

The background of the slide is a complex, abstract network diagram. It consists of numerous nodes of varying sizes and colors (dark blue, light blue, and grey) connected by thin, light grey lines. Some nodes are highlighted with larger, concentric circles. The overall aesthetic is modern and technological.

# FINAL PROJECT PRESENTATION

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# AGENDA

- Expectations and Goals
- Reviewing GameCo. History
- Analyzing the 2010 decade
- Recommendations

# EXPECTATIONS AND GOALS

## Expectations

- GameCo. has perceived the current sales velocity to have remained the same over time in our regional markets.

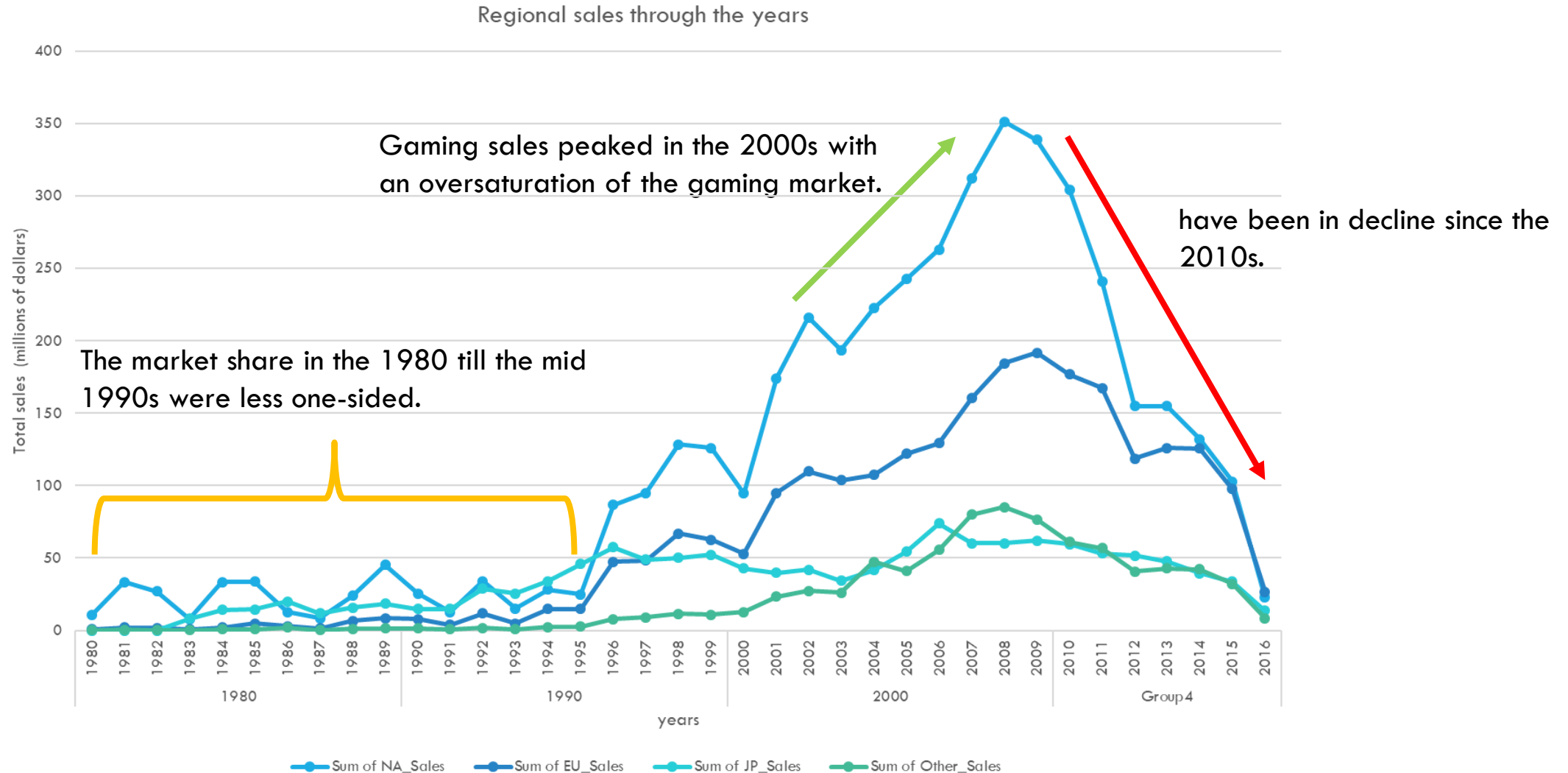
## Goals

- This analysis serves to see the past historical data of the regional gaming markets to foresee where the 2017 marketing budget should be allocated.



# REVIEWING GAMECO. HISTORY

# GAMECO'S GLOBAL SALES (\$ 351 M) PEAKED IN 2008 AND HAVE SEEN DOWNWARD TREND SINCE THEN

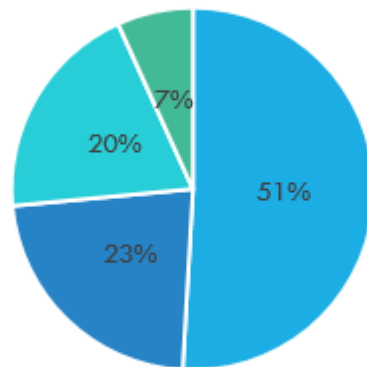


# GAMECO'S GLOBAL AND REGIONAL SALES HAVE BEEN THROUGH CONSTANT FLUCTUATION DURING 1980 - 2016

Looking at the sales throughout the years, we can see that through the decades that the market has fluctuated quite a bit. But there have been two constants:

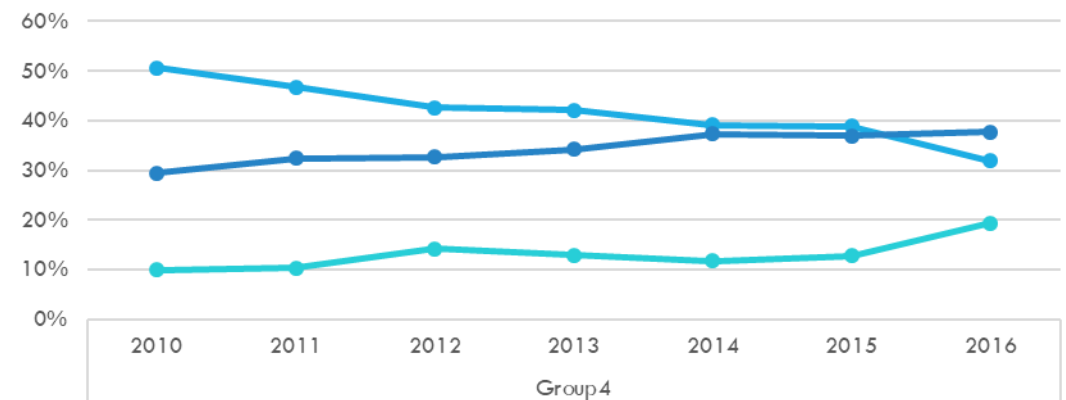
- The North American (NA) has dominated the gaming industry for four decades with 51% of the market on average.
- The European (EU) market has seen relative growth on an average 0.72 Million year over year and has 34% of the global market.

Average Global Market Share Through 1980-2015



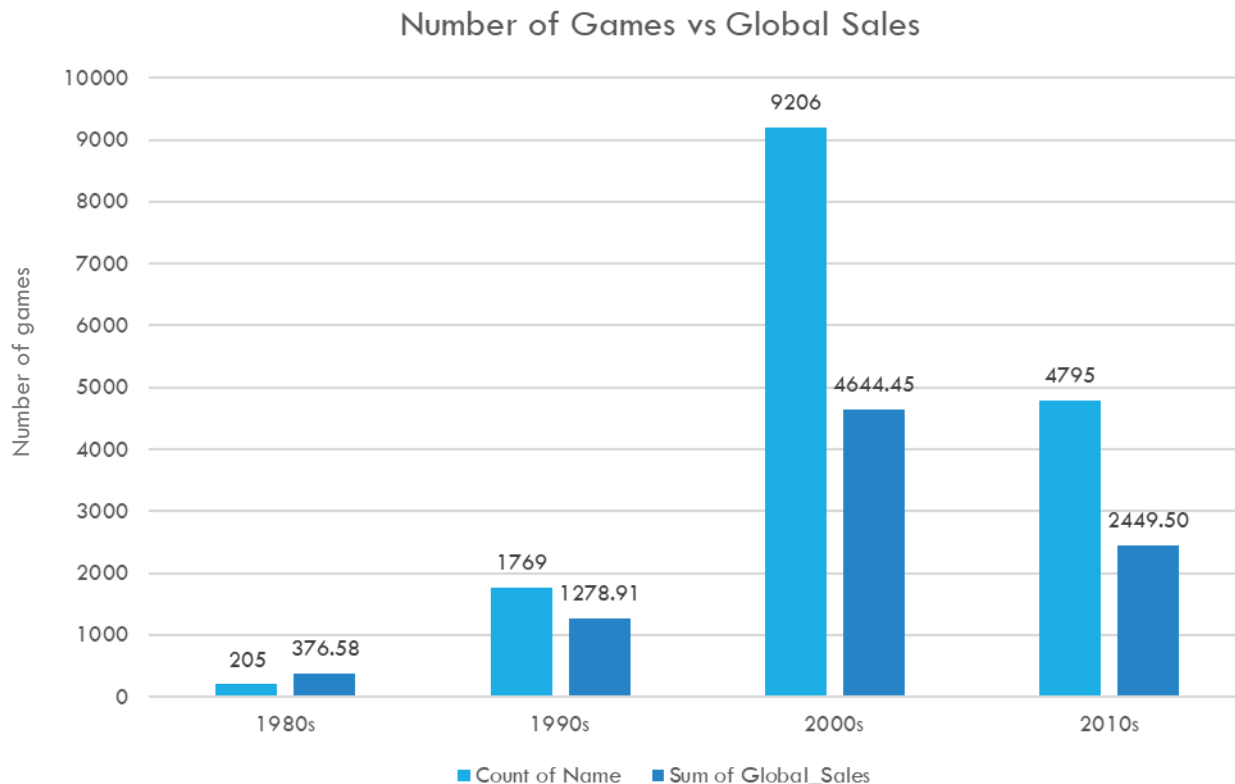
- Sum of % of NA sales
- Sum of % of EU sales globally
- Sum of % of JP sales globally
- Sum of % of Other sales globally

Sales Channel Market Share



- Sum of % of NA sales globally
- Sum of % of EU sales globally
- Sum of % of JP sales globally

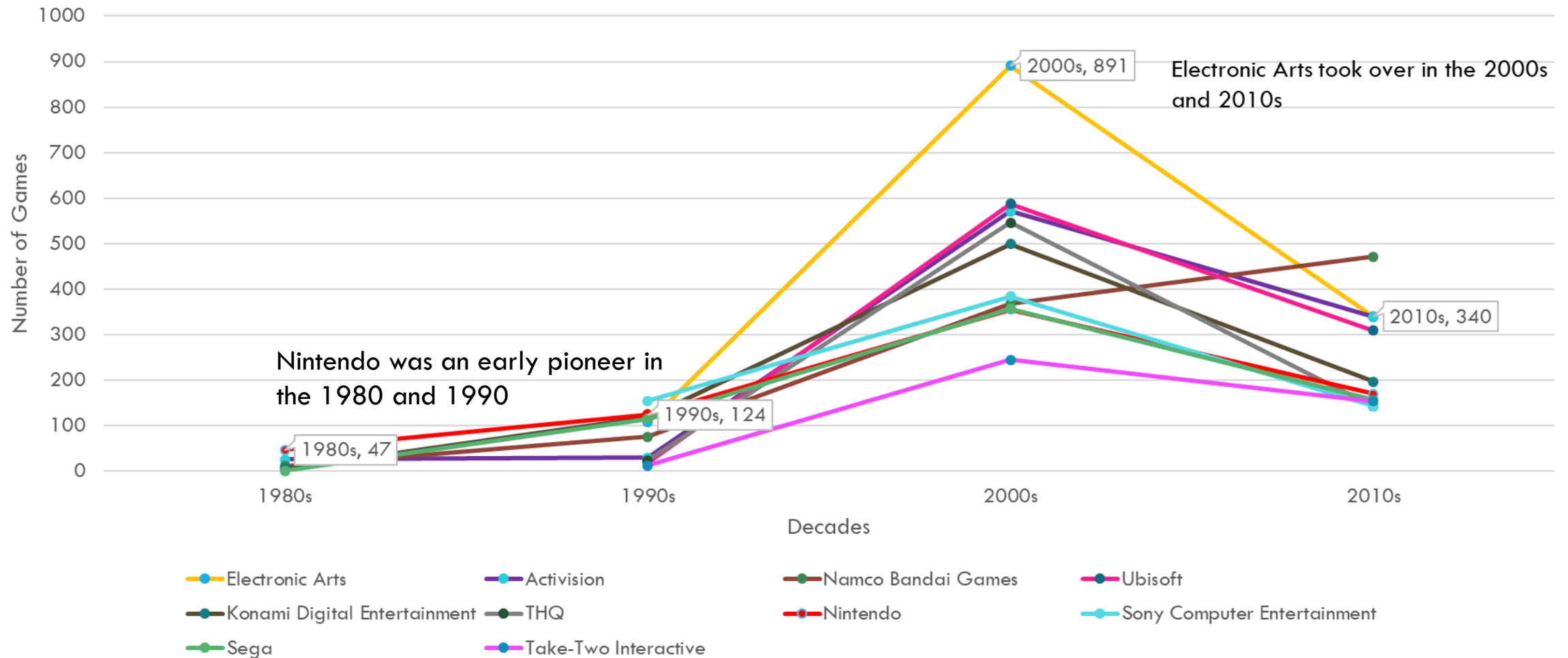
# THE OVERSATURATED GAMING MARKET HAS SEEN 16,000 GAMES PUBLISHED BETWEEN 1980 TO 2016



- 58% of those games were released in the 2000s to 342 different publishers.
- We started in the 1980s with 35 publishers with 205 games for 1% of the total game released.
- The relationship between the number of games and sales took a shift in the 2000s.
- 2010s market saw 50% decrease in games published and global sales.

# OVER 4805 GAMES PUBLISHED IN THE 2000S

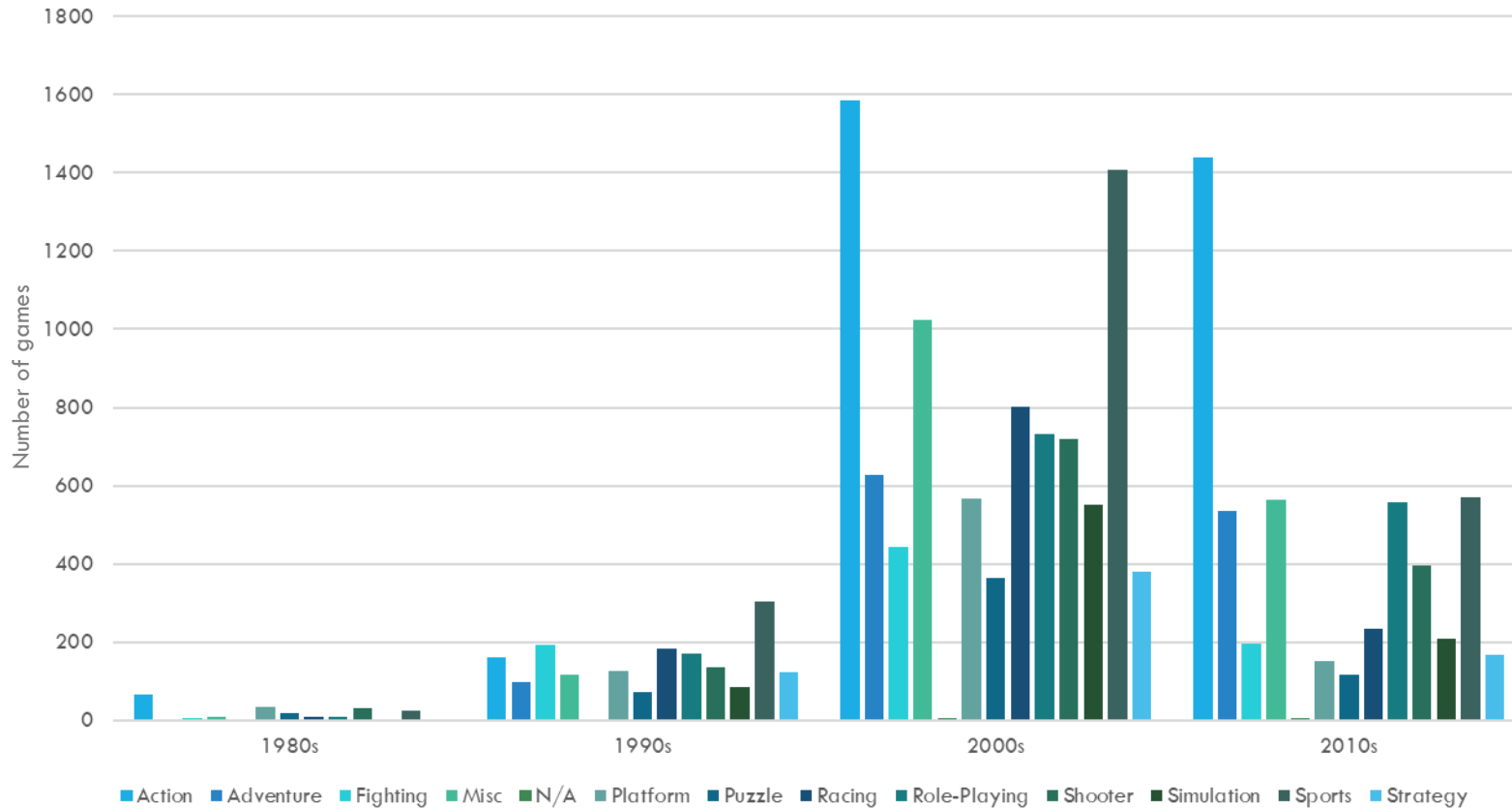
Number of Games Top 10 Publishers by Year





# 2000-2010 SAW AN AVERAGE INCREASE OF 542% IN NUMBER OF GAMES PER GENRE

Popular game genres by decade



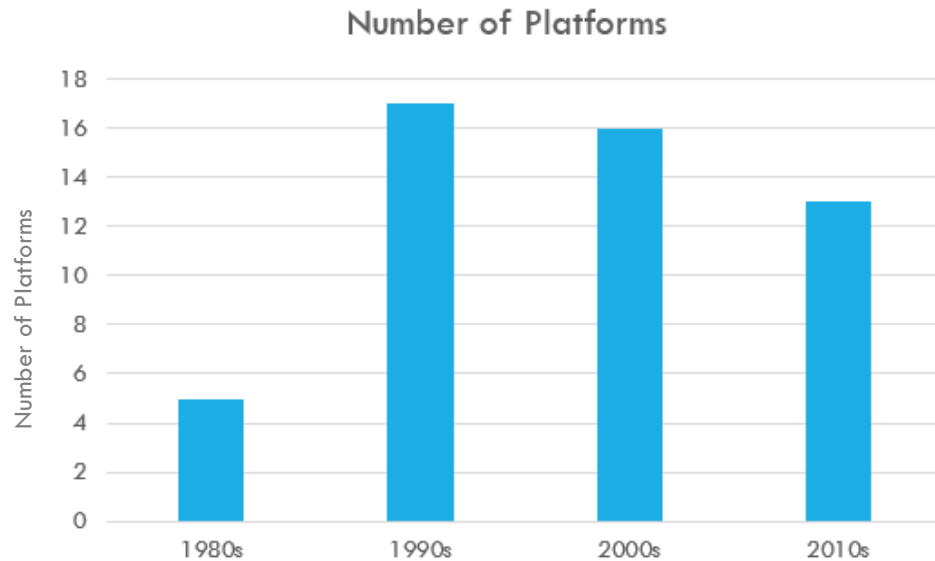
We can see that in the 1980 the popular genre was action.

1990 was sports

2000 was action and shooter in second

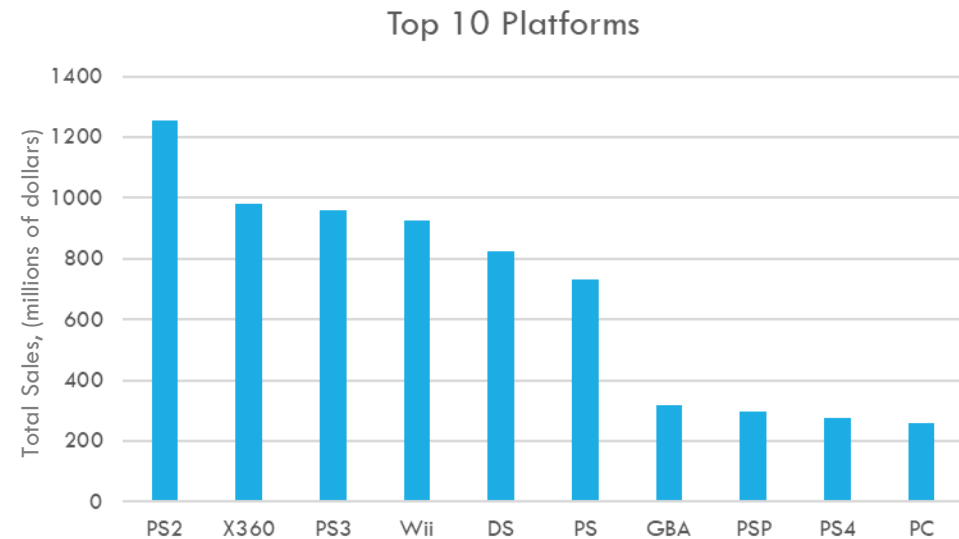
And 2010 action was the most popular.

# A BOOM OF 23% IN PLATFORM CREATION



We see major growth within the first two decades of recorded data:

- 5 in the 1980s
- 17 in the 1990s



We see the top performing platforms on the global market

1. PS2 with \$1,255 Million
2. X360 with \$979 Million
3. PS3 with \$957 Million

# SUMMARY

## Sales

- The gaming market has continuously evolved over the last four decades. It has experienced lots of fluctuations peaking in the 2000s and in a downward spiral in the 2010s with a 50% decrease in sales and games published.
- The North American market has kept a 51% share of the global market over the decades.
- The European market has experienced an average growth of 0.72 million and kept 34% of the global market.
- The Japanese market peaked at 29% of the global market share in the 1990s and declined more than 50% since.
- Global sales growth from the 1990s to 2000s had a huge jump of 3,365.54 million but from the 2000s to 2010s we had negative growth of -2,194.95 million.

## Games & Publishers

- The 2000s brought in 58% of the total games in the past four decades and the 1990s brought in more publishers than any other years.

## In Conclusion

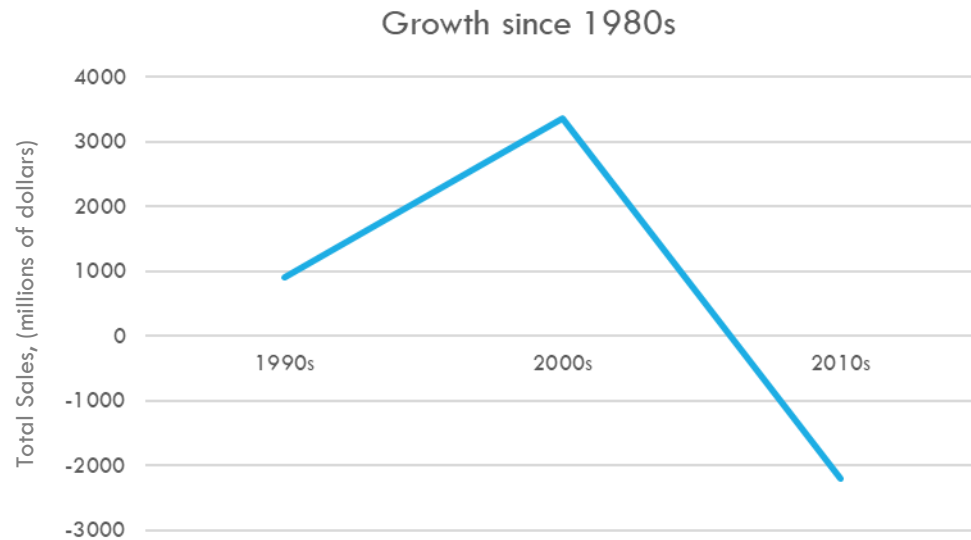
- This demonstrates the vast fluctuations in the gaming markets and the sales velocity cannot be deemed as a constant over time.



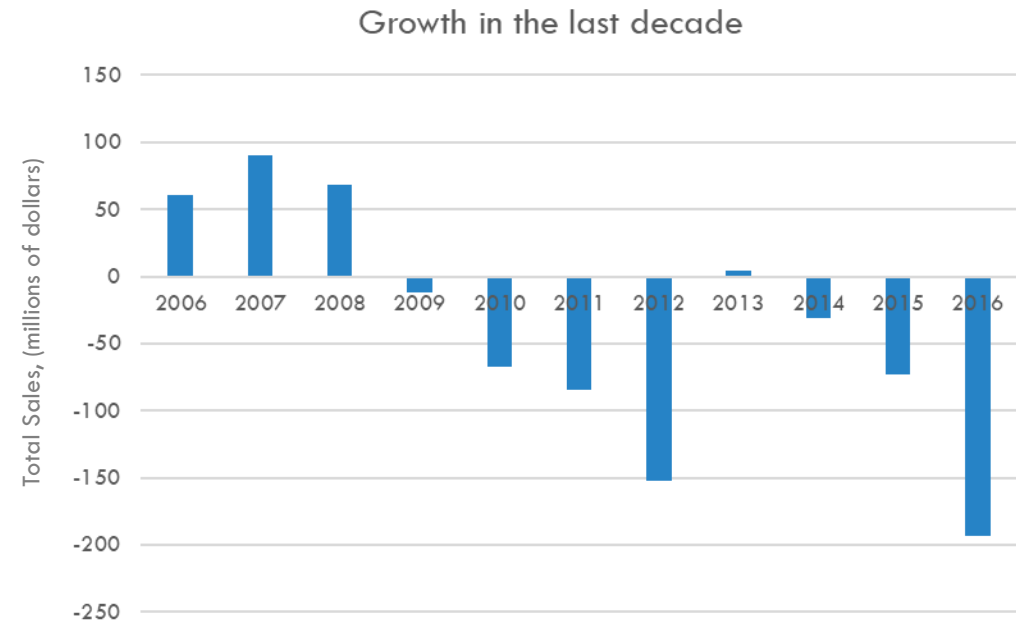
# ANALYZING THE 2010 DECADE

# DECREASE OF -65% IN MARKET GROWTH RATE SINCE 2000S

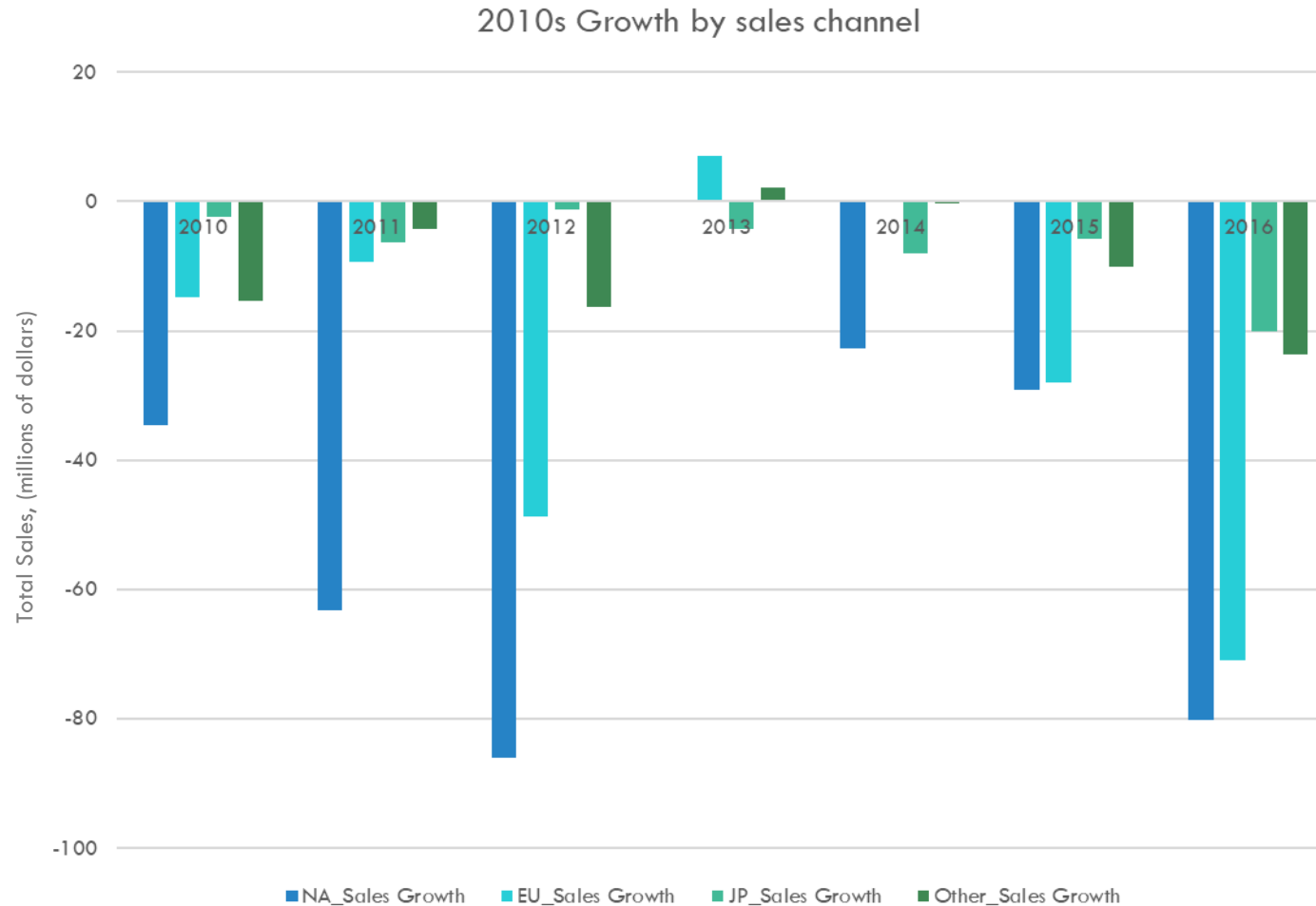
As noted in the first slide the gaming market, global sales have decreased by half since its peak in the 2000.



And here is an overview of our current market. The year-over-year global growth rate since 2010 has been in the negative, with 2013 as an exception.



# EUROPE IS THE ONLY MARKET THAT EXPERIENCED A (\$7 MILLION) POSITIVE GROWTH FROM 2010-2016

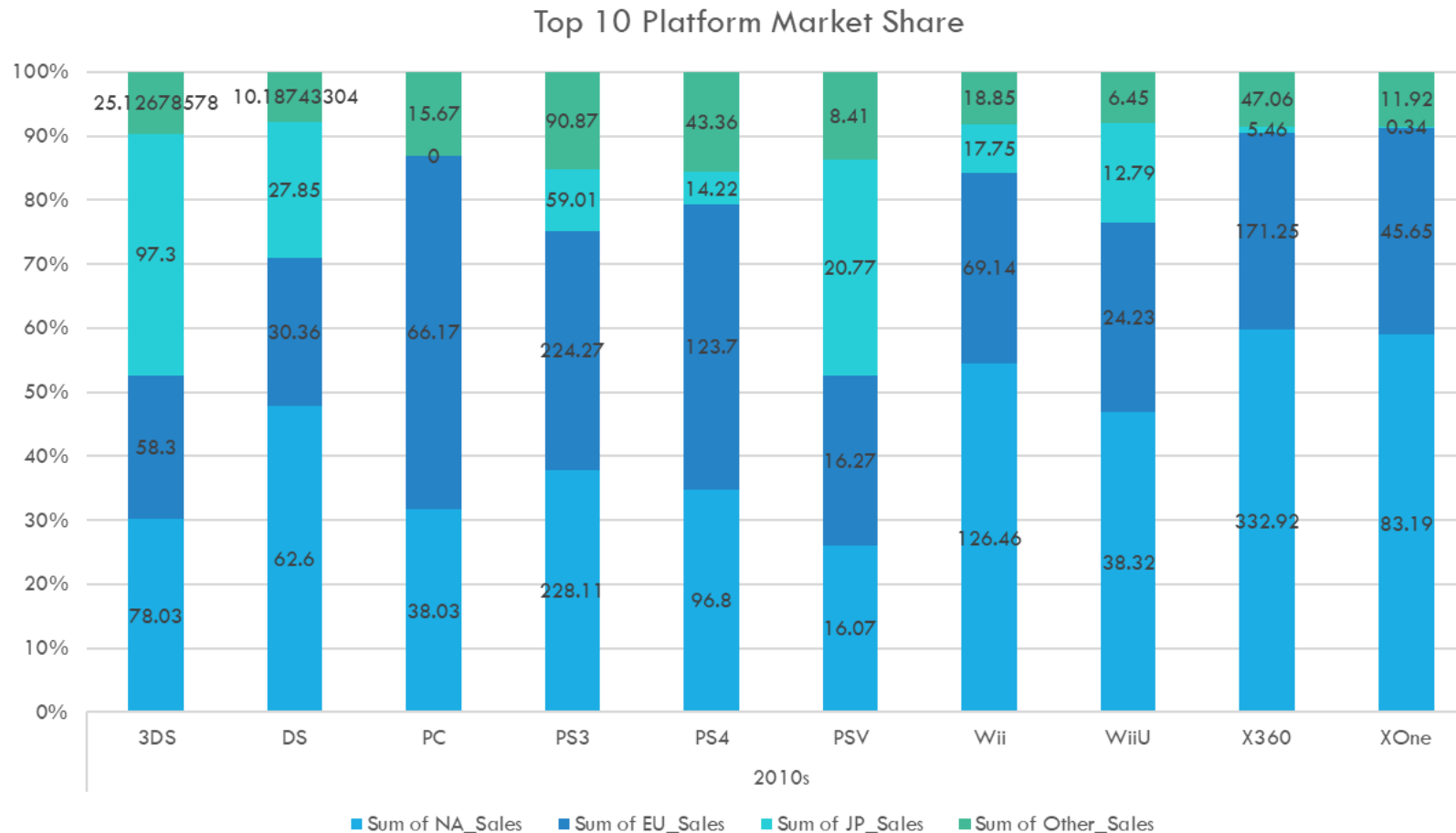


If we segment the last 6 years into 3 segments

- 2010-2012 all markets had negative growth but the Japanese markets were less significant
- 2013 the European and Other markets were in a positive growth
- 2014-2016 all markets back on a negative growth cycle with the Japanese market getting a bigger hit than the 2010-2012 years.

# SONY, MICROSOFT, NINTENDO AND PC DOMINATE WITH 87% OF THE PLATFORM MARKET

The growth in the gaming market can be seen in multiple areas. Here is the first, platforms.

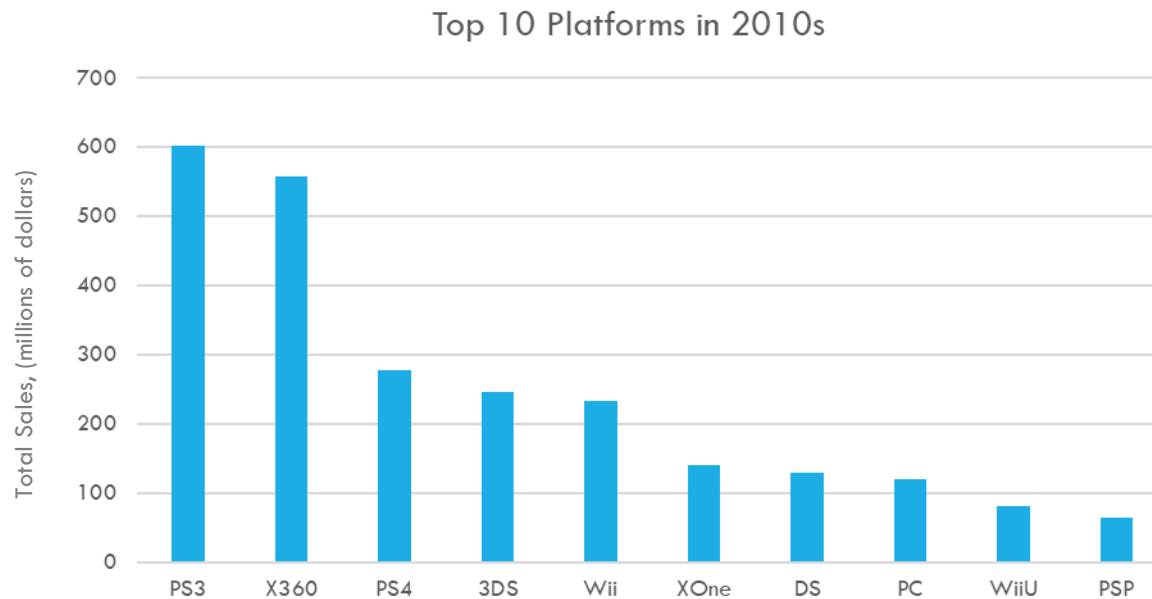


Notable points:

- The Japanese market dominates the small format consoles: 3DS and PSV
- Europe dominates the PC (computer), and PS3,4 (PlayStation)
- Whereas North America dominates the Wii, U and DS and the Xbox 360 and One.

# PS3, XBOX 360 & PS4 BESTSELLING PLATFORMS OF 2010S

Since consoles constantly evolve, here are the top 10 consoles in 2010s:

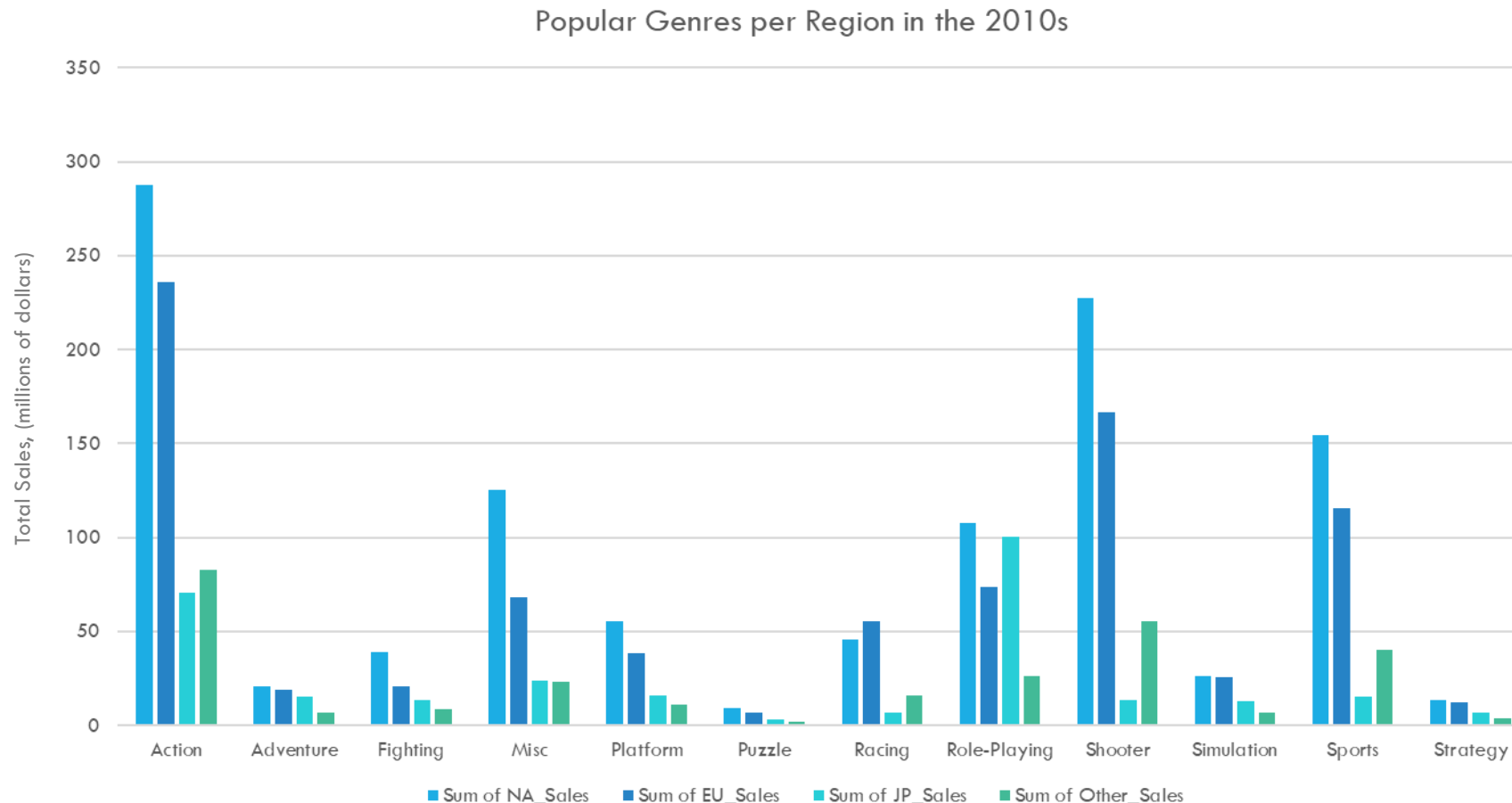


1. PS3 with \$602 Million
2. Xbox 360 with \$556 Million
3. PS4 with \$278 Million



# TOP 5 GENRES OF 2010S: ACTION, SHOOTER, SPORTS, ROLE-PLAYING AND MISCELLANEOUS

Another area that we can see how the market has grown is the genres.

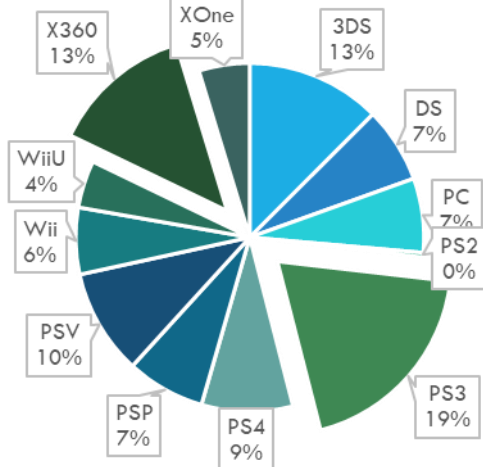


Here are the popular genres by region:

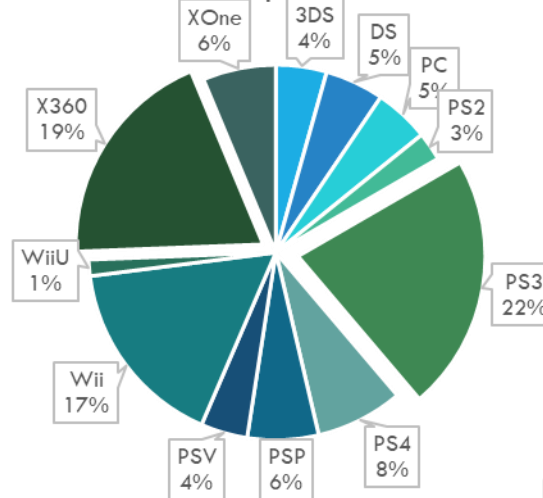
- North America:
  - Action
  - Shooter
  - Sports
- Europe:
  - Action
  - Shooter
  - Sports
- Japan:
  - Role-playing
  - Action
  - Miscellaneous

# TOP 5 GENRES PLAYED ON PS3/PSP, XBOX 360, 3DS & WII

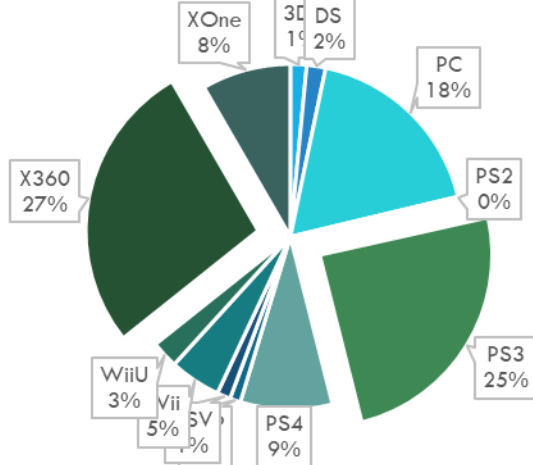
Action



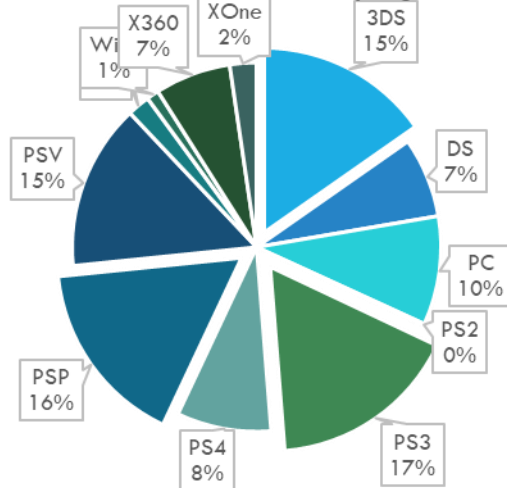
Sports



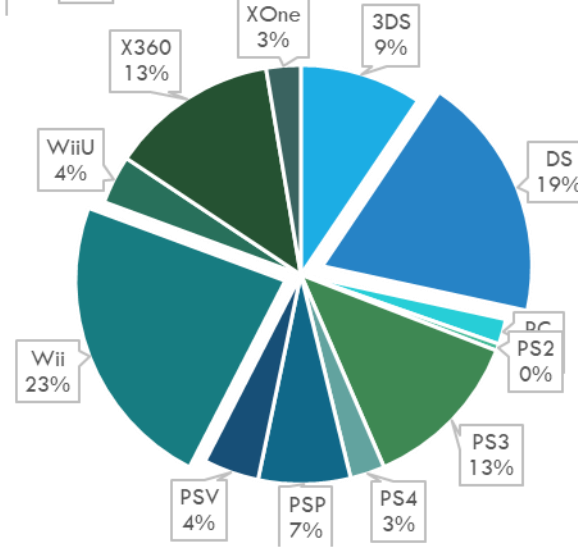
Shooter



Role-Playing



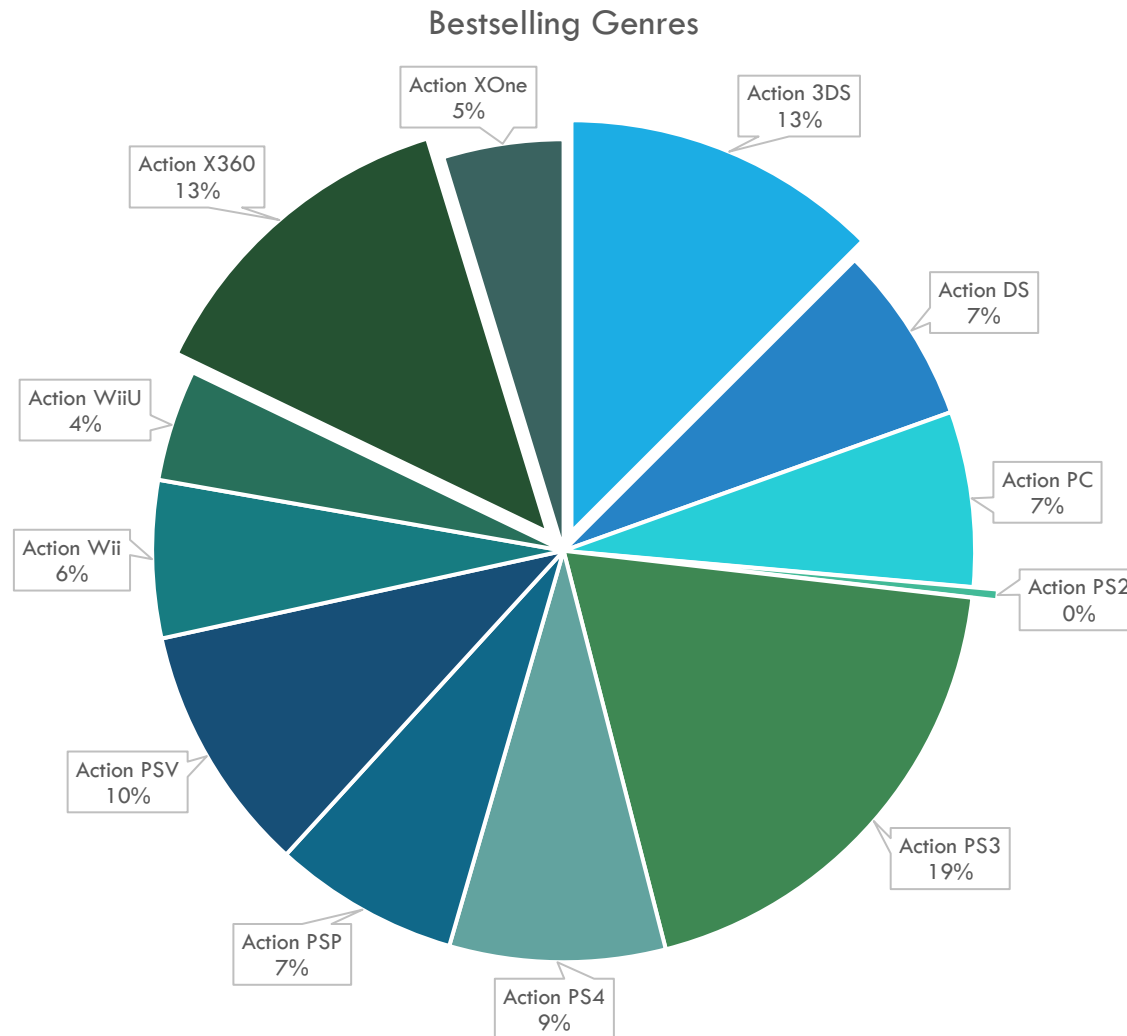
Miscellaneous



Here is where the users usually play them:

- Shooter, Action and Sports the popular genres in Europe and North America are played on:
  - PS3
  - Xbox 360
- Role-playing and Miscellaneous, the popular genres in Japan are played on:
  - 3DS
  - PS3
  - PSP
  - X360
  - Wii

# TOP GENRES: ACTION, SPORTS AND MISC. FROM 1980-2016



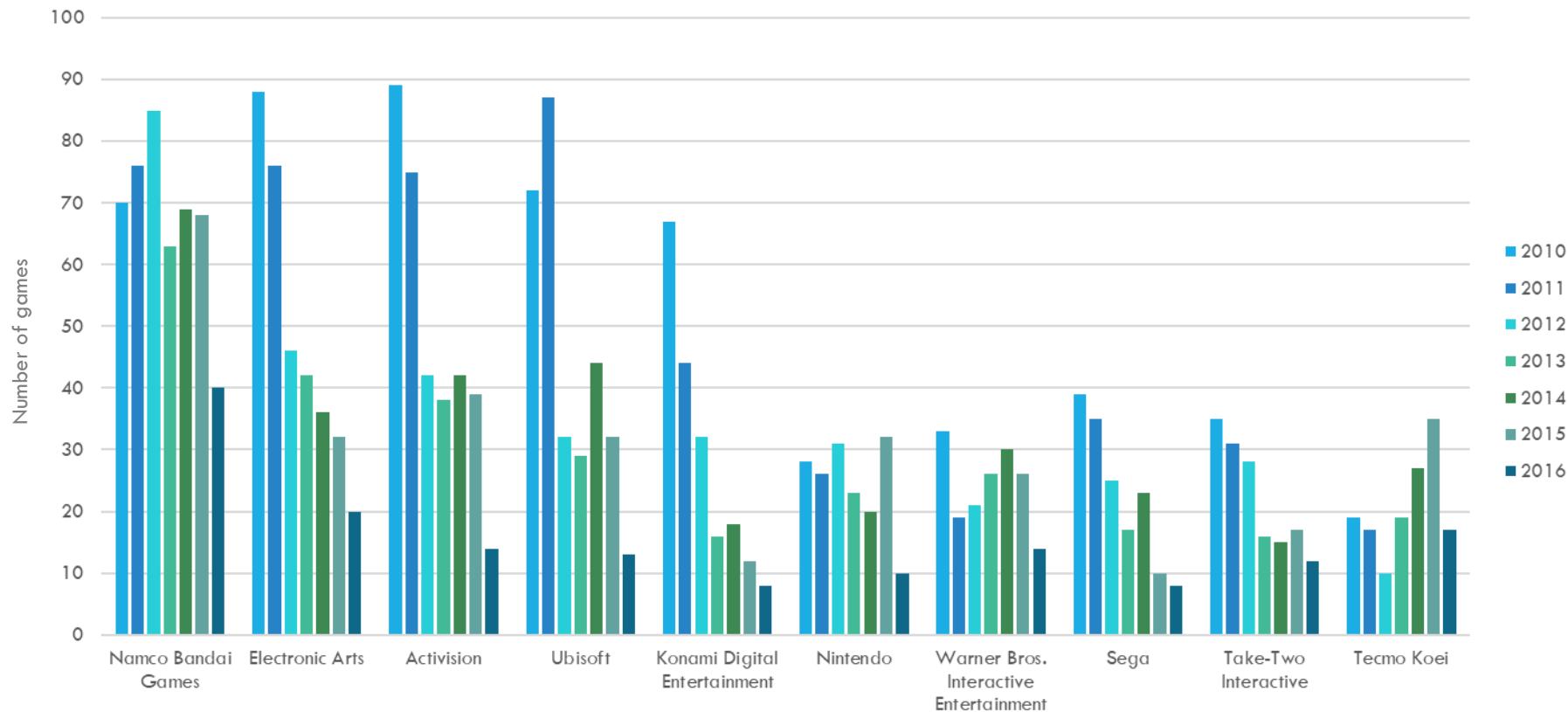
The bestselling genres in the past four decades would be:

1. Action at 20%
2. Sports at 14%
3. Miscellaneous at 10%

# AN AVERAGE DOWNWARD GROWTH OF 3% FOR THE TOP PUBLISHERS IN THE 2010S

With the growth of the market so did the numbers of games published

Number of Games Top 10 Publishers in 2010s



- Electronic Arts have 21% of the markets with their shooter and sports games most popular in NA/EU
- Nintendo kept 18% of the market. And it is the only publisher to have success in all three markets.
- Activision have 17% of the market with their action and shooter games most popular in NA/EU.

# TOP 3 PUBLISHERS: ELECTRONIC ARTS, ACTIVISION & NINTENDO

The most games published doesn't necessarily mean top sales.

Top sales globally:

1. Electronic Arts 19%
2. Activision 16%
3. Nintendo 16%

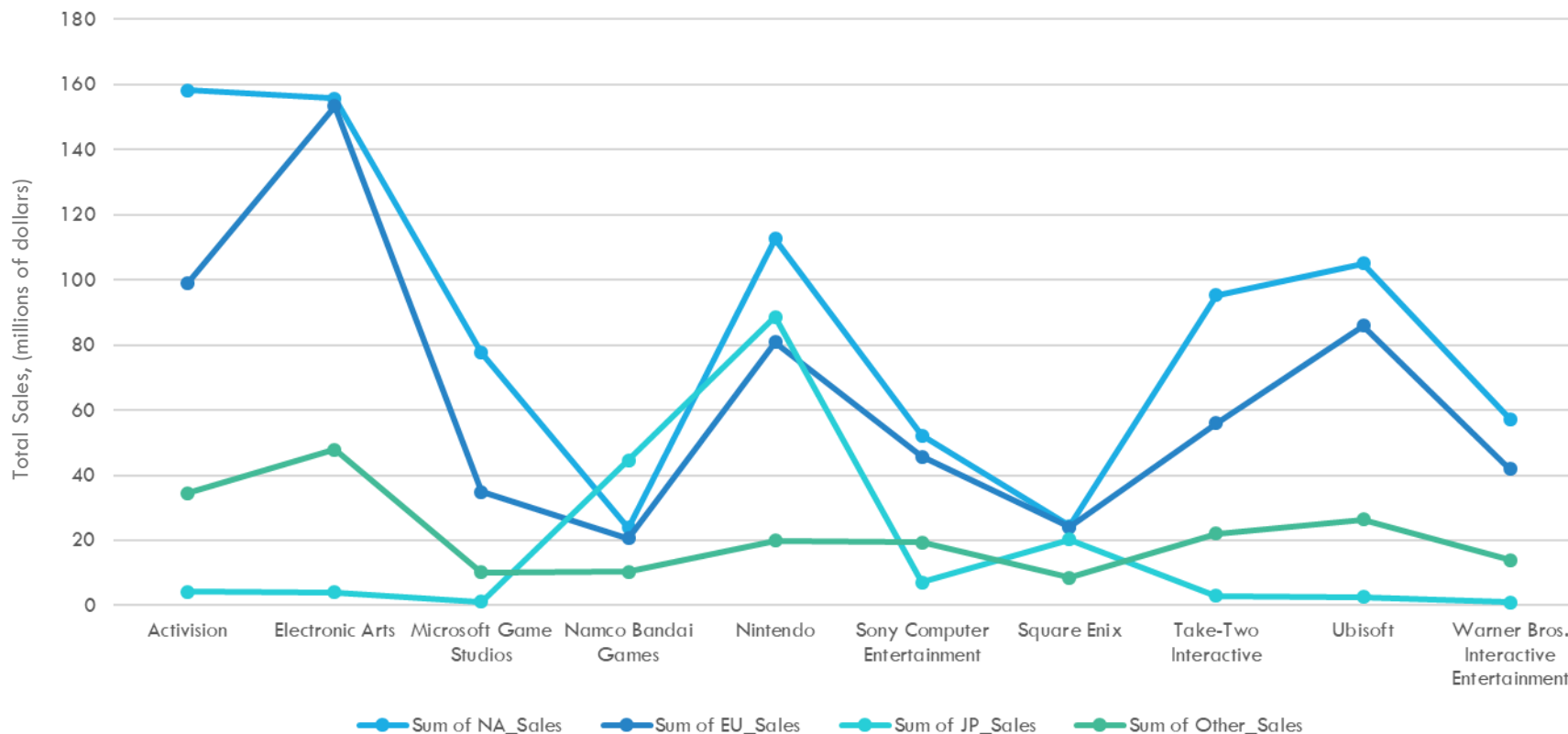
Here are some top 10 number of games published that didn't make it into the Top 10 sales:

- Konami Digital Entertainment
- Sega
- Tecmo Koei

They were replaced by:

- Microsoft Games Studios
- Sony Computer Entertainment
- Square Enix

Regional Sales by Top 10 Publishers Globally



# RECOMMENDATIONS

## Which Market to Invest In

- With the steady growth of the European (EU) global market share and the Japanese (JP) market slowly recovering since last year, I would recommend investing in these two markets.

## To investigate

- Investigate why the North American (NA) market took such a bigger hit than other markets in the 2010s. And see if could stop the downward trend.

## Suggestions for Genres, Platforms and Publishers to Invest In

- Budgets could be allocated to popular genres:

Genres	Markets	Consoles
Action	NA, EU	PS3, Xbox 360
Shooter	NA, EU	PS3, Xbox 360
Sports	NA, EU	PS3, Xbox 360
Role-playing	JP	3DS, PS3
Miscellaneous	JP	Xbox 360, Wii

- or invest in the top-earning consoles: PS3, Xbox 360 and PS4
- or publishers: Electronic Arts, Activision and Nintendo.