

Awesome Video Game Data

Geoffrey Zatkin
Founder of EEDAR



GAME DEVELOPERS CONFERENCE™ CHINA
SHANGHAI INTERNATIONAL CONVENTION CENTER
SHANGHAI, CHINA · OCTOBER 19-21, 2014

YOUR PRESENTER



Indie Game Developer
1991 to 1996



MONOLITH

Lead Designer
2003 to 2005

**Geoffrey
"GZ"
Zatkin**



Sr. / Lead Designer
1997 to 2003



**SONY ONLINE
ENTERTAINMENT**



Founder
2006 to Current

EEDAR



EEDAR

CONTEXT IS EVERYTHING

ATTRIBUTION

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				Literary Genre	Optional Peripherals	Hardware Requirements	Combat Speed	Launch Competitors	Gender(s) Available
Edition Type	Developer	Publisher	Genre	Sub-Genre	Genre Elements	Monetization Model	Setting	Camera Perspective	Avatar(s) Used

ATTRIBUTION

15,000+ Objectively Quantifiable Attributes of Video Games (Retail and Digital)



About EEDAR

- Founded in 2006
- Based in Carlsbad, California w/ 60 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

- 118,000+ Products (Games, Accessories, Hardware) Observed To Date
- 148,000,000+ Data Points

GAMES



GAMES

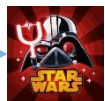
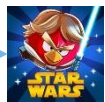
Franchise

Distinct Game

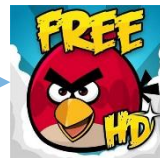
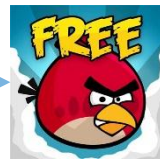
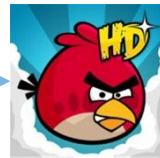
Region

Platform

SKU



PlayStation Store



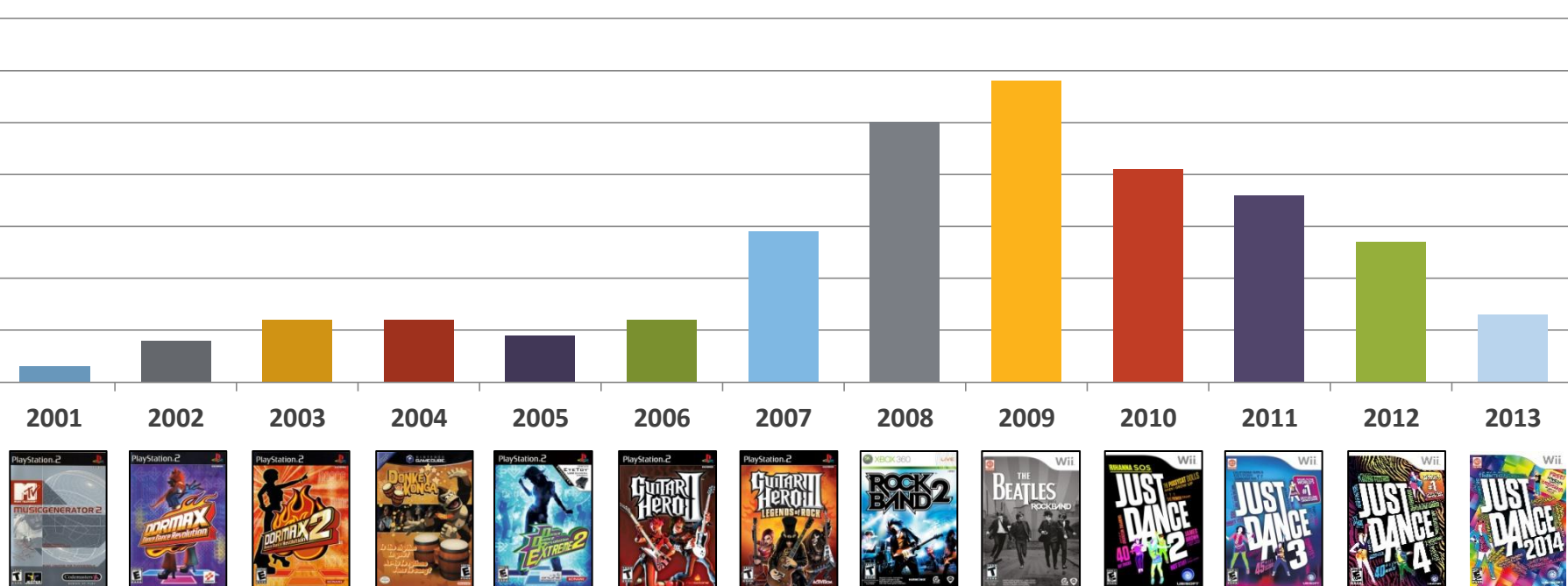
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CONTEXT IS EVERYTHING

FADS: MUSIC & RHYTHM GAMES

Music & Rhythm Genre Games Released by Year

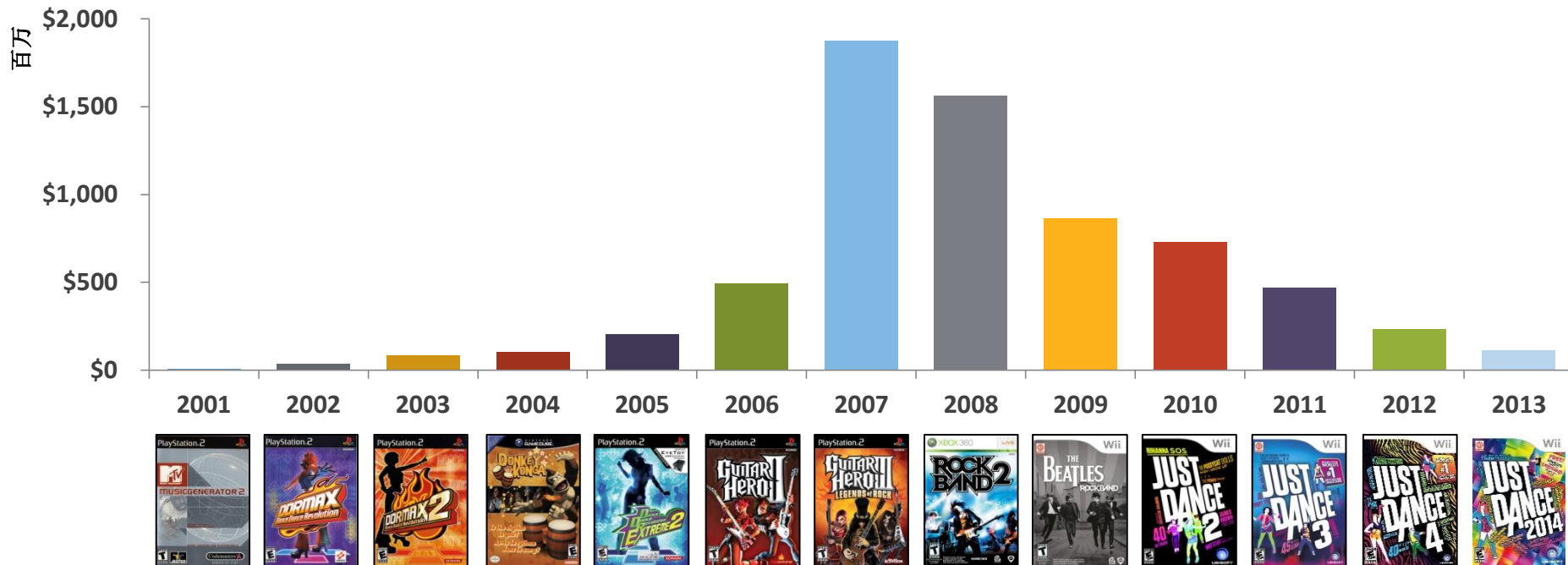
All 6th, 7th and 8th Generation Console, Handheld and PC Distinct Titles in the U.S.A.



FADS: MUSIC & RHYTHM GAMES

Revenue from Music & Rhythm Genre Games

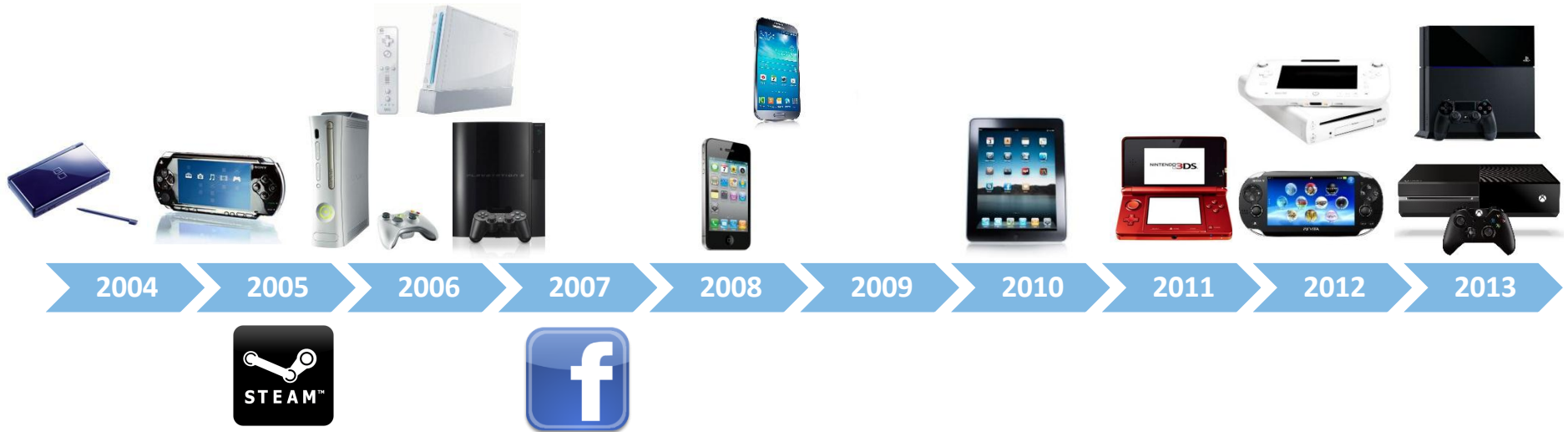
All 6th, 7th and 8th Generation Console, Handheld and PC Distinct Titles in the U.S.A.



8TH GENERATION

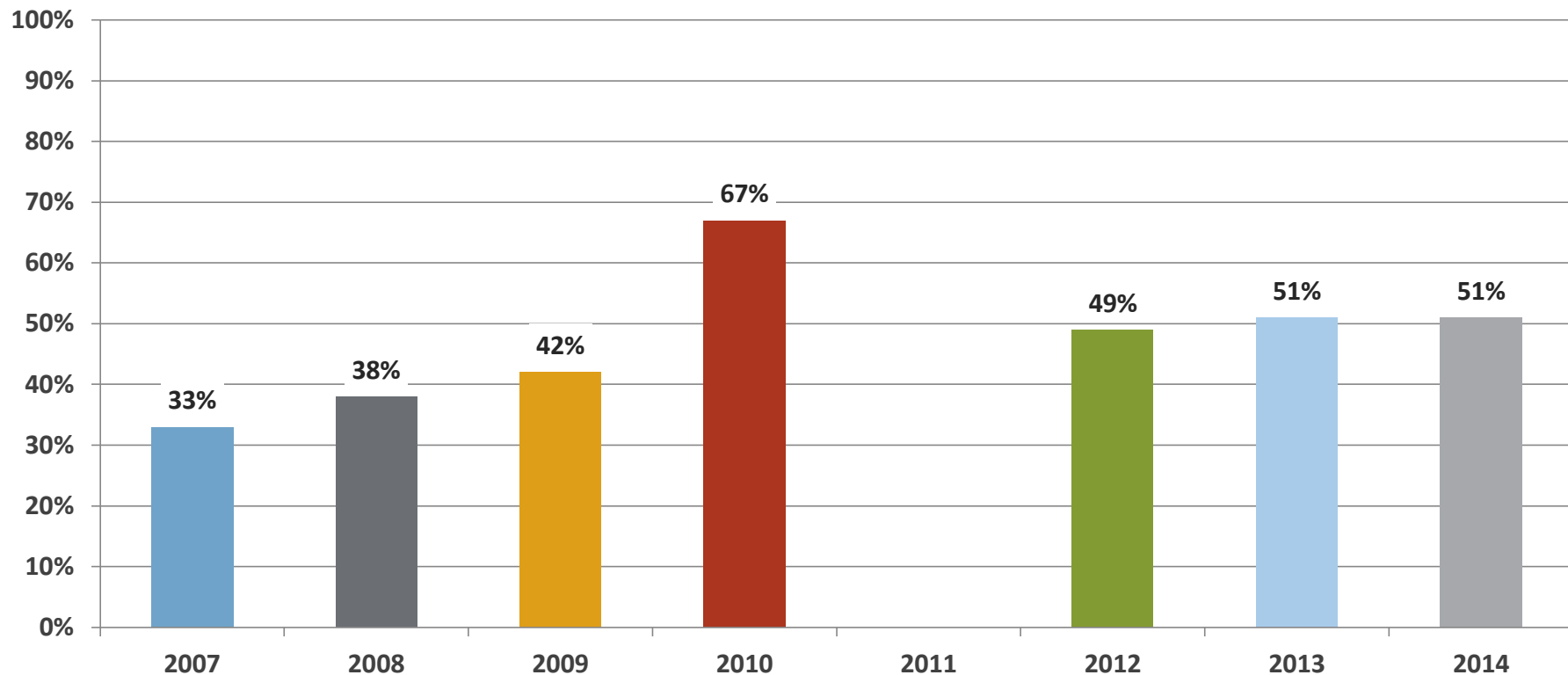
We are at the **start** of the
8th generation of game consoles
and the beginning of what could be the
last generation of **dedicated** gaming hardware

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



WHO GAMES?

% of American homes with a video game console



Source: ESA

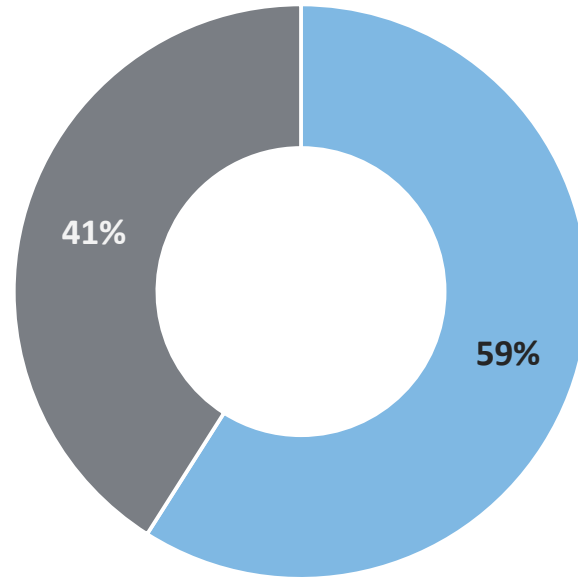


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CONTEXT IS EVERYTHING

WHO GAMES?

Game Playing Population of the USA

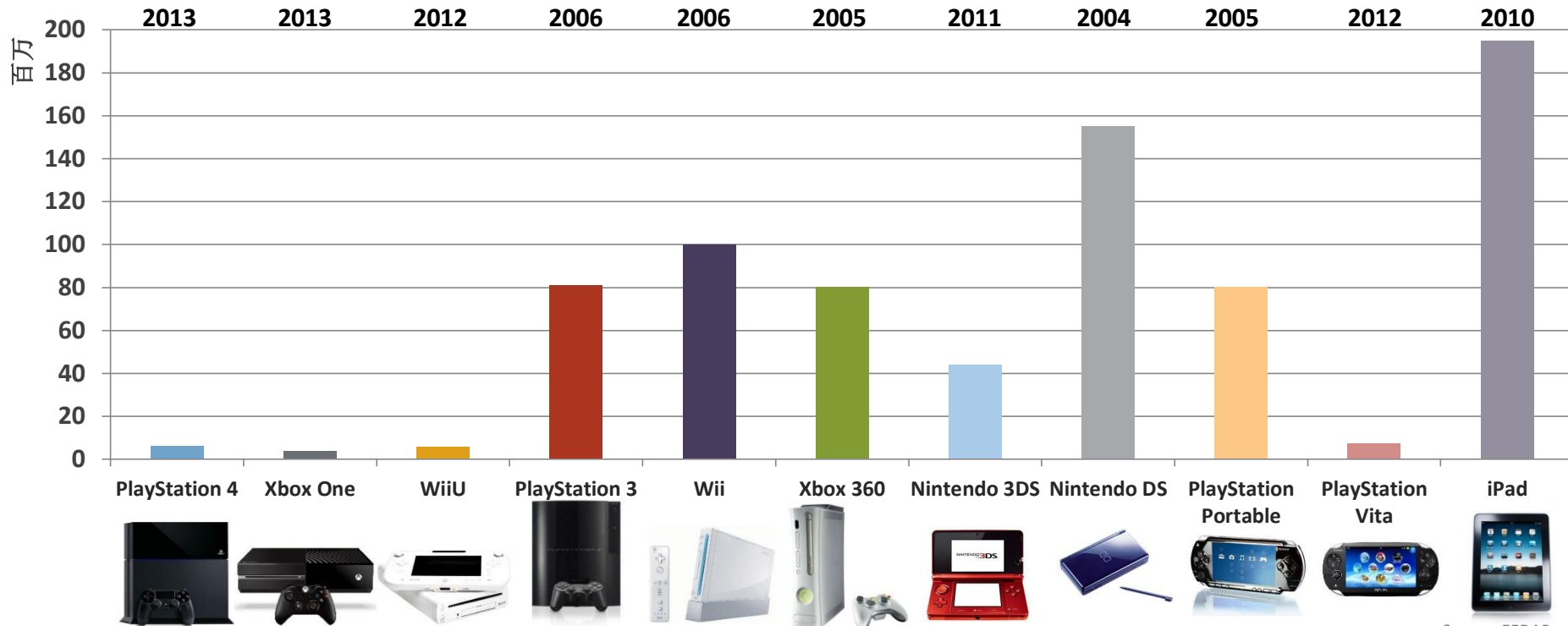


■ Game Players ■ Non Game Players

HARDWARE SALES

Platform Sales Worldwide

Through December, 2013



Source: EEDAR

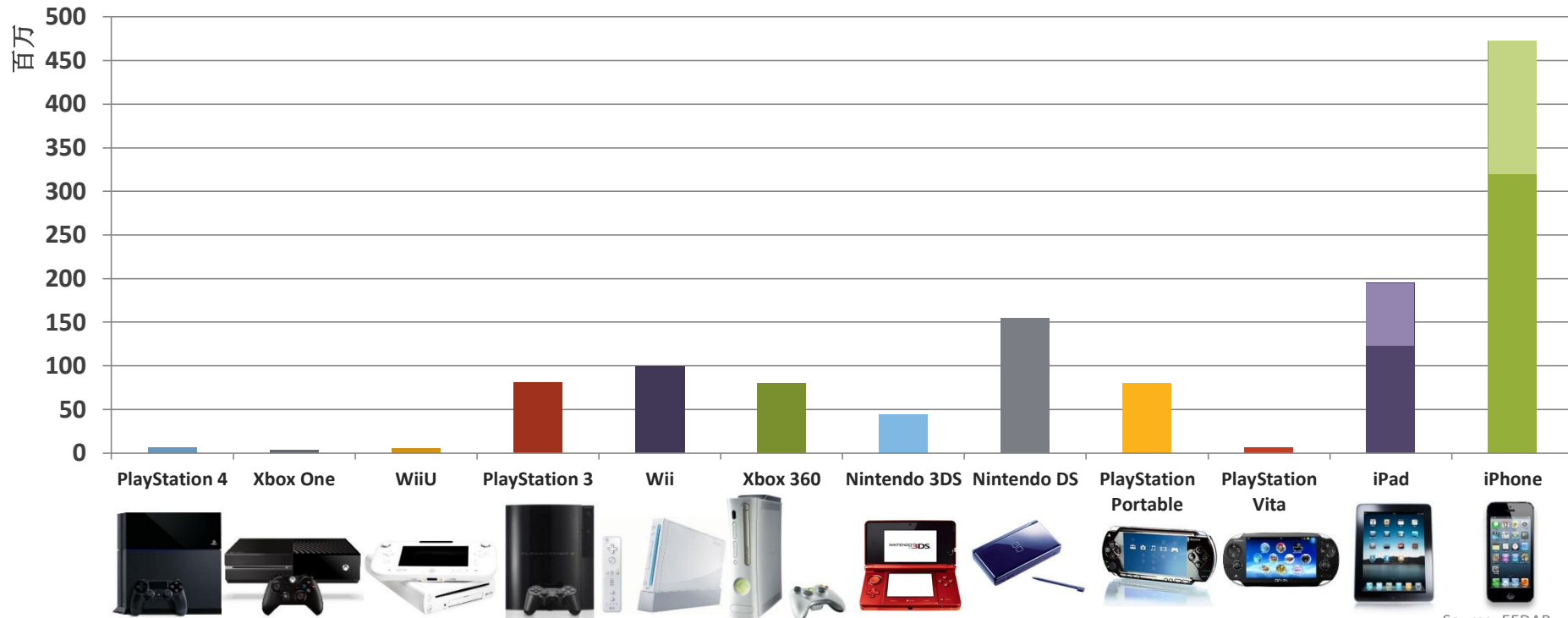


EEDAR

CONTEXT IS EVERYTHING

HARDWARE SALES

Platform Sales Worldwide Through December, 2013

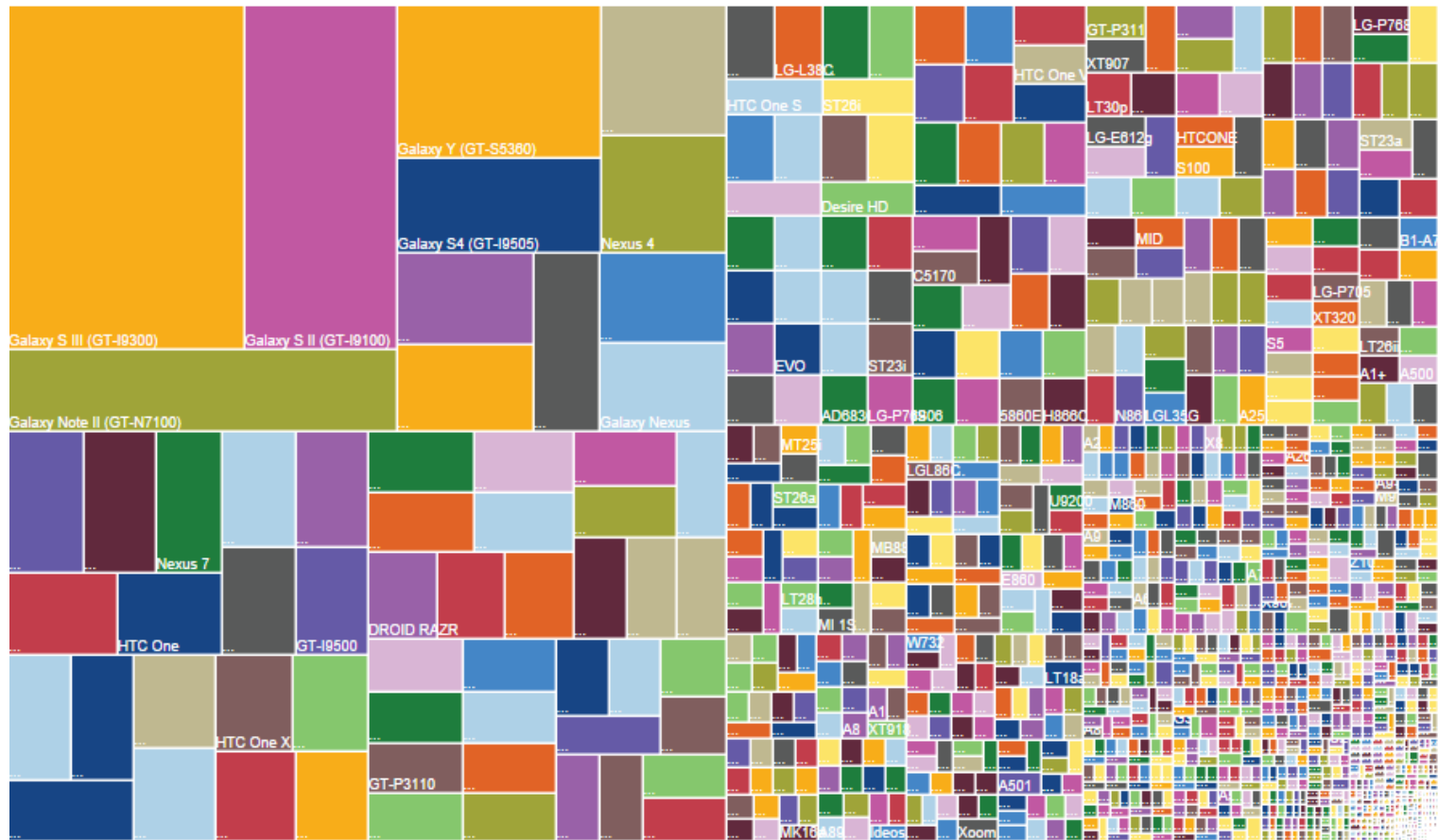


EEDAR

Source: EEDAR

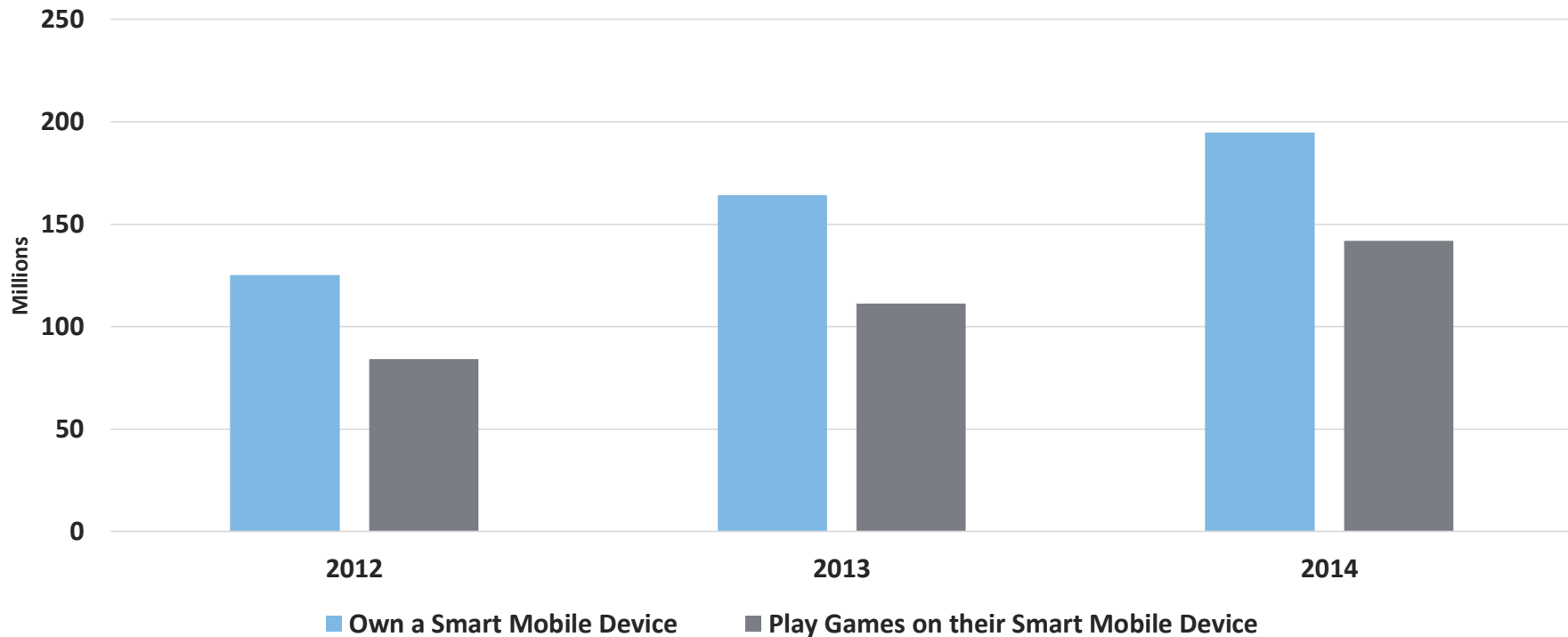
CONTEXT IS EVERYTHING

ANDROID DEVICE FRAGMENTATION



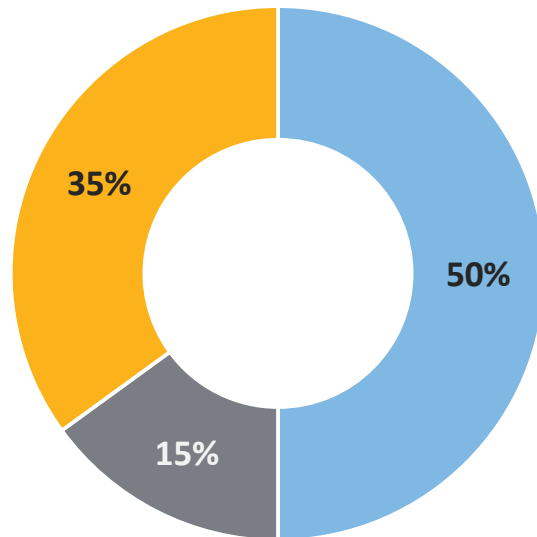
MOBILE GAMERS

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



MOBILE GAMERS

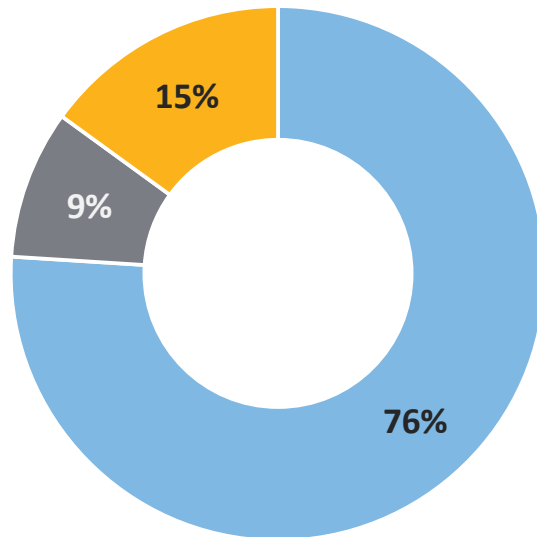
Mobile Gamers by Device Ownership [Active Mobile Gamers][NA/Europe]



■ Smartphone & Tablet ■ Tablet Only ■ SmartPhone Only

MOBILE GAMERS

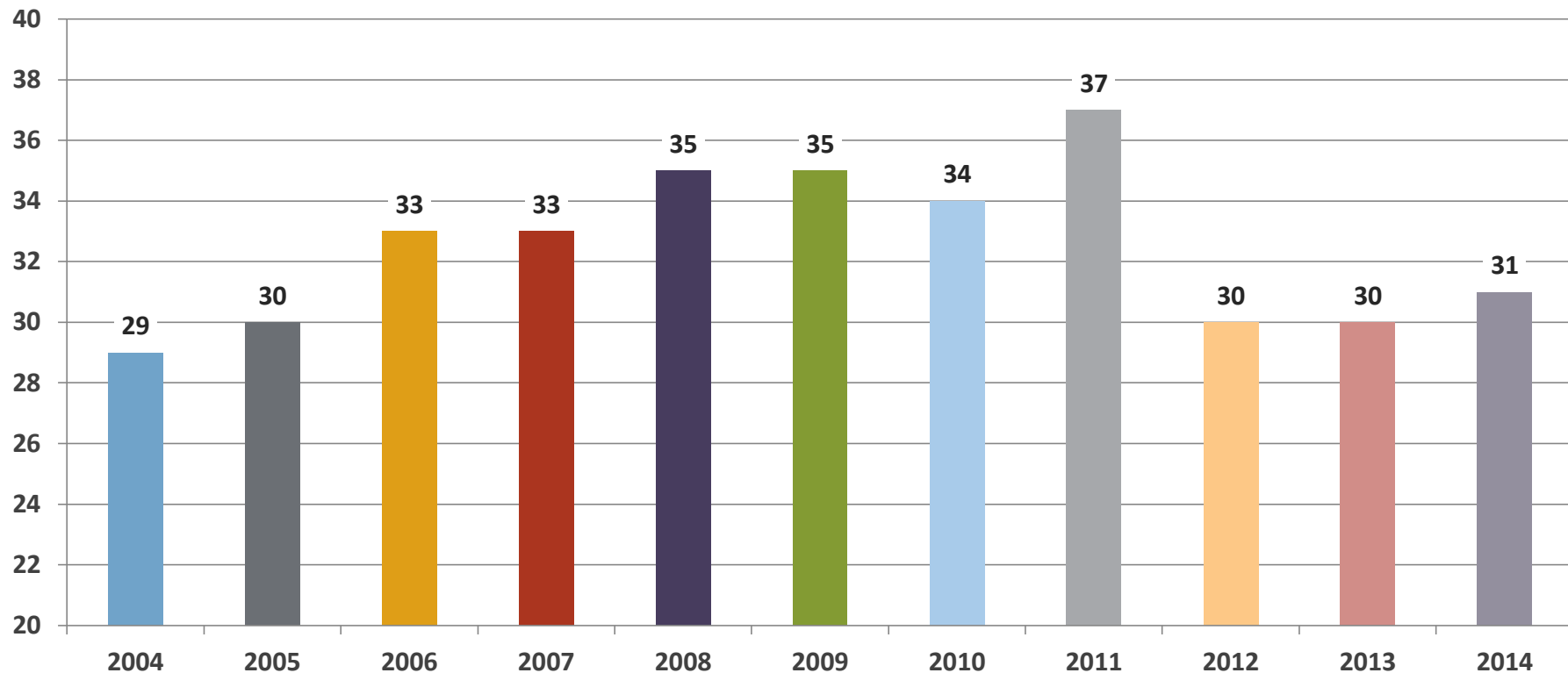
Mobile Gaming Revenue by Device Ownership [Active Mobile Gamers][NA/Europe]



■ Smartphone & Tablet ■ Tablet ■ Smartphone

WHO GAMES?

Average Age of Gamers in the USA



Source: ESA

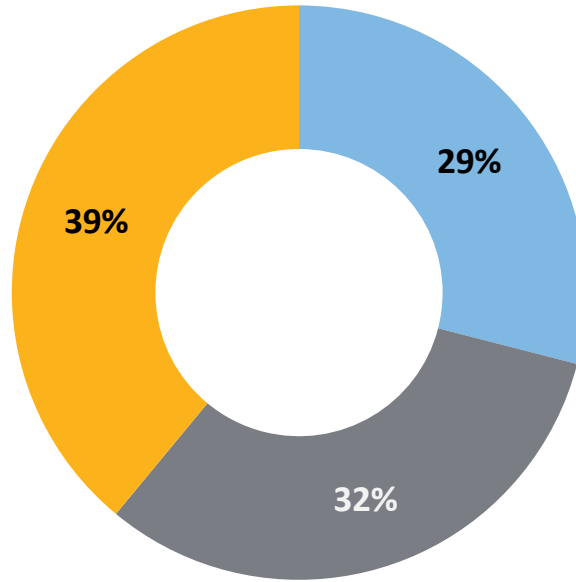


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CONTEXT IS EVERYTHING

WHO GAMES?

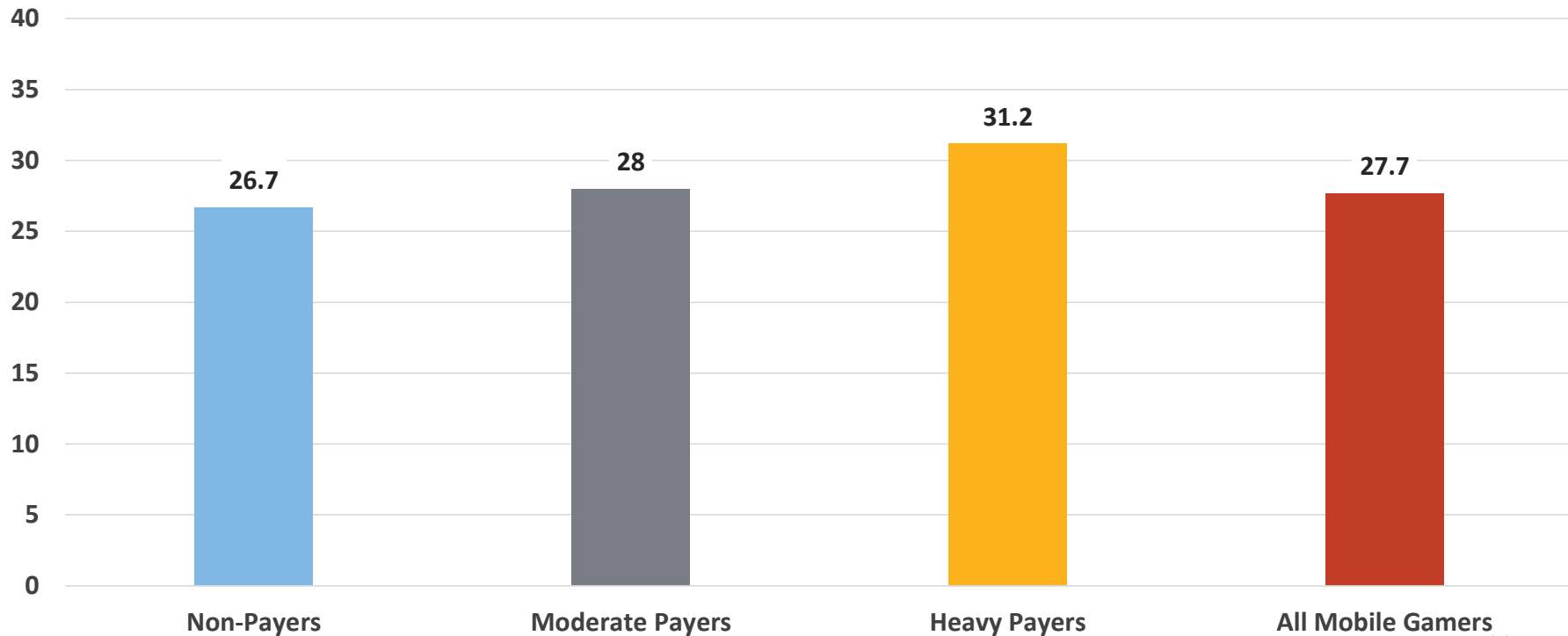
Age of Gamers in the USA



■ Under 18 ■ 18 to 35 ■ 36+

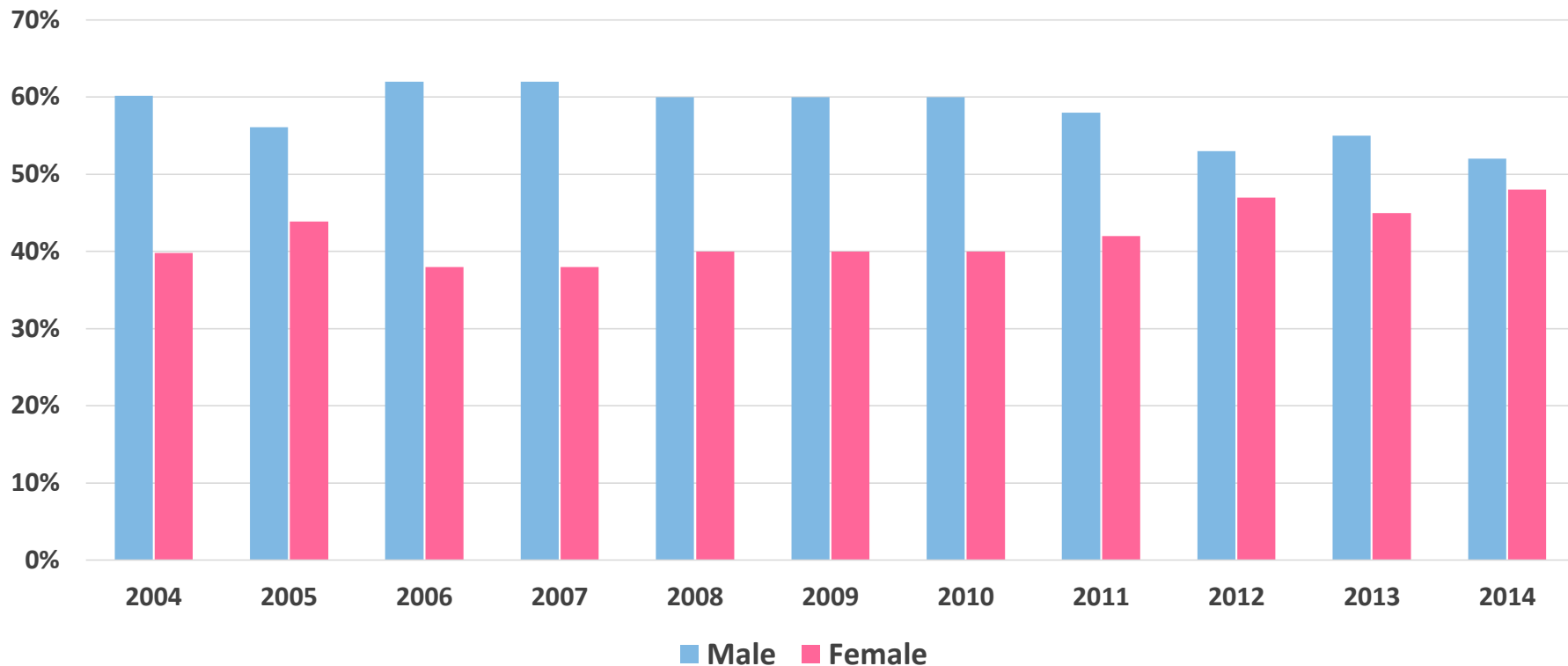
WHO GAMES?

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



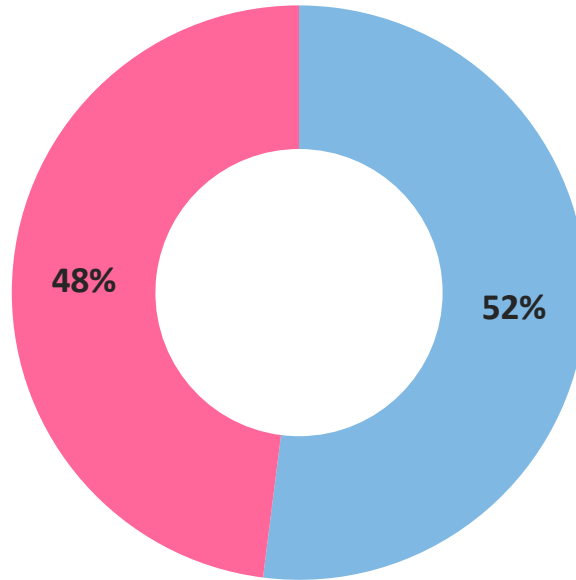
WHO GAMES?

Gender of Game Players in the USA



WHO GAMES?

Gender of Gamers in the USA

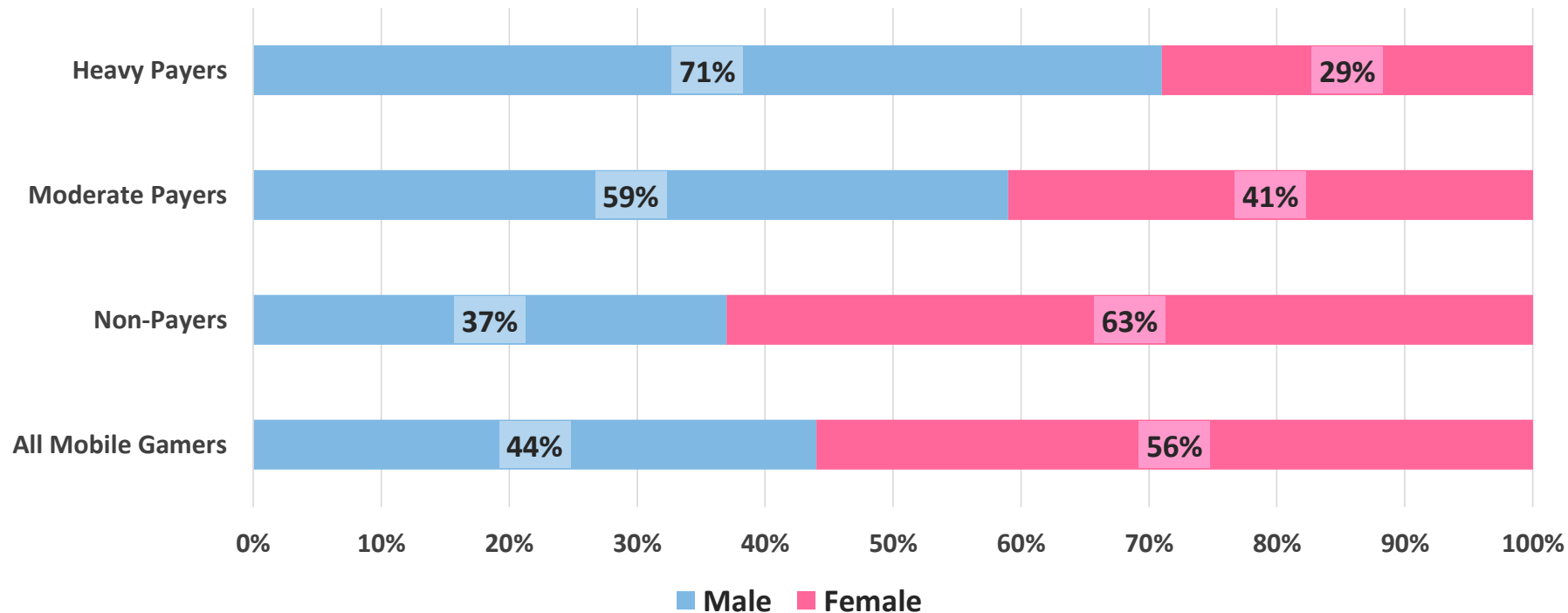


■ Male ■ Female

WHO GAMES?

Gender by Mobile Spending Segment in North America

Of users that indicated they engage in daily mobile gaming activities



WHO GAMES?

Adult women

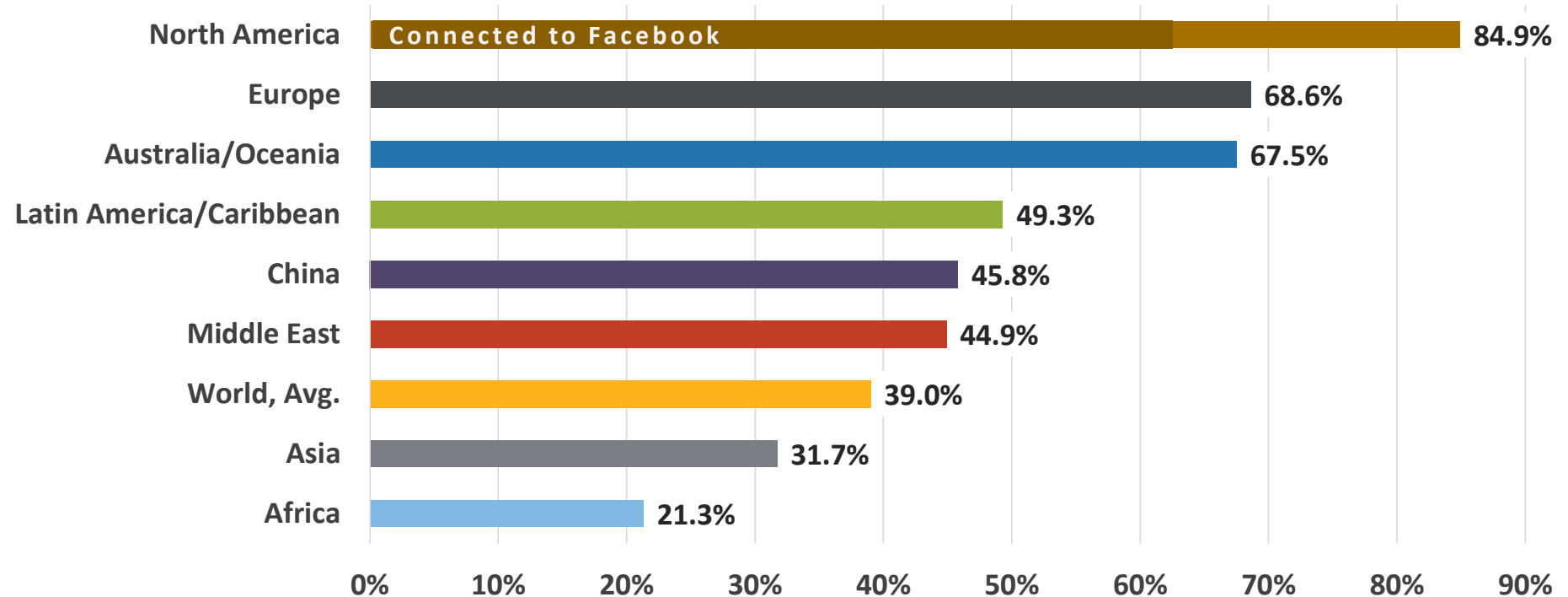
now represent a **greater** portion
of the game-playing population (31%)
than **boys age 17 or younger** (19%).

THE 'GAMERS' OF TODAY ARE ENTERTAINMENT CONSUMERS



INTERNET PENETRATION

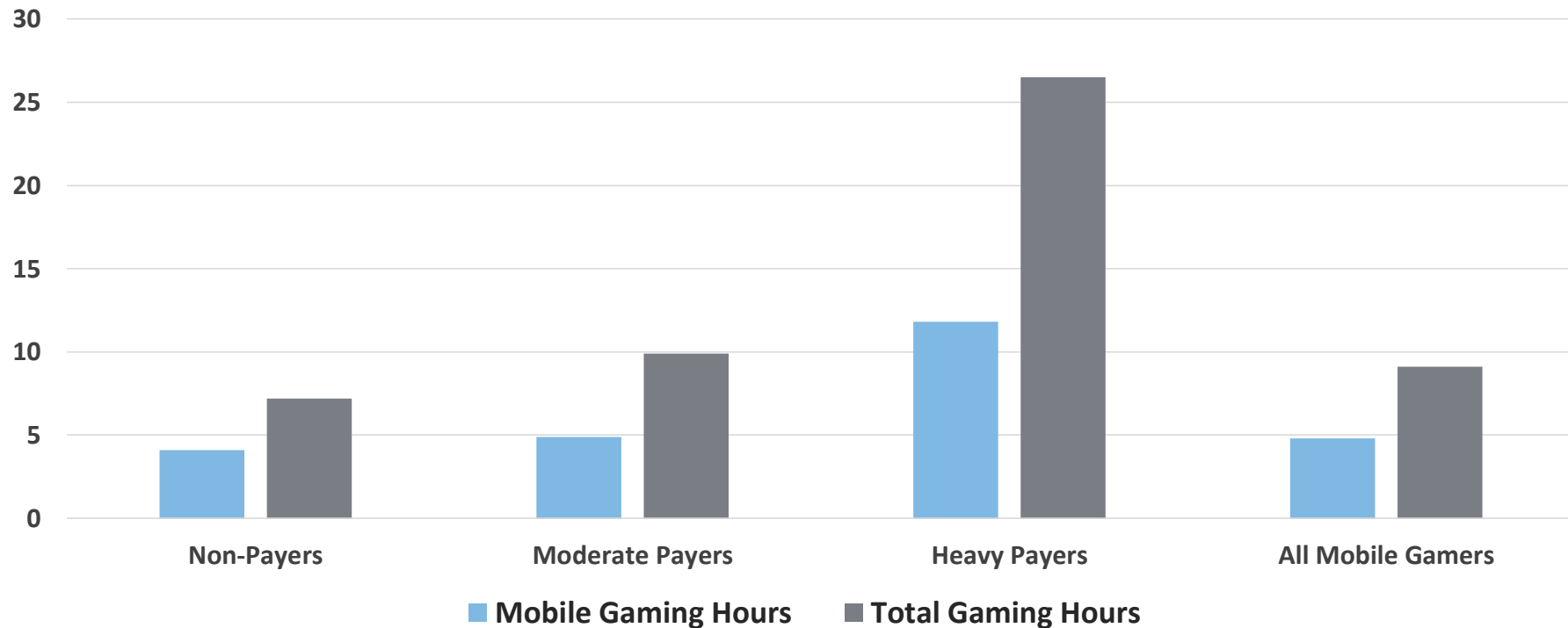
World Internet Penetration by Region
[Q4, 2013]



Source: Internet World Stats

GAMING TIME

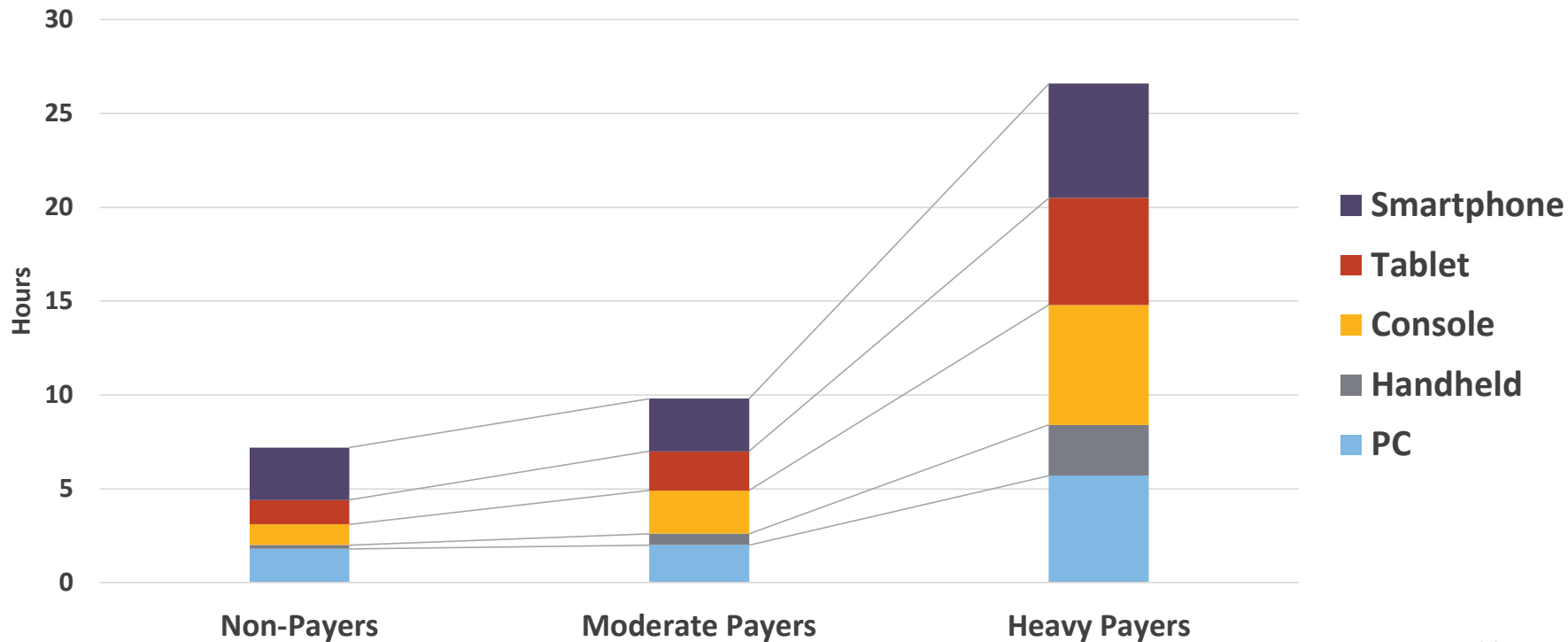
Total Gaming Hours Per Week by Mobile Spending Segment
[Active Mobile Gamers][NA/Europe]



GAMING TIME

Weekly Gaming Timeshare by Mobile Spending Segment

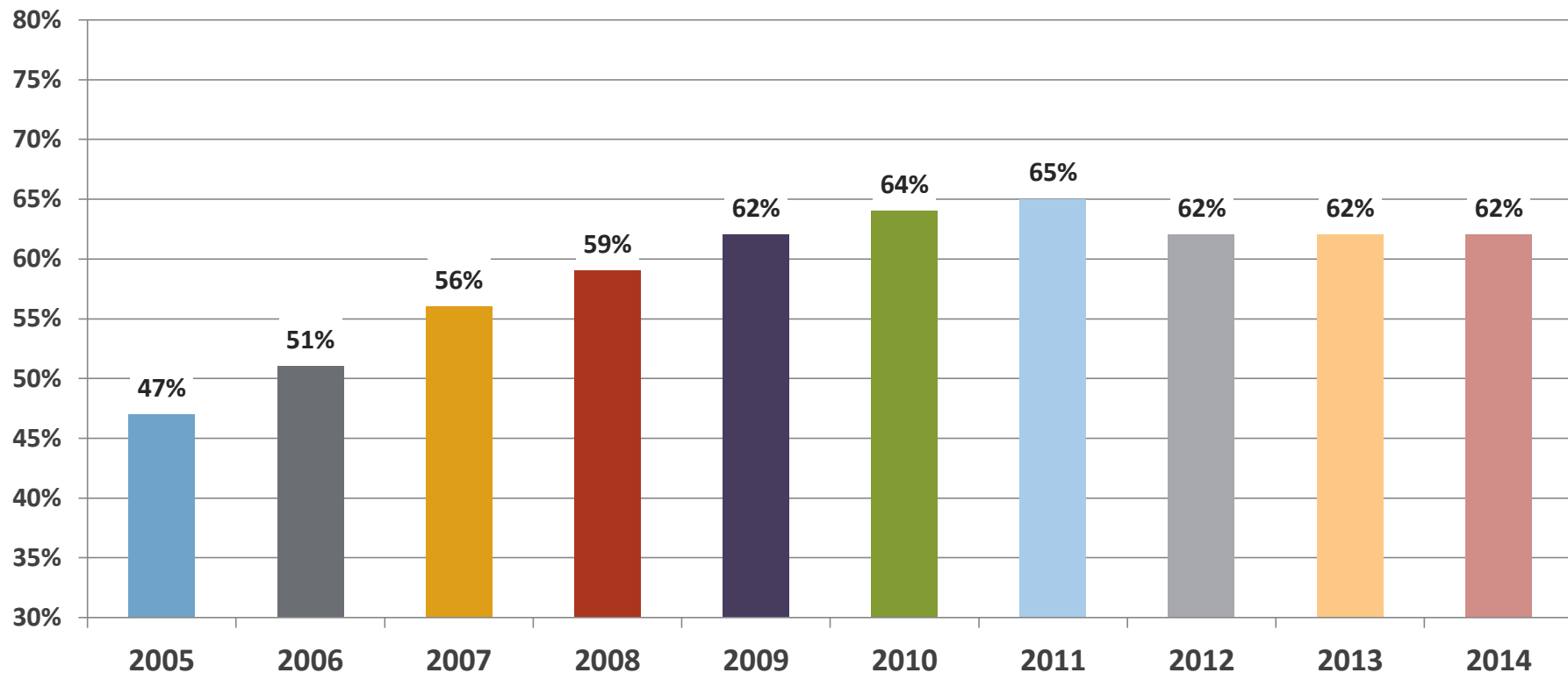
[Active Mobile Gamers][NA/Europe][Hours Per Week]



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

WHO GAMES?

% of Gamers That Play Games with Others, Either In-Person or Online



Source: ESA

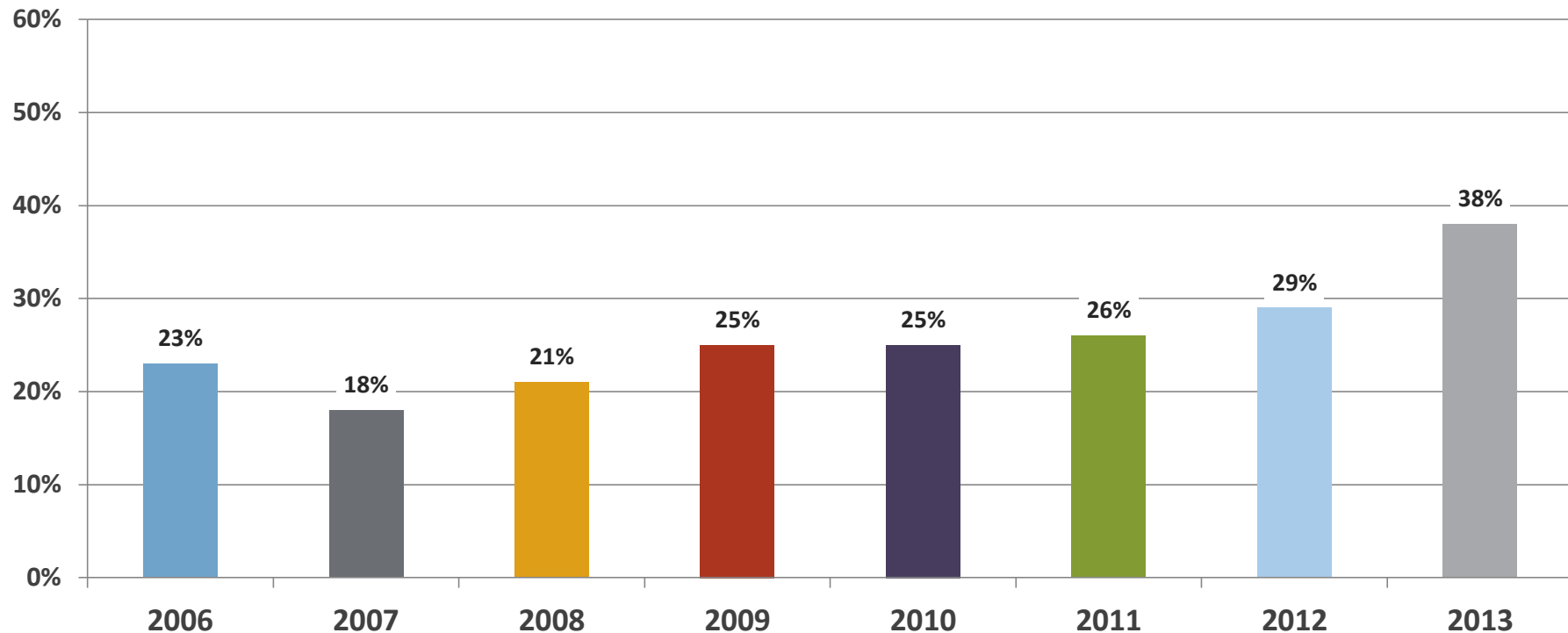


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CONTEXT IS EVERYTHING

COOPERATIVE PLAY

Prevalence of Co-Op
[Retail Console Platform Titles] [NA/Europe]



Source: EEDAR

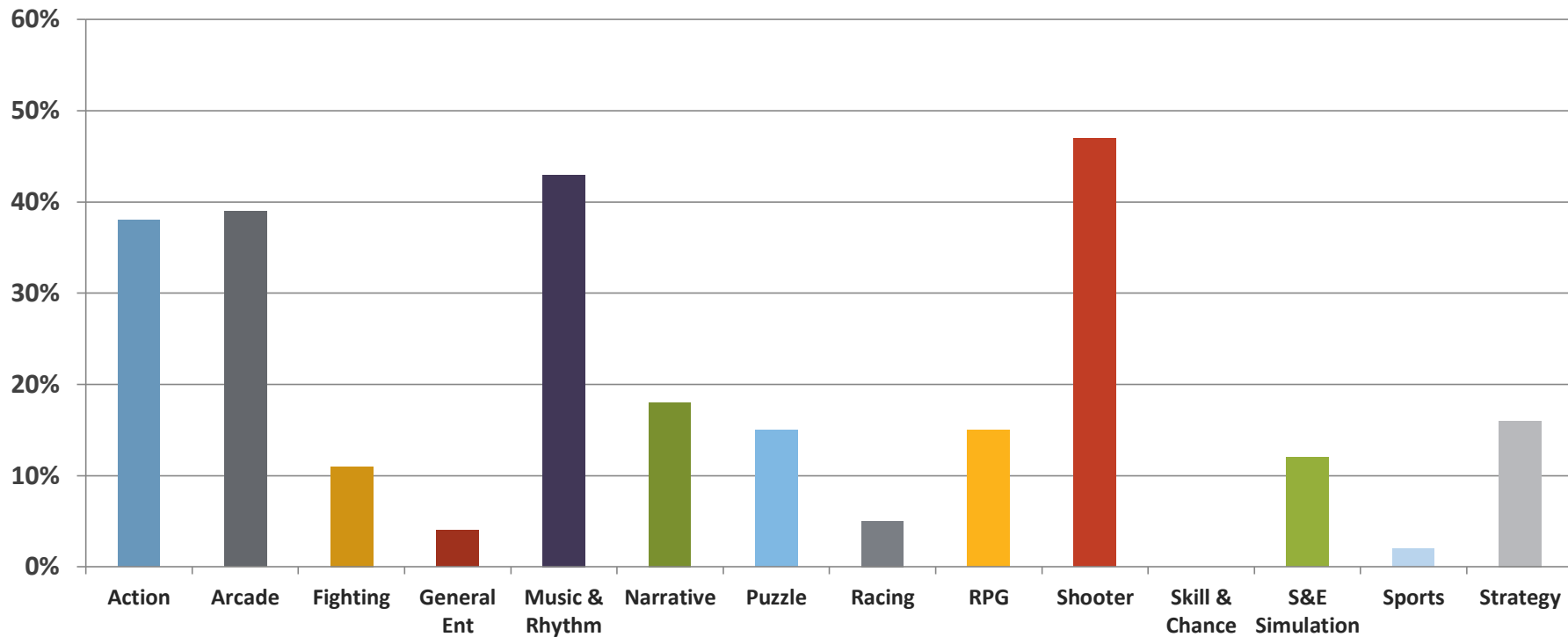


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CONTEXT IS EVERYTHING

COOPERATIVE PLAY

Prevalence of Co-Op by Genre
[PS3, Wii & 360][Retail Titles][NA/Europe]



Source: EEDAR



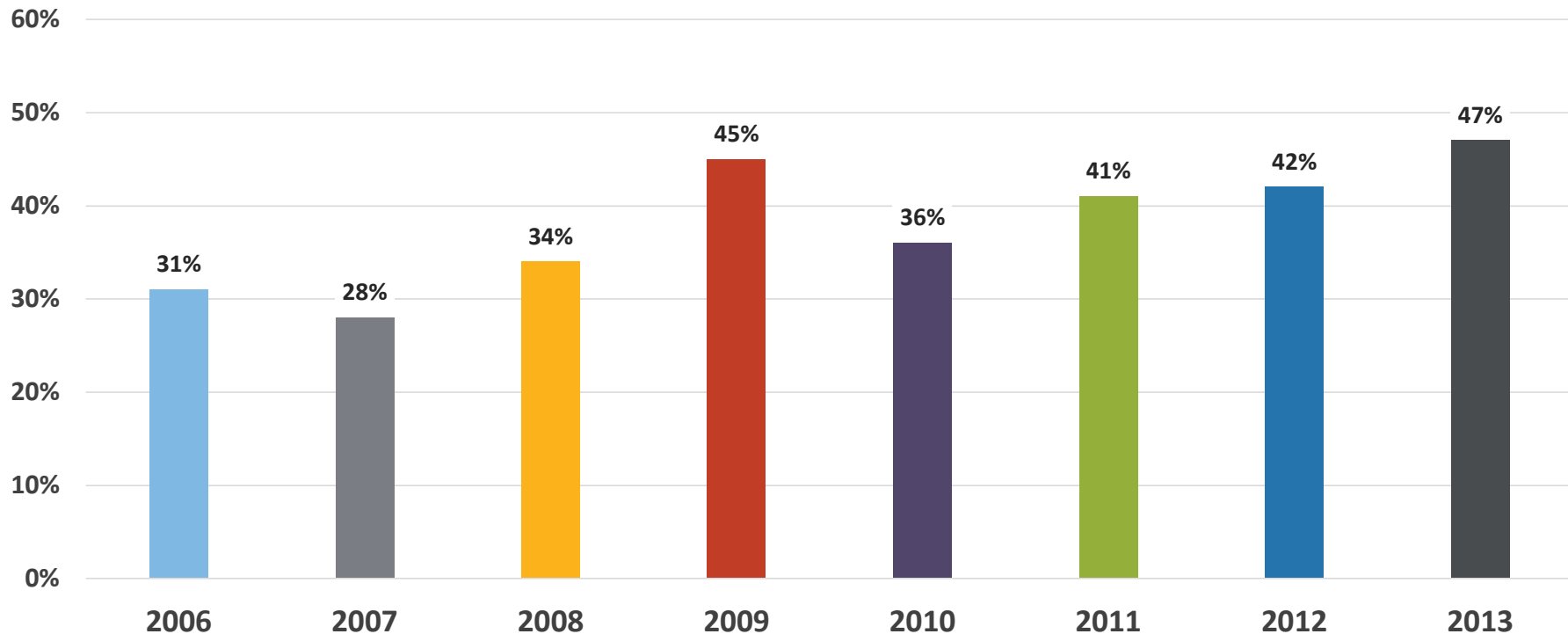
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CONTEXT IS EVERYTHING

MULTIPLAYER SUPPORT

HD Games with No Multiplayer Support

[Xbox 360 & PS3] [Retail Titles] in [NA/Europe]



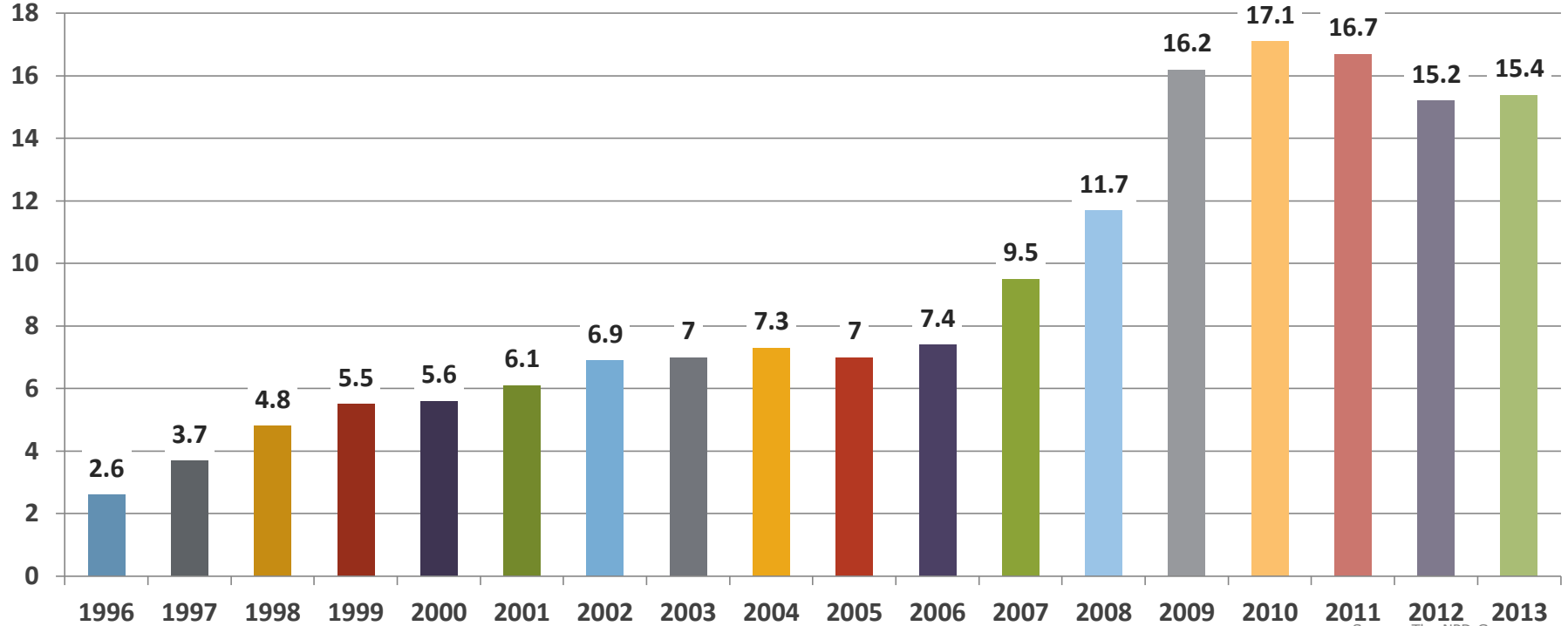
Source: EEDAR



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CONTEXT IS EVERYTHING

US Video Game Sales Billions of Dollars



Source: The NPD Group

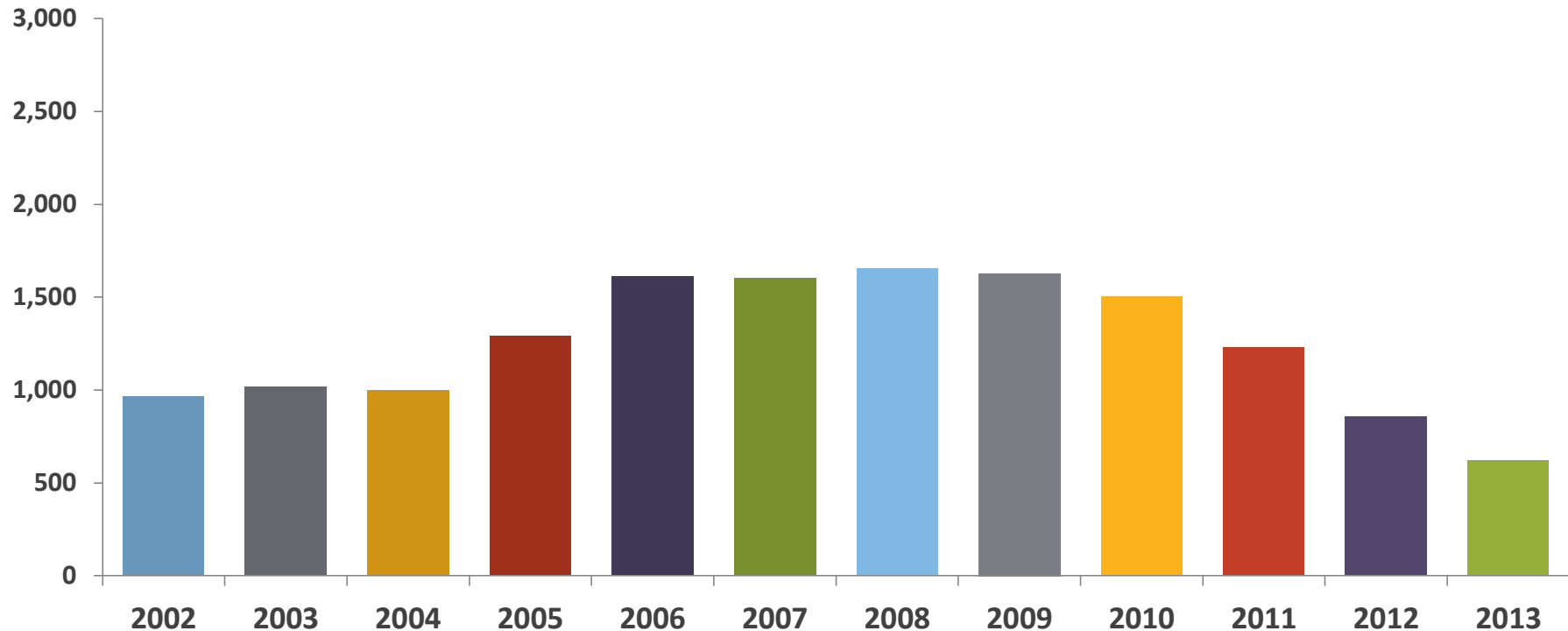


A RENAISSANCE

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

GAME RELEASES

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



Source: EEDAR



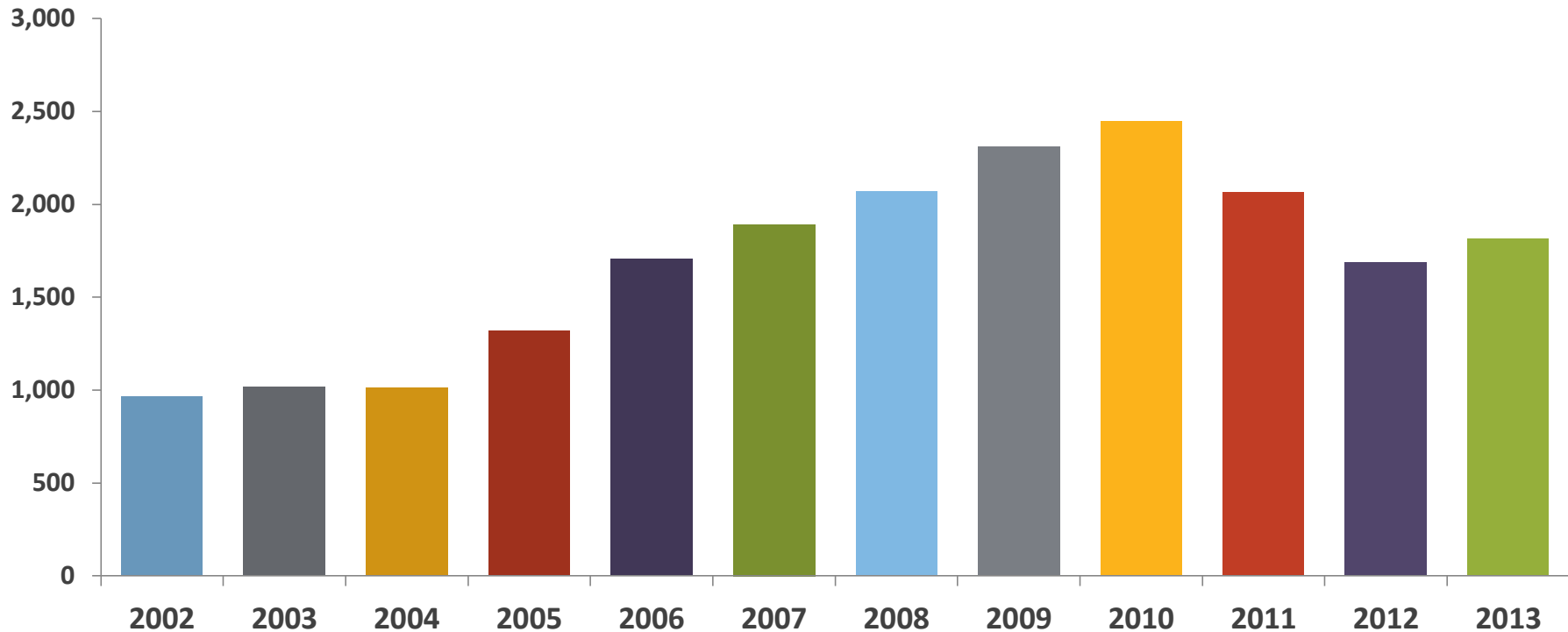
EEDAR

CONTEXT IS EVERYTHING

GAME RELEASES

Release Quantities

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



Source: EEDAR



EEDAR

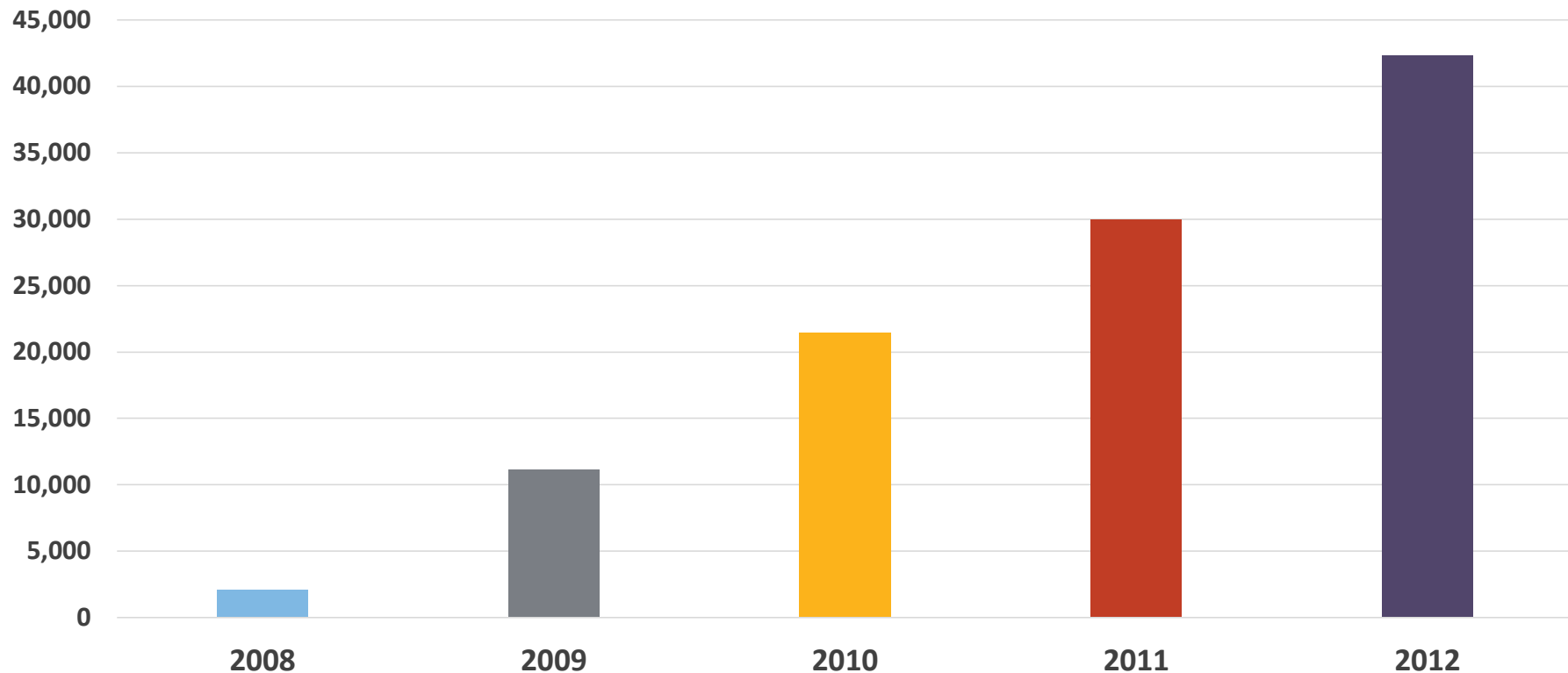
CONTEXT IS EVERYTHING

CHANGES



GAME RELEASES

Quantity of iPhone games released per year in NA



Source: EEDAR

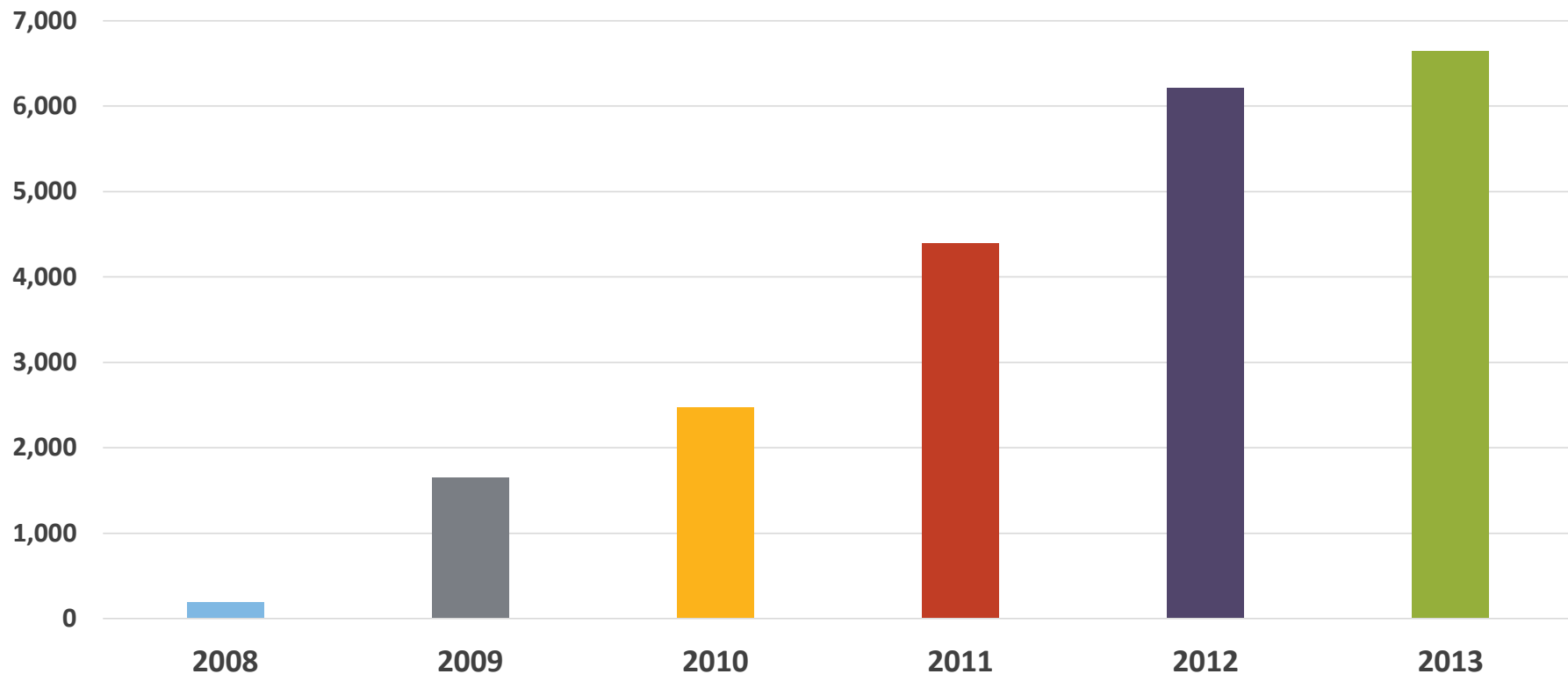


EEDAR

CONTEXT IS EVERYTHING

GAME RELEASES

Quantity of “Ranked” iPhone Games Released per Year in NA

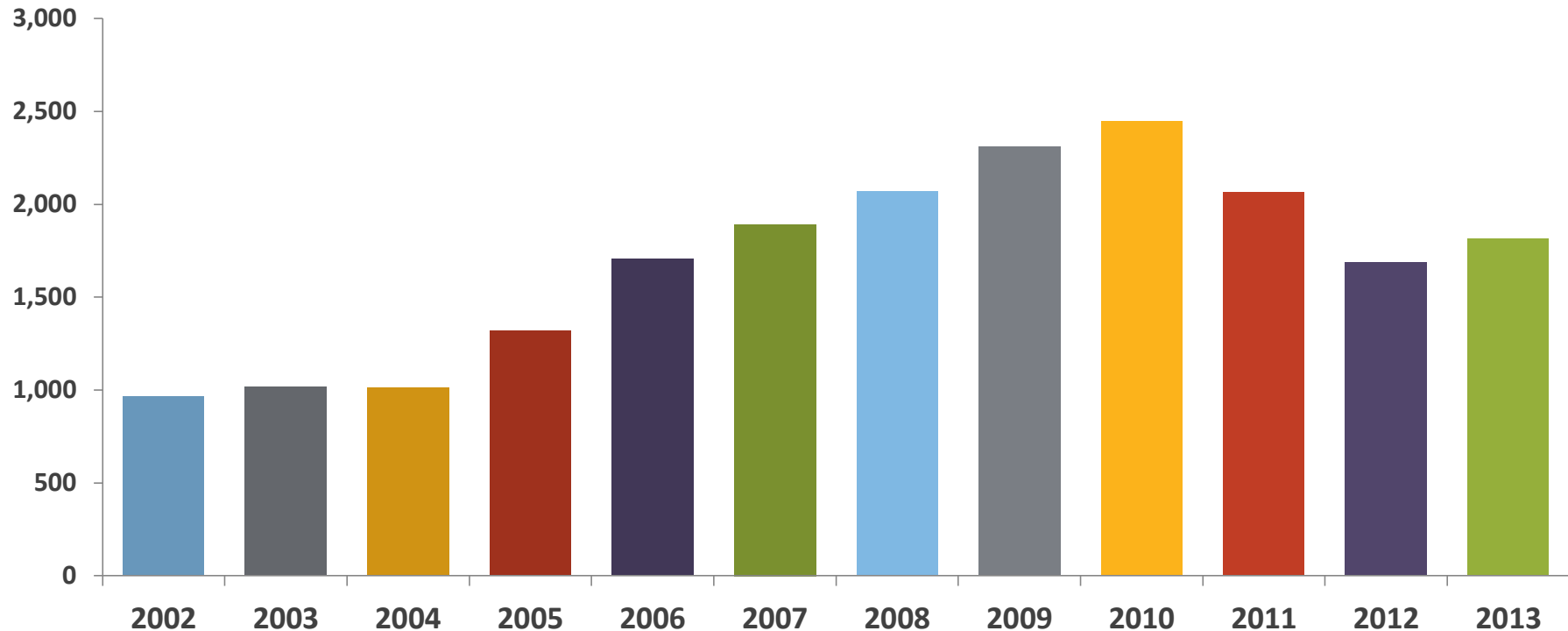


Source: EEDAR

GAME RELEASES

Release Quantities

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



Source: EEDAR



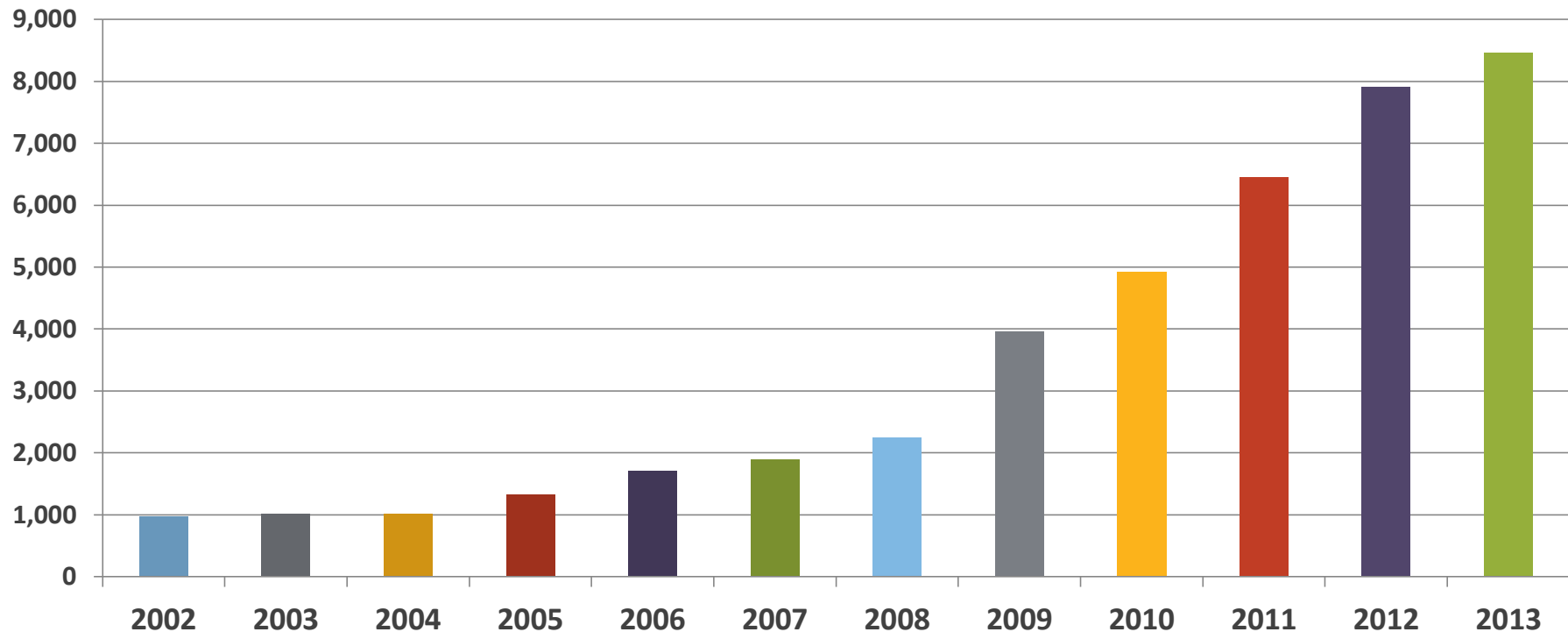
EEDAR

CONTEXT IS EVERYTHING

GAME RELEASES

Release Quantities

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



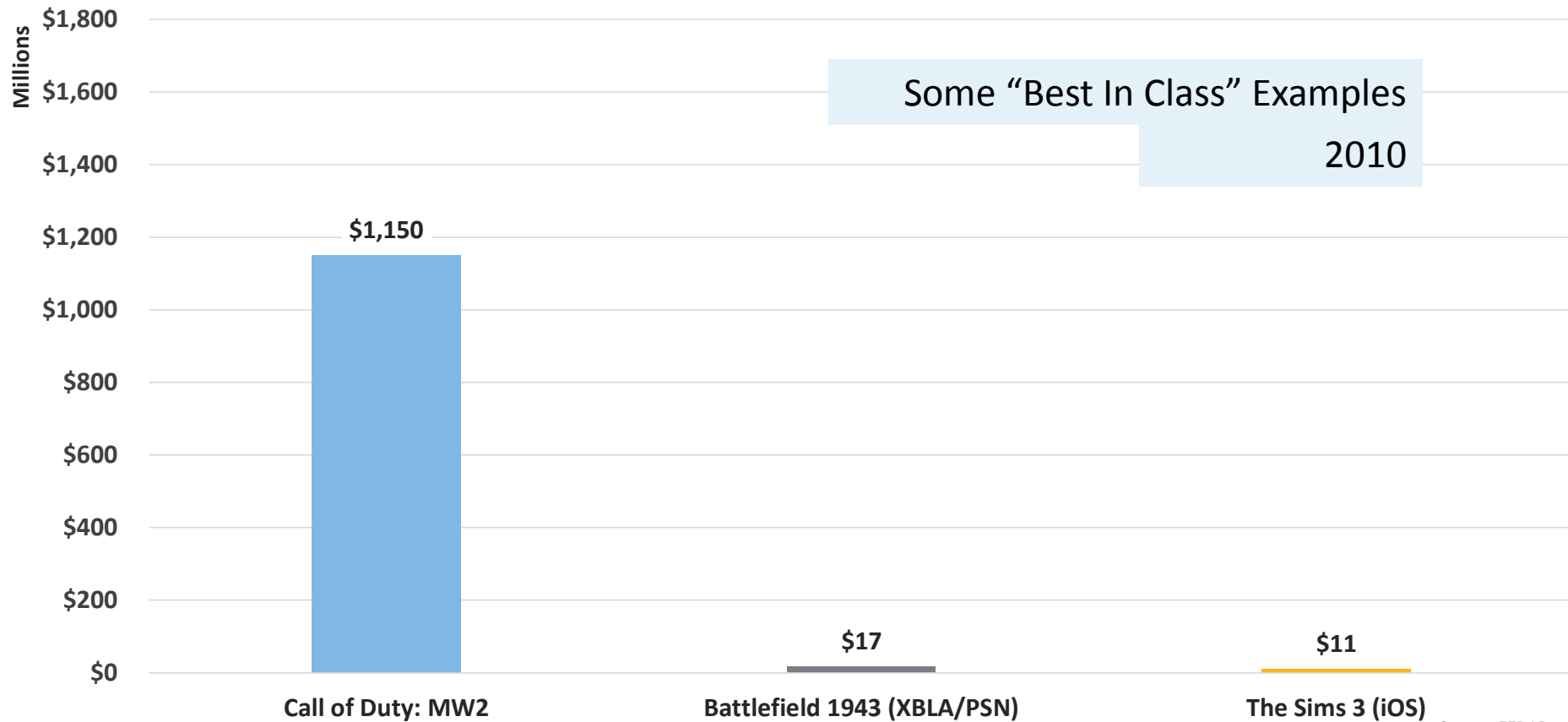
Source: EEDAR



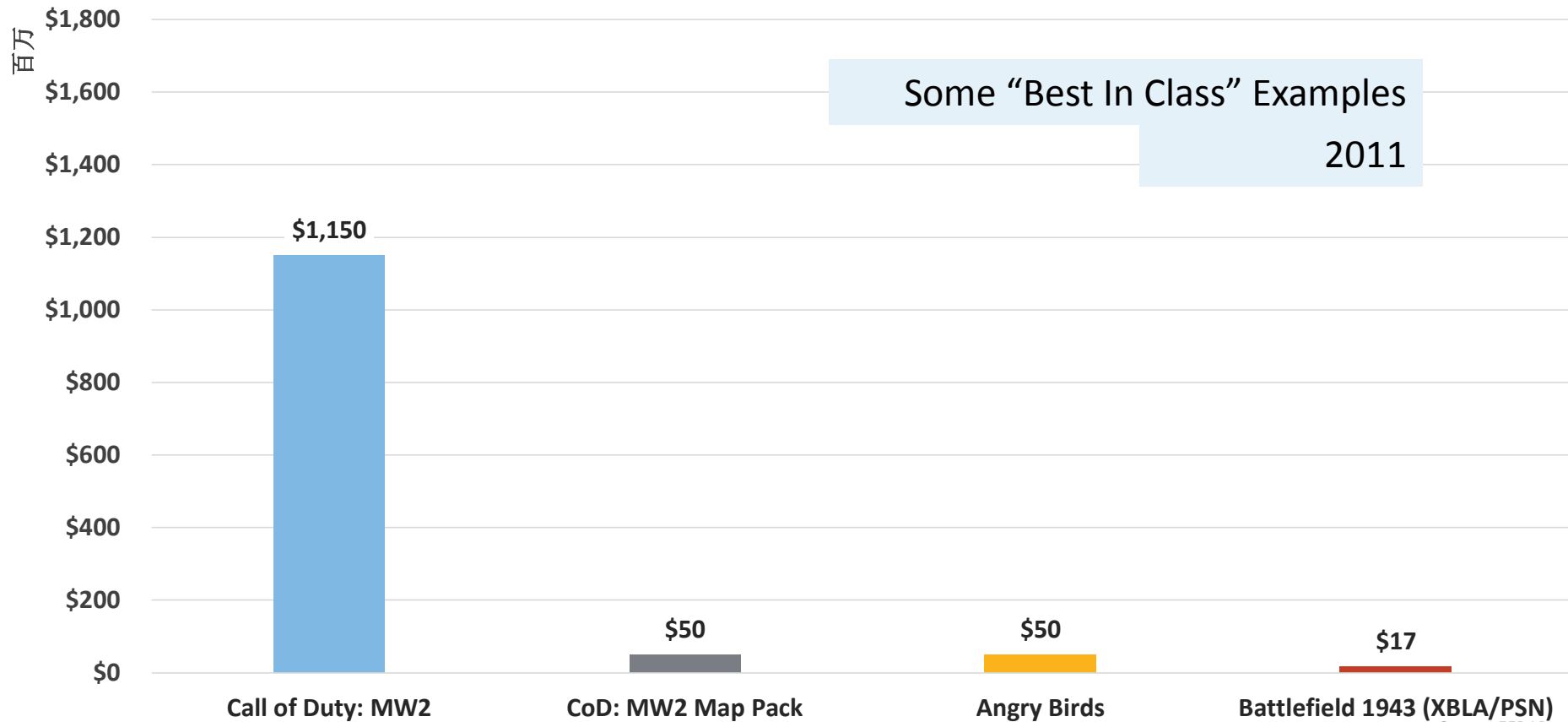
EEDAR

CONTEXT IS EVERYTHING

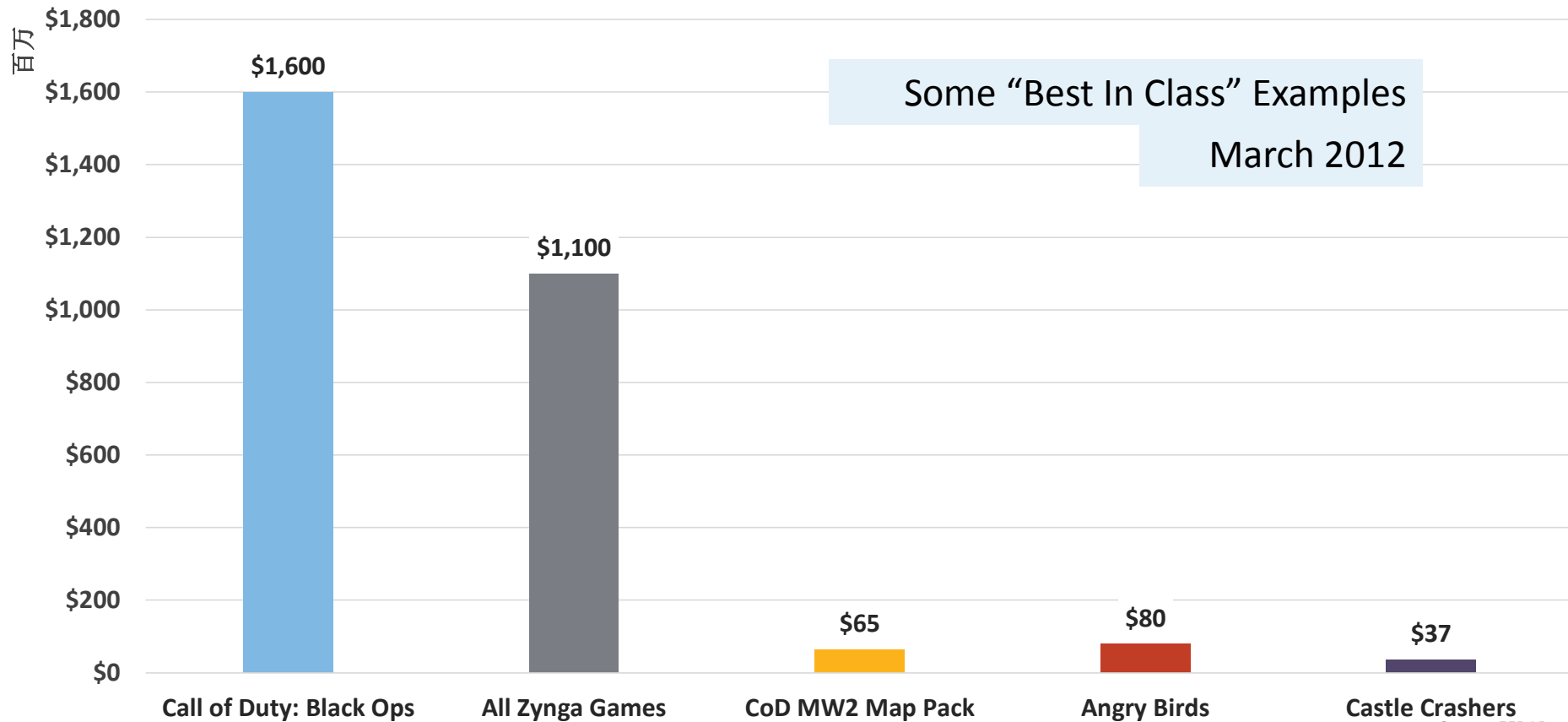
WHY DO I STILL TALK ABOUT CONSOLE?



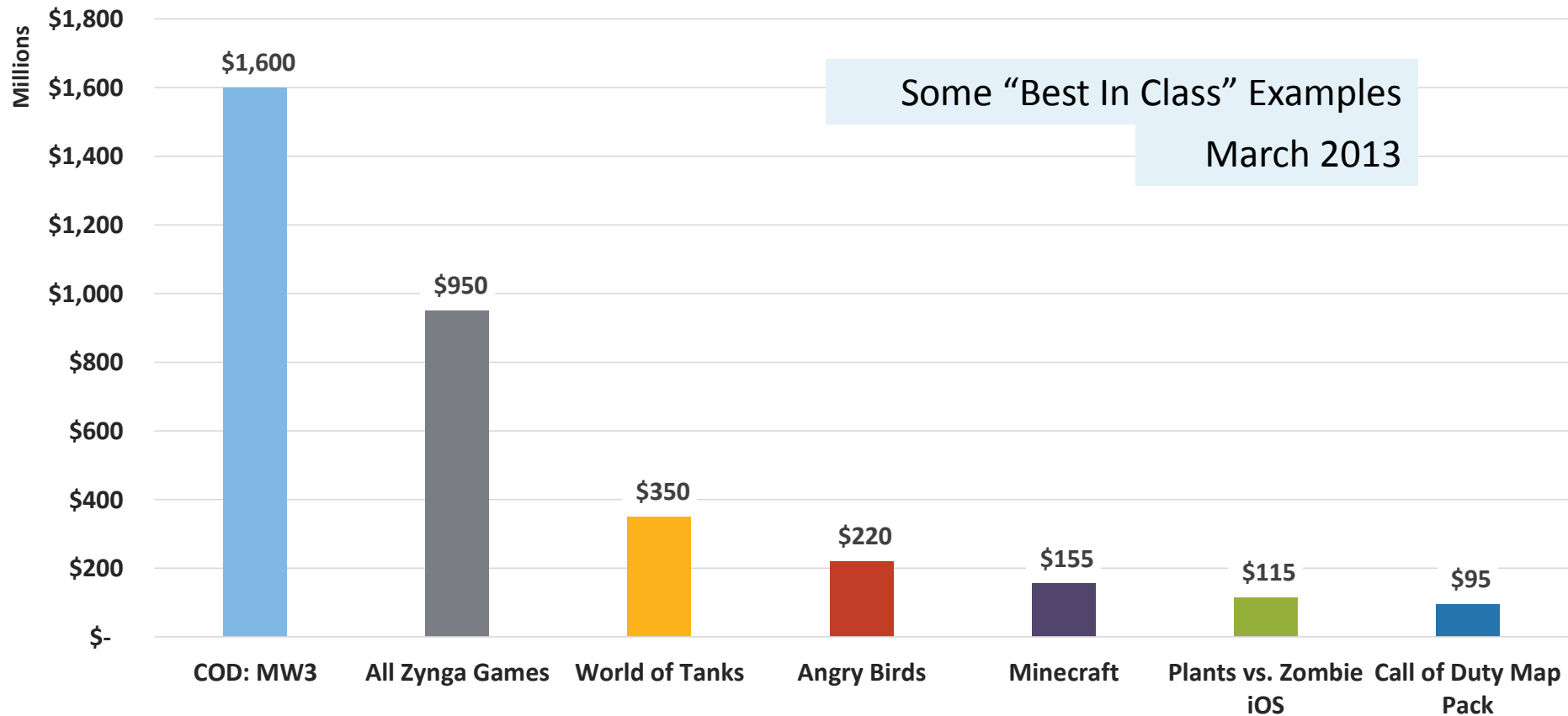
WHY DO I STILL TALK ABOUT CONSOLE?



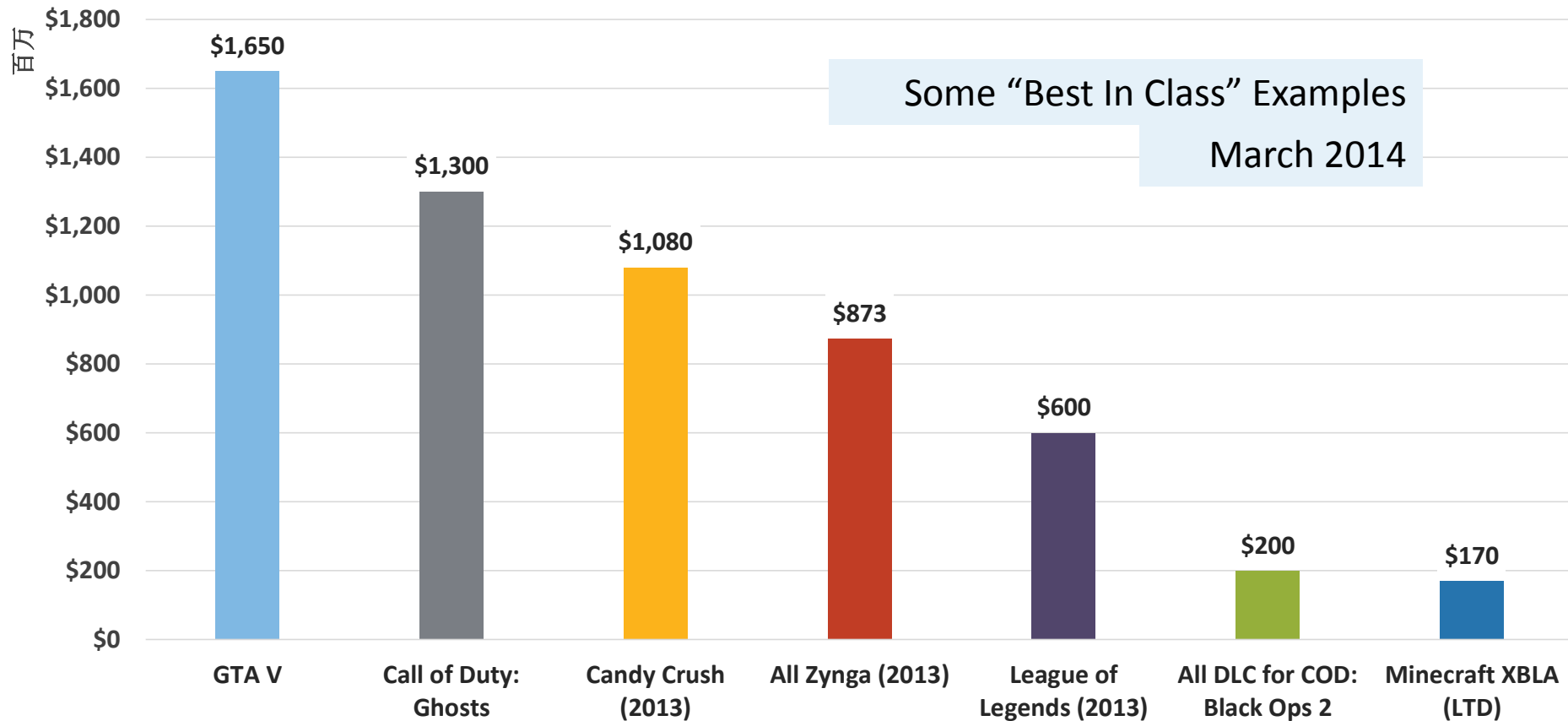
WHY DO I STILL TALK ABOUT CONSOLE?



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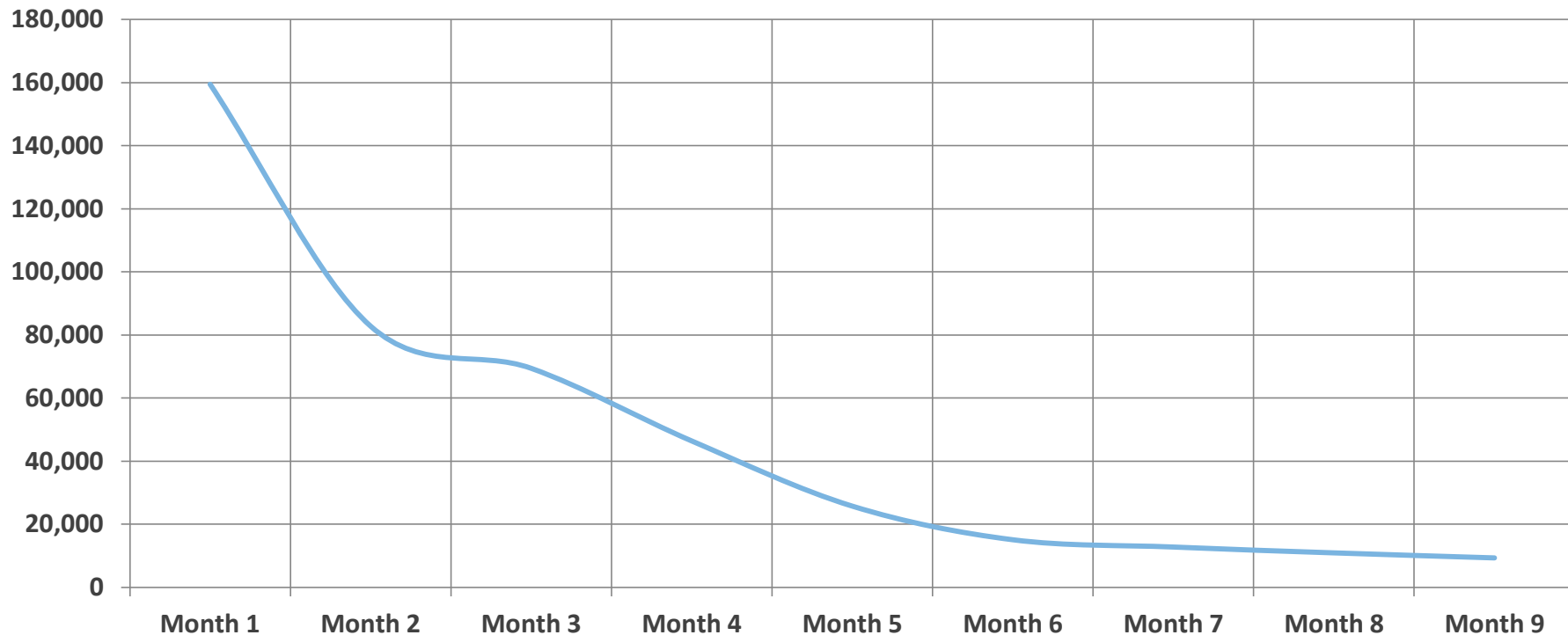


WHY DO I STILL TALK ABOUT CONSOLE?



SALES CURVE

All [PlayStation 3 and Xbox 360] [Shooter] Games
Average [Unit Sales] of [U.S.] [Retail] Games; [Nov 2005] to [Dec 2010]



Source: EEDAR & The NPD Group



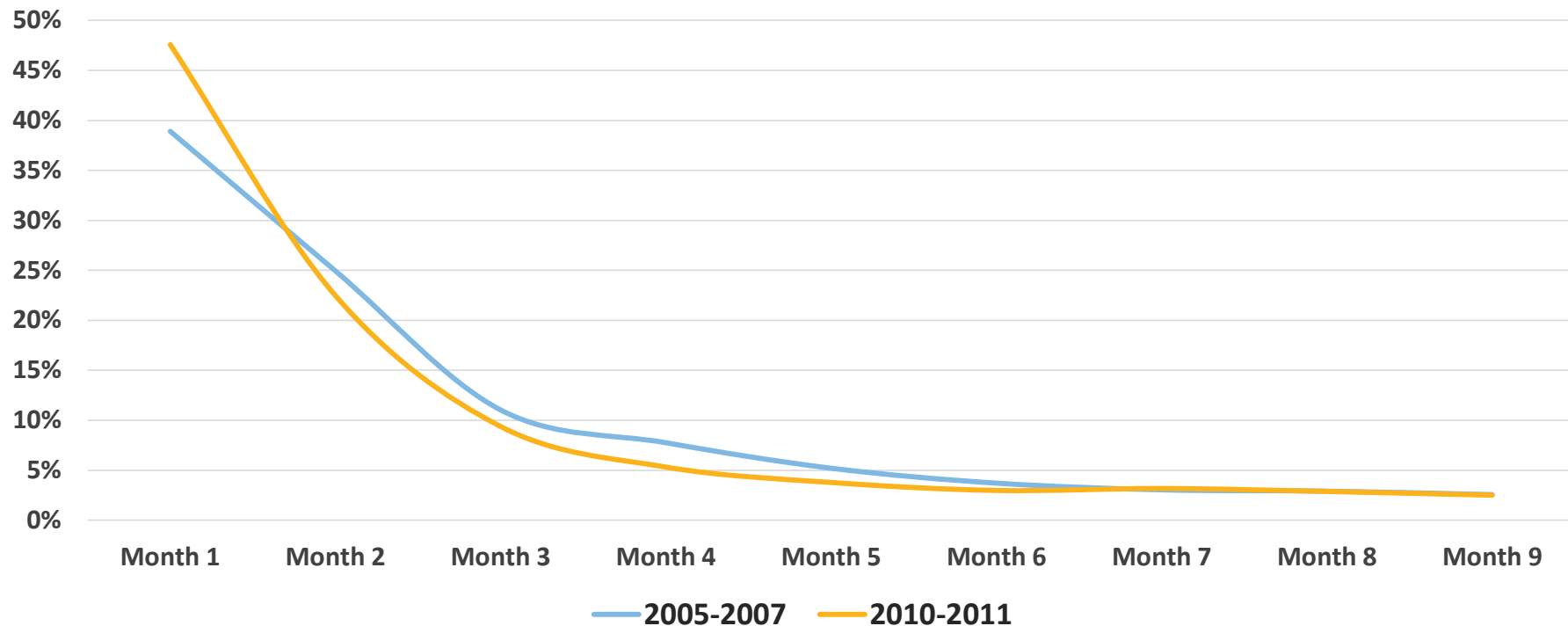
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CONTEXT IS EVERYTHING

SALES CURVE

Frontloading of Sales by Core Genres over Time

[Genres: Action, Fighting, RPG, Shooter, Strategy] [USA] [% of Total 9 Month Unit Sales]



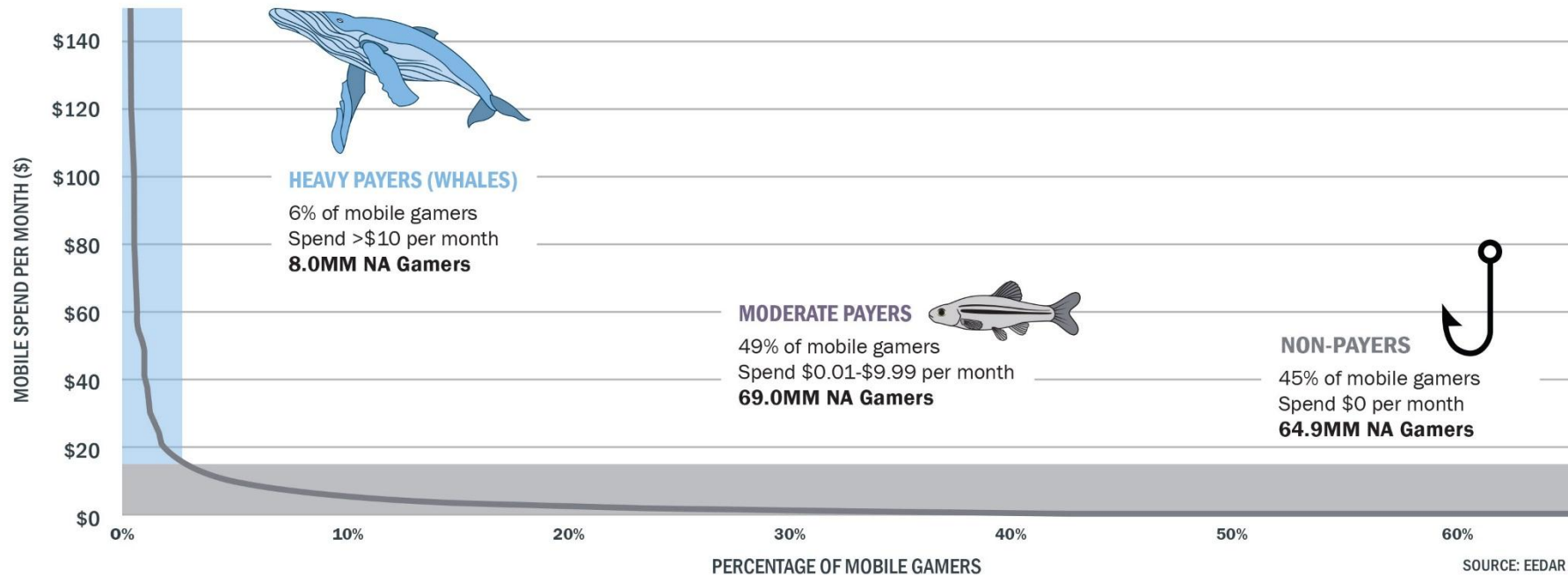
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Source: EEDAR & The NPD Group

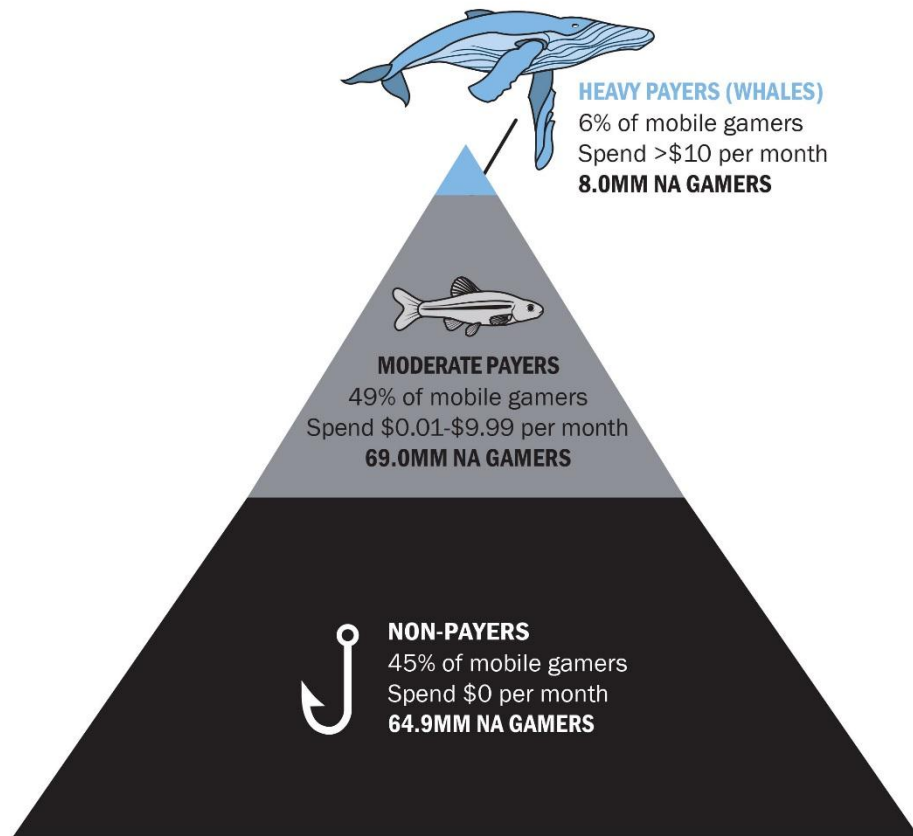
CONTEXT IS EVERYTHING

Go **BIG** or Go Home

MONETIZING MOBILE



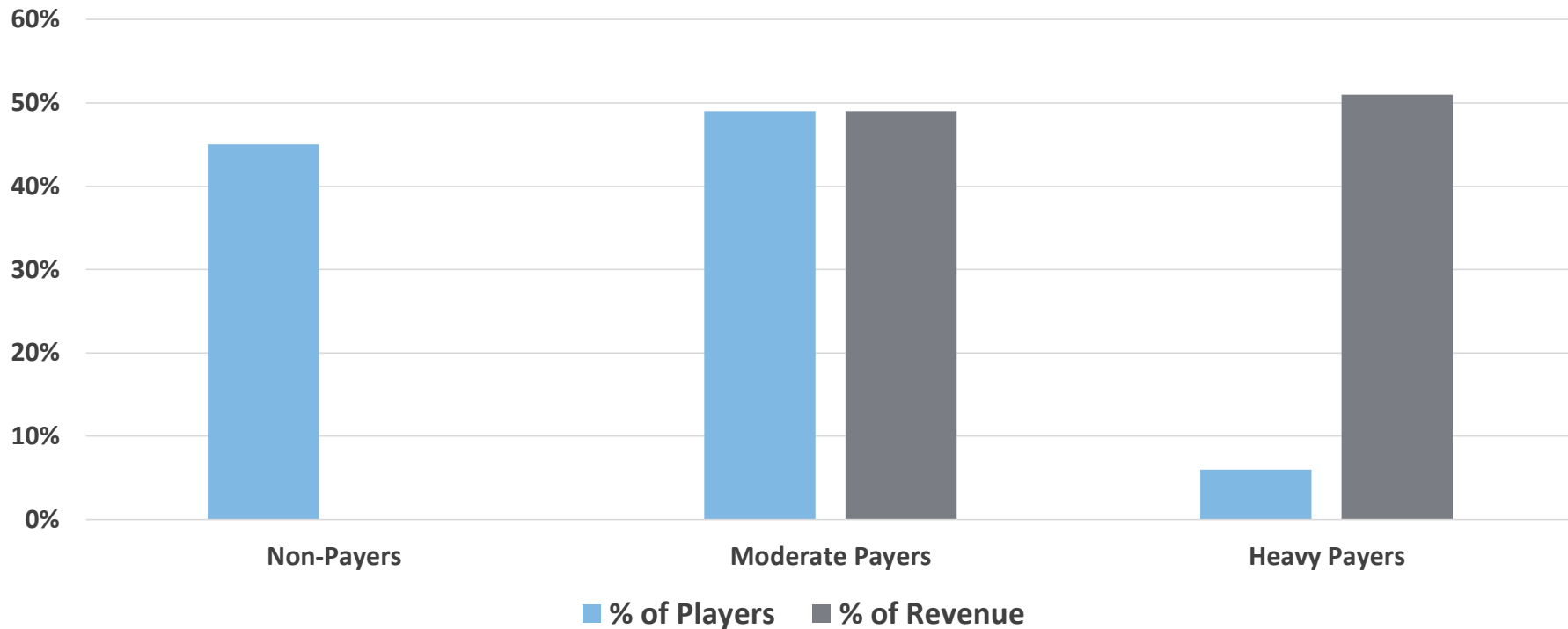
MONETIZING MOBILE



MONETIZING MOBILE

Mobile Gamers Revenue Breakdown

[Active Mobile Gamers][NA/Europe]



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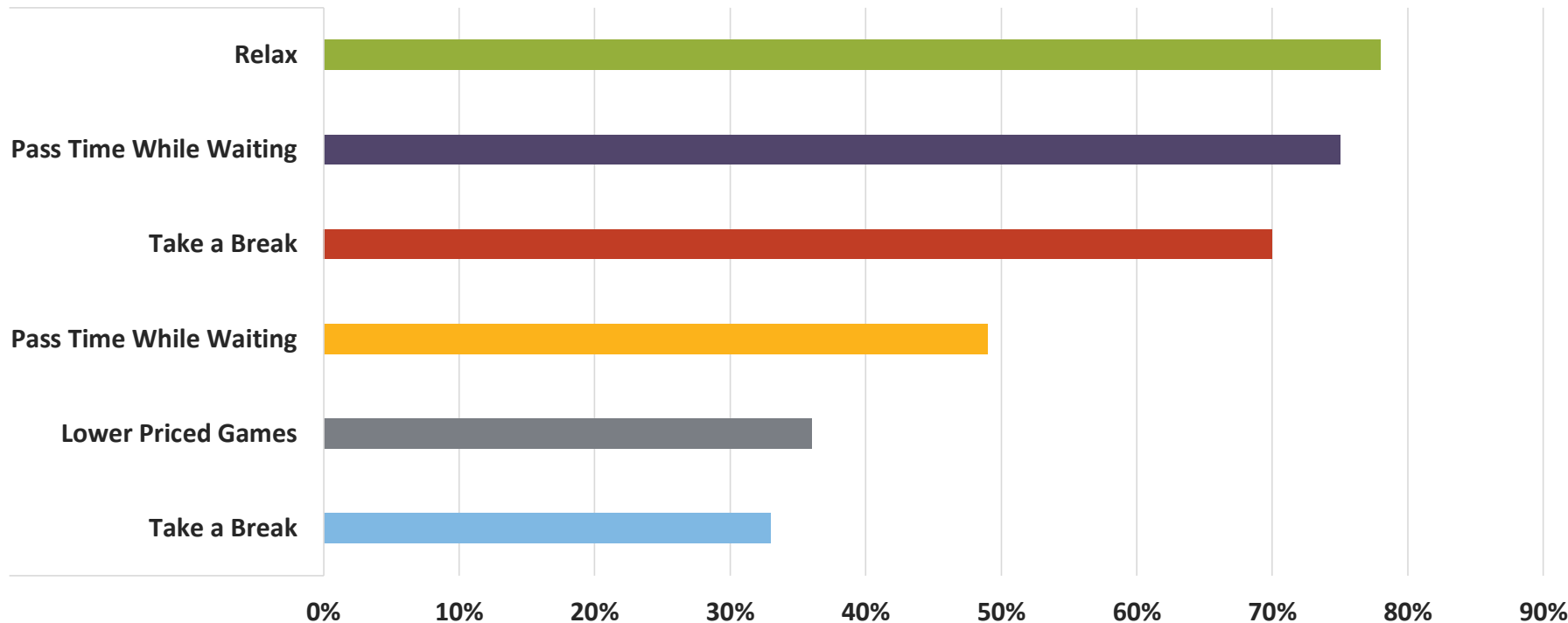
Source: EEDAR Mobile Report 2014

CONTEXT IS EVERYTHING

MOBILE DEVICES

Top 3 Reasons Mobile Gamers Play Mobile Games

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



Source: EEDAR Mobile Report 2014

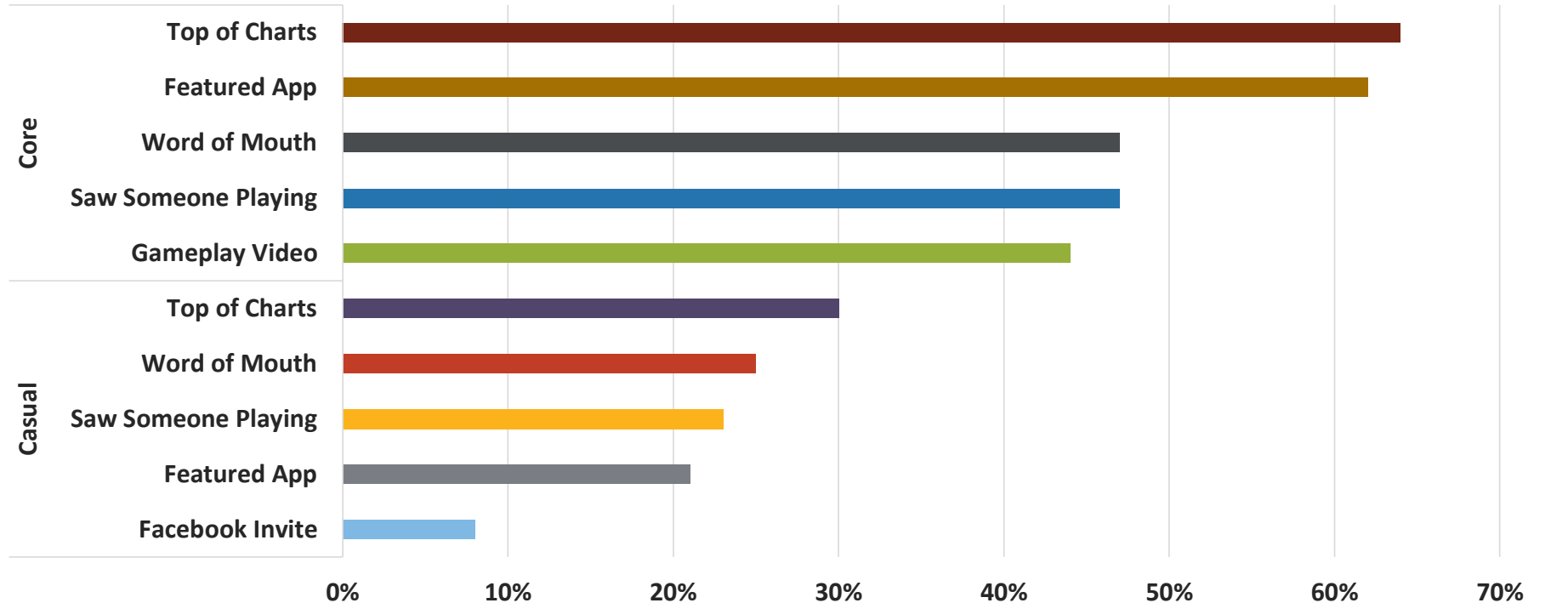


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CONTEXT IS EVERYTHING

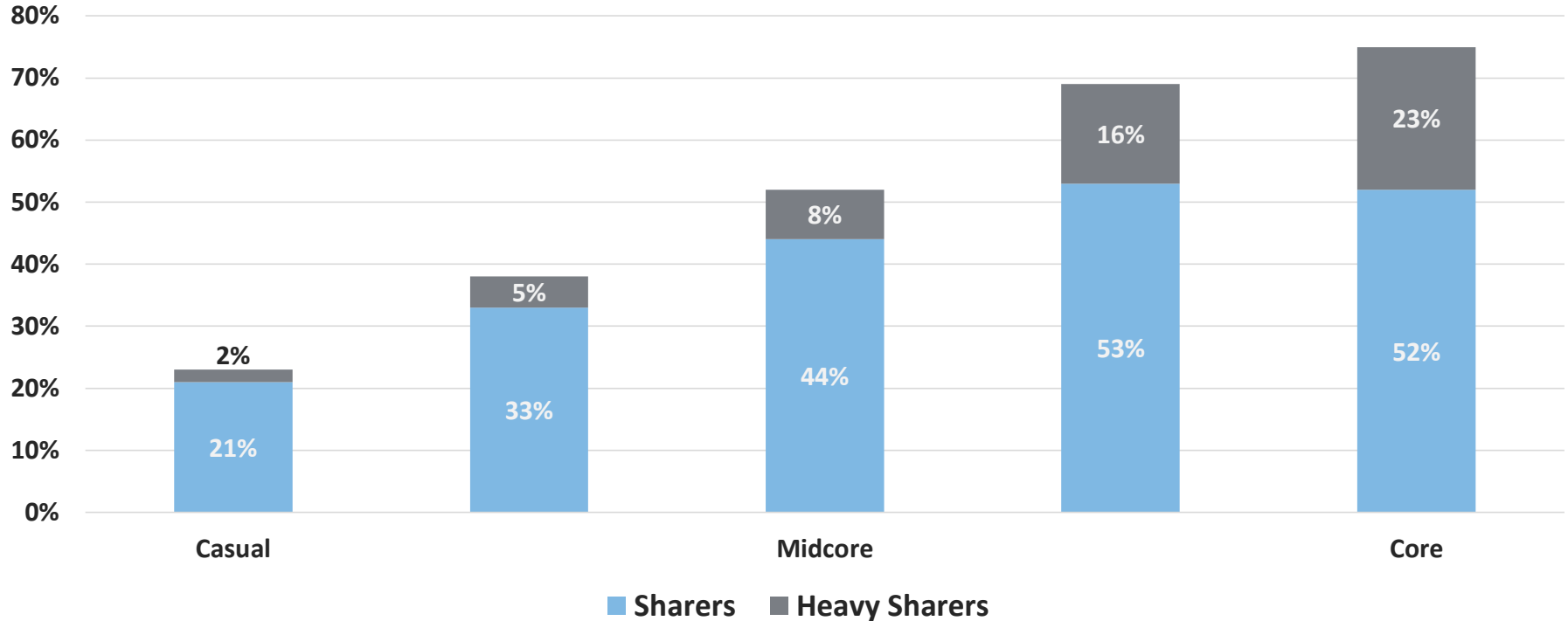
Sources Mobile Gamers Use to Discover Mobile Games

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

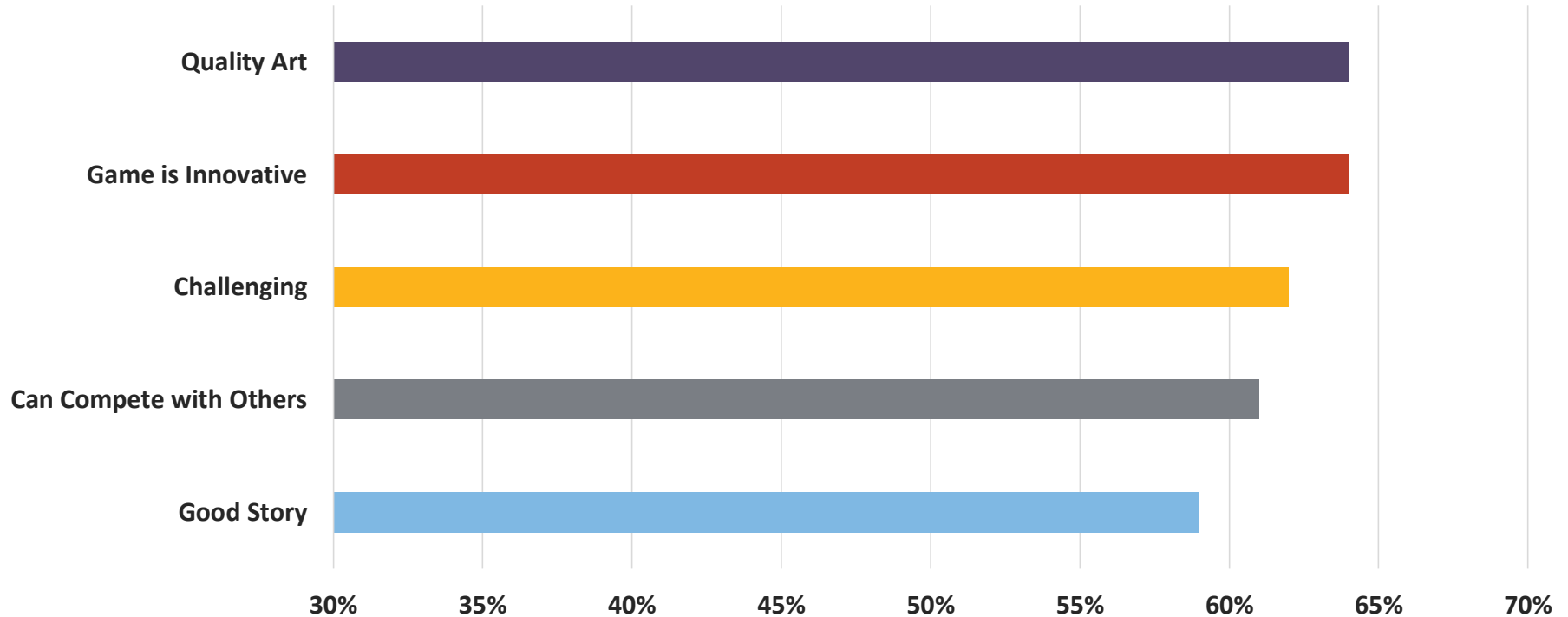


Source: EEDAR Mobile Report 2014

Mobile Player Sharing Propensity [Active Mobile Gamers][NA/Europe]



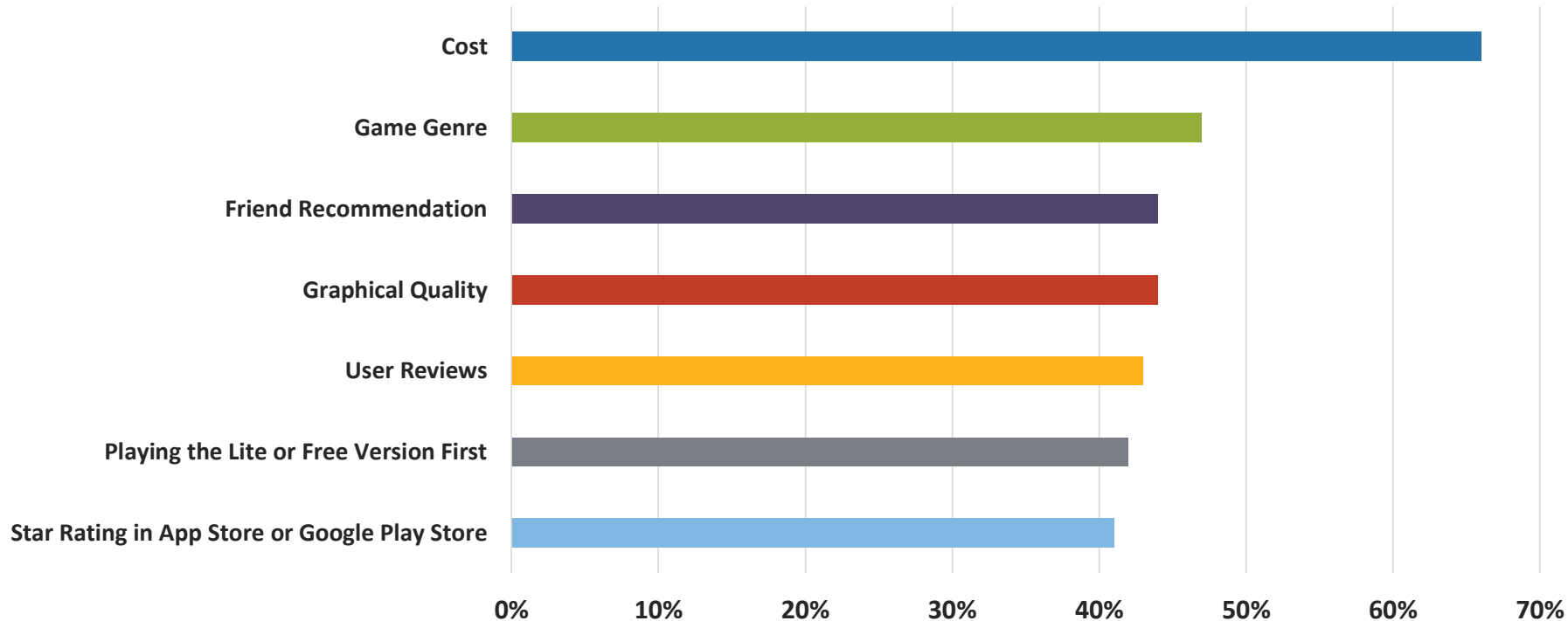
Features “Core” Mobile Games Share [Active Mobile Gamers][NA/Europe]



Source: EEDAR Mobile Report 2014

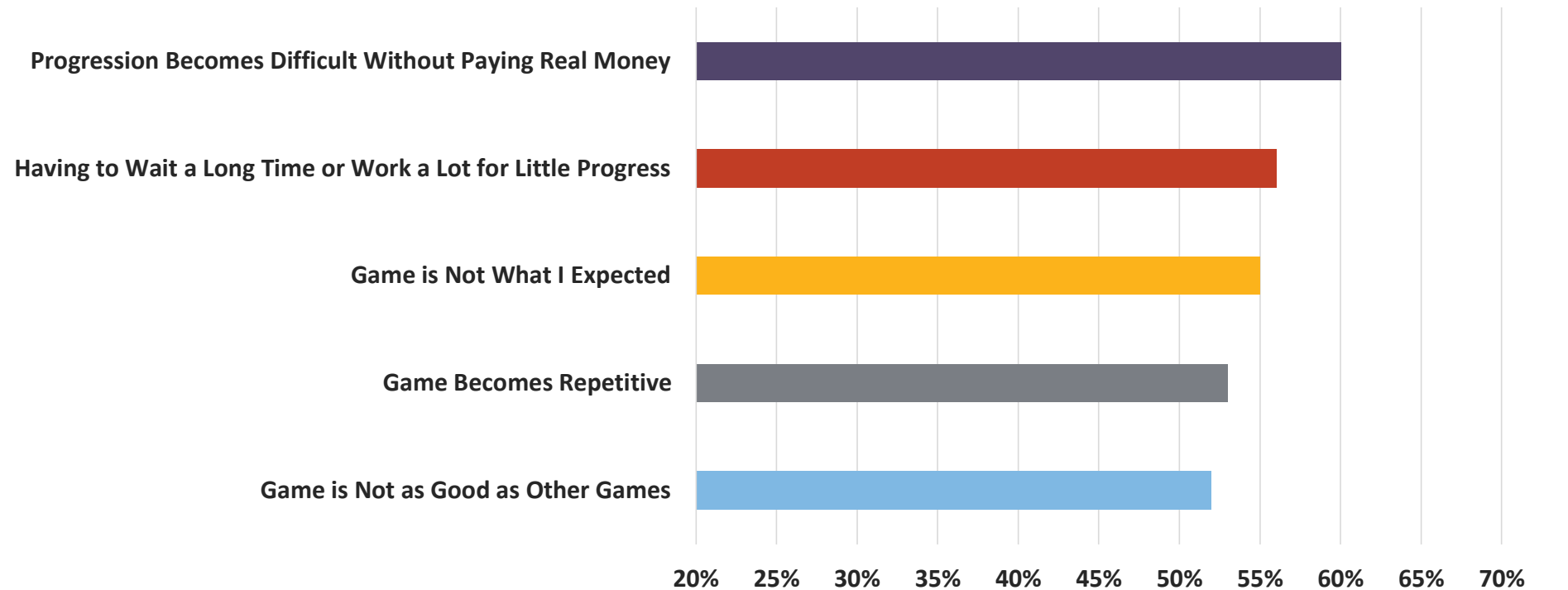
ACQUISITION

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



Source: EEDAR Mobile Report 2014

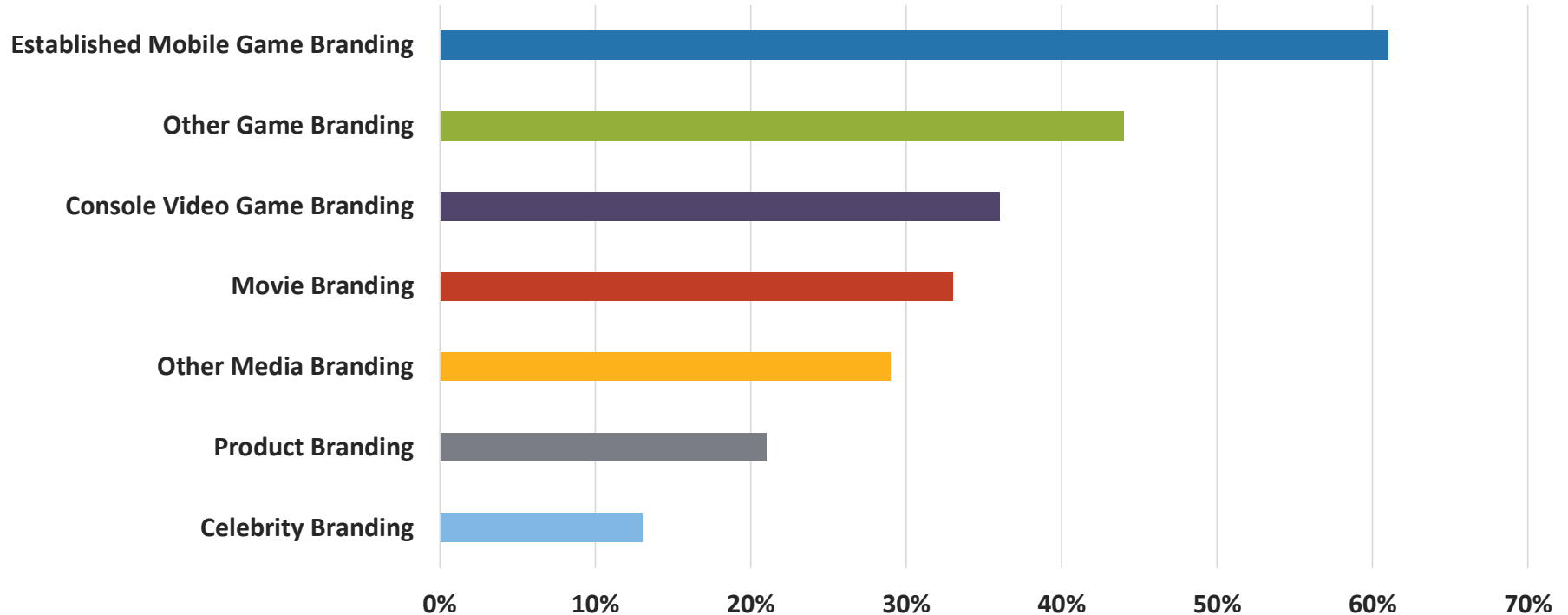
Reasons “Core” Mobile Gamers Stop Playing Mobile Games [Active Mobile Gamers][NA/Europe]



Source: EEDAR Mobile Report 2014



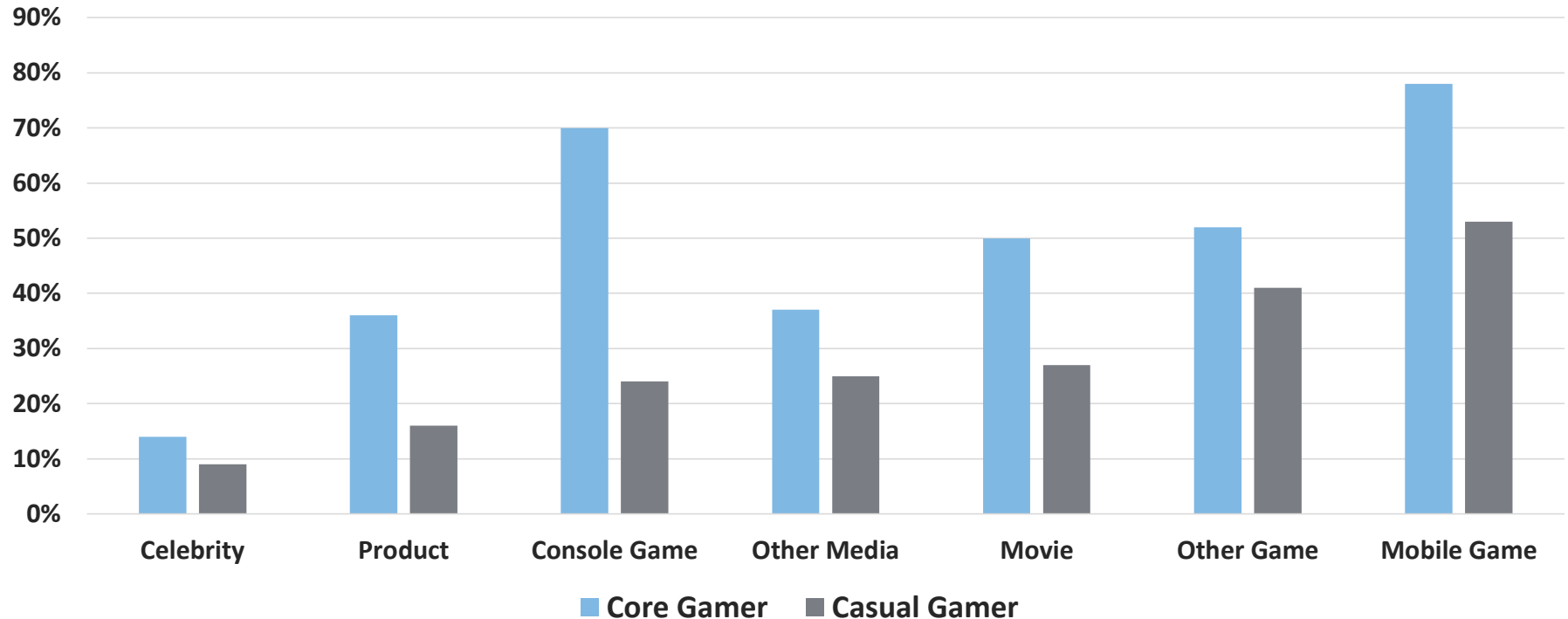
Influence of Brand on Mobile Game Downloads [Active Mobile Gamers][NA/Europe]



Source: EEDAR Mobile Report 2014

Influence of Brand on Mobile Game Downloads

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





The “Big Three” Western Social Media Sites

DIGITAL STOREFRONTS



amazon.com[®]



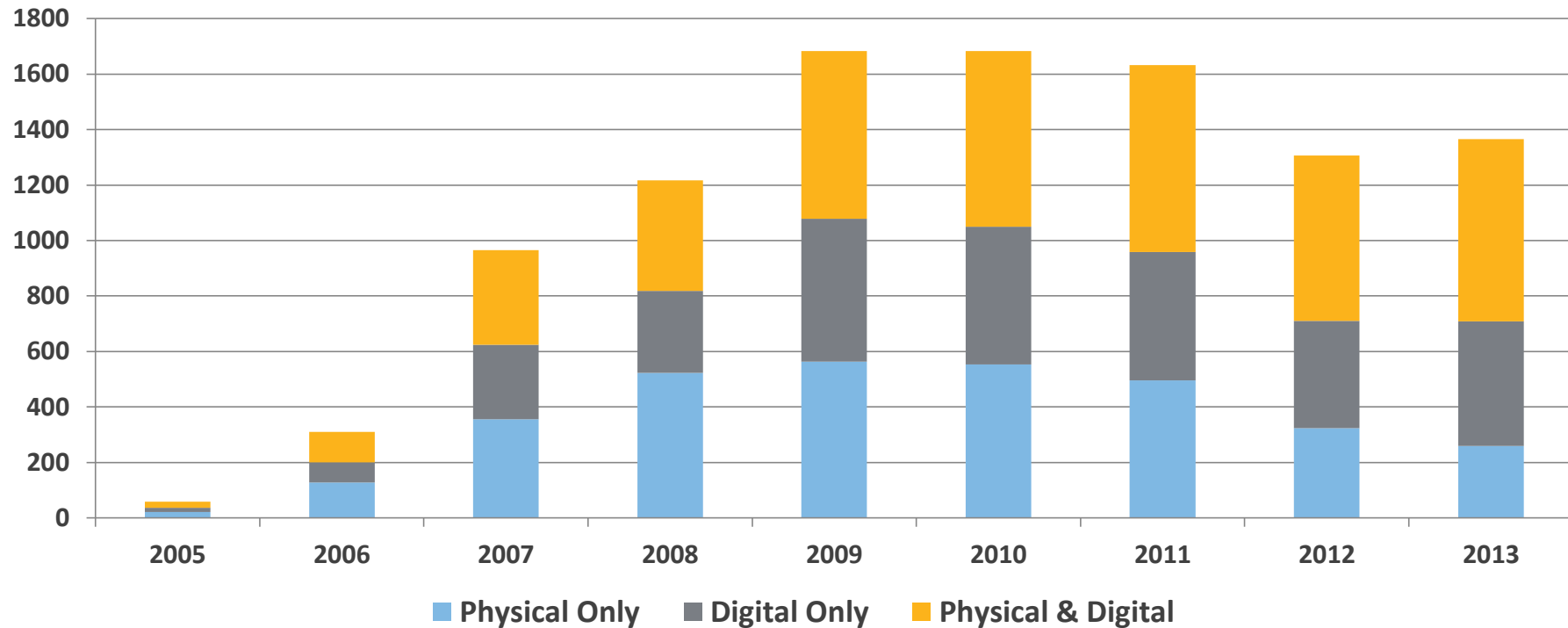
CONSOLE STOREFRONTS



DIGITAL RELEASES

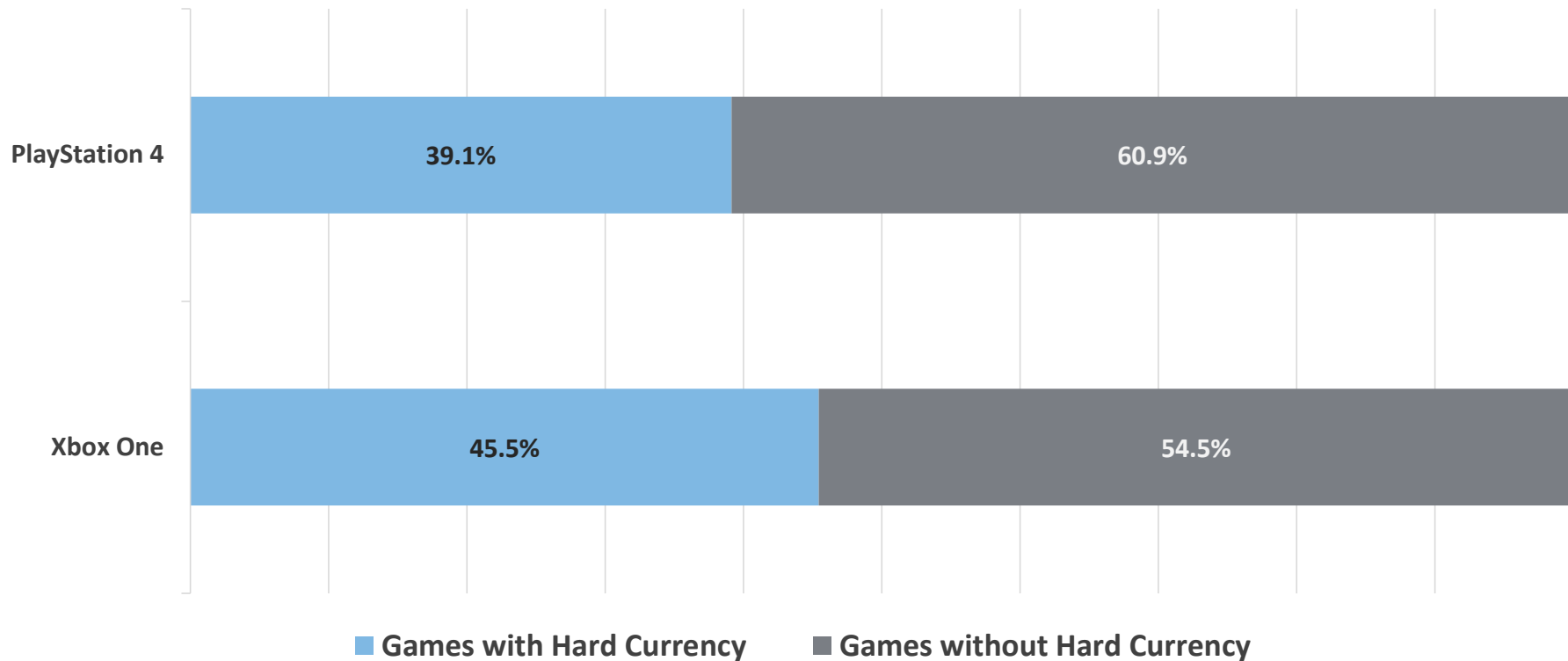
Digital and Retail Console Games Over Time

PS3, PS4, Wii, Wii U, 360 & XB1 in the USA



HARD CURRENCY

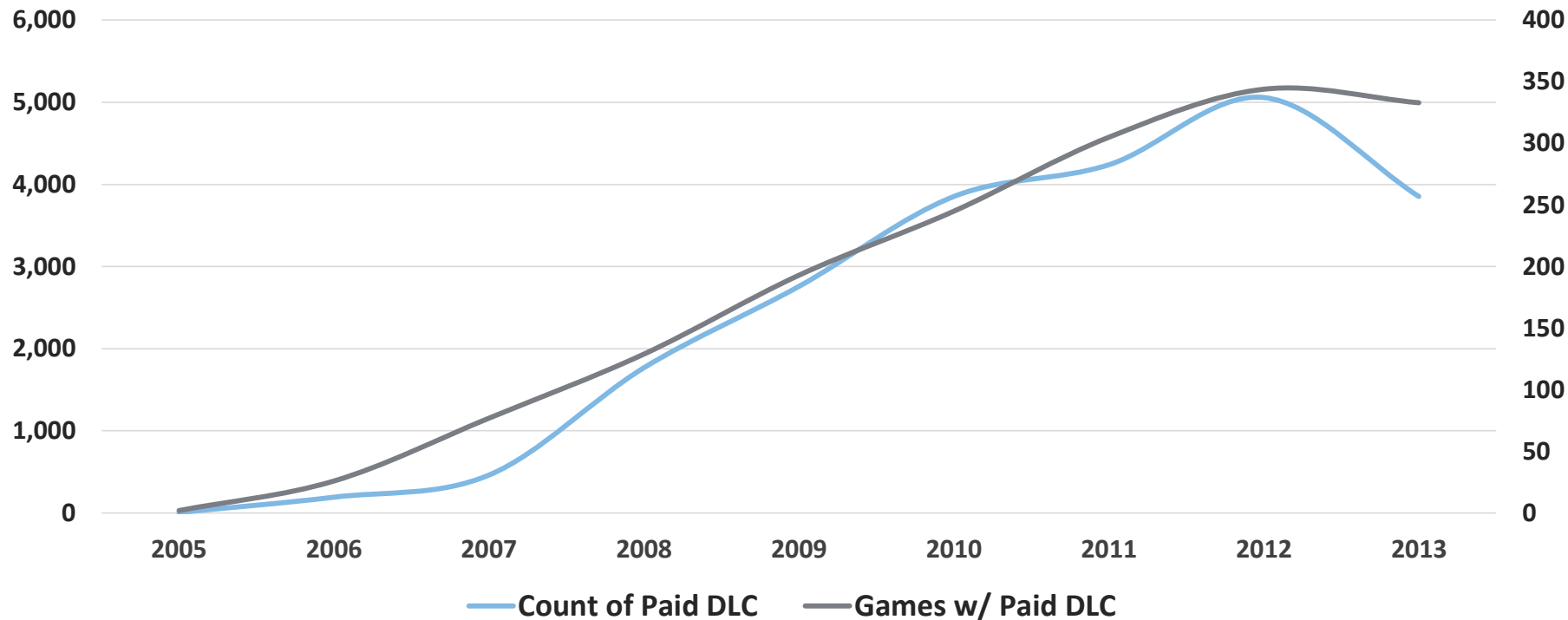
8th Gen Launch Titles using Hard Currency



GAME-AFFECTING DLC

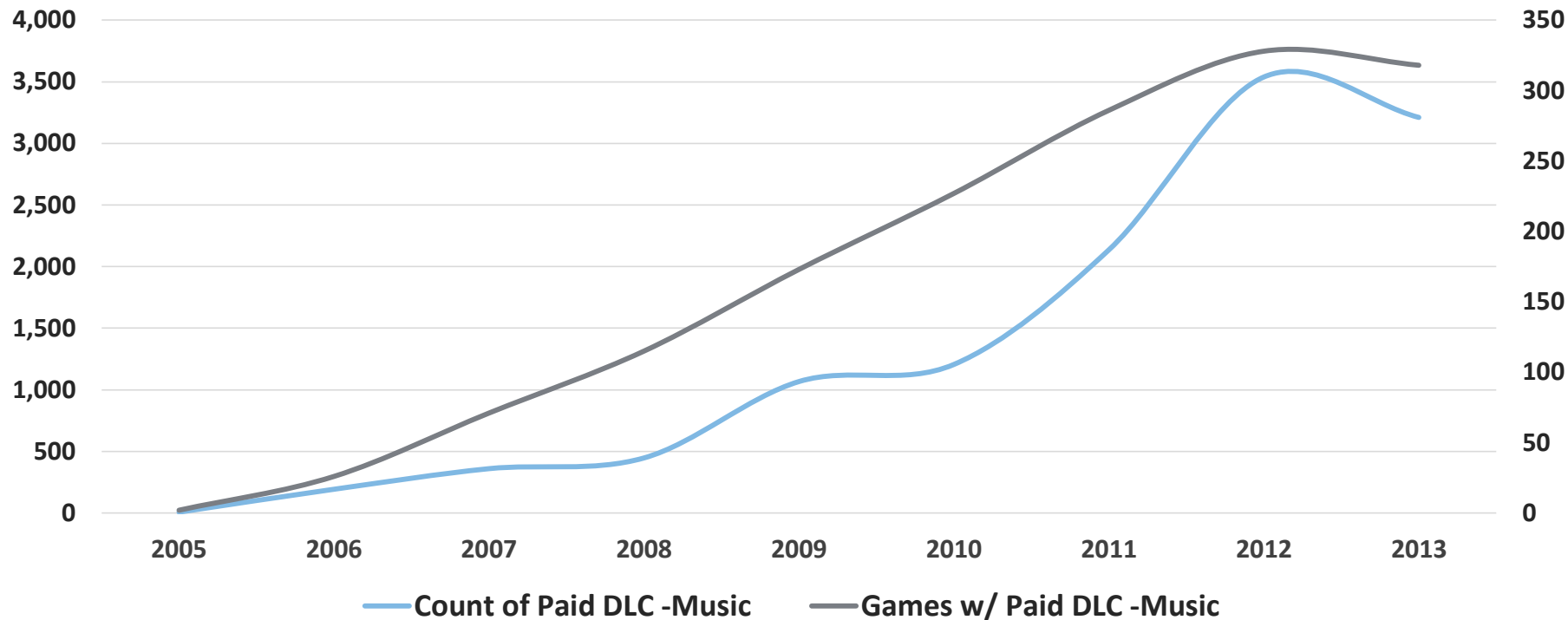
Game-Affecting DLC Prevalence

All PS3 & Xbox 360 Platform Titles



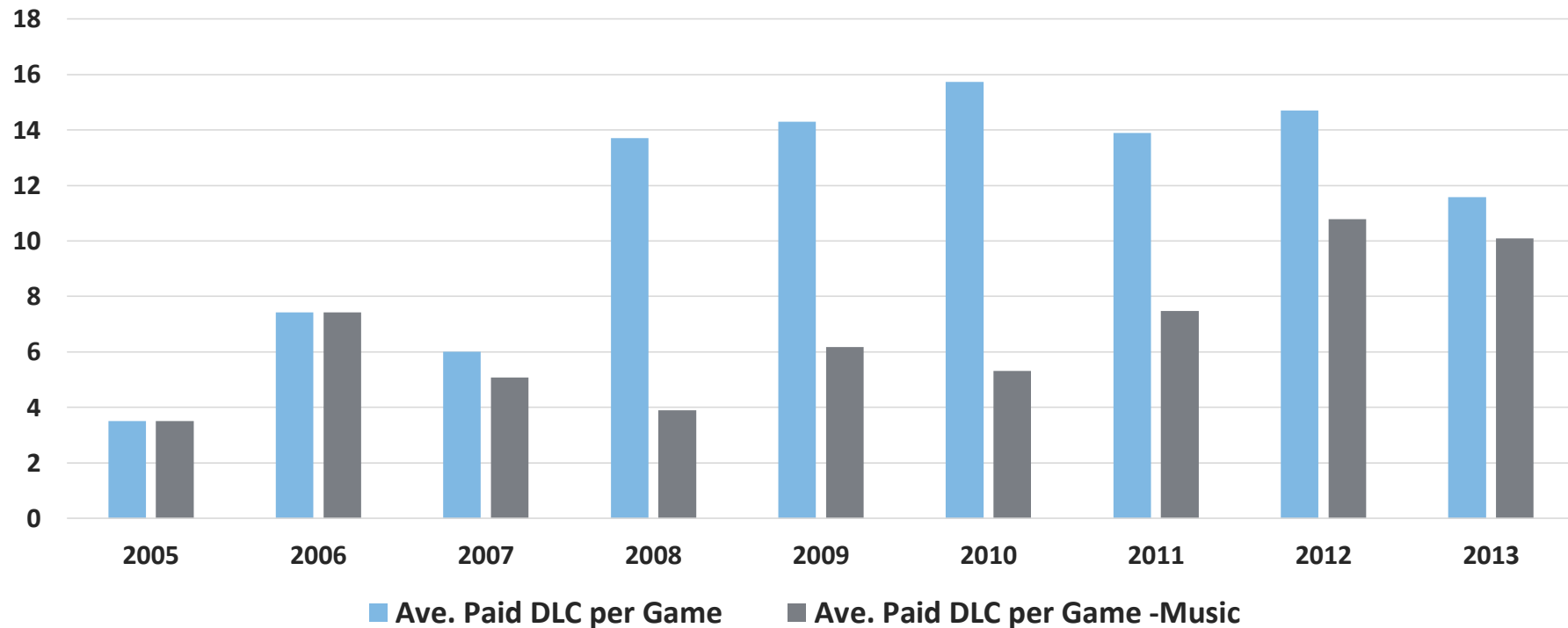
GAME-AFFECTING DLC

Game-Affecting DLC Prevalence removing Music Games
All PS3 & Xbox 360 Platform Titles



GAME-AFFECTING DLC

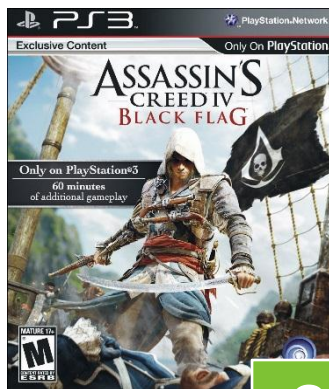
Average Quantity of Paid Game-Affecting DLC per Game
All PS3 & Xbox 360 Platform Titles



People that spend more money **on** mobile games
spend more money **in** mobile games.

THE QUALITY THRESHOLD

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



INFLUENCE OF REVIEWS



Group 1



Group 2

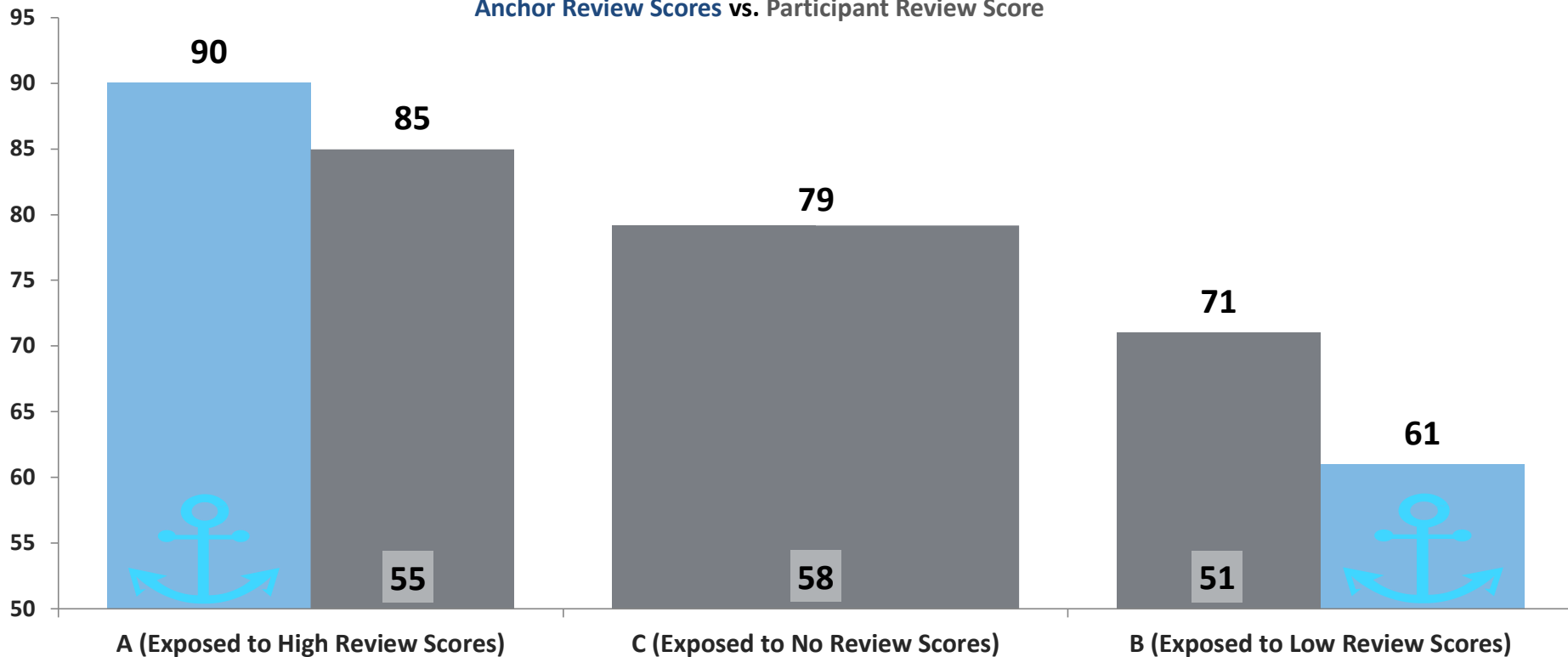


Group 3

INFLUENCE OF REVIEWS

SMU/EEDAR Study

Anchor Review Scores vs. Participant Review Score



Source: EEDAR



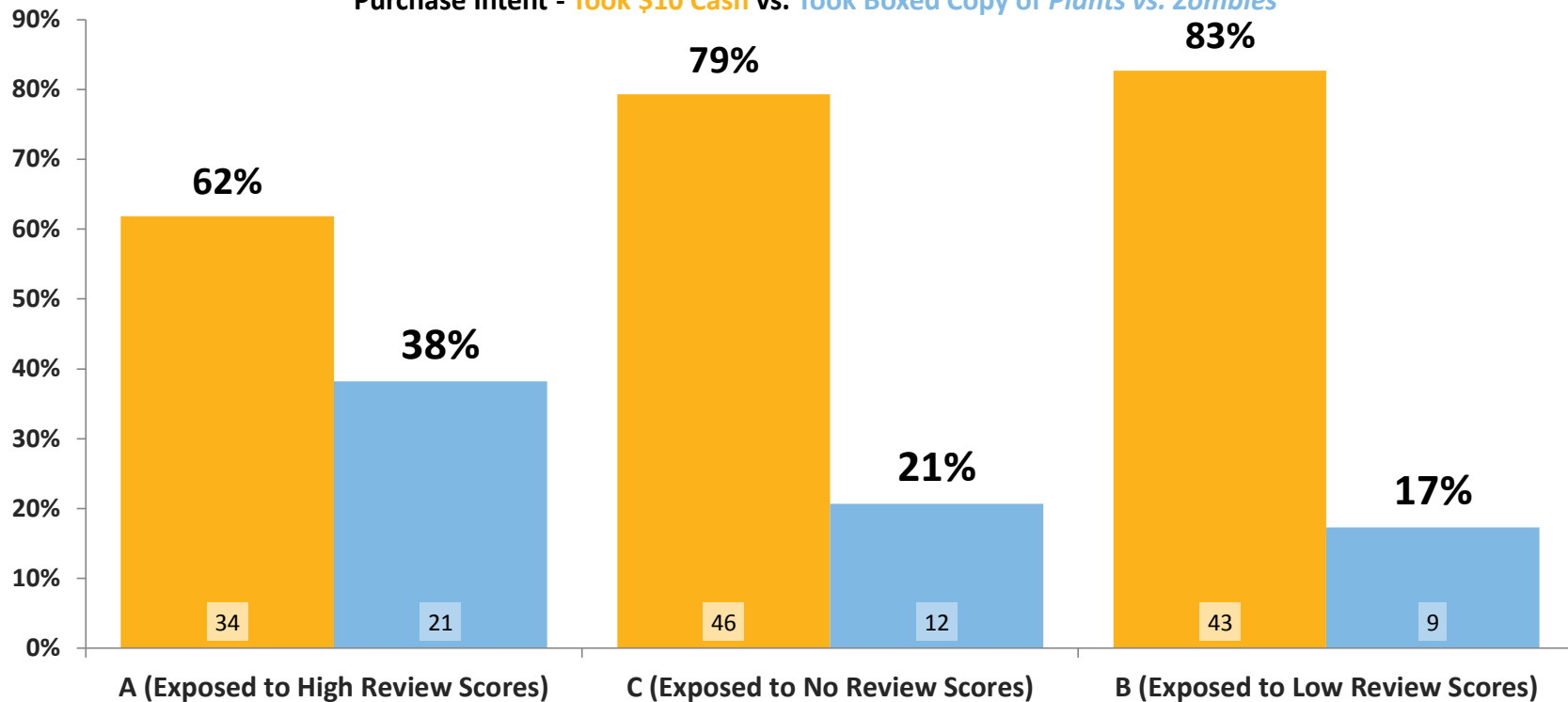
EEDAR

CONTEXT IS EVERYTHING

INFLUENCE OF REVIEWS

SMU/EEDAR Study

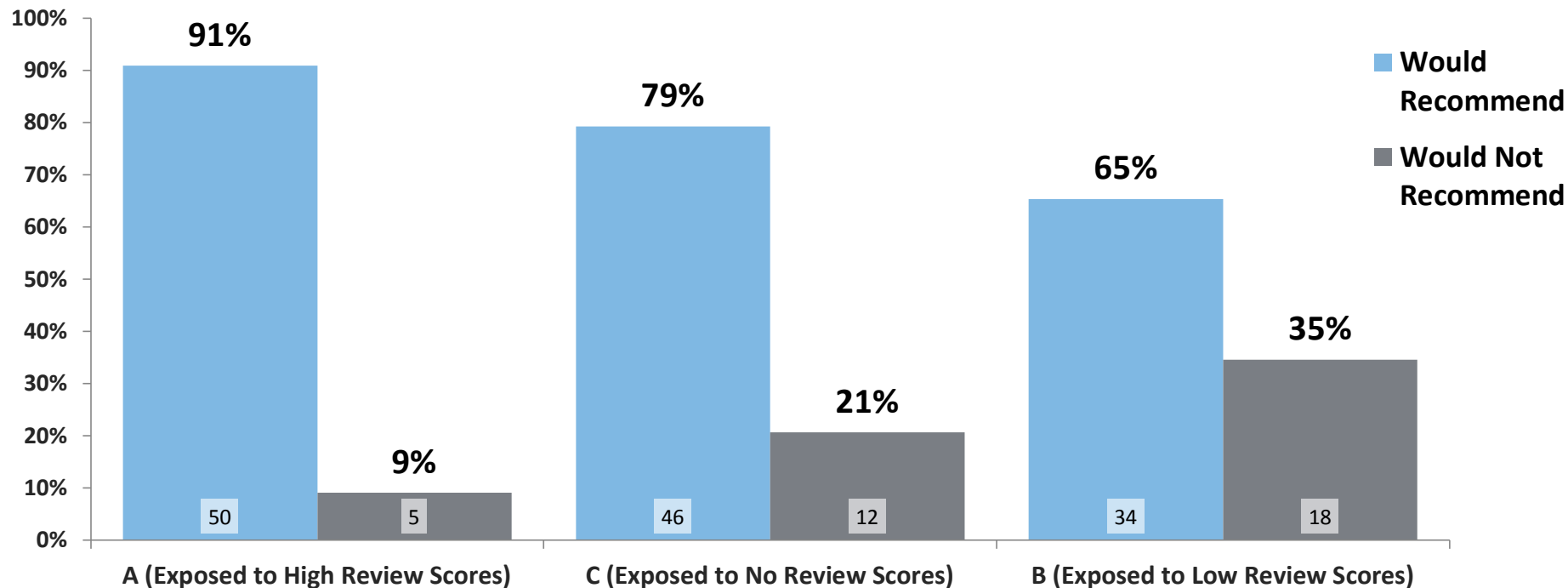
Purchase Intent - Took \$10 Cash vs. Took Boxed Copy of *Plants vs. Zombies*



INFLUENCE OF REVIEWS

SMU/EEDAR Study

Participants Willingness to Make a Positive Recommendation to a Friend/Relative



Source: EEDAR



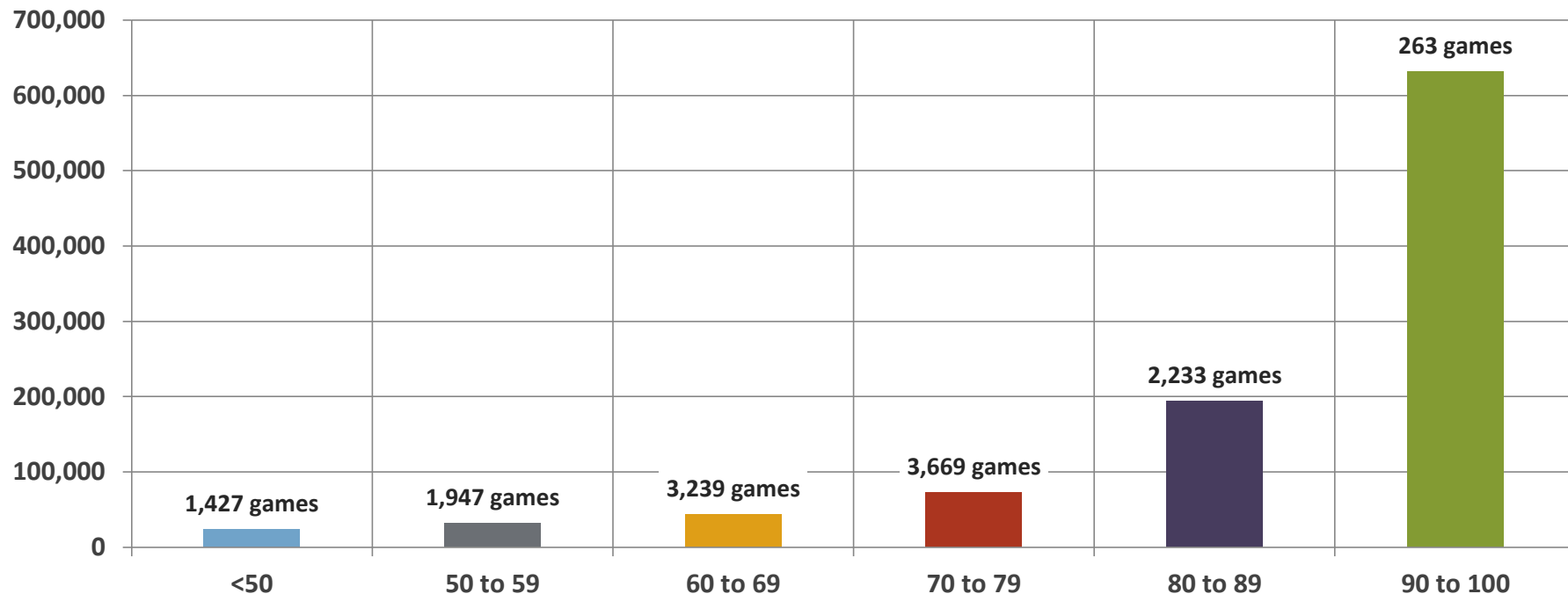
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CONTEXT IS EVERYTHING

GAME QUALITY

Ave. 3 Month [Unit Sales] by [Review Score]

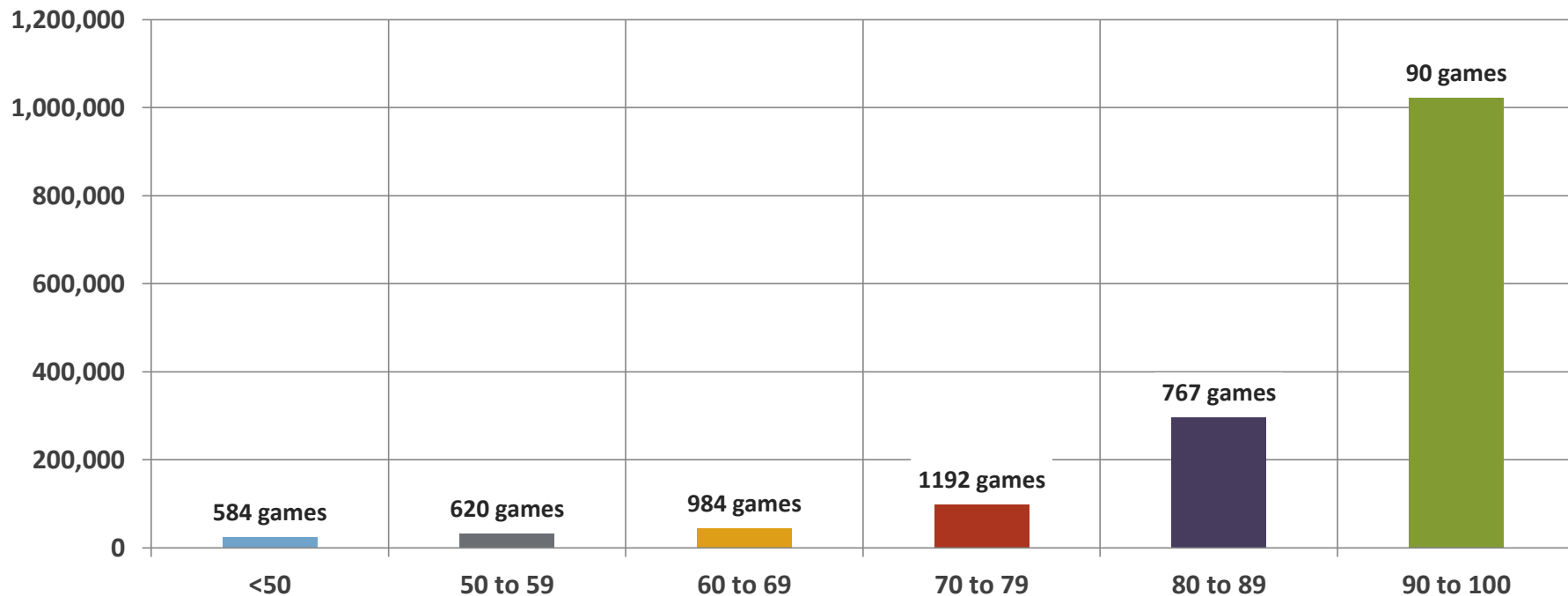
All Retail 6th, 7th and 8th Generation Console, Handheld and PC Platform Games in the U.S.A
Platform Launch through [December 2013]



Source: The NPD Group & EEDAR

GAME QUALITY

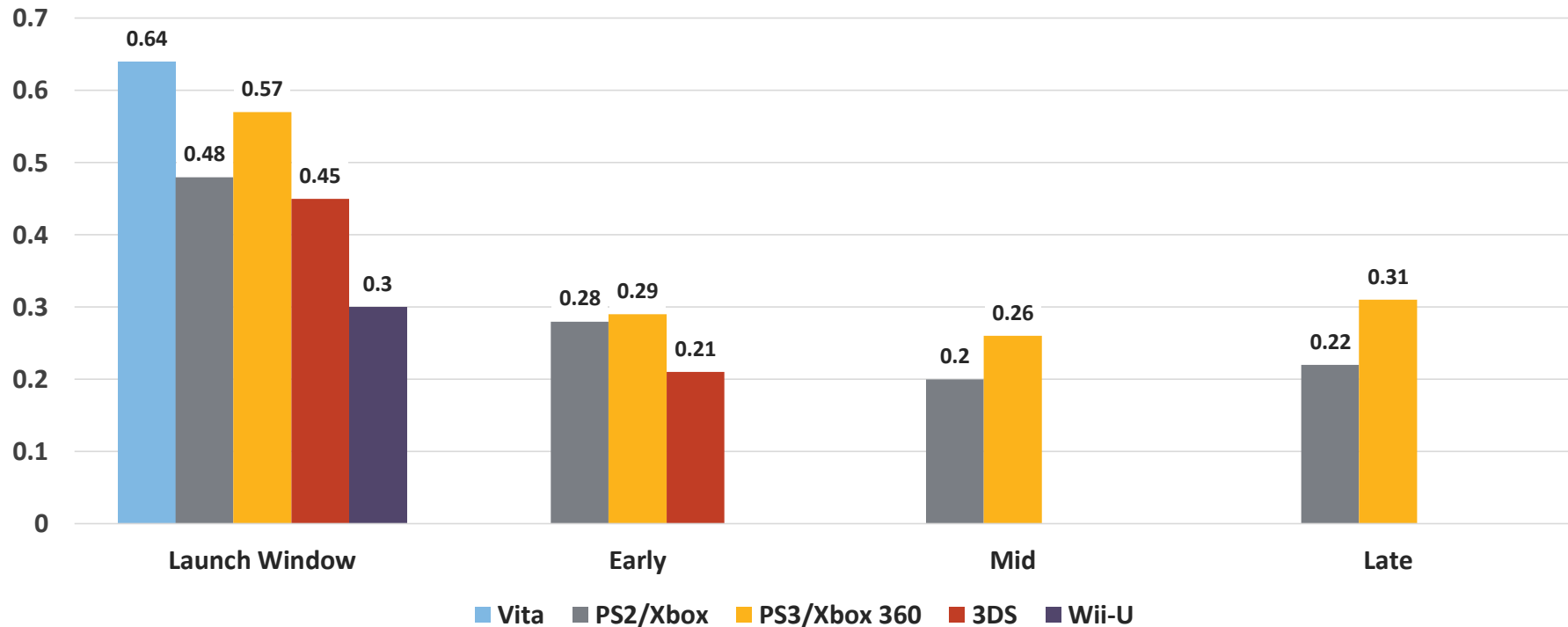
Ave. 3 Month [Unit Sales] by [Review Score]
All [U.S.] [Retail] [360, PS3, PS4, Wii, WiiU, XB1] games [Combined Editions]
Platform Launch through [December 2013]



Source: The NPD Group & EEDAR

GAME QUALITY

Review Score Correlation to Unit Sales
[Coefficient of Determination - R-Squared] [>10k Unit Sellers] [USA]



EEDAR

Source: EEDAR

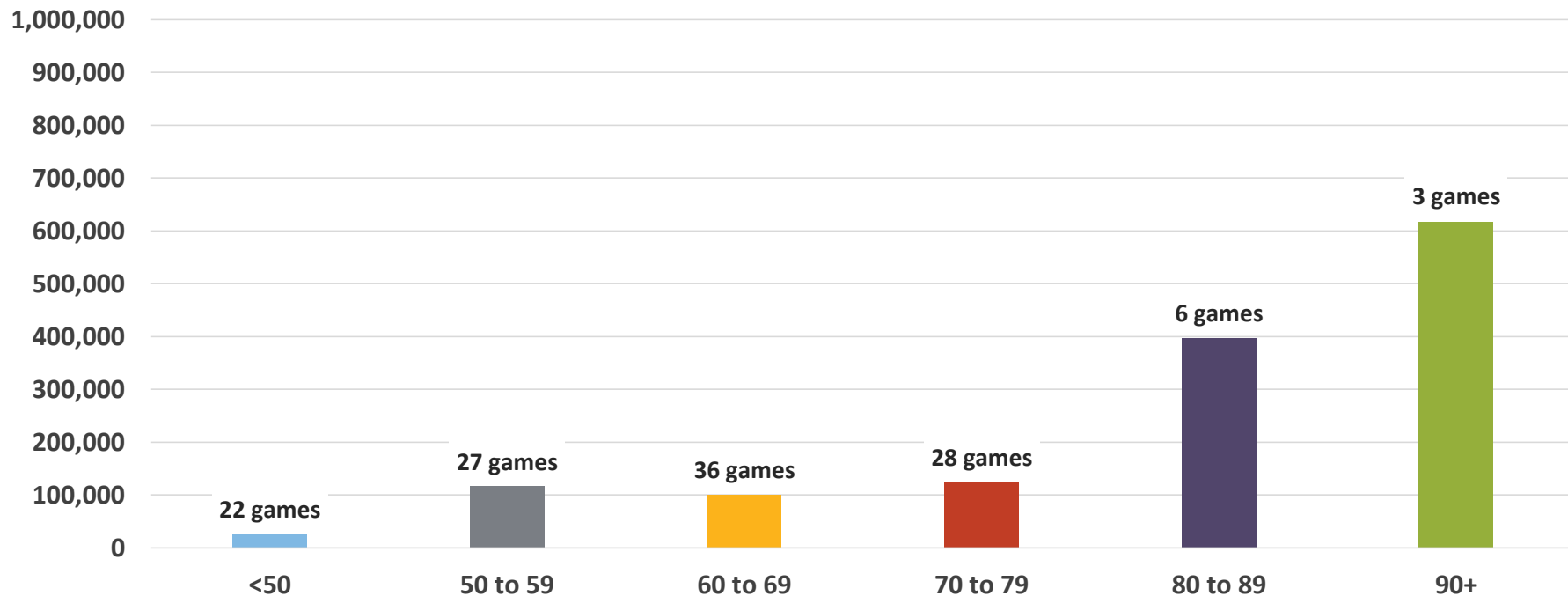
CONTEXT IS EVERYTHING

GAME QUALITY

Ave. 3 Month [Unit Sales] by [Review Score]

All [U.S.] [Wii] games [Combined Editions]

Platform Launch through [October 2007]



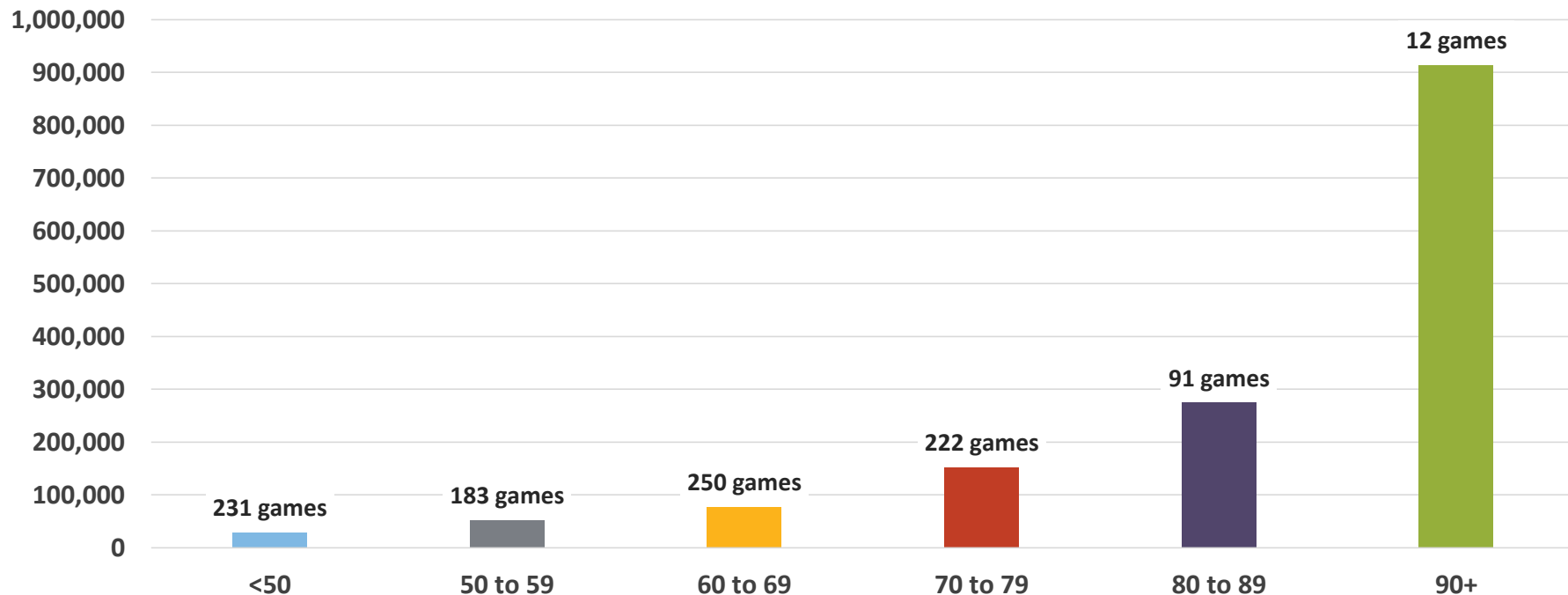
Source: The NPD Group & EEDAR

GAME QUALITY

Ave. 3 Month [Unit Sales] by [Review Score]

All [U.S.] [Wii] games [Combined Editions]

Platform Launch through [April 2013]



Source: The NPD Group & EEDAR

MARKETING VS. GAME QUALITY



There are **so many** games out there...

That if your game isn't **really** good...

AND doesn't spend a lot **marketing**...

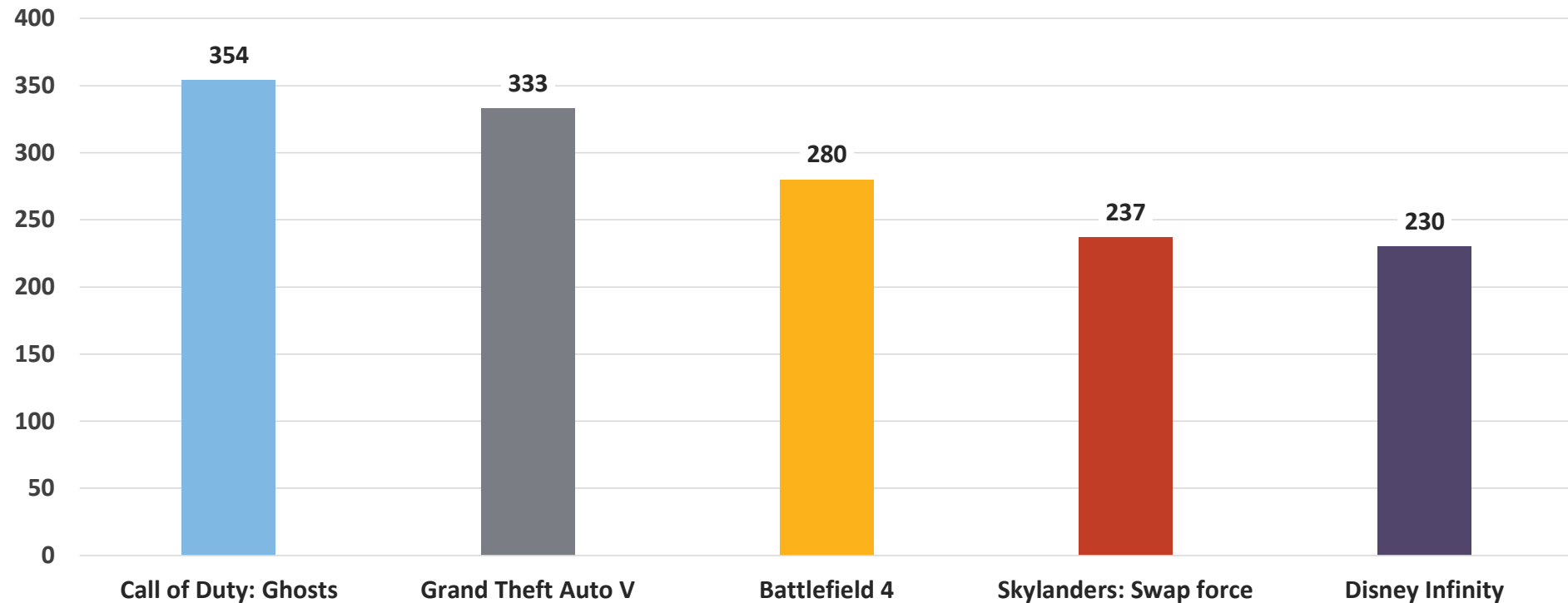
Nobody hears about it...

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] [2013] [USA]

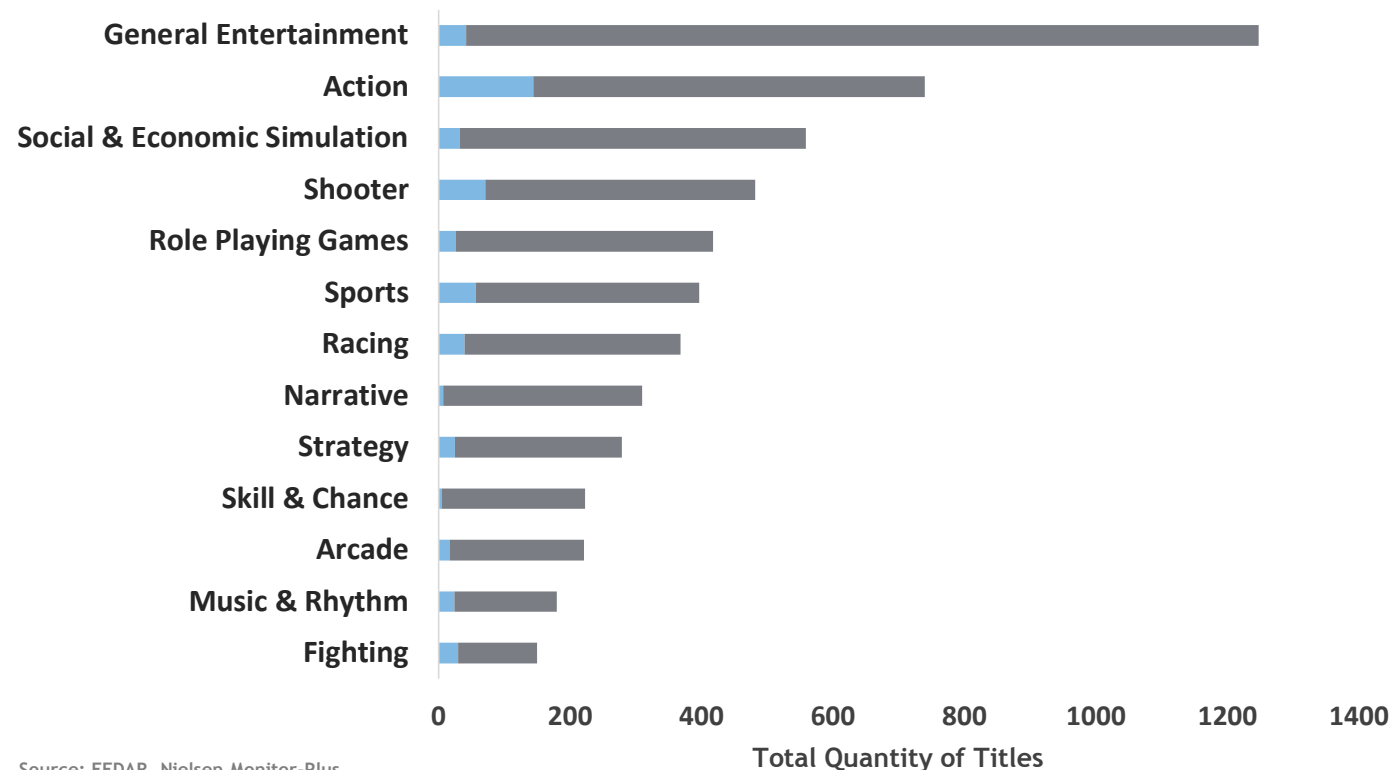


EEDAR

Source: EEDAR

CONTEXT IS EVERYTHING

DIRECT MEDIA SPEND SHARE

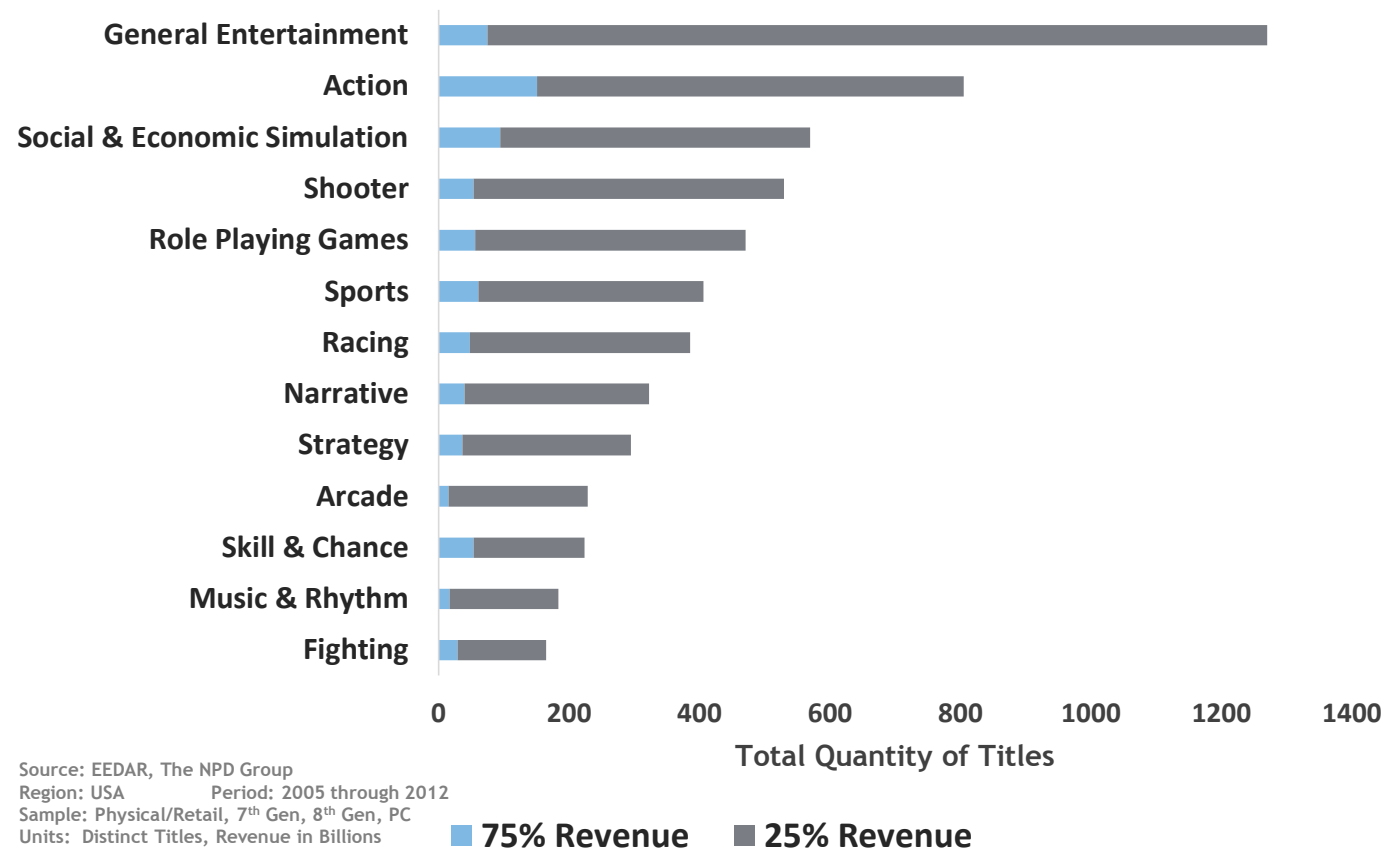


9.3%
OF RETAIL TITLES
ACCOUNT FOR
75%
OF DIRECT MEDIA
SPEND SINCE 2005.

Source: EEDAR, Nielsen Monitor-Plus
Region: USA Period: 2005 through 2012
Sample: Physical/Retail, 7th Gen, 8th Gen, PC
Units: Distinct Titles, Spend in Millions

■ 75% Revenue ■ 25% Revenue

RETAIL REVENUE TITLE SHARE



12.5%

**OF RETAIL TITLES
HAVE GENERATED**

75%

**OF RETAIL REVENUE
SINCE 2005.**

Source: EEDAR, The NPD Group
Region: USA Period: 2005 through 2012
Sample: Physical/Retail, 7th Gen, 8th Gen, PC
Units: Distinct Titles, Revenue in Billions

■ 75% Revenue ■ 25% Revenue

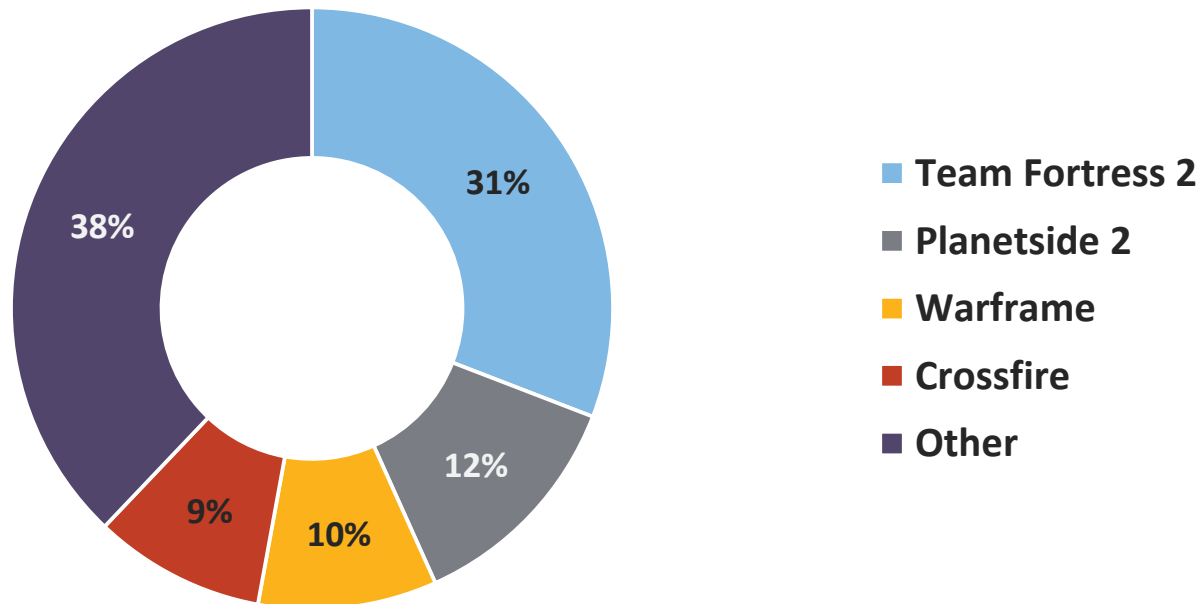
MARKET LEADERS

Western video games have seen market leaders emerge within each gaming vertical,

With the **top few titles** earning the **lion's share** of the **revenue** generated within that vertical.

MARKET SHARE LEADERS

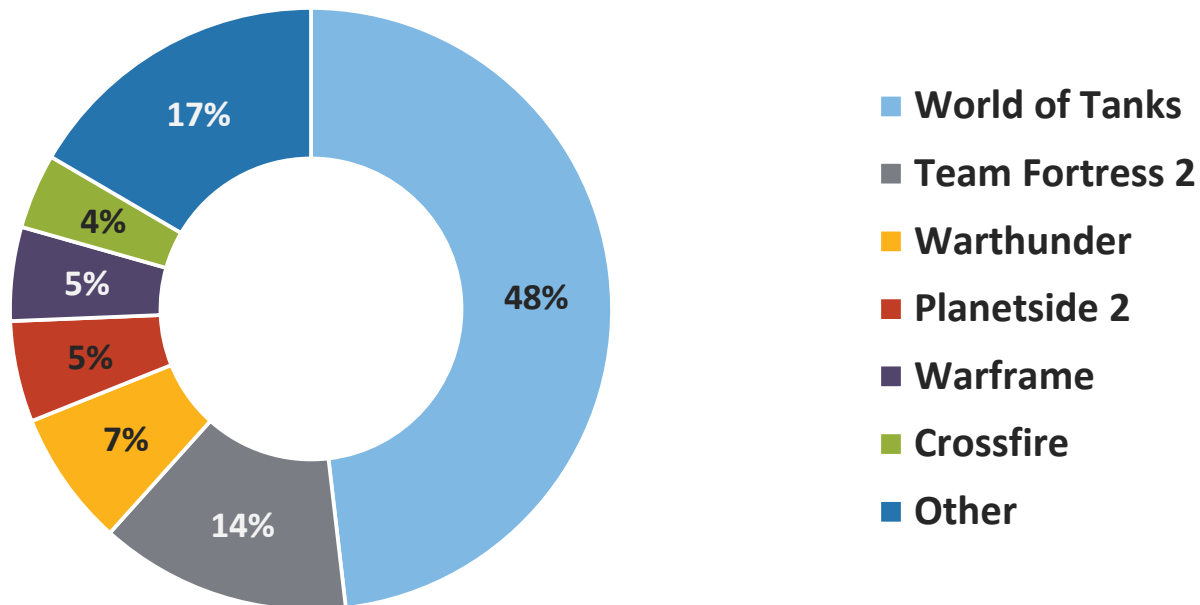
PC F2P Shooters
Western Market Share by DAU



MARKET SHARE LEADERS

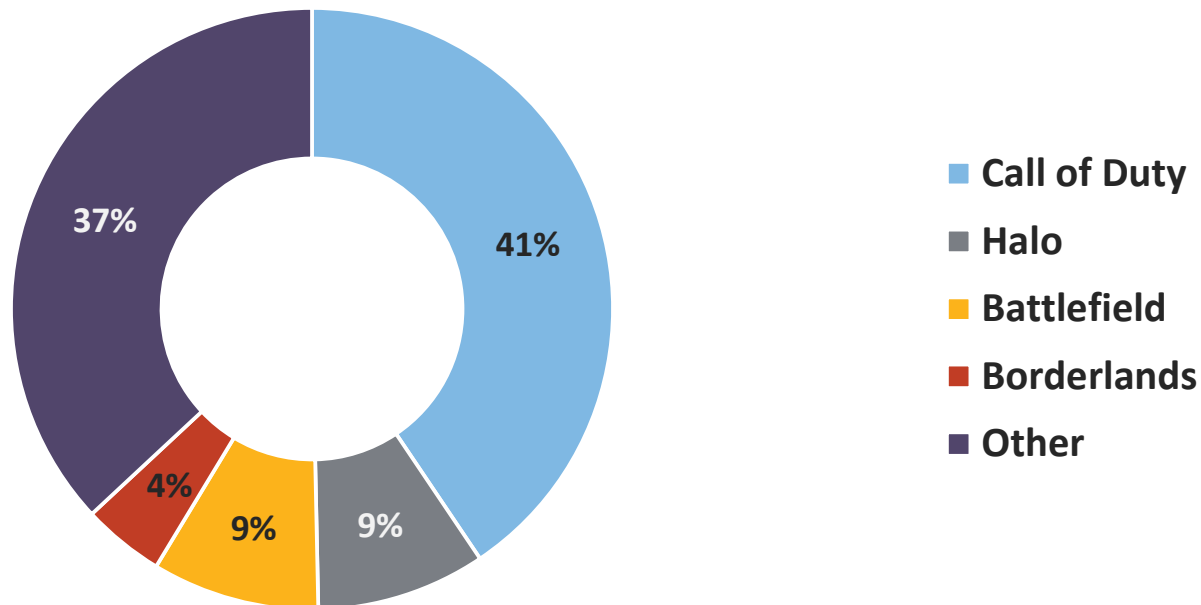
PC F2P Mechanized Shooters

Western Market Share by DAU



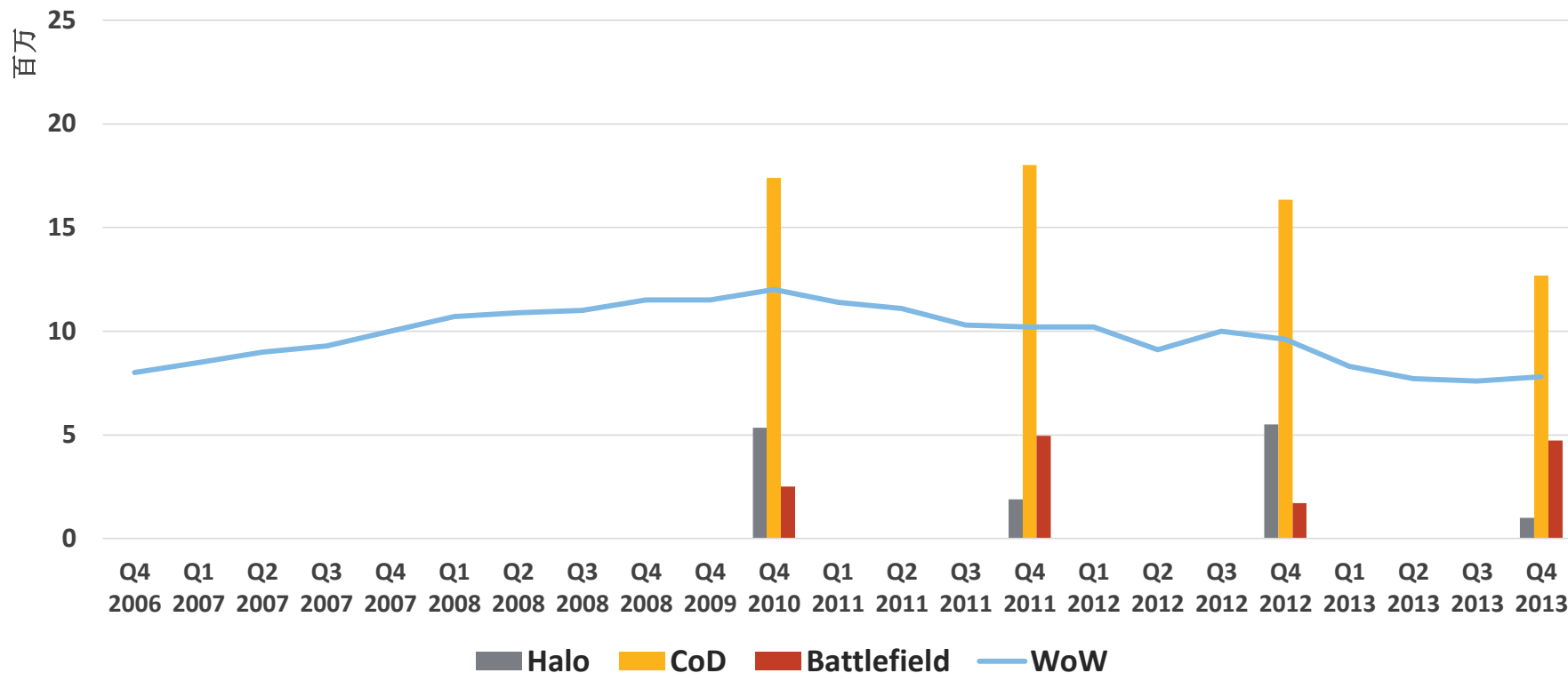
MARKET SHARE LEADERS

Retail Console/PC Shooters US Market by 2YR Unit Sales



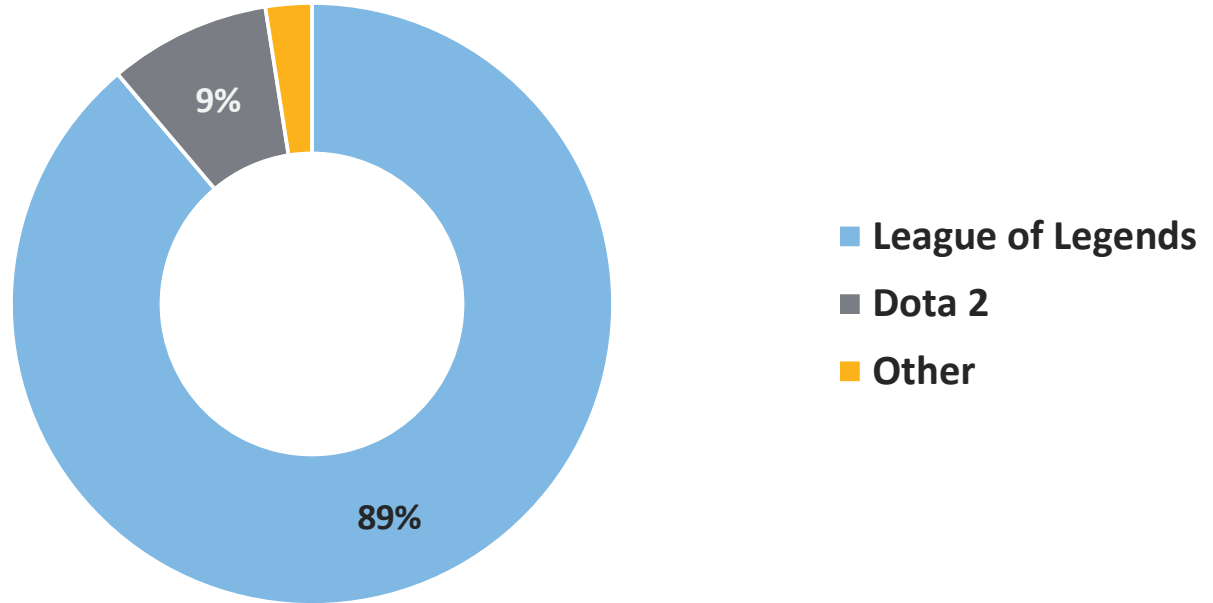
MARKET SHARE LEADERS

Active WoW Subscribers vs. 2YR US Shooter Unit Sales



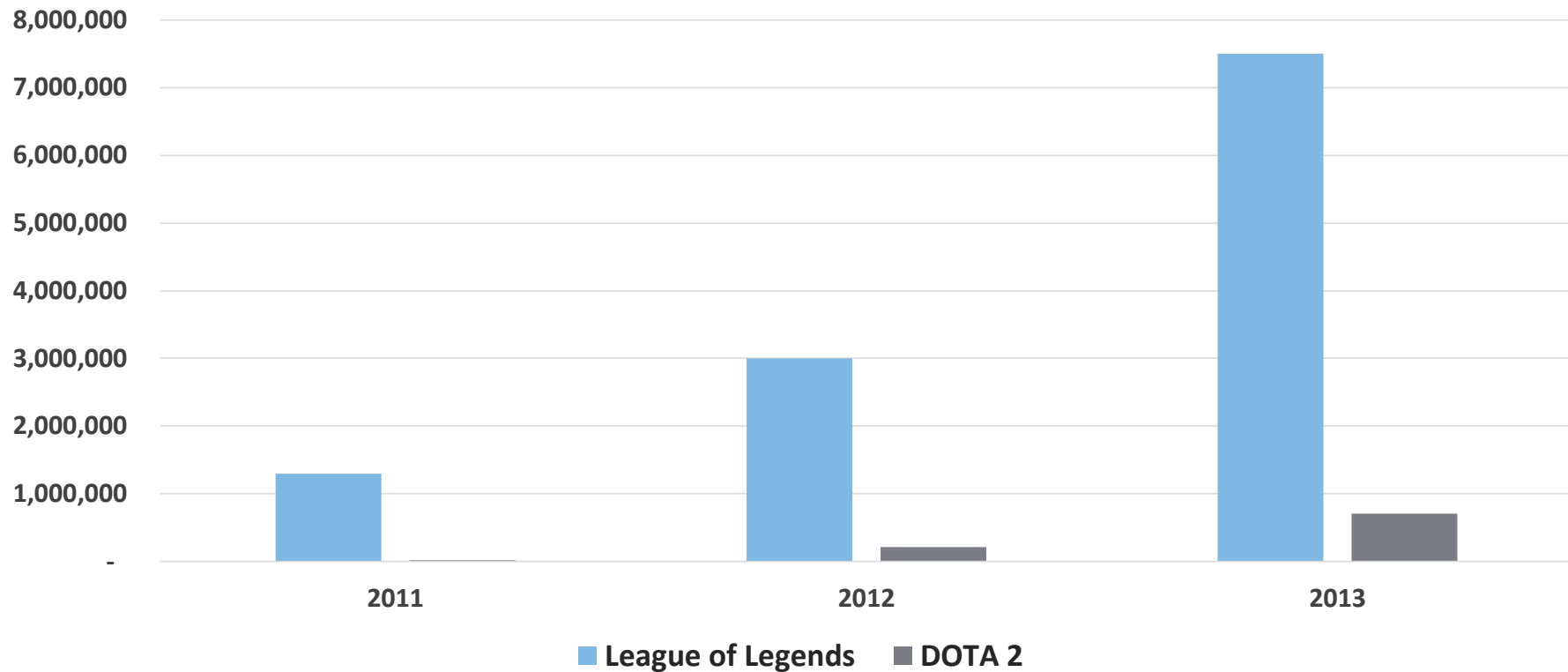
MARKET SHARE LEADERS

PC F2P MOBA
Worldwide by MAU



MARKET SHARE LEADERS

Top MOBA Concurrent Players Worldwide



THANKS FOR COMING

Awesome Video Game Data



Geoffrey Zatkin

Founder

gzatkin@eedar.com



EEDAR

CONTEXT IS EVERYTHING

