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SAN FRANCISCO

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The secret garden

- ④ Mobile Games and the 4% of the addressable marketplace who love them



Introduction to phones



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Introduction to phones

- ⌕ About 350 handset models in north america alone



Introduction to phones

⌘ Different resolutions

96x65 “series 30”

120x100

128x128 “series 40”

176x200 “series 60”

240x320 “QVGA”

⌘ Others

Landscape, alternating screen sizes



Introduction to phones

⊕ Different platforms

BREW

J2ME

Symbian

Windows Mobile

Linux



What have you got?

☹ Is this just a thing to talk on?



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What have you got?

⊕ There is more than meets the ear

Browser

Application Downloads

Network Connections

Native API access/Sandbox



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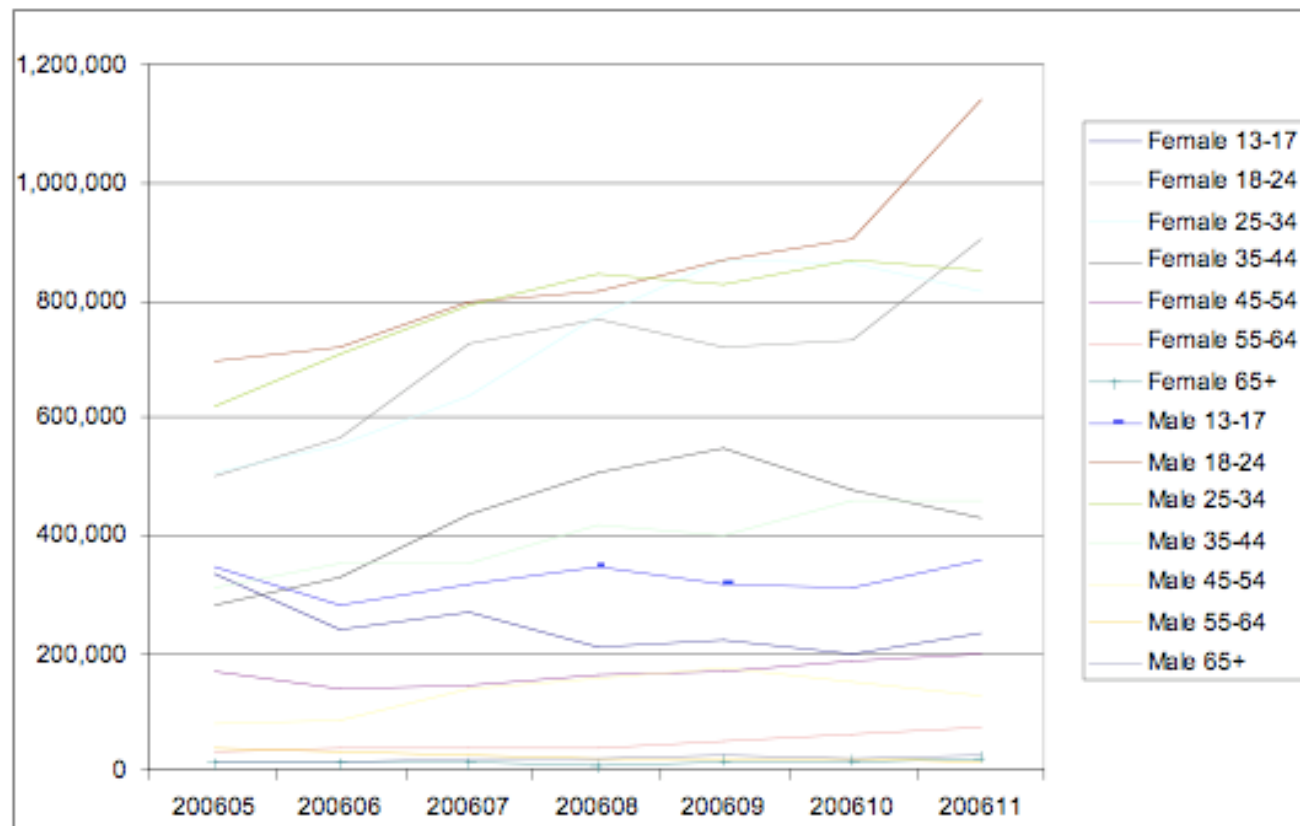
Some statistics

- David Gosen, Iplay:
“In the first half of this year we’ve seen our revenues increase by over 90 per cent over the same period last year.”
- 4% Marketplace penetration (M:Metrics)
- 30% of consumers want to play games (Sprint)
- Growing downloads (M:Metrics)
 - 4.5 million game downloaders in April 2006
 - 7.3 million in November 2006
- US retail revenues from mobile games totaled about \$500 million in 2006 after growing 30-40 percent (M:Metrics)
- At the end of 2006 36 publishers had ten or more titles on operator decks (M:Metrics)
!!Roughly a third as many as when EA became a publisher!!



Changing demographics

(source M:Metrics)





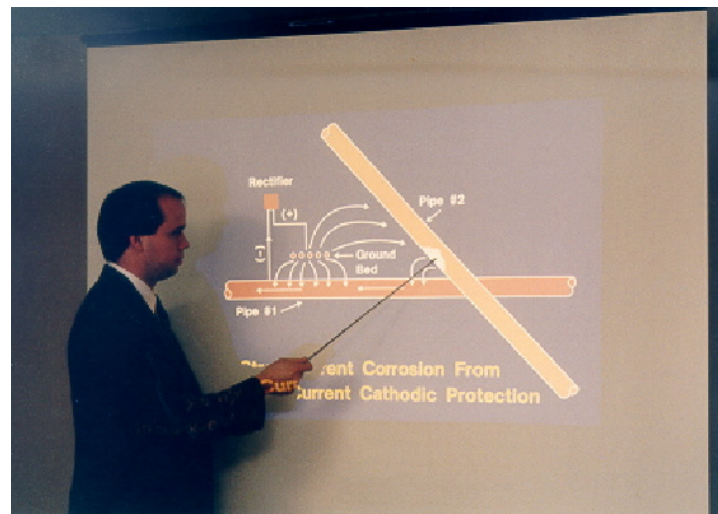
4% Marketplace penetration

- ⌘ Open gardens/closed gardens
- ⌘ Model is almost irrelevant
- ⌘ Poor discovery
- ⌘ Poor conversion
- ⌘ Almost a secret!!



How can we change this?

- ③ Educate the consumer





How can we change this?

Marketing



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How can we change this?

⊕ Great content

- ⊕ Super Mario Bros. (NES - 40 Million*)
- ⊕ Tetris (Game Boy - 33 Million*)
- ⊕ Super Mario Bros. 3 (NES - 18 Million)
- ⊕ Super Mario World (SNES - 17 Million)
- ⊕ Super Mario Land (Game Boy - 14 Million)
- ⊕ The Sims (PC - 10 Million)
- ⊕ Super Mario Bros. 2 (NES - 10 Million)
- ⊕ Grand Theft Auto: Vice City (PS2 - 8.5 Million)
- ⊕ GoldenEye 007 (N64 - 8 Million)
- ⊕ Donkey Kong Country (SNES - 8 Million)
- ⊕ Super Mario Kart (SNES - 8 Million)
- ⊕ Half-Life (PC - 8 Million)
- ⊕ Starcraft (PC - 8 Million)
- ⊕ Tomb Raider II (PS1 - 8 Million)
- ⊕ Final Fantasy VII (PS1 - 7.8 Million)
- ⊕ Myst (PC - 7 Million)
- ⊕ Gran Turismo 3 (PS2 - 7 Million)
- ⊕ Halo 2 (Xbox - 6.3 Million)
- ⊕ Super Mario 64 (N64 - 5.94 Million)

Source: NPD * — *Includes copies bundled with the platform*



How can we change this?

③ “The breakthrough title”

Myst

Wing Commander

Halo



In the beginning...

- ⌚ Early platforms for games
 - C64, Nintendo, Sega, Atari, Apple
- ⌚ Wide variety of games
 - Role of brands and licenses
 - ⌚ Dr J vs Larry Bird, Madden
 - Original IP
 - ⌚ M.U.L.E., Ultima, Zork



In the beginning 2.0...

- ⌚ Early phones with fragmented platforms
BREW, J2ME, Symbian
- ⌚ Wide variety of games
Role of brands and licenses
 - ⌚ Bejeweled, Fox Sports, TetrisOriginal IP
 - ⌚ JAMDAT games, Skipping Stone



The titles today

- ④ 1200 titles on offer in December compared to 911 in January (M:Metrics)
 - On carrier decks
- ④ Off deck alternatives
 - Gamejump.com
 - Thumbplay.com
 - Playphone.com
 - Handango.com
- ④ Title sales
 - Blockbusters prevail...
 - Comparable to Hollywood?



The titles tomorrow

- ③ What does a phone have going for it?
 - Input is poor
 - Screen is poor
 - Memory is small





The titles tomorrow

- ③ What does a phone have going for it?
 - Connectivity
 - Huge volumes
 - ③ 1 in 3 people in the world has a cell phone





How to leverage best features?

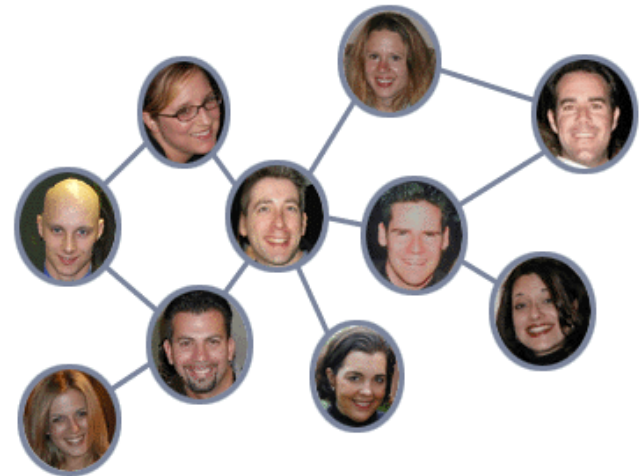
⊕ Mobile “web 2.0” not yet here

Social networking

Community

Tagging

Rating



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The down side

☹ Welcome to porting!





The down side





Porting 101

- ⌘ Big pain in the neck
- ⌘ Carriers need handsets on all phones
 - Multiple platforms
 - Firmware oddities
- ⌘ Vendors
 - OpenPath, Z-Axis
- ⌘ Platforms
 - Javaground, Tira
- ⌘ Homegrown solutions



So you have a mobile title...

⊕ Some tough questions



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So you have a mobile title...

⊕ How can you get a carrier to care?



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So you have a mobile title...

③ How can you get a publisher to care?



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So you have a mobile title...

⊕ How can you get a customer to care?



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So you have a mobile title...

☹ Did you check if your mom cares?



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Who is your consumer?

- ③ Mass Market vs Niche Market
- ③ Seinfeld vs World of Warcraft





The Mass Market

- ⊕ The “ideal” consumer
- ⊕ Genres
 - Sports
 - Casual
 - Puzzle

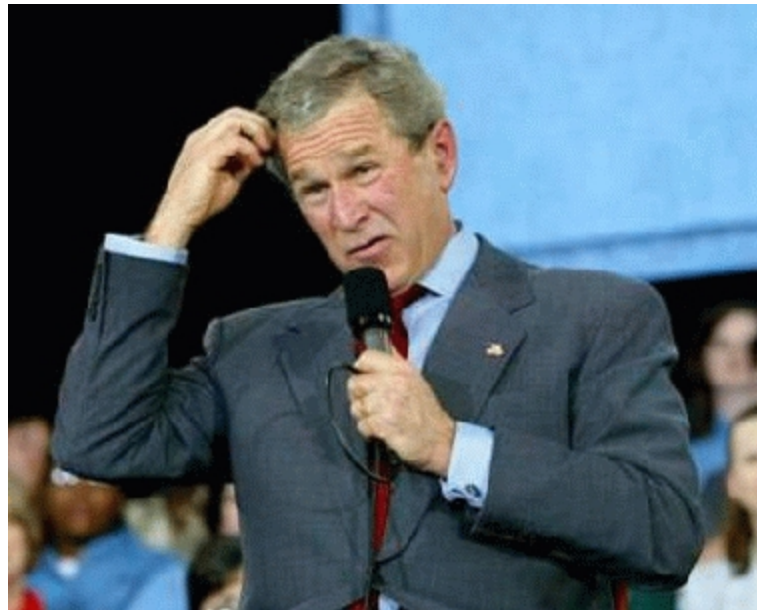


The Niche Market

- ⊕ Hardcore gamers
- ⊕ Genres
 - Sports
 - Action
 - RPG
- ⊕ Sports x2 ??
 - Subject matter maybe more than genre...



What does this all mean?



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What does this all mean?

- ③ Market is not very well understood



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- ③ Market is not very well understood
- ③ Not yet an industry



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- ⌕ Market is not very well understood
- ⌕ Not yet an industry
- ⌕ Transparency is improving



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- ⌕ Transparency is improving
- ⌕ Opportunity to redefine marketplace
- ⌕ Changes in distribution models
- ⌕ The future of content!



Some opportunities

- ③ MMOs
- ③ Serial content
- ③ Cross platform
- ③ Advertising in games/Advergaming
- ③ Game of the month
- ③ Viral games



Thanks for your time!!

👤 Questions?

John Szeder

john@mofactor.com

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