



**GDC**  
**Europe**

Game Developers Conference™ Europe 2011  
**August 15-17, 2011 | Cologne, Germany**  
[www.GDCEurope.com](http://www.GDCEurope.com)

# **Digitale Evolution Beschleunigt: Die Entstehung von 'Smart' TV**

**Paul Nowosad**  
**Vice President, TransGaming Inc.**



**GDC**  
11  
**Europe**

The background of the slide features a complex, abstract graphic composed of overlapping circles and a grid of lines in various shades of pink, red, and white, creating a sense of digital connectivity and motion.

Game Developers Conference™ Europe 2011  
**August 15-17, 2011 | Cologne, Germany**  
[www.GDCEurope.com](http://www.GDCEurope.com)

# **Digital Evolution Accelerates: The Emergence of 'Smart' TV**

**Paul Nowosad**  
Vice President, TransGaming Inc.



# Watching TV...



# Watching TV...



**Between 4 - 6 hours of TV is watched on average by U.S. individuals**

**Over 50% of youth watch video (i.e. youtube) on computer**



# Playing Games...



# Playing Games...



**Approximately 2-hours of interactive content  
(i.e. games) played by U.S. individuals**

**\*Broad average, with select segment of consumers well above the average**

**Broader U.S. games industry is approximately  
\$21.6 billion industry**

**\*global video game business approaching \$65 billion**



# What is Smart TV?

Smart TV | IPTV | Connected TV | Widgets



YAHOO!  
CONNECTED TV



SAMSUNG

SMART TV



SMART TV



# Who is Playing Today?





# Dilemmas to Solve... Moving to New Platforms

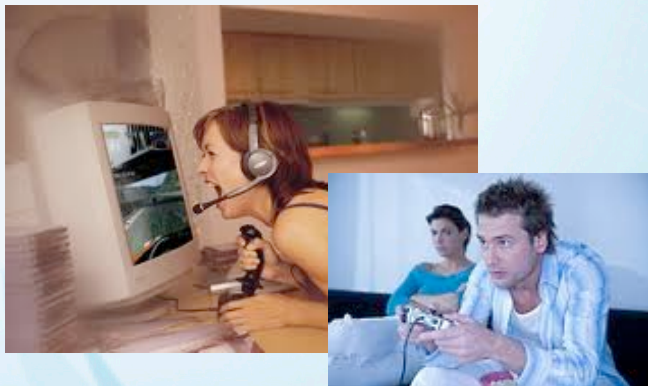
## Access



## Control



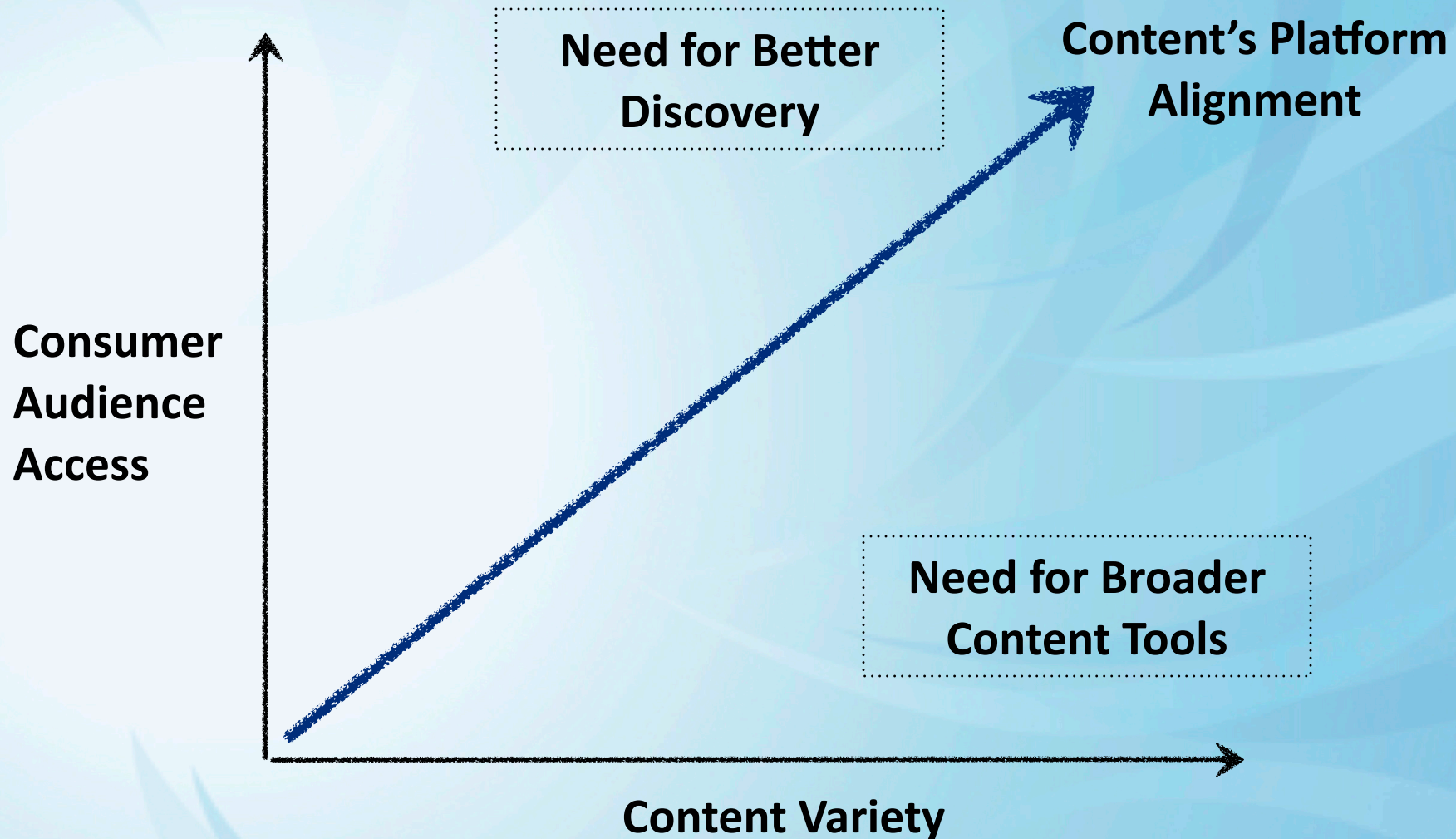
## Content Dynamic



## Discovery - Monetization



# Content Creativity... FLOW





# Access...

**Being part of a 'Smart' industry, requires various key technical components working together**



- **Faster Silicon**
- **More Memory**
- **GPU/CPU**



- **Connectivity**

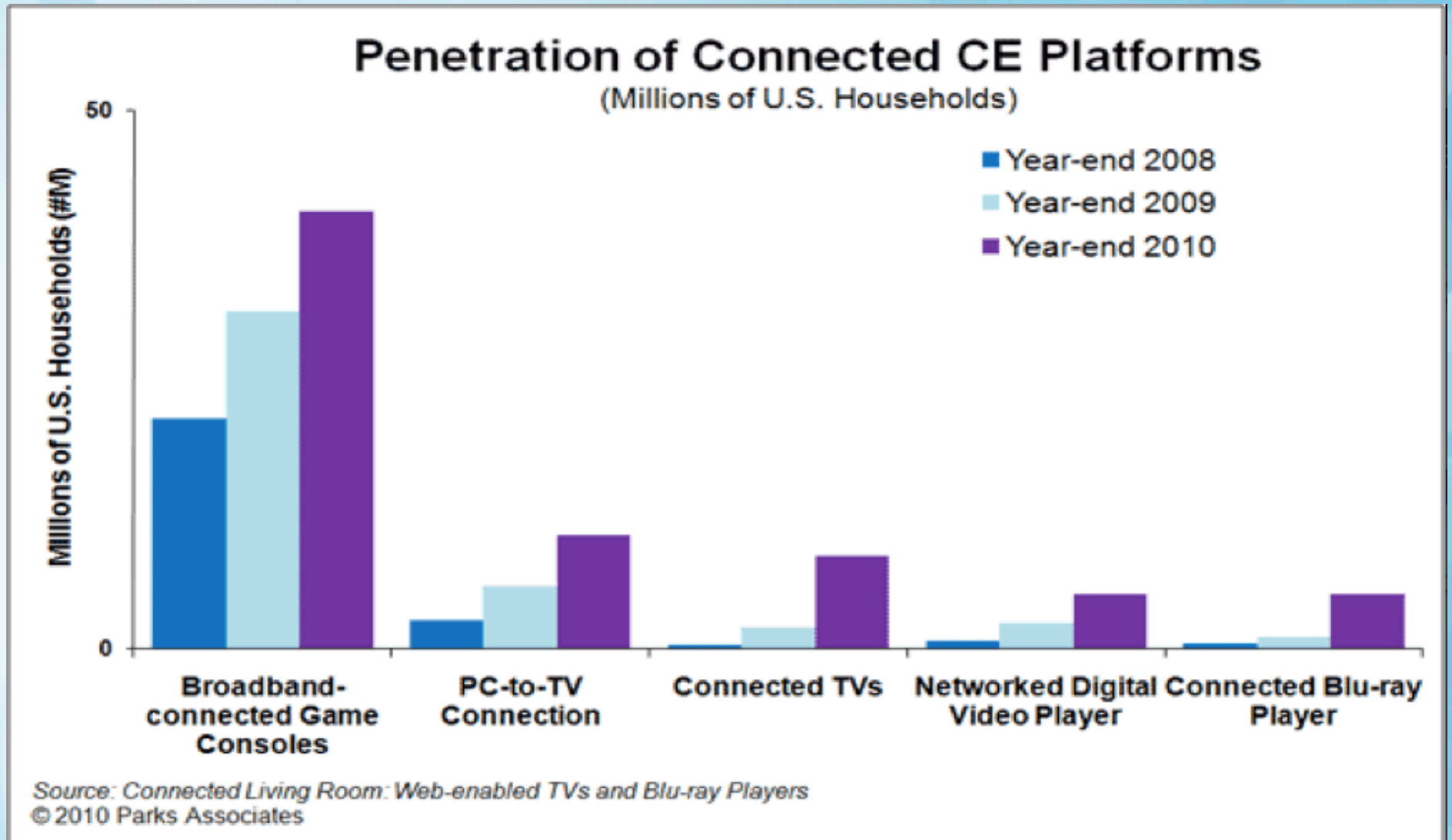
# How Did Mobile Do it... Access

## Mobile:

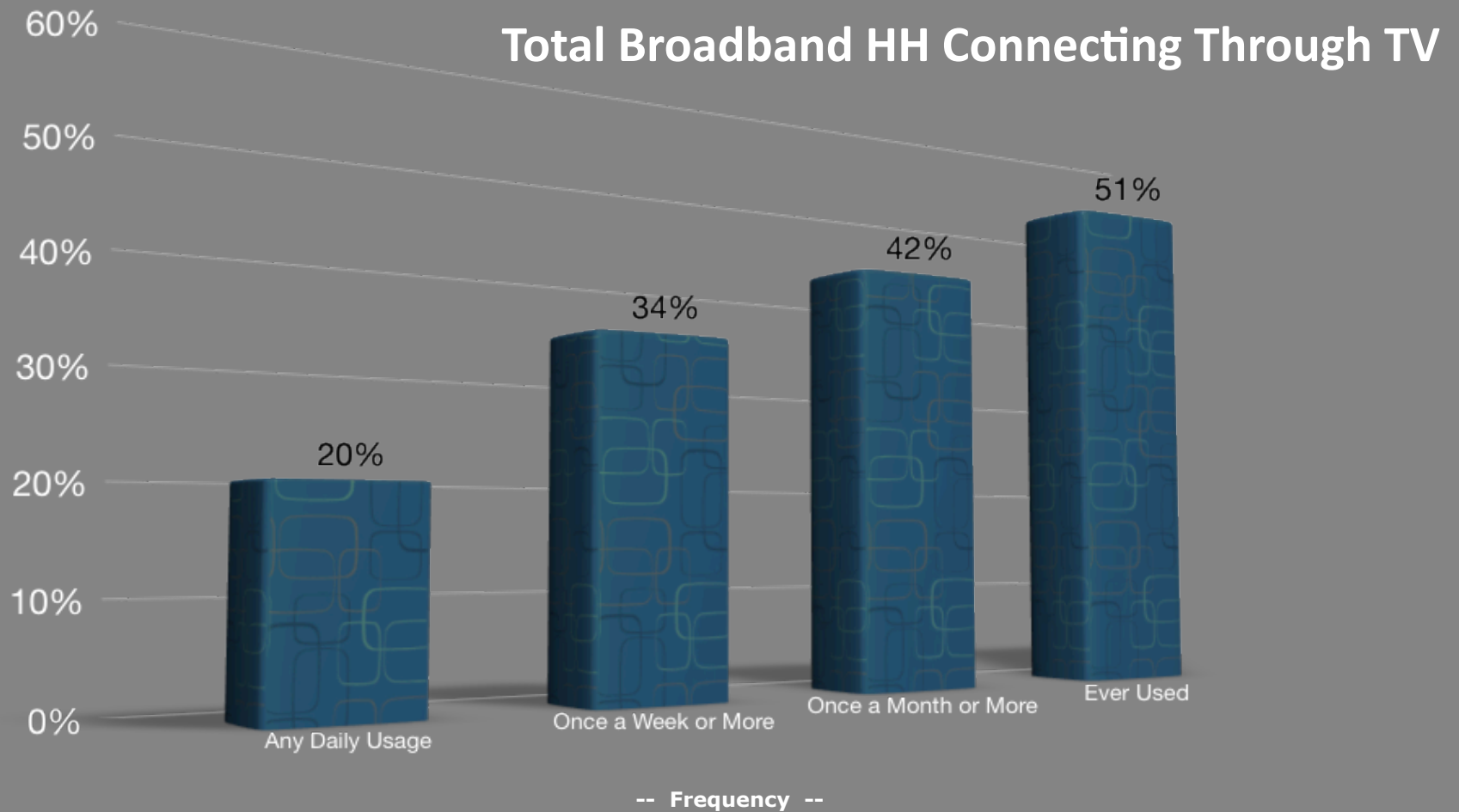
- In 2010, Smart Phones grew over 50% vs. 2009
  - Overall mobile market only grew 21% during same period
  - Crossing the 100M+ units in market threshold
- Global leaders for Smart Phones have distilled down to:
  - Android, Apple, Blackberry, Nokia, Microsoft
    - Consolidation of systems
    - Strong features... App support, content communities



# Trend to Access Today...



# Trend to Access Today...



<http://www.yctvblog.com/blog/2011/02/03/seven-insights-about-internet-tv/>



# Trend to Access Today...

**The television will experience greater transformation in the next 5 years then it has in the last 50 years**



In 2011:<sup>1</sup>

- Worldwide sales of connected TVs to outpace game consoles
  - Leading OEMs to sell 53 Million connected TVs while leading game consoles sold will number 37 Million

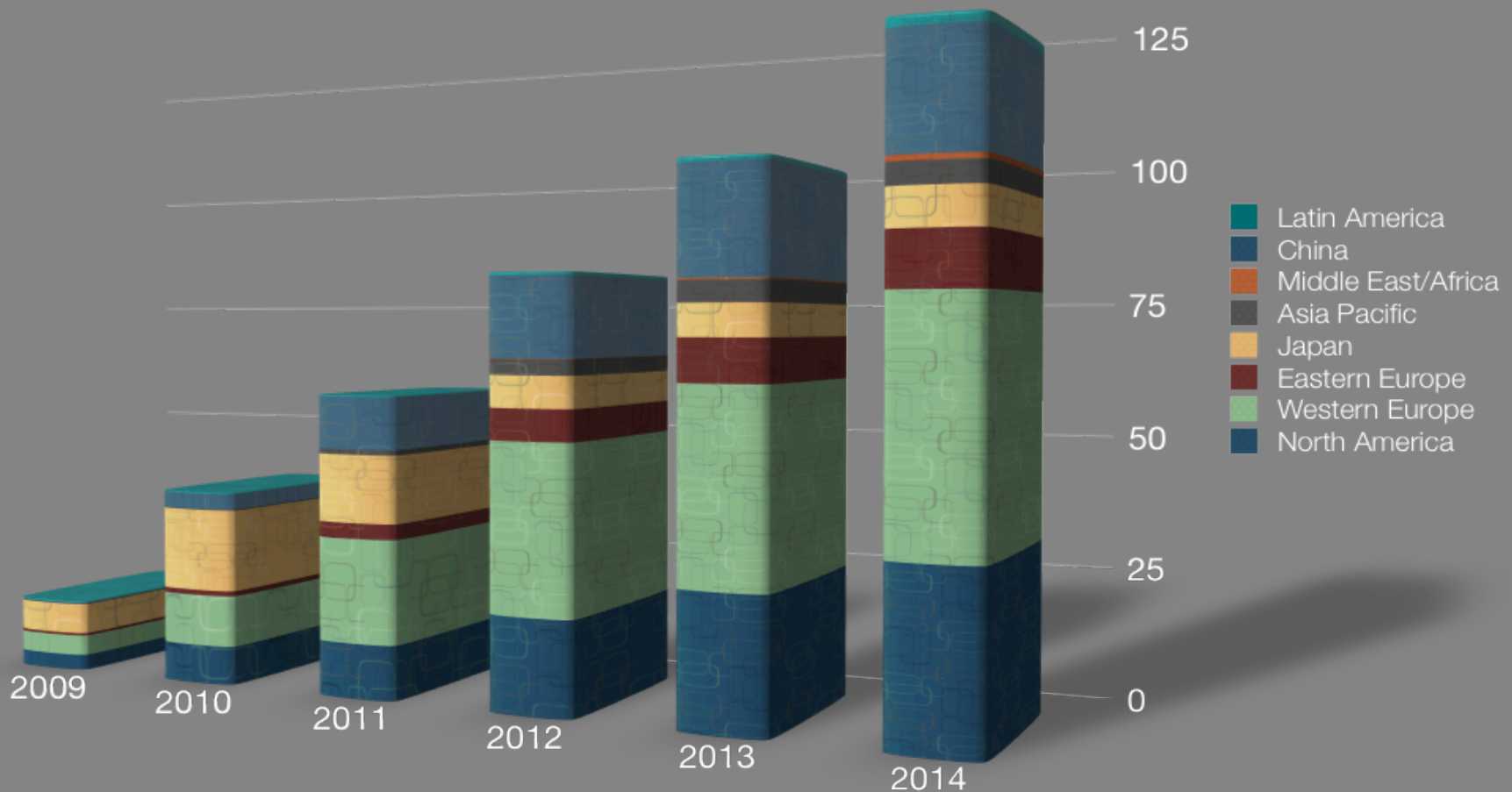
In 2016:<sup>2</sup>

- 70% of all in-home video devices sold will be able to connect to the Internet

1) Source: Video in the Emerging Connected Home: Connected device forecasts 2011-2016 Informa Telecoms & Media, July 2011 | 2) Ibid

# Trend to Access Today...

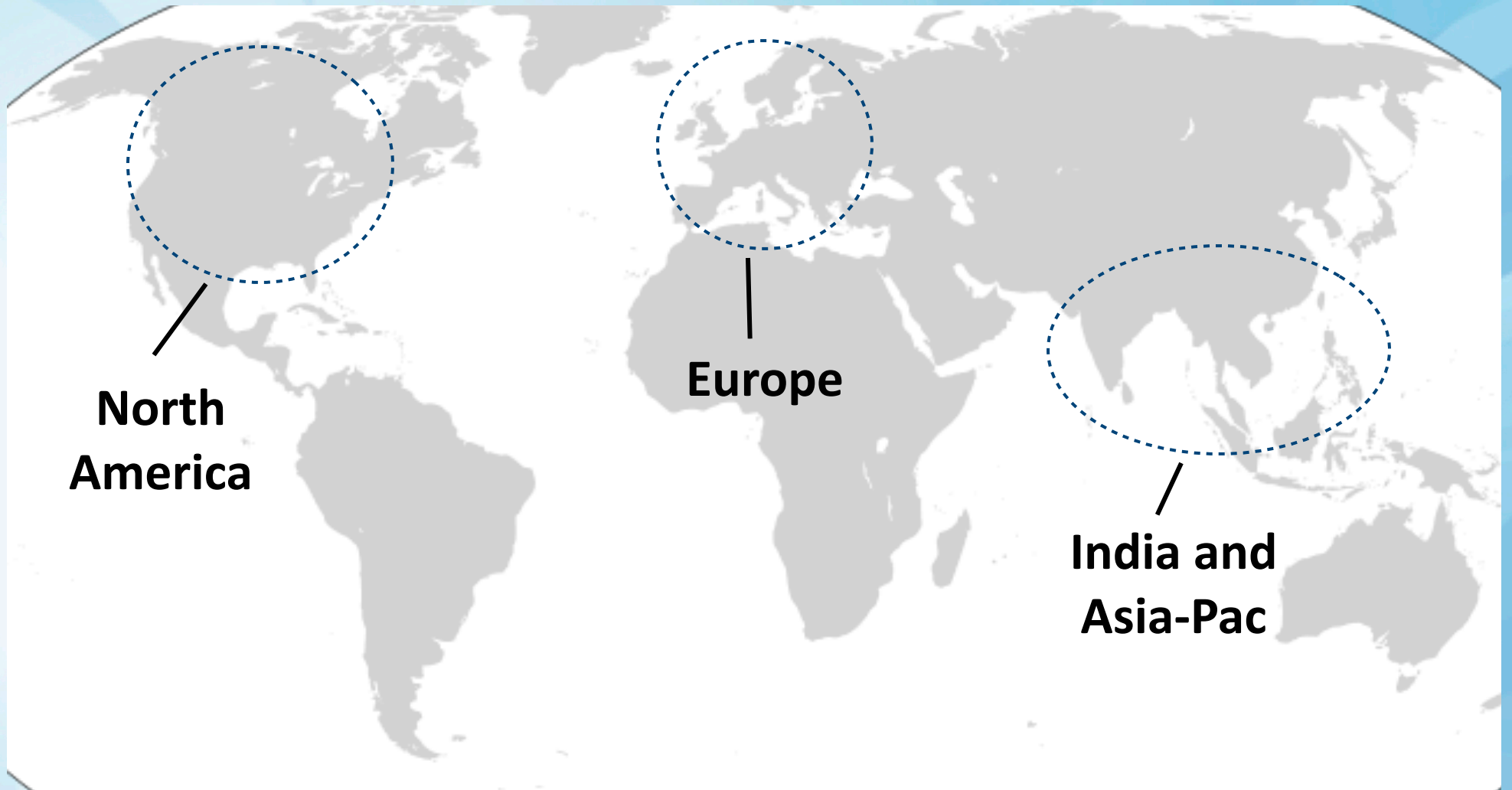
## Smart/Connected TV Shipments



<http://www.displaysearch.com> - "Connected TVs Forecast to Account for 21% of Global TV Shipments in 2010"



# Access Growth...



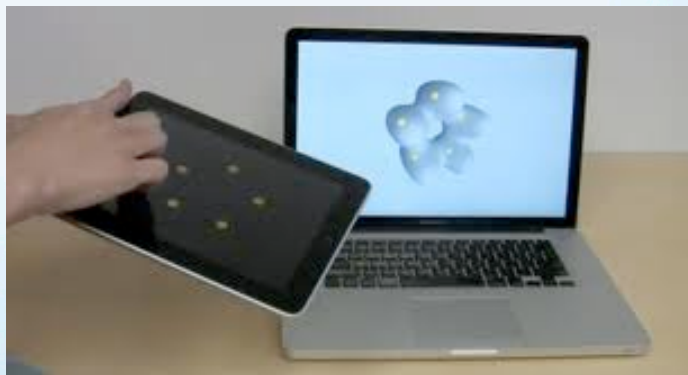
# Control...

Transitioning from 'core gaming' control to TV control requires new technology and game design ideas





# How Did Mobile Do it... Control



# Content...

**TV is a social platform, offering  
entertainment experiences for the masses**

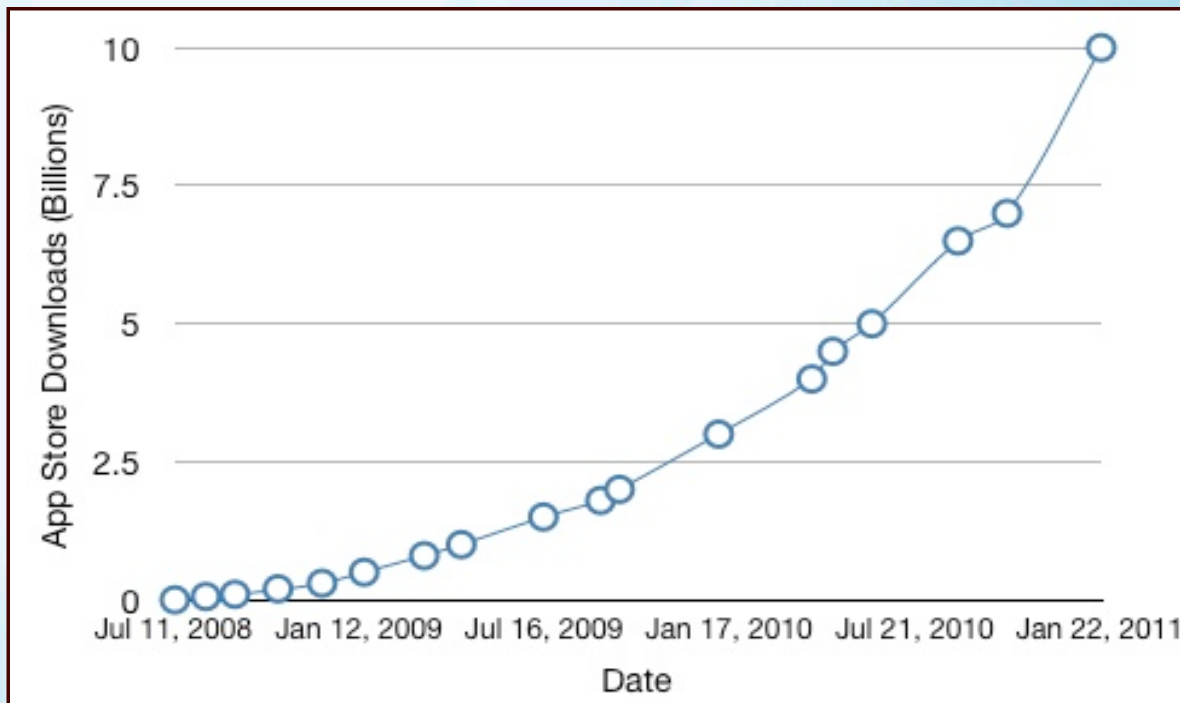


**Toolkit**



# How Did Mobile Do it... Content

- Billions of Apps have been downloaded by consumers
- Interactive Content and Games are top categories for 'connected mobile devices' (ie. smart phones)



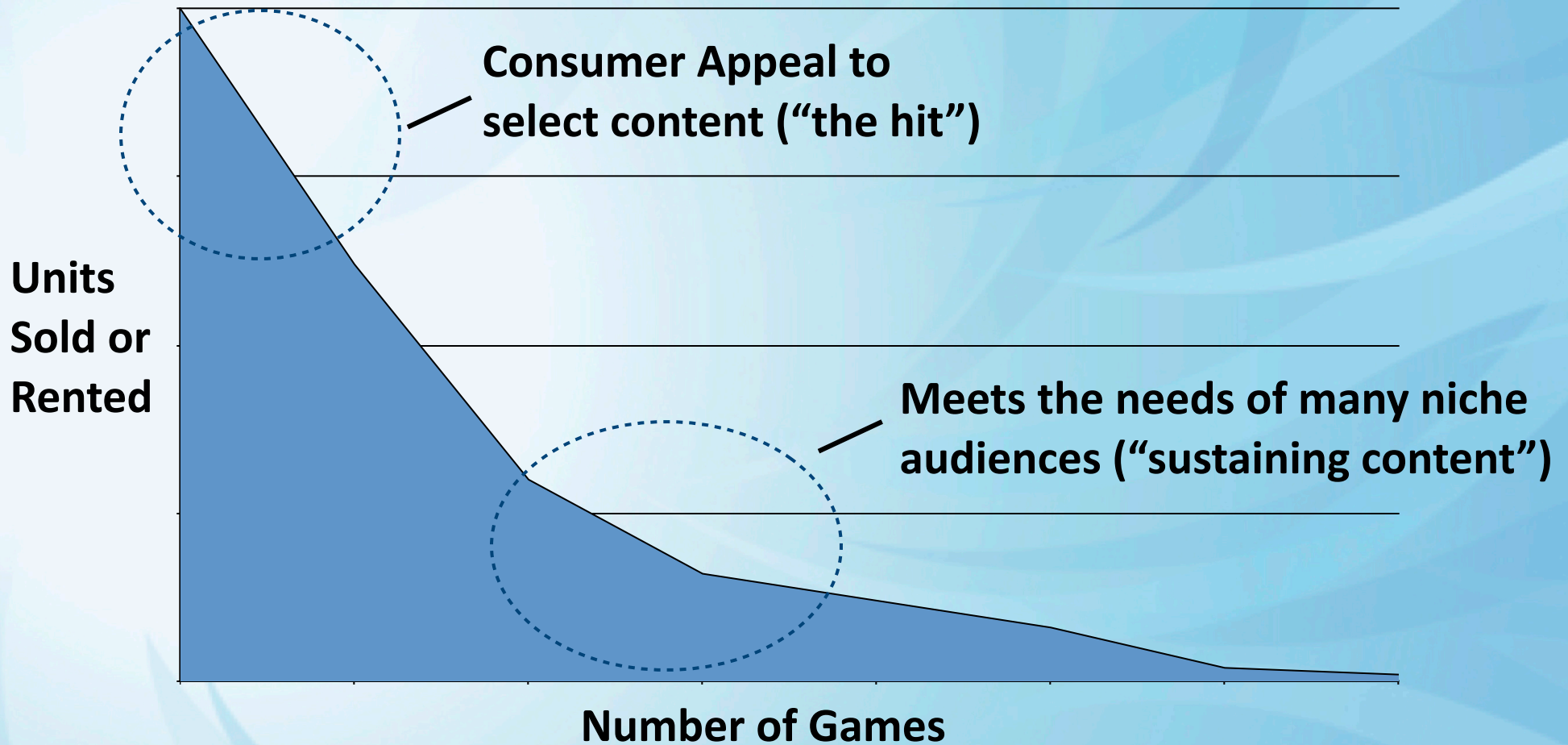
Apple iOS

## Most Popular Categories (as a proportion of Active Apps)

- Books – 17%
- **Games – 14%**
- Entertainment – 11%
- Education – 8%
- Lifestyle – 7%



# Content Consumption...



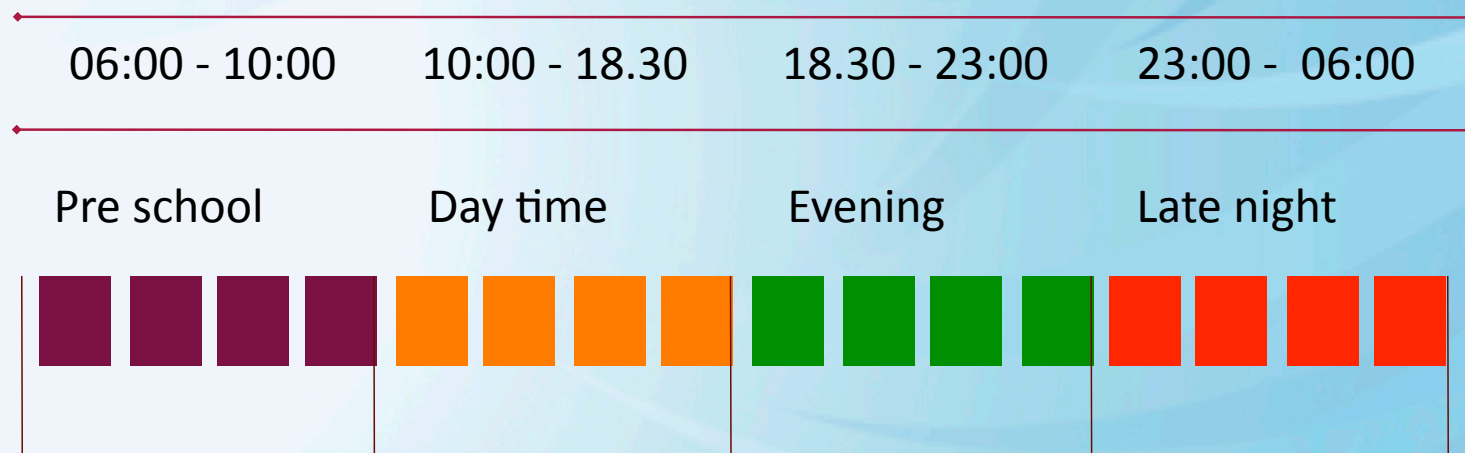
# The TV Audience for Content...

Platform Appeal	Medium	Medium - High	High	Optimal
Boys and Girls 4-11				•
Boys 12-17	•			
Girls 12-17		•		
Men 18-24	•			
Women 18-24		•		
Men 25-34		•		
Women 25-34				•
Men 35-49			•	
Women 35-49				•
Men and Women 50+			•	

- Family friendly mainstream platform
  - mainstream TV audiences currently averaging 4-6 hours of viewing a day
- Primary target audience – Family Gamers:
  - Children 4-11; Mothers 25-49; Fathers 35-49

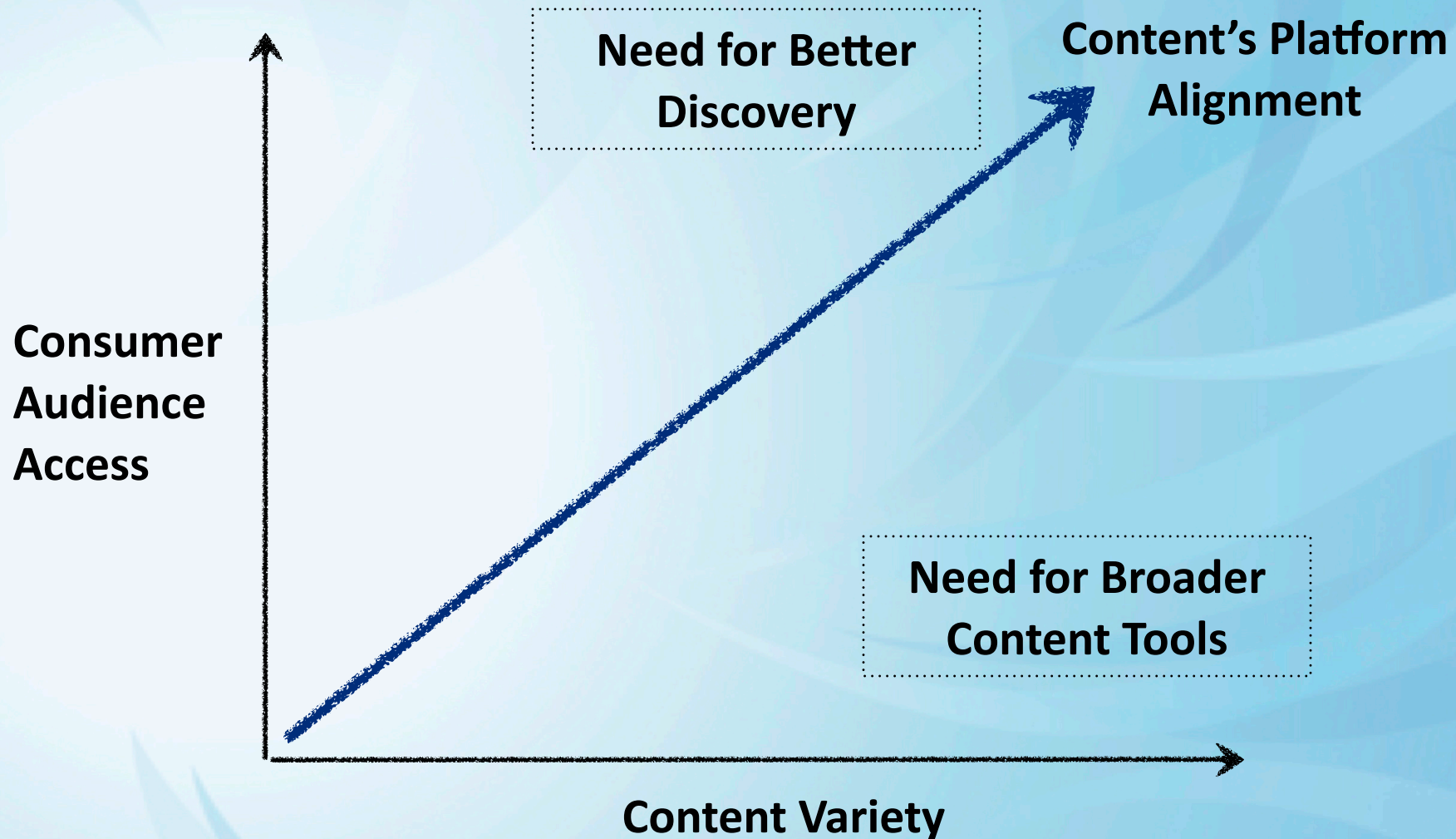
# TV is Balanced and Programmed...

**Unique position of TV in consumer life  
requires a programmed approach**





# Content Creativity... FLOW



# Content...

Broader Content Tools = Focus on Design



**PC Casual and  
Download  
Content**

**Mobile Content  
(more snack  
based)**

**Social  
(Flash, HTML, other)**

**Certified  
technologies,  
engines, SDKs,  
design tools**

# Discovery & Monetization...

TV is a programmed platform, aiding discovery of content through easy access



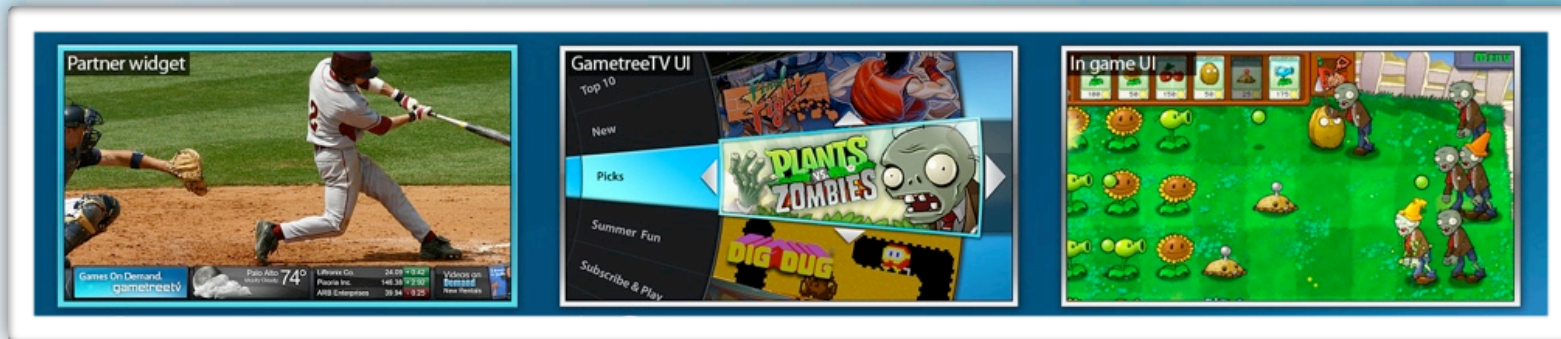


# Discovery in TV...

**TV content today is programmed, organized  
and branded by 'broadcast' aggregators...  
even when available on-demand**

The HBO logo, featuring the letters "HBO" in a bold, black, sans-serif font, with a small registered trademark symbol (®) to the right of the "O".The RTL logo, consisting of the letters "R", "T", and "L" in a bold, sans-serif font, each contained within a separate colored square (red for "R", yellow for "T", and blue for "L").The NBC logo, featuring the iconic peacock logo with six colorful feathers (red, orange, yellow, green, blue, and purple) above the letters "NBC" in a bold, black, sans-serif font.The BBC logo, consisting of the letters "B", "B", and "C" in a bold, white, sans-serif font, each contained within a separate black square.The ABC logo, featuring the letters "abc" in a white, lowercase, sans-serif font, set against a black circular background.

# How Do You Play?



**Discovery Platform for  
Interactive content  
available on TV**

**Programmed  
Platform for  
interactive content**



**A Global Leader In The Deployment of  
Interactive Entertainment**



# Who is TransGaming...

DISTRIBUTING



ENABLEMENT

CREATE

# Dilemmas being addressed...

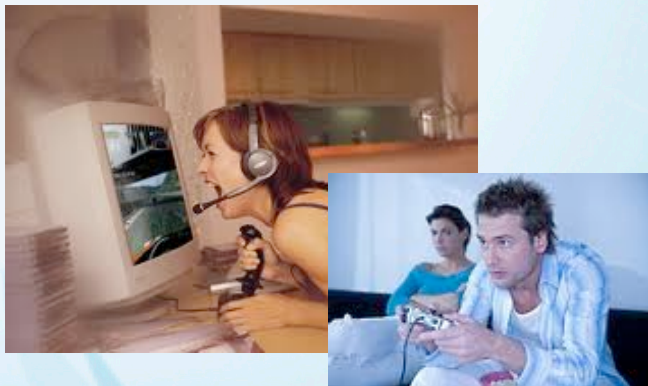
## Access



## Control



## Content Dynamic



## Discovery - Monetization





# GameTree TV Platform

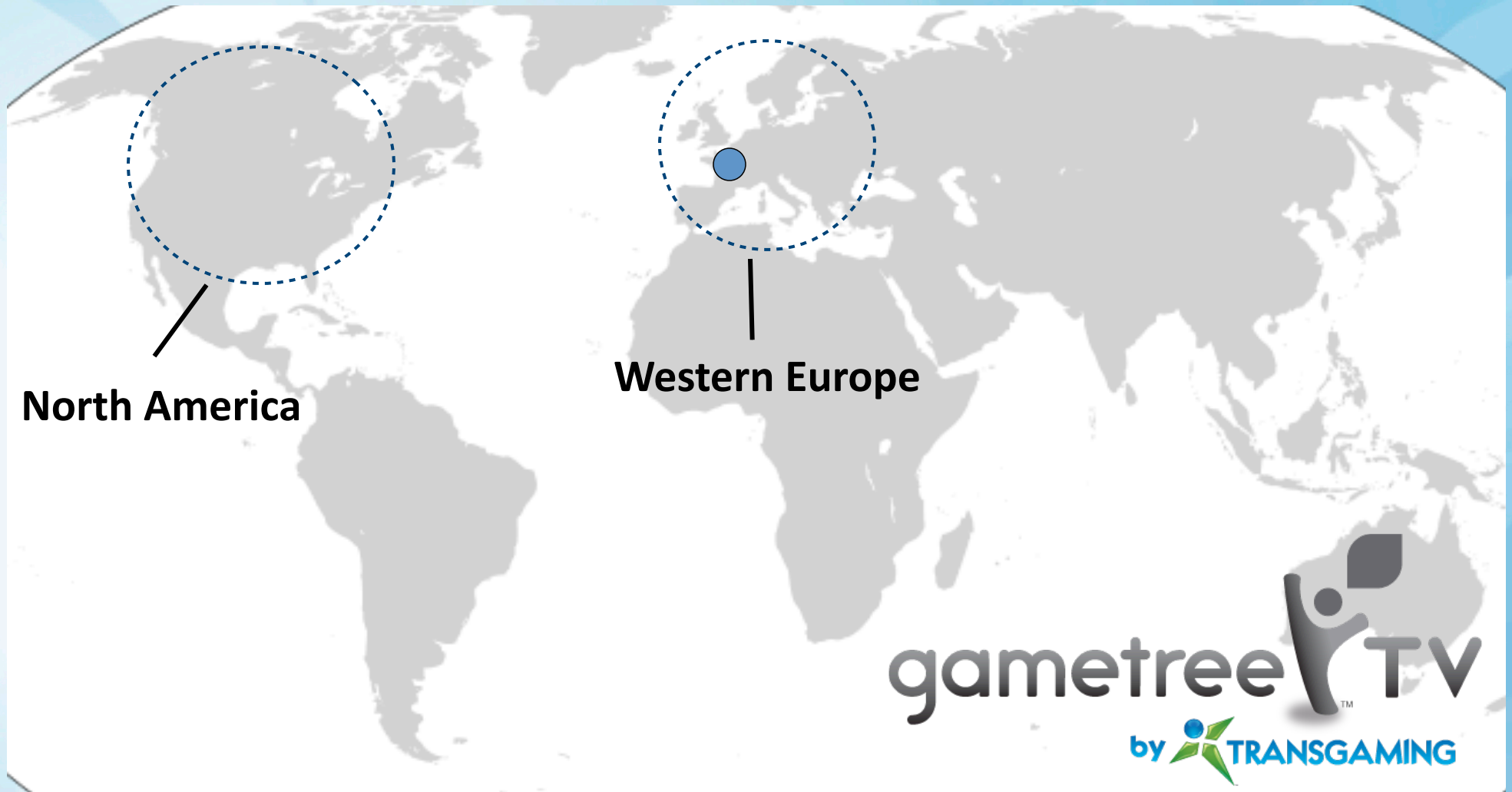
Smart TV | IPTV | STB



Live April 2011



# Global Access and Growth...



# Platform Control...

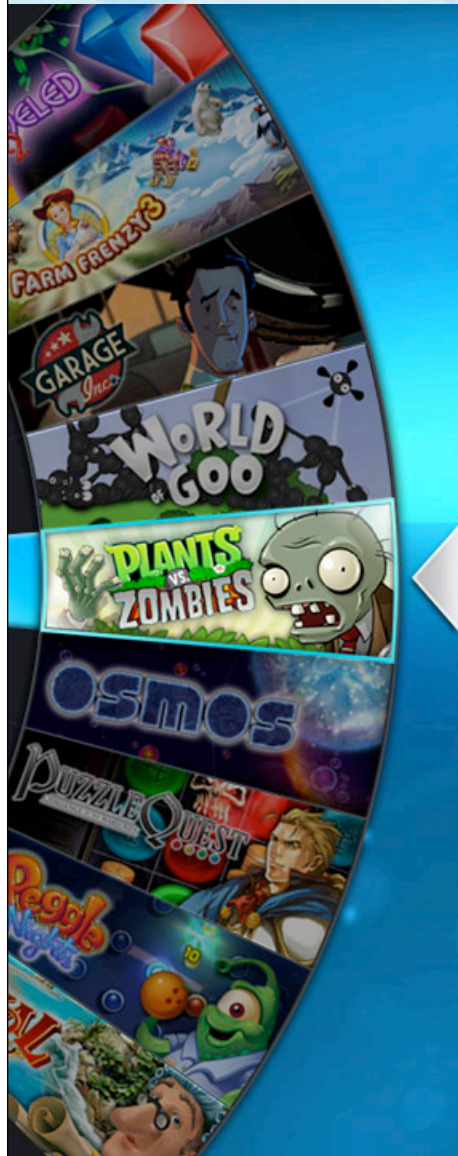
**Working with operators and controller OEMs to ensure the interactive content experience is compelling and fun.**



**Working with Khronos Group on 'stream input'... presenting an open standard for multi-platform control design**



# GameTree TV Experience... Discovery



**PLANTS  
vs.  
ZOMBIES**

PLAY

Choose a Plan

ONE DAY  
\$0.99

ONE WEEK  
\$2.99

UNLIMITED  
\$9.99

SUBSCRIBE  
& SAVE  
\$4.95 / MONTH

Plants vs. Zombies  
(single line centers, double line wraps)

+ Add Favorite



Get ready to soil your plants as a mob of brain-loving zombies try to invade your home where your only defense is an arsenal of zombie-zapping plants! Use peashooters, wall-nuts, cherry bombs to mulchify zombies before they reach your front door. The fun is certain to never die!

Ages  
**12+**

GameTree TV



Controller  
Information

**4.3** AVERAGE PLAYER  
RATING

— Rate It ★★★★★ +

Copyright: Lorem ipsum dolor sit amet consectetur alare. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea...

Games Like This:

BEJEWELED

COOKING  
ACADEMY

Cake  
Mania

FARM FRENZY 3

Around the World  
**80**  
Days

gametree TV



# GameTree TV Monetization...

**PLANTS vs. ZOMBIES**

PLAY

Choose a Plan

- ONE DAY \$0.99
- ONE WEEK \$2.99
- UNLIMITED \$9.99
- SUBSCRIBE & SAVE \$4.95 / MONTH

Get ready to soil your plants as a mob of brain-loving zombies try to invade your home where your only defense is an arsenal of zombie-zapping plants! Use peashooters, wall-nuts, cherry bombs to mulchify zombies before they reach your front door. The fun is certain to never die!

Ages 12+ GameTree TV

4.3 AVERAGE PLAYER RATING

Rate It ★★★★★

Copyright: Lorem ipsum dolor sit amet consectetur alare. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea...

Games Like This:

- BEJEWELD
- COOKING ACADEMY
- Cake Mania
- FARM FRENZY
- 80 Days

**Why Subscribe?**

Different games every month.  
Unlimited gameplay.  
**One Low Price!**

Featuring:

**Plants vs. Zombies**

In this action-strategy game, where Zombies are invading your home, and the only defense is your arsenal of plants the fun is sure to never die!

First month FREE!\*

SUBSCRIBE & SAVE MONTH

\* Introductory rate for first time subscribers only

gametree TV

## One Day Rental

- Offers 24 hour access to a single game

## Week Rental

- Offers 7 day access to a single game

## Unlimited Rental

- Offers unlimited access to a single game as long as customer is with platform/service provider

## Subscription

- Offers access to a catalog of games that are scheduled on a standard calendar month... rolling subscription

# Content Programming

- **Interactive Content for Everyone**

GameTree TV brings fun, casual games to family audiences worldwide - extending gaming to broader, mainstream audiences in the same “spirit” as Nintendo Wii and the Apple iPhone.



- **Programming**

Just like television, GameTree TV is programmed weekly with new games, video trailers, sales promotions and holiday stunts to help maximize user retention and optimize revenue.

- **A Growing Catalog**

TransGaming leverages its ever growing relationships with top game developers to build a dynamic catalog of games from content owners such as: PopCap, Nickelodeon, National Geographic, DreamWorks, Warner Bros and many others.



# Content Programming



- **Support for Innovation**

In addition to top name game developers, TransGaming is committed to bringing a broad range of interactive content to GameTree TV by offering tools and support to upcoming game developers and in turn providing fun, entertaining new games to global audiences.

- **GameTree TV Enhanced Features**

TransGaming has a product roadmap that will grow ARPU and sustain customer loyalty by updating GameTree TV with enhanced features such as:

- Advertising supported games; Freemium and Micropayment based games
- Social features including multiplayer, leader boards, rewards, and postings to social networks





Now Live in France with Free Cable | [Free.fr](http://Free.fr)

CONFIDENTIAL - DO NOT CIRCULATE

# Contact Us

**Paul Nowosad**

**Vice-President**

Content Acquisition & Business Development

**431 King Street West**

**Suite 600**

**Toronto, Ontario**

**Canada M5V 1K4**

**paul.nowosad@transgaming.com**

**www.transgaming.com**

