

# 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

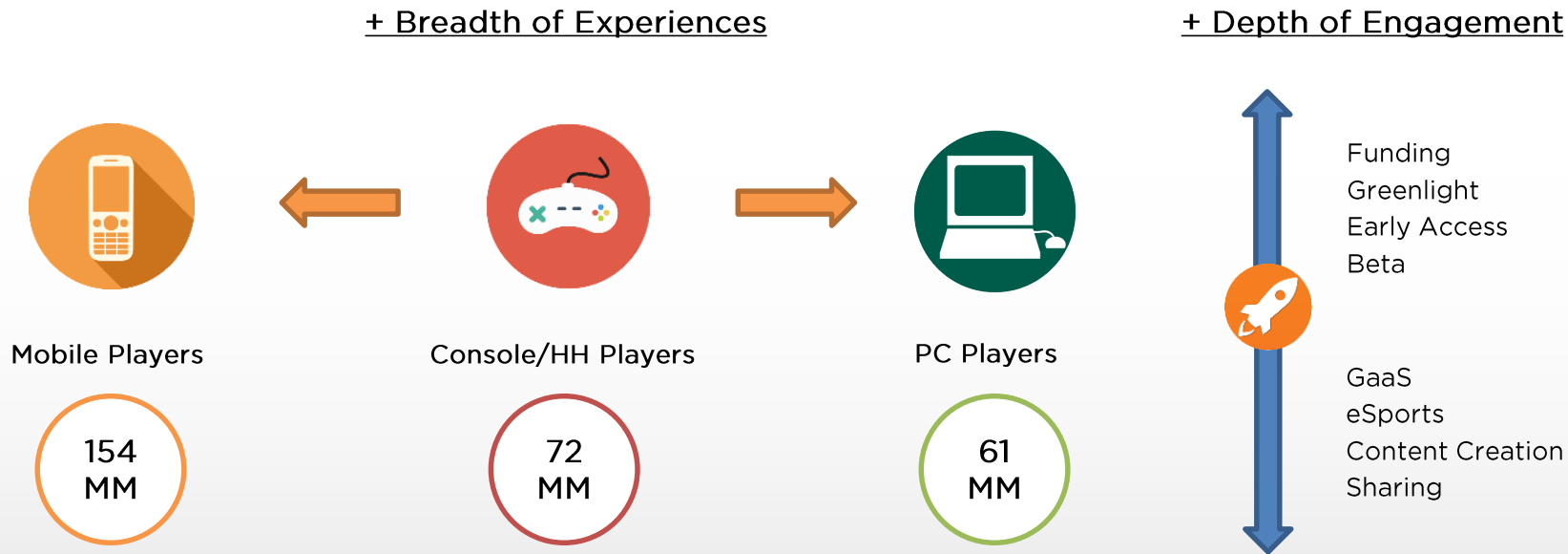
Player  
Viewer  
Content Creator  
Financer  
Professional

## 2010 - \$50B Worldwide

PC/Console/HH  
Retail  
Brand Marketing

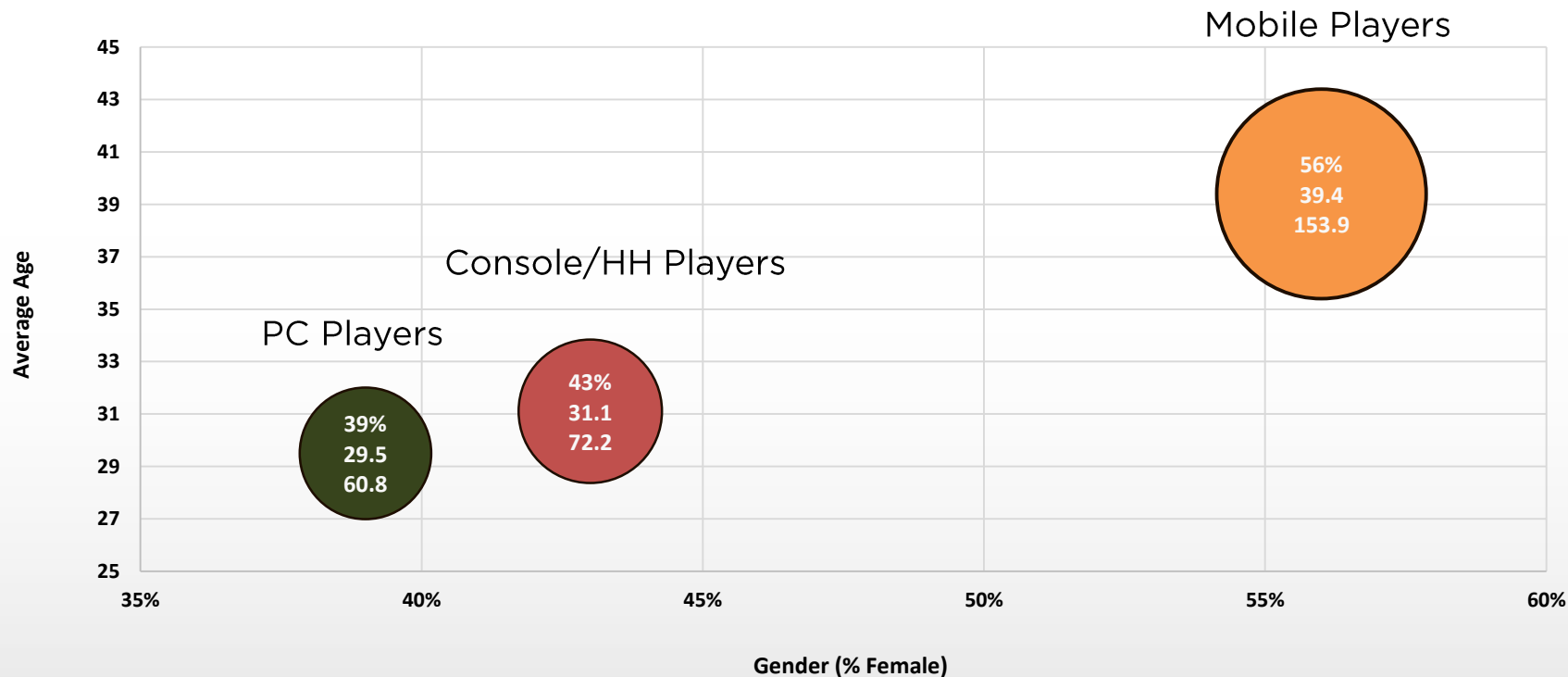
# GAMING IS EXPANDING BOTH WIDER AND DEEPER

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



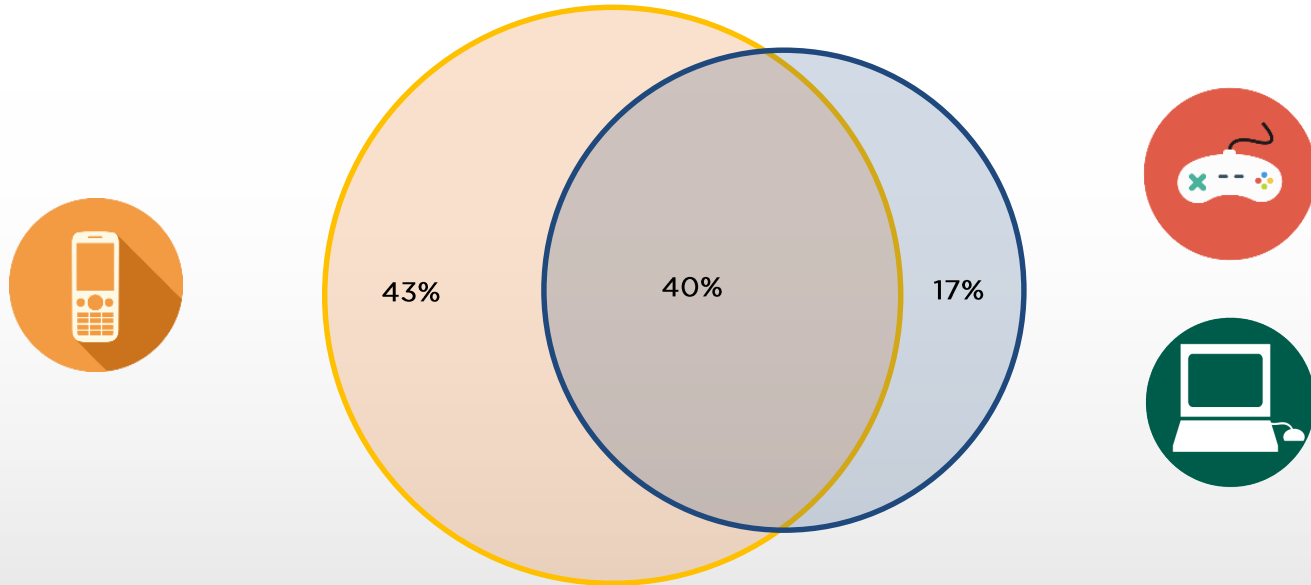
# MOBILE HAS ADDED NEW GAMERS TO THE MARKET

Market Size and Player Demographics by Platform  
[United States][PC Gamers Excludes Social Games]

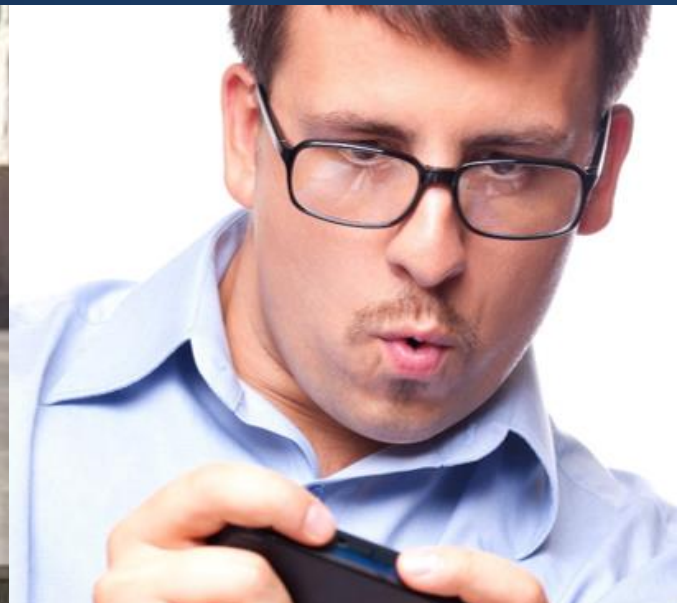


# CONSOLE AND PC GAMERS ALSO PLAY ON MOBILE

Overlap of Active US Gamers By Platform

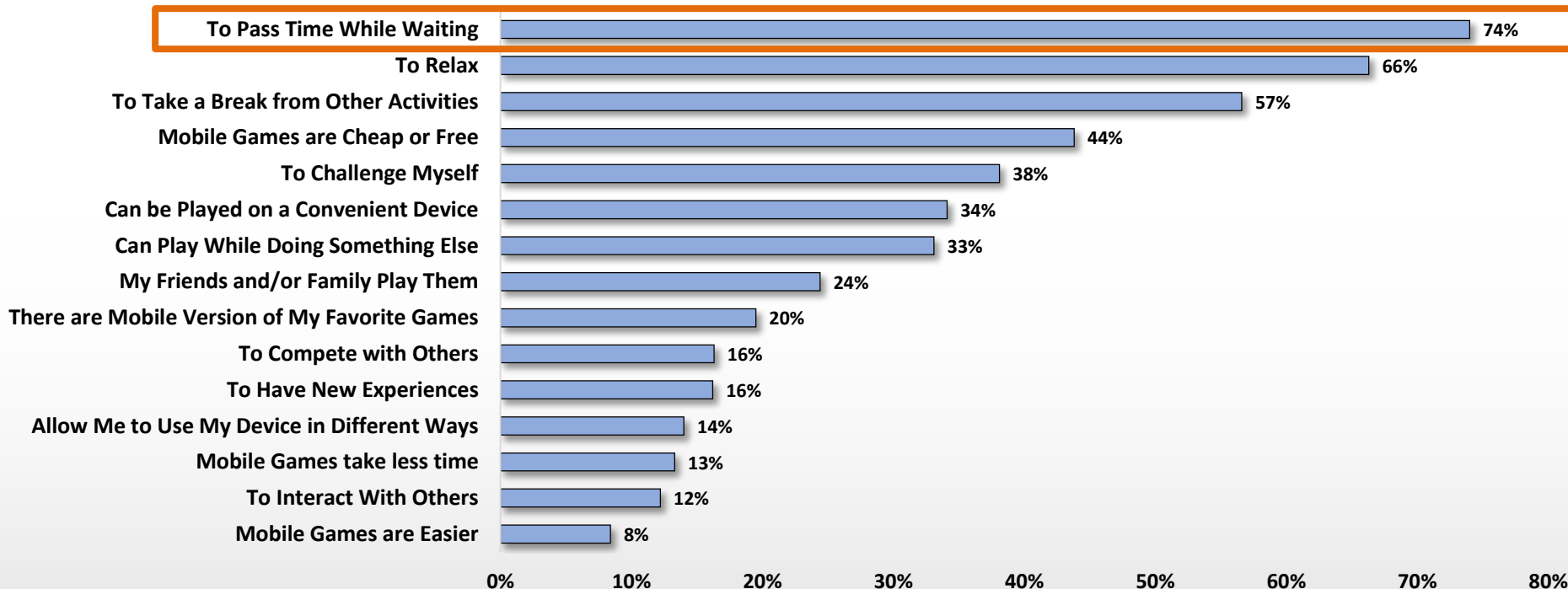


# MOBILE ACCESSIBILITY HAS ADDED DIVERSITY TO THE MARKET



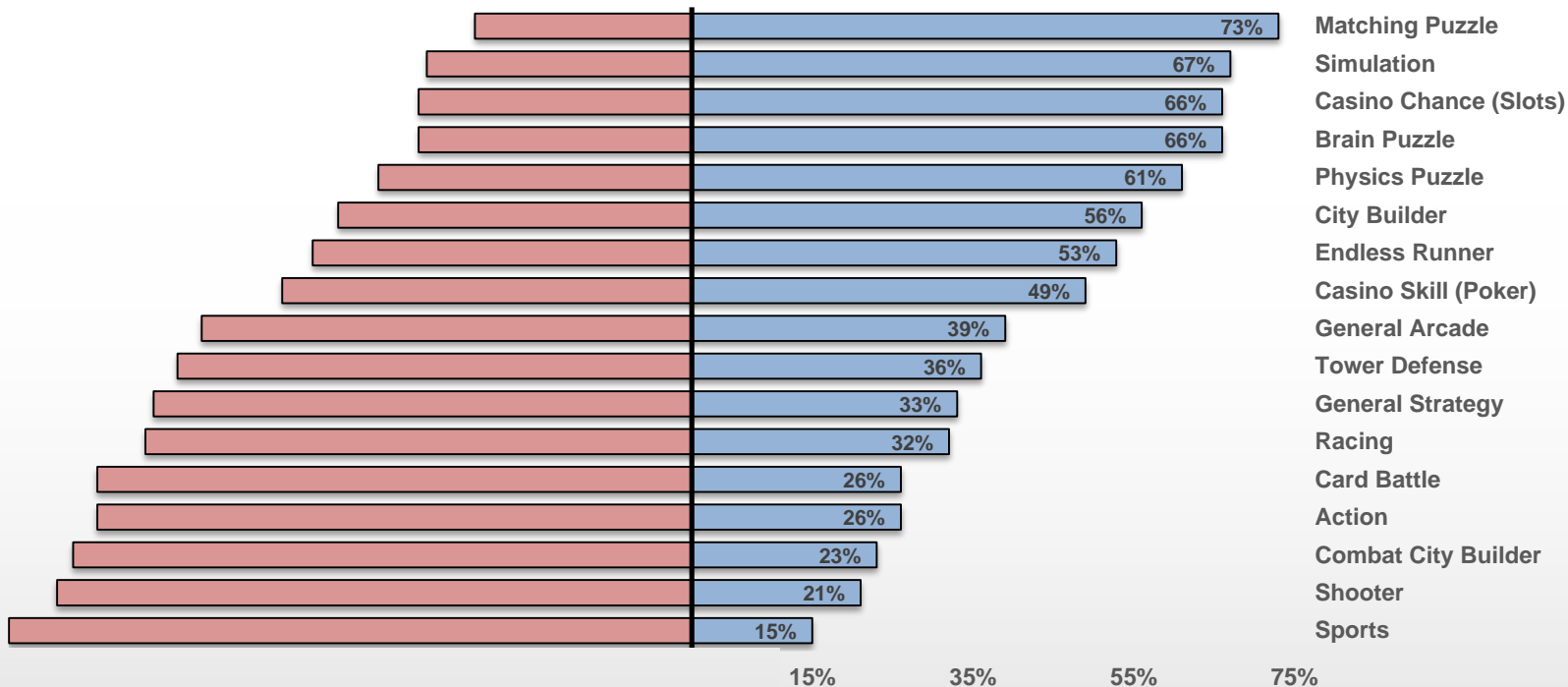
# REASONS FOR PLAYING MOBILE = SHORT SESSION LENGTHS

Percentage of Mobile Gamers that Endorse Reason for Playing Mobile Games



# GREAT DIVERSITY WITHIN MOBILE MARKET

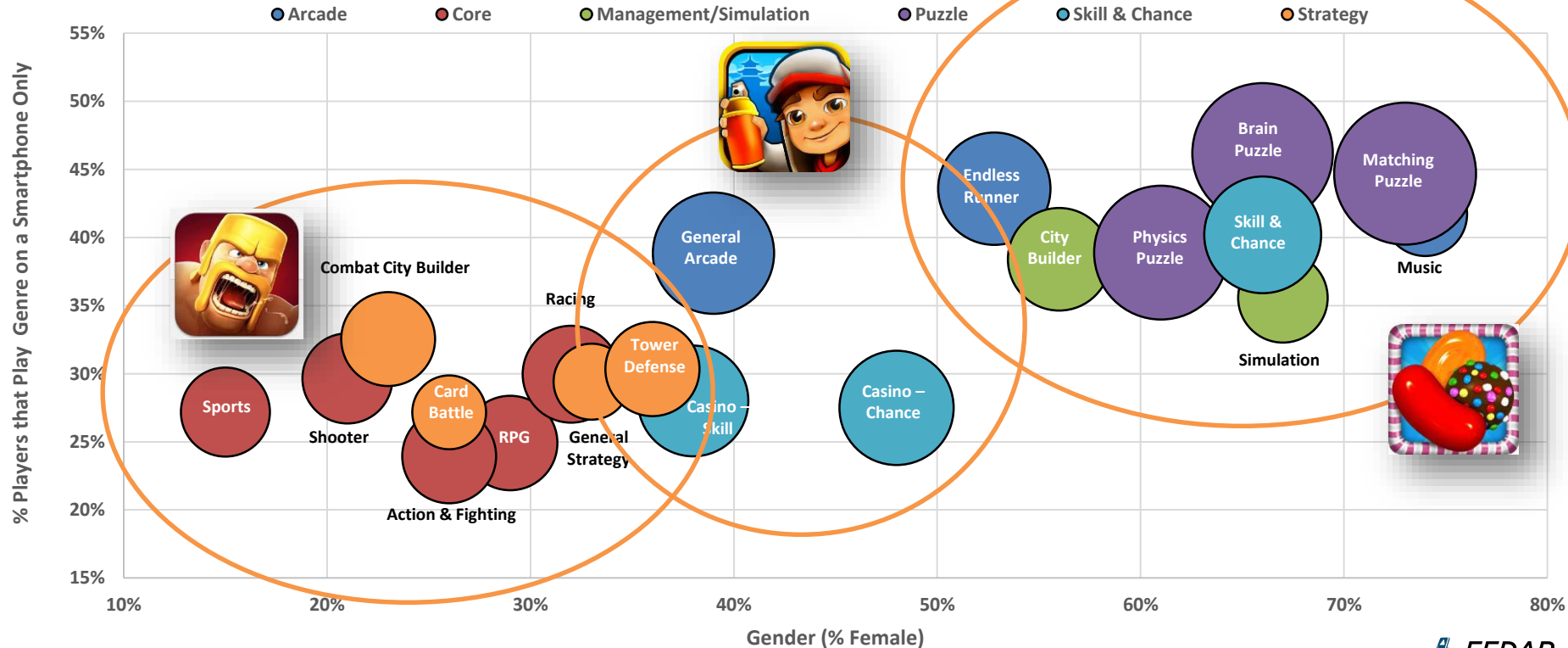
## Gender Splits by Mobile Genre [North America]



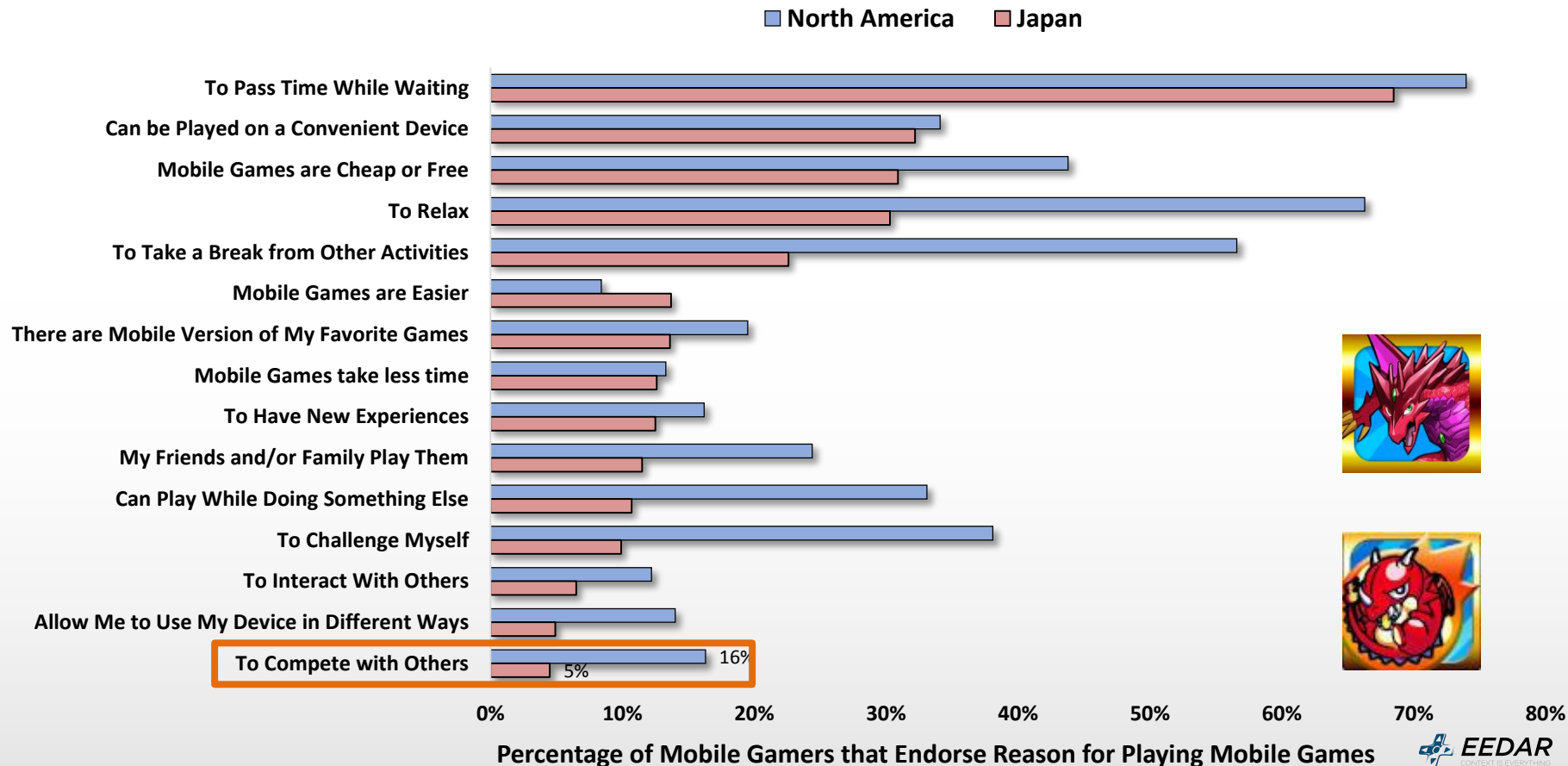


# GENRE RELATES TO MARKET SIZE AND PLAYER BASE

## Mobile Genres Player Gender, Device, and Market Size



# JAPAN IS LESS INTERESTED IN COMPETITIVE PVP THAN US



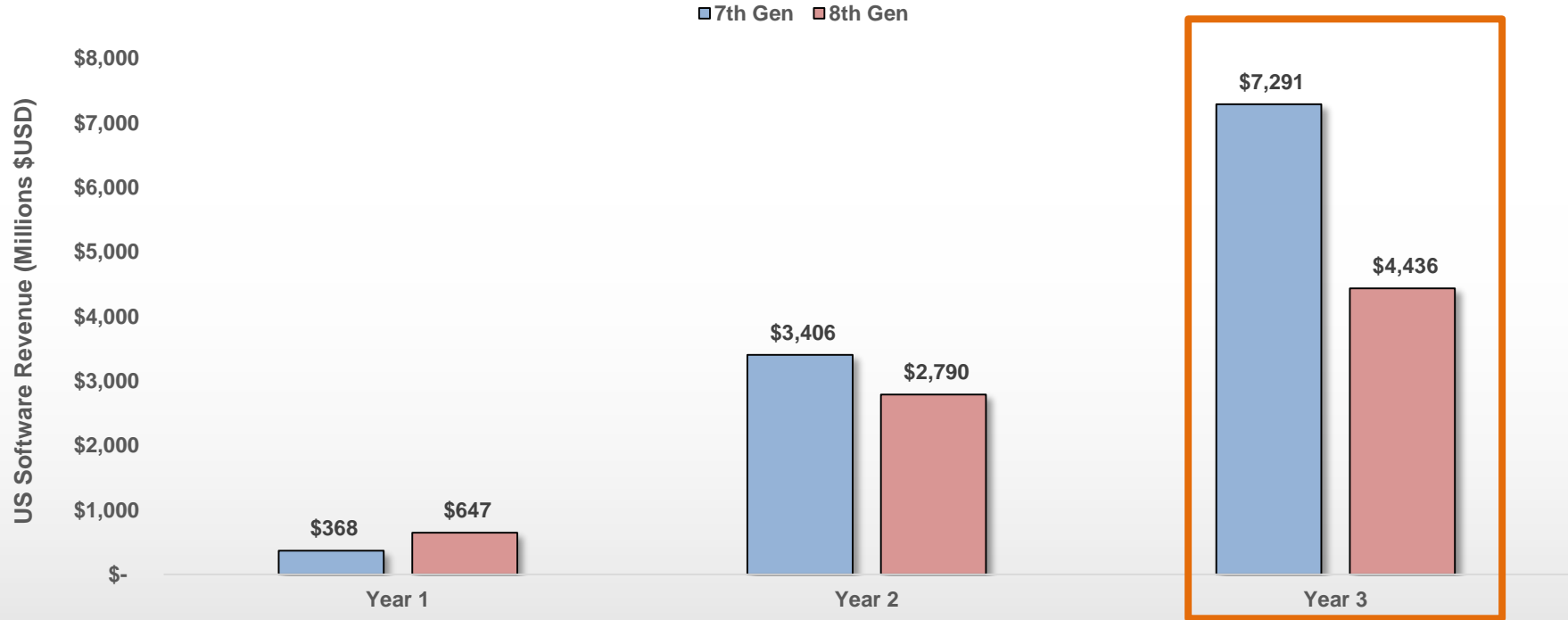
IT TURNS OUT CONSOLE GAMING IS PRETTY HARD TO KILL



# 8<sup>TH</sup> GENERATION CONSOLE SOFTWARE SALES APPEAR DOWN

## Console Software Sales - 7th Gen vs. 8th Gen

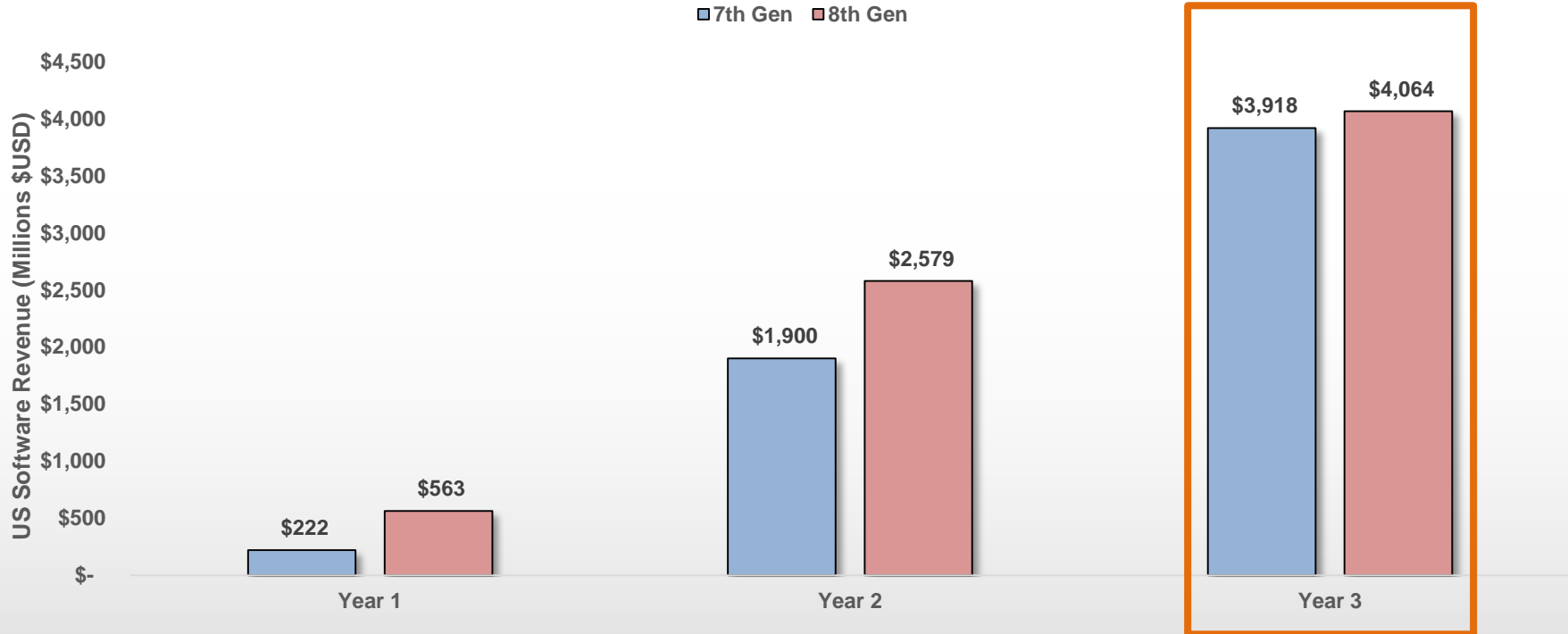
[USA][Digital and Physical][Excludes DLC][Year 1 is First Year of each Consoles Launch][2015 est.]



# BUT - REMOVING THE WII BUBBLE TELLS DIFFERENT STORY

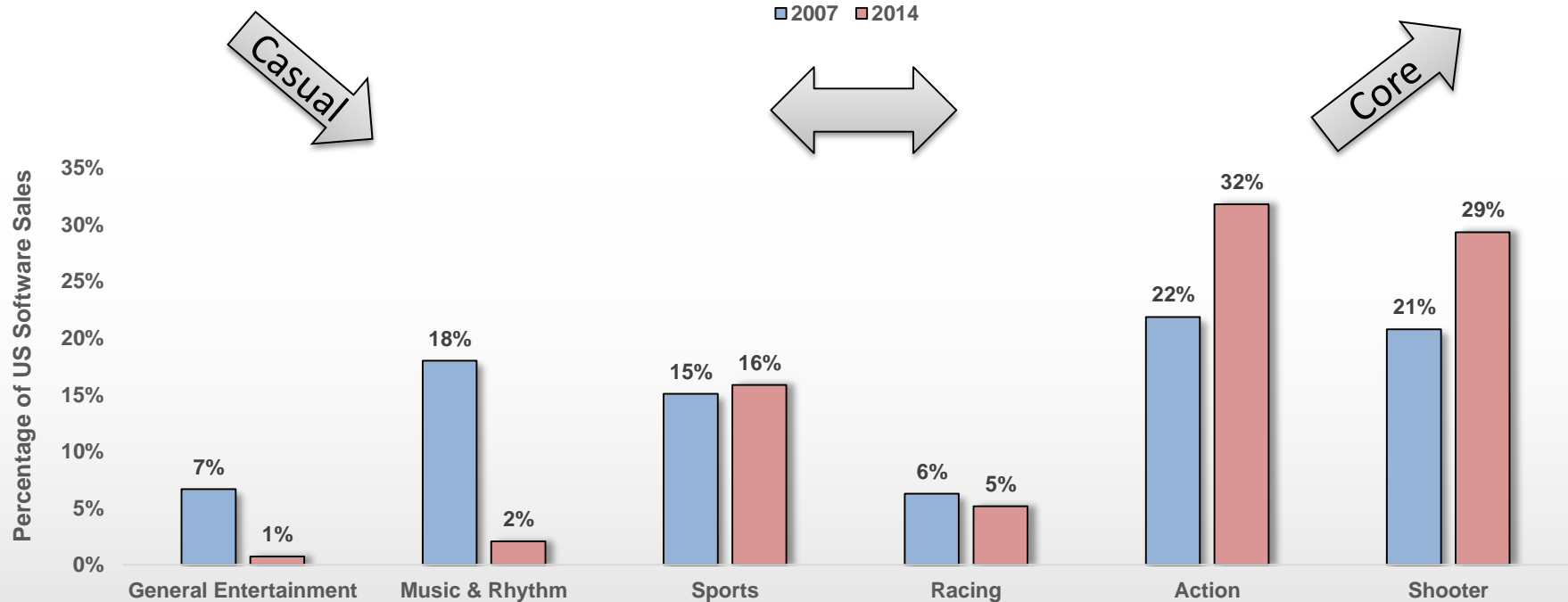
## Console Software Sales - 7th vs. 8th Gen

[Wii Removed][USA][Digital and Physical] ][Year 1 is First Year of each Consoles Launch][2015 est.]



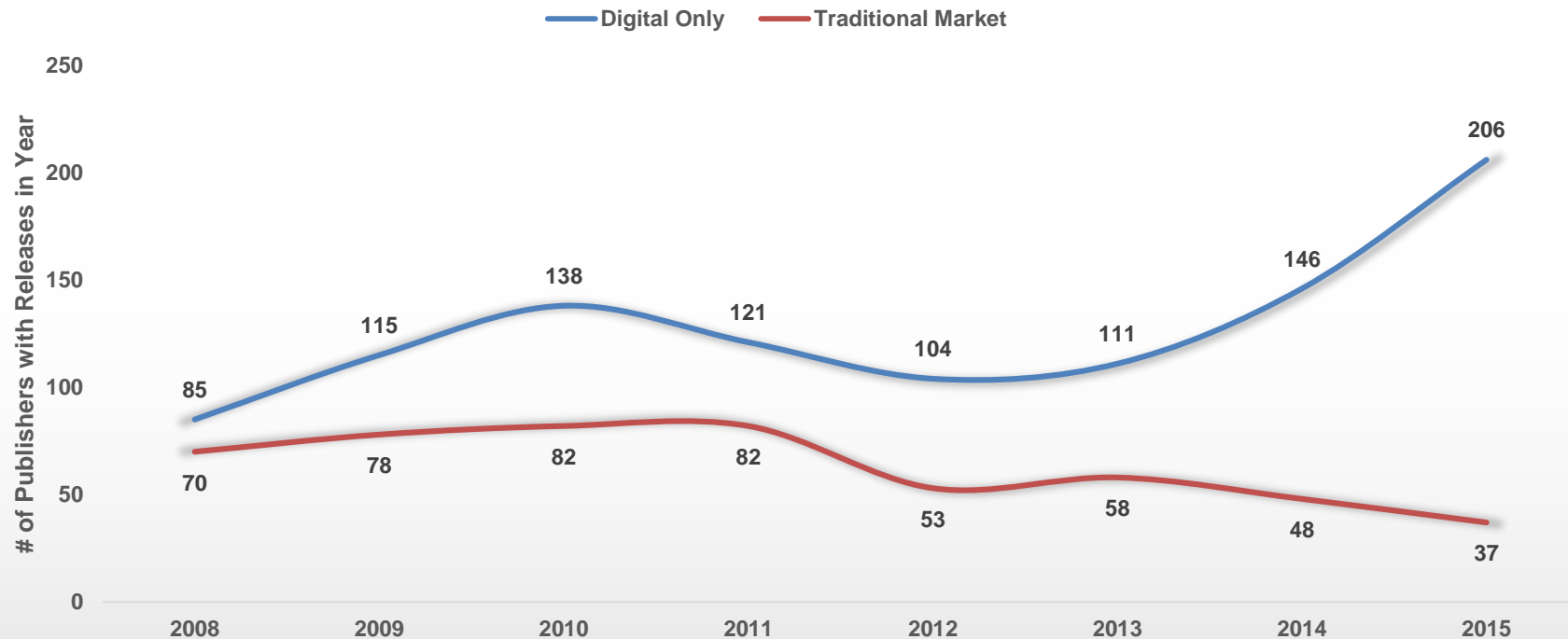
# THE CASUAL CONSOLE EXPERIENCE WAS CANNIBALIZED

Percentage of Software Sales by Genre - 7th vs. 8th Gen  
[US]Digital and Physical



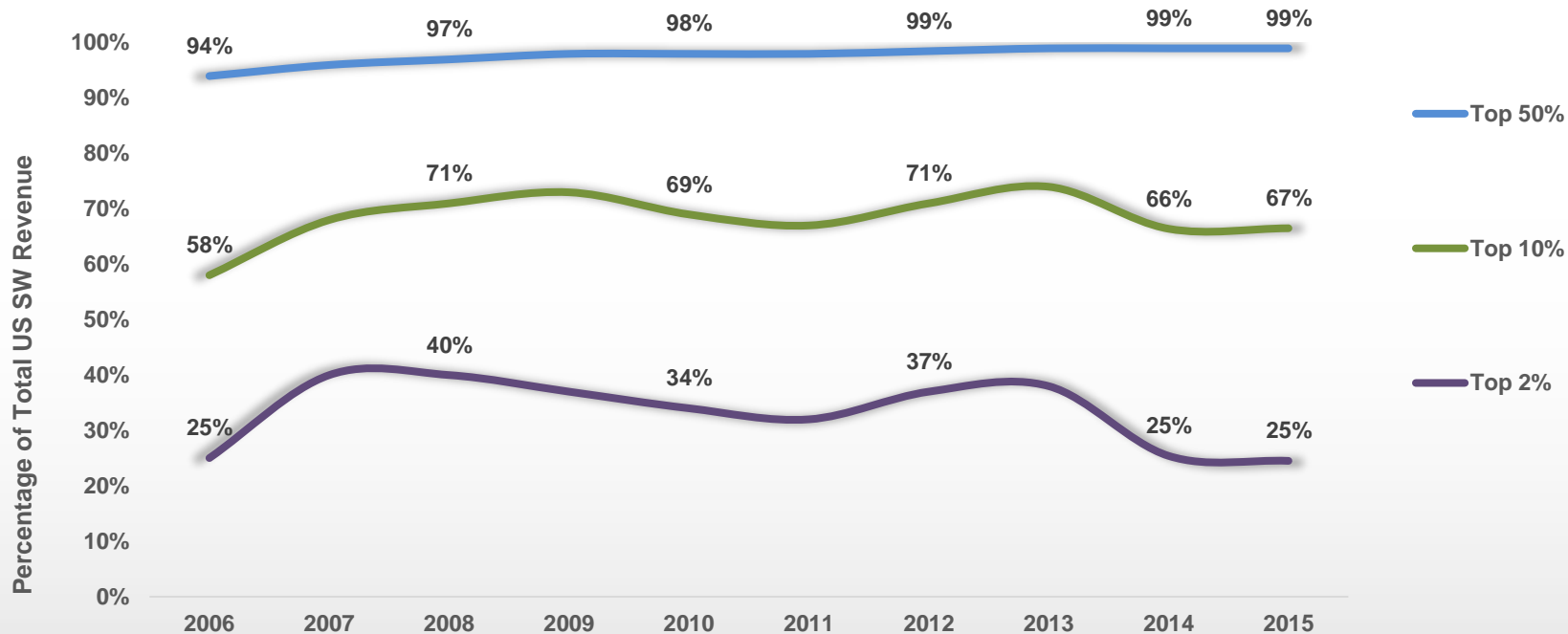
# DIGITAL IS DRIVING DIVERSITY ON THE CONSOLES

Count of Active Yearly Publishers  
[Microsoft, Nintendo, & Sony Consoles]



# AND LESS REVENUE IS DRIVEN BY TOP PUBLISHERS

Percentage of Revenue from Top x Percentage of Titles - By Year  
[United States][Physical + Digital][Excludes DLC][Consoles]





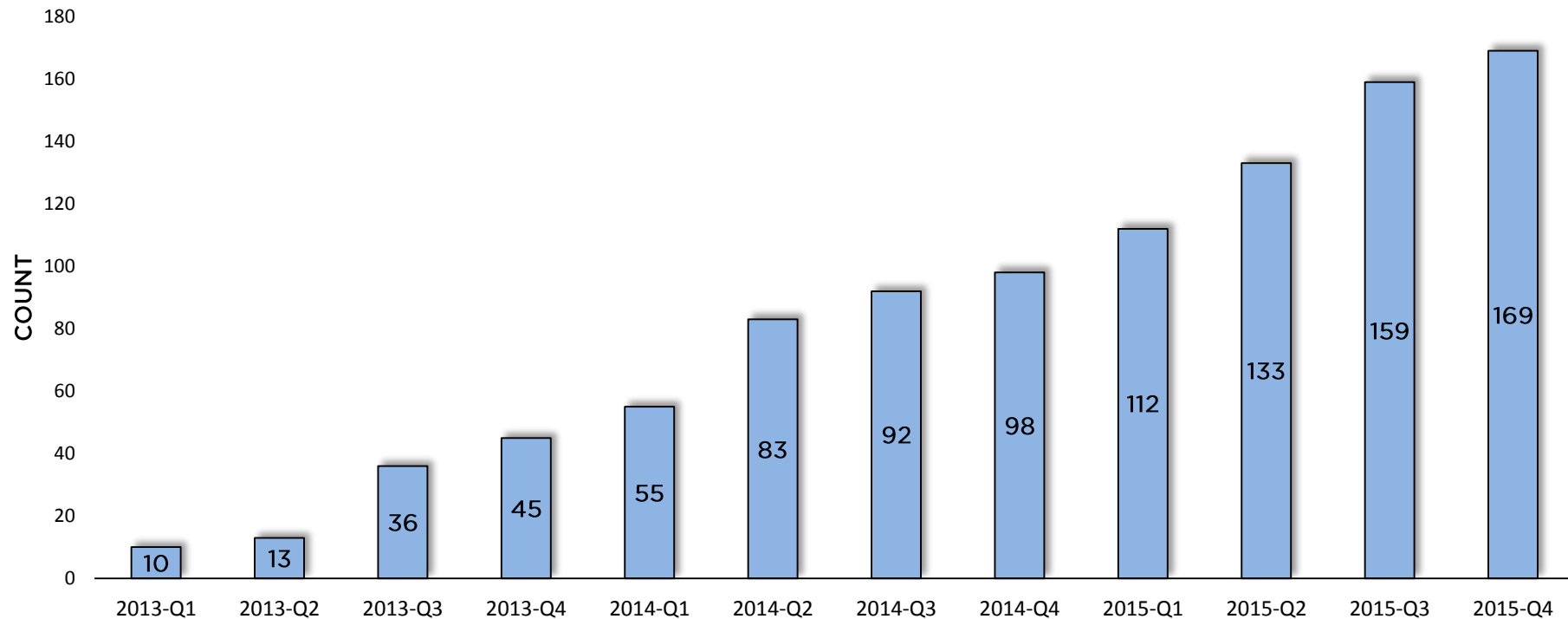
PC GAMING IS A HUB OF INNOVATION FOR GAMING EXPERIENCES



# EARLY ACCESS IS STILL GROWING RAPIDLY

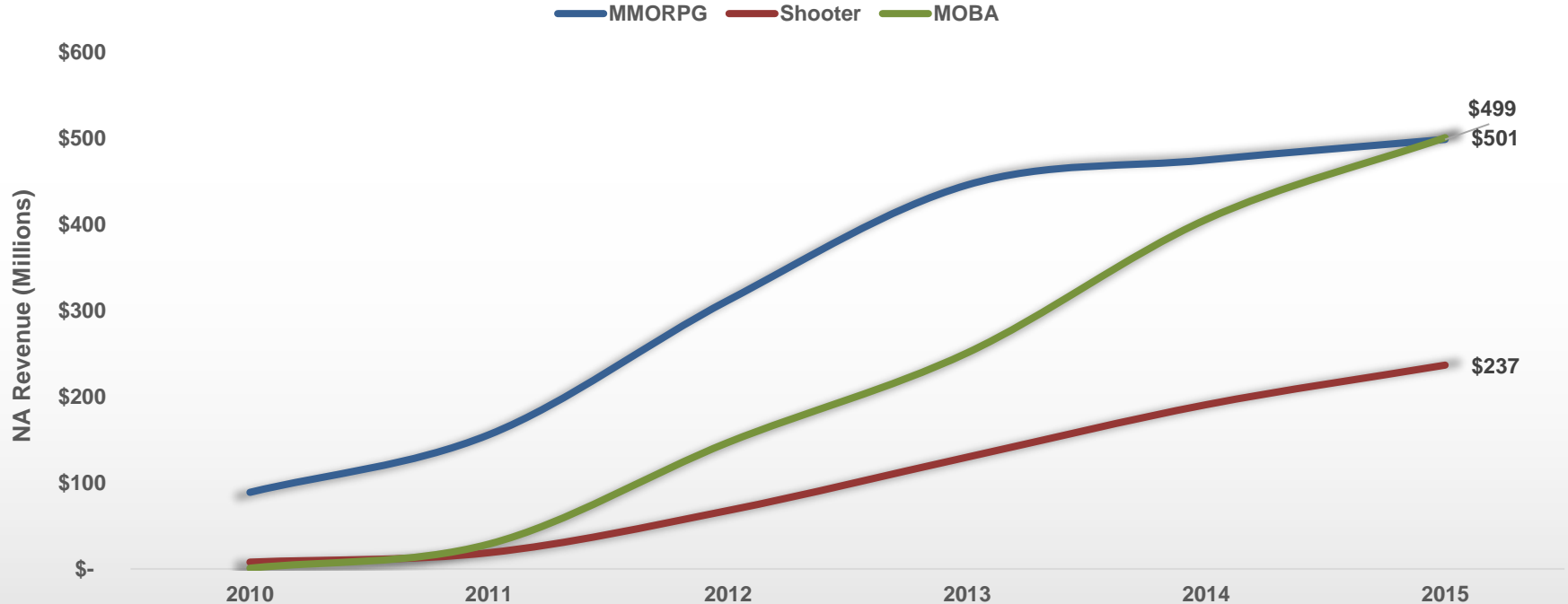
## Early Access Titles by Quarter

[Steam][April 2012 - March 2016]



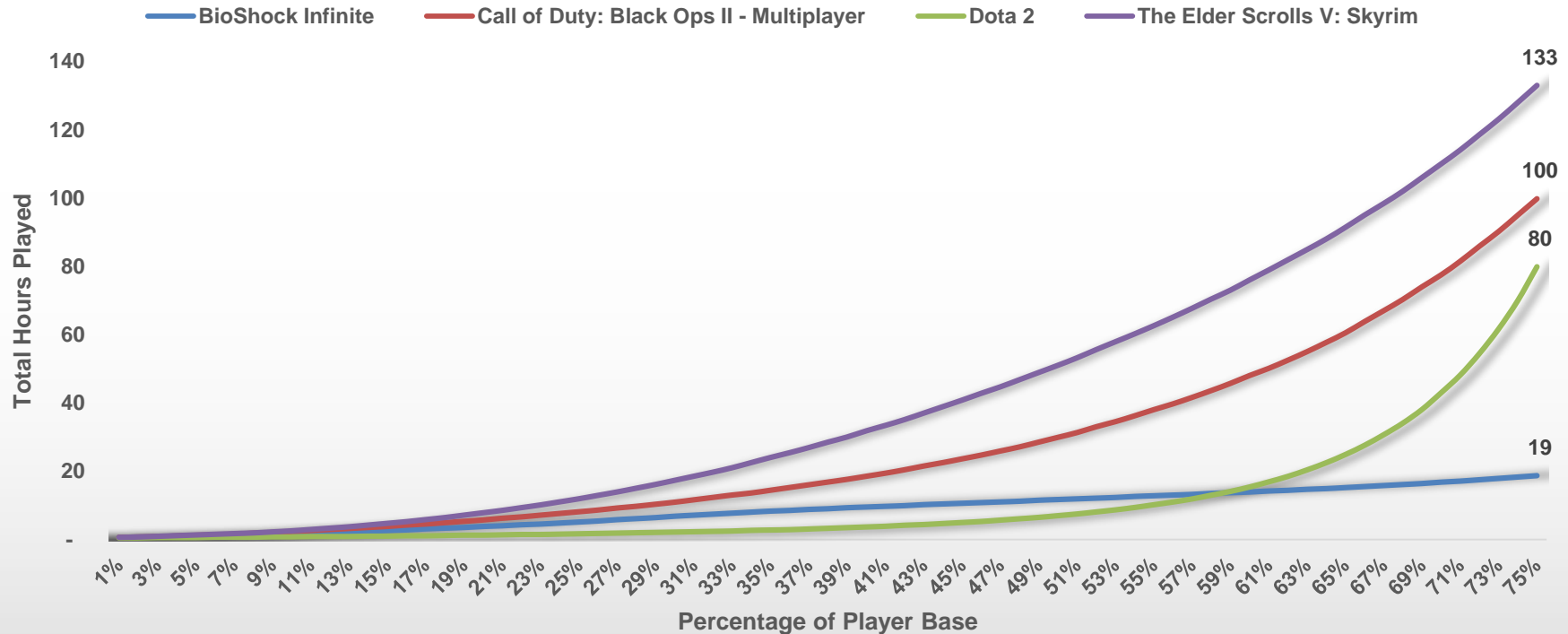
# MOBA HAS GROWN RAPIDLY IN PAST 3 YEARS

PC F2P Genres & Annual Revenue  
[North America] [Client-Based Titles]



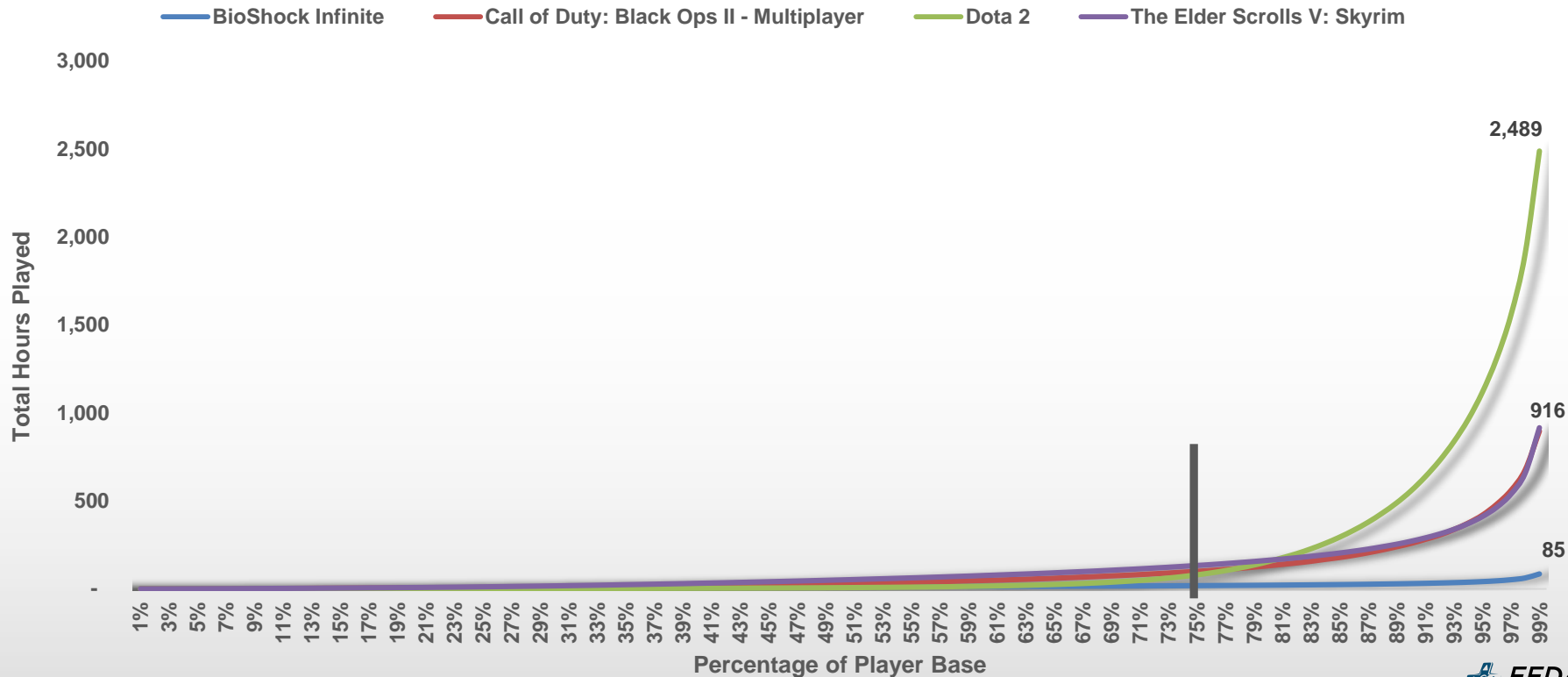
# GAAS MODEL IS INCREASING ENGAGEMENT OUTSIDE OF F2P

Total Hours Played by Player Base - View of Partial Base (0%-75%)  
[Worldwide LTD][Steam Players]



# PC F2P LONG TERM ENGAGEMENT IS HIGH

Total Hours Played by Player Base - View of Entire Base (100%)  
[Worldwide LTD][Steam Players]



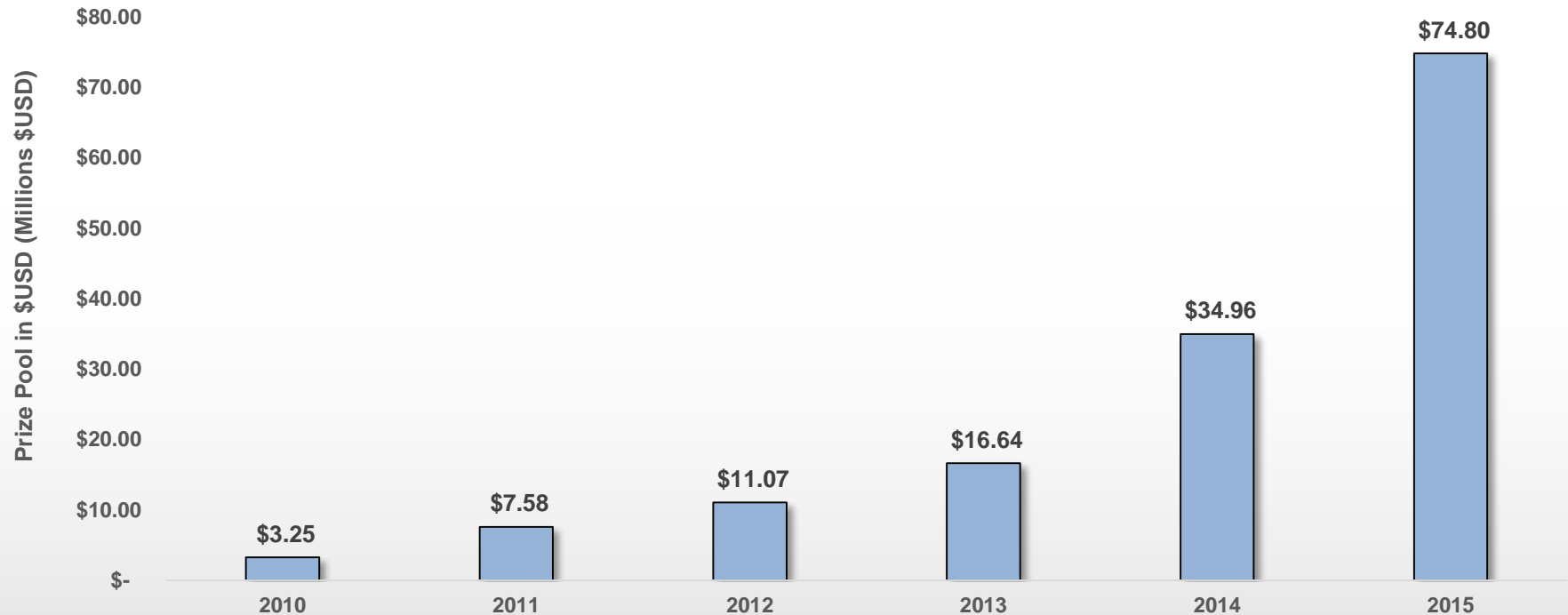


GAMING IS NOW MORE THAN PLAYING GAMES



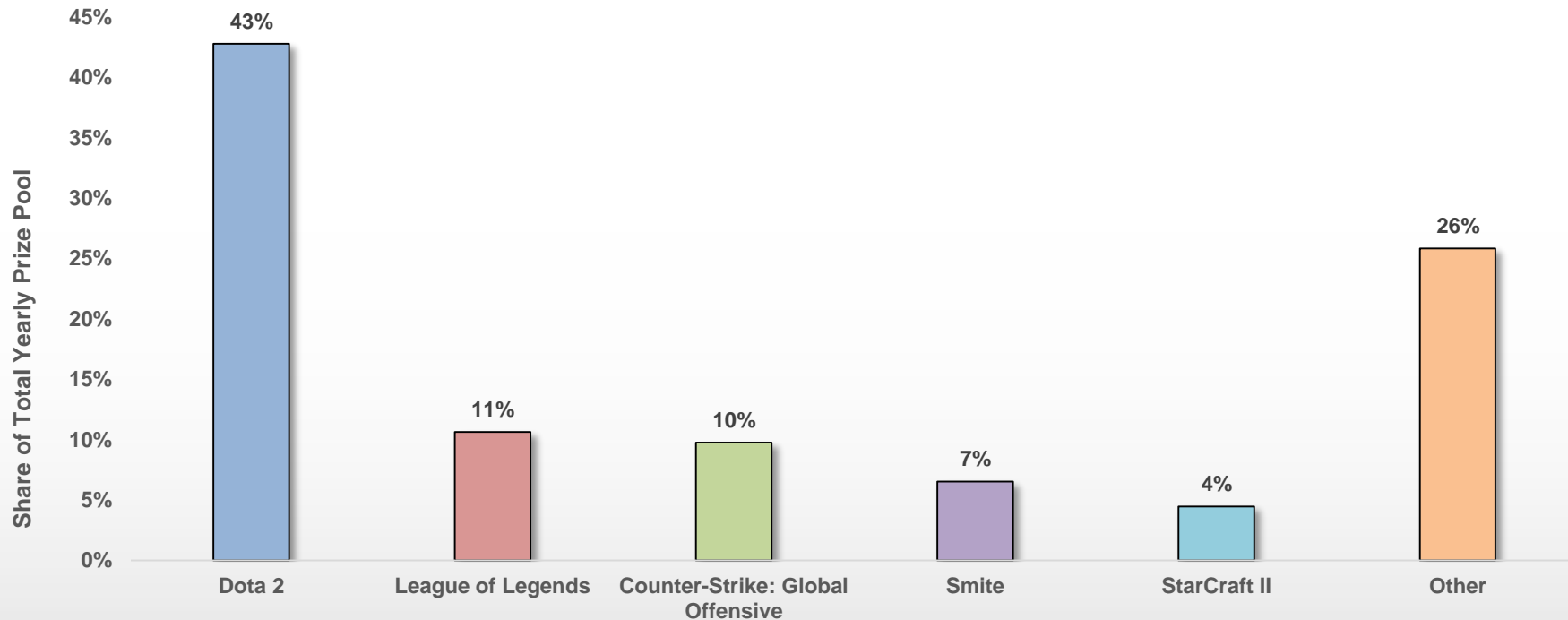
# ESPORTS TOURNAMENT PRIZE POOLS ARE GROWING RAPIDLY

Yearly eSports Prize Pools  
[Worldwide]



# PLAYERS ARE FUNDING THE PRIZE POOL GROWTH

Share of Total eSports Prize Pool  
[Worldwide]

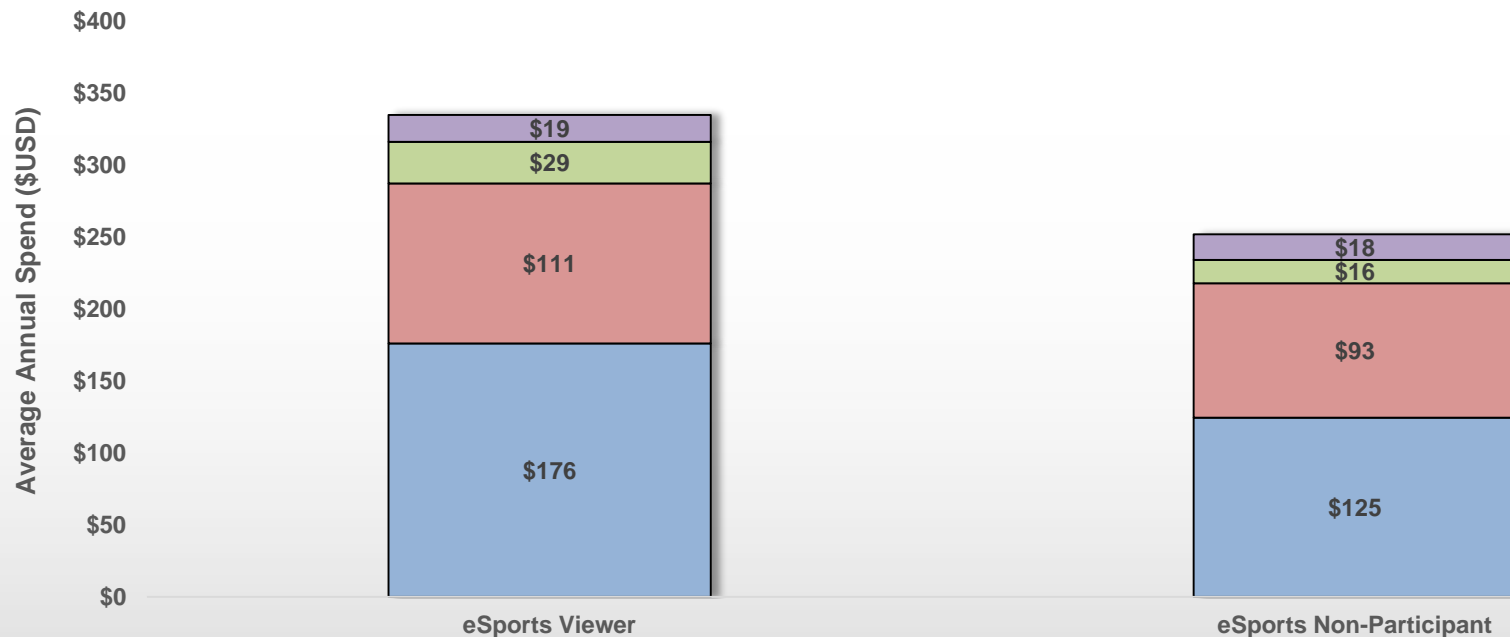




# ESPORTS AUDIENCE IS A VALUABLE CONSUMER BASE

## Average 12 Month Video Game Spend by Platform [PC Gamers][North America][Includes Microtransactions]

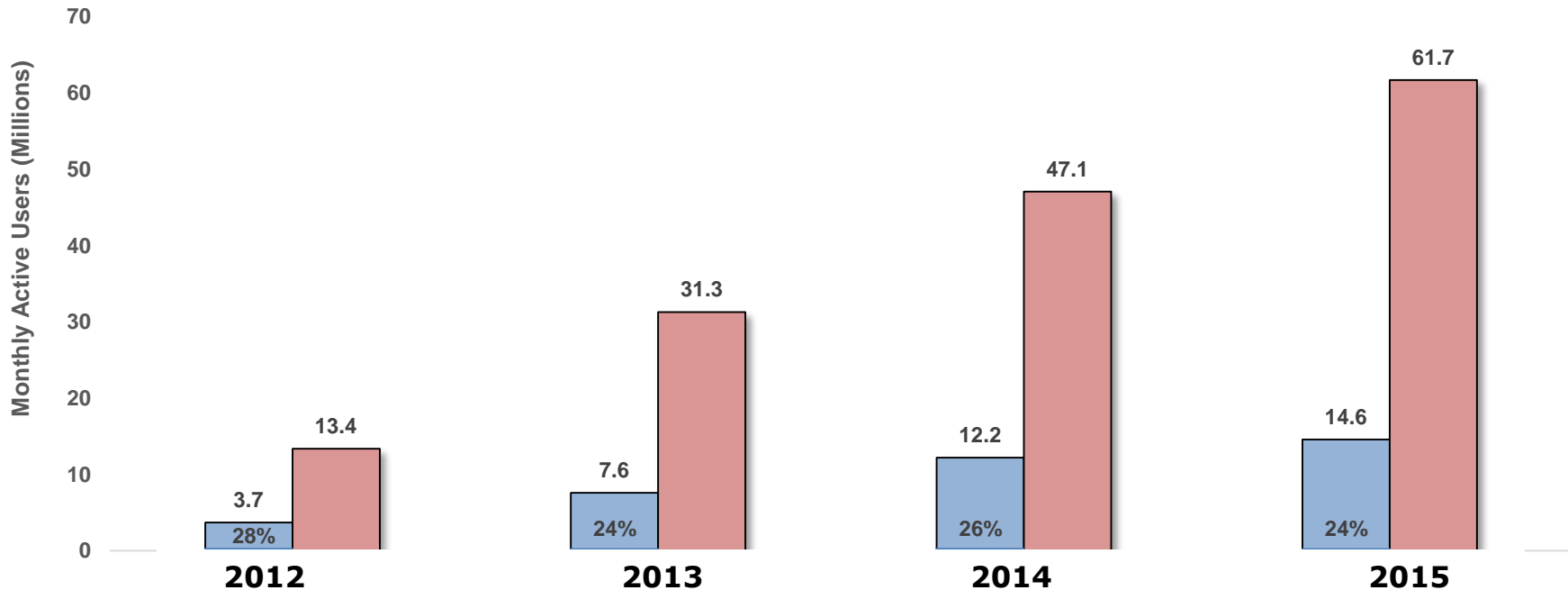
■ PC Games (Client-based) ■ Console Games ■ Handheld Games ■ Mobile Games



# STREAMING PROVIDES A NEW WAY TO SHARE AND CONSUME

**Twitch's Monthly Active Users**  
[Month of August Each Year][Worldwide]

■ US Users ■ Worldwide Total

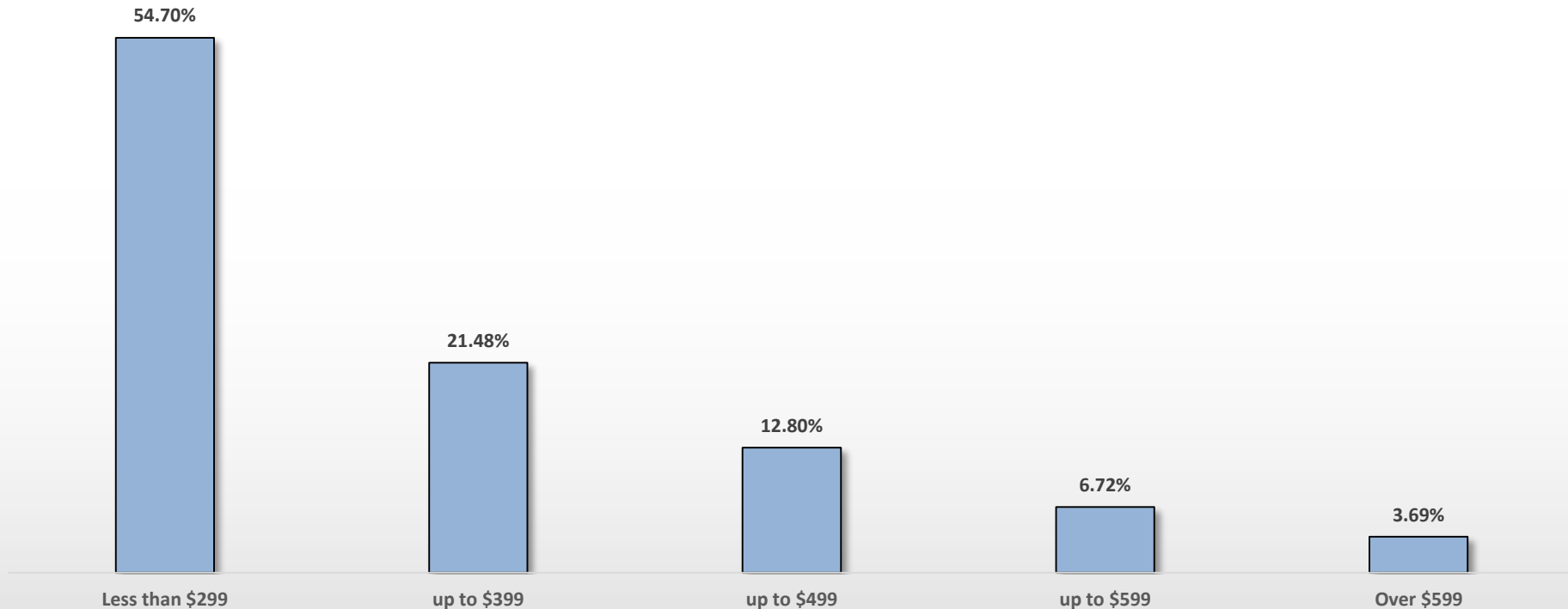


VR ADDS AN EVEN GREATER RANGE OF POSSIBLE EXPERIENCES



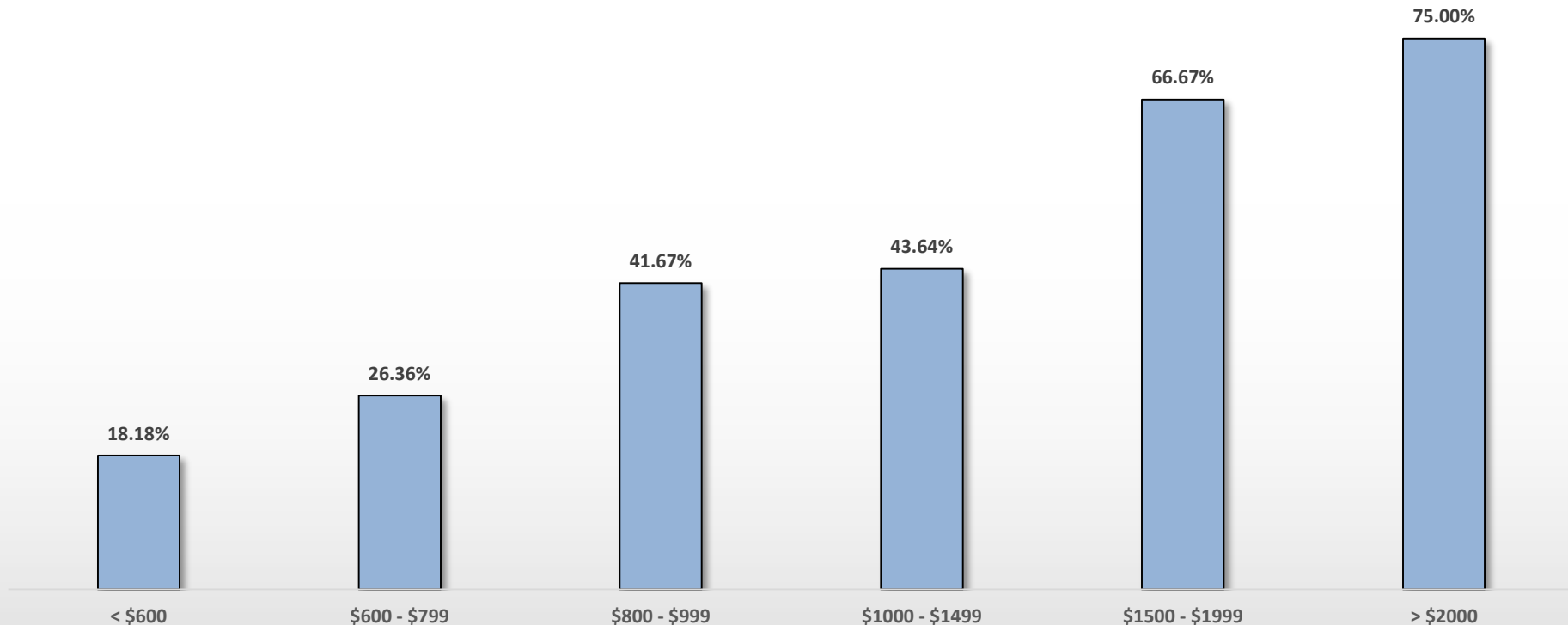
# PRICING IS AN INITIAL BARRIER TO MAINSTREAM PENETRATION

How Much Would You be Willing to Spend on a VR Headset?  
[NA Active PC and Console Gamers]



# VR PURCHASE INTENT RELATED TO HARDWARE SPEND

Headset Purchase Interest in Next 18 Months by PC HW Spend  
[NA Active PC and Console Gamers] [Oculus, Vive, or PSVR] [Last PC Purchase]

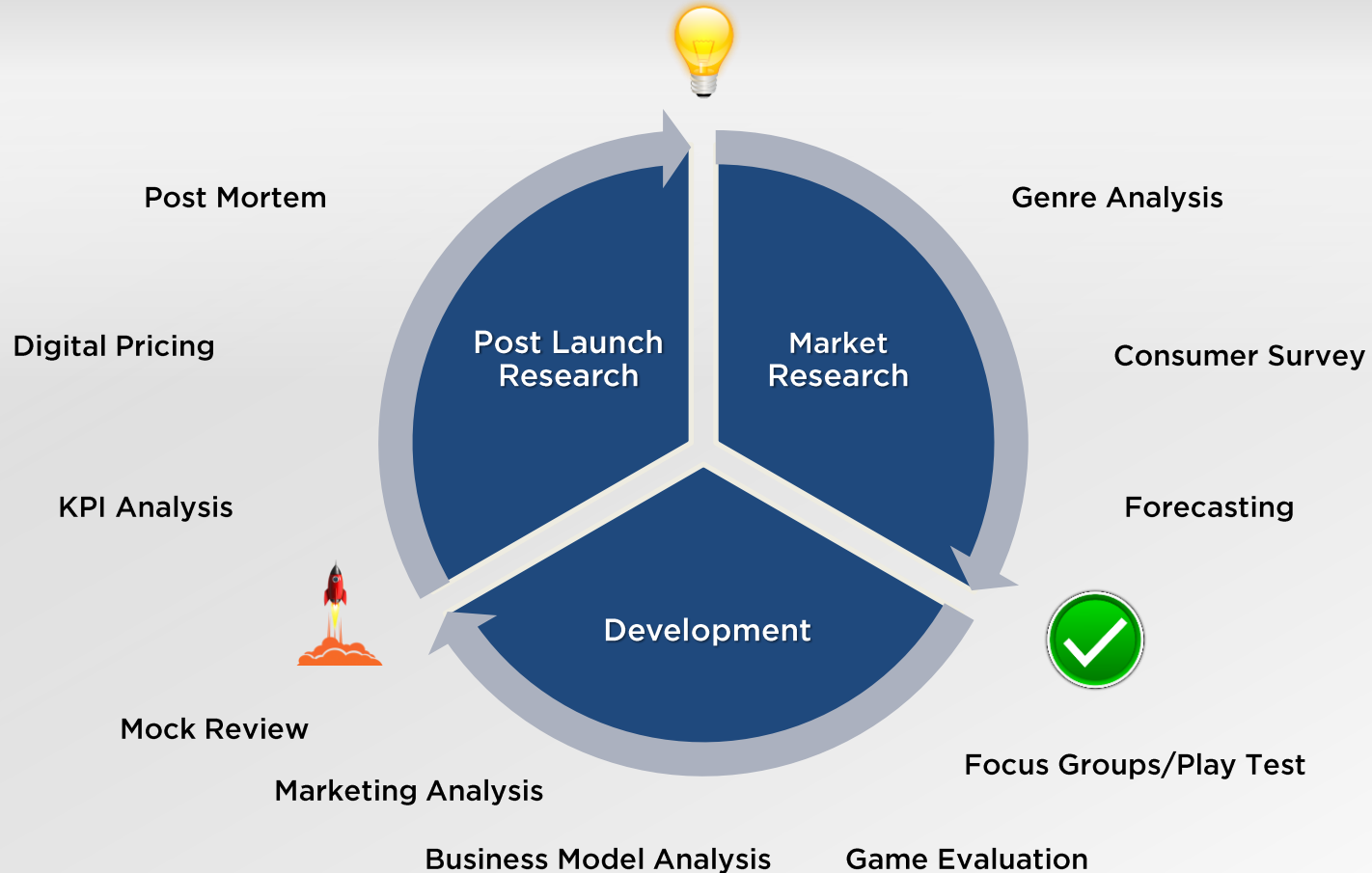




BUT OBVIOUS BARRIERS TO MAINSTREAM VR ARE SHORT-TERM



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CONTEXT IS EVERYTHING

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COOPER WADDELL AT [CWADDELL@EEDAR.COM](mailto: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?



How do they discover?



What games are they playing?

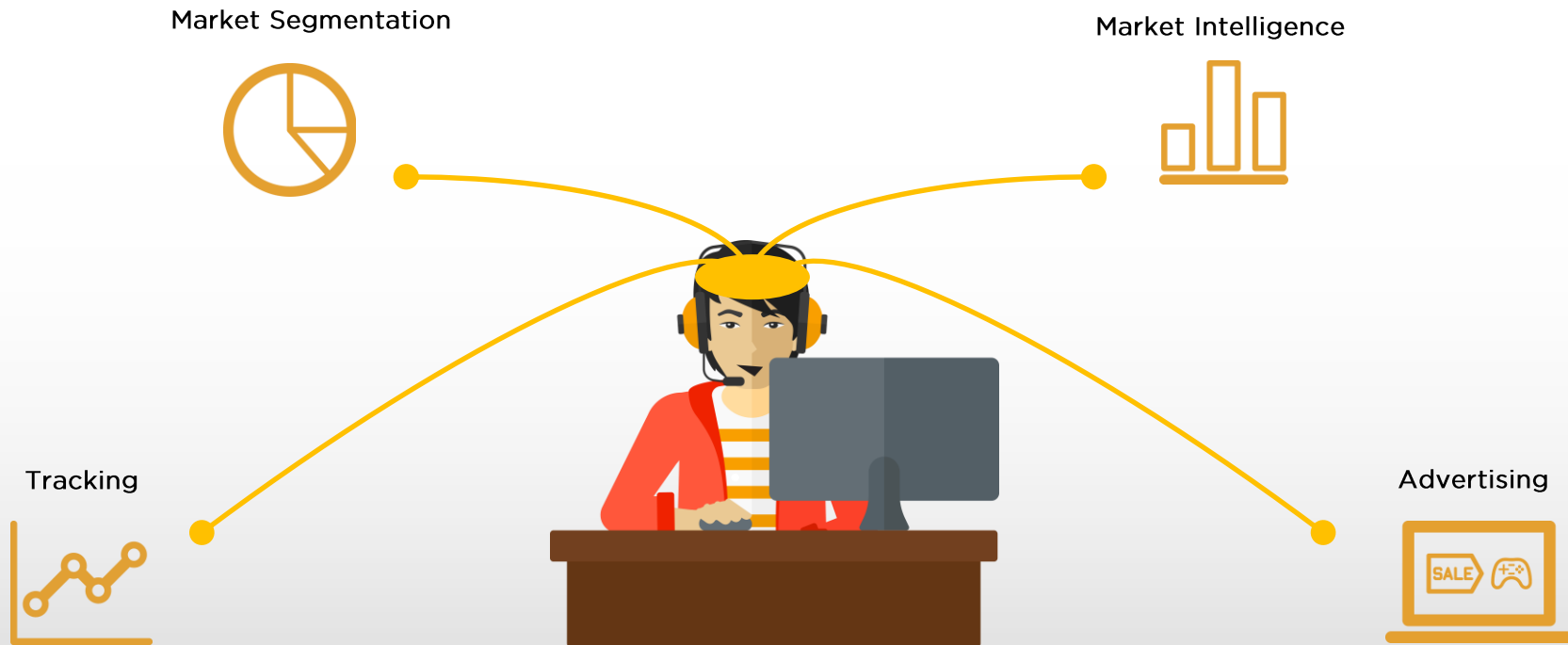


How do they engage?



# PLAYERPULSE IS THE TRACKER FOR AN EXPANDING INDUSTRY

PlayerPulse combines many services into one product.





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