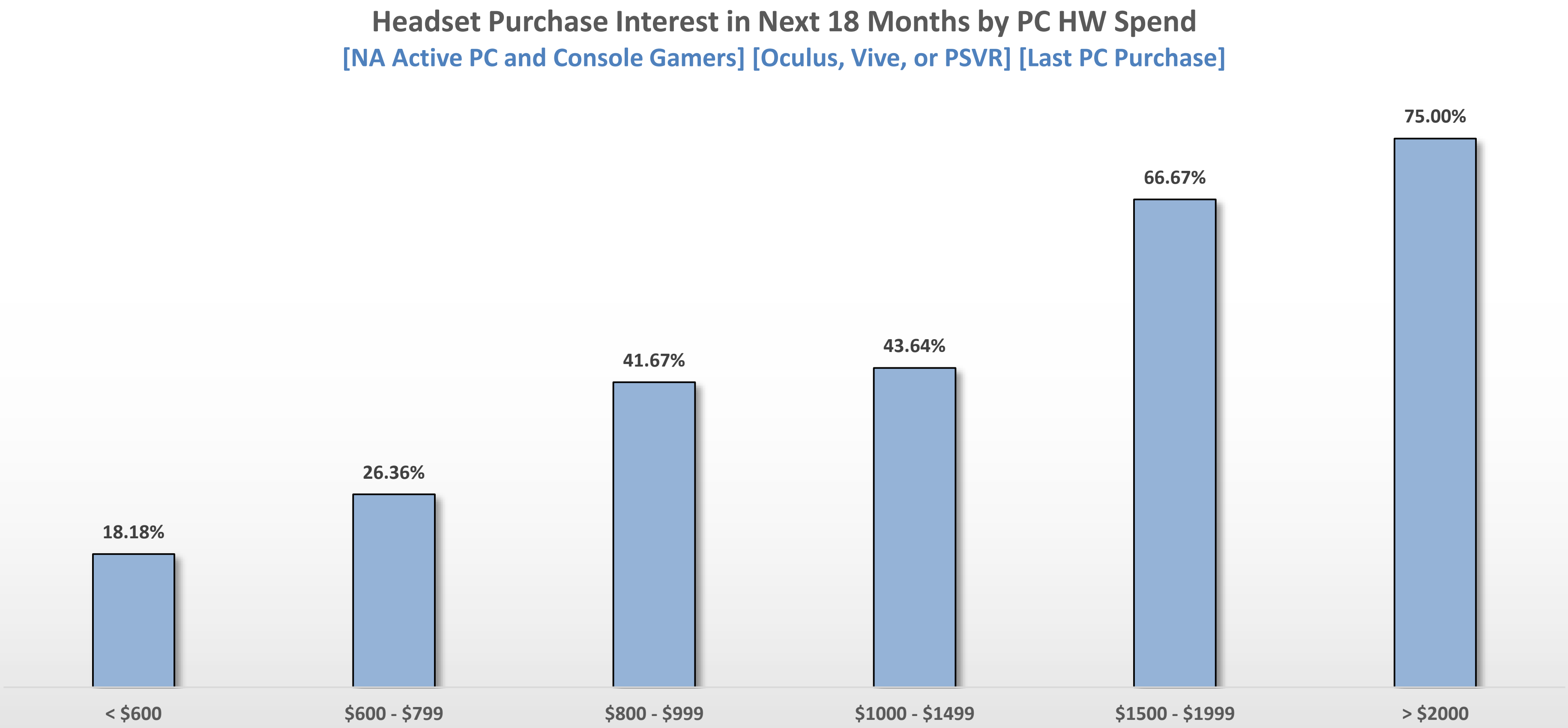
VR PURCHASE INTENT RELATED TO HARDWARE SPEND



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But obvious barriers to mainstream VR are short-term

EEDAR Insights - Data and Expertise Applied Across the Product Lifecycle

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FOR MORE INFORMATION ON INSIGHTS SERVICES CONTACT COOPER WADDELL AT CWADDELL@EEDAR.COM

PlayerPulse is the tracker for an expanding industry

PlayerPulse provides a 360° view from awareness and discovery to play and sharing.

Who is aware of your product?

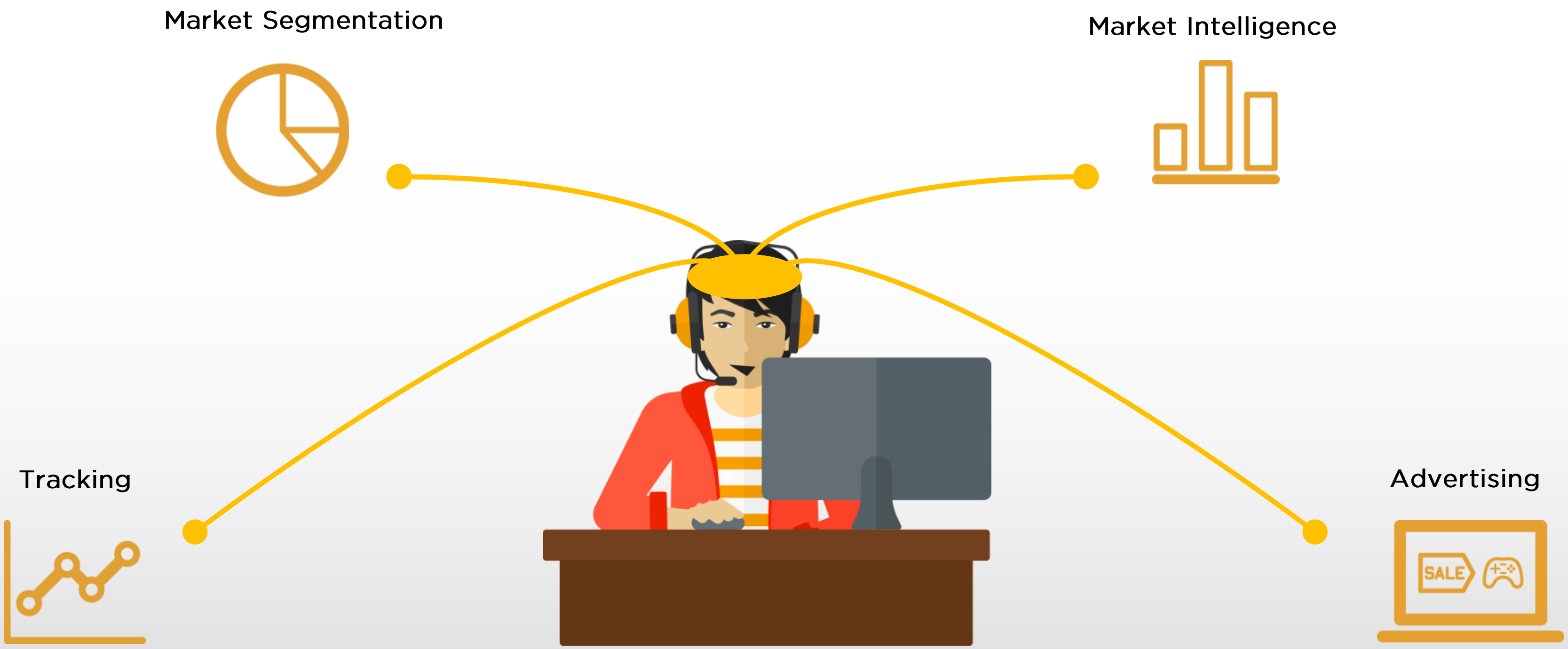
What games are they playing?

How do they discover?

How do they engage?

PlayerPulse is the tracker for an expanding industry

PlayerPulse combines many services into one product.



PLAYER PULSE

BY EEDAR & QRIOUSLY

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