Tokyo Game Show 2012

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Report
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Report on the Tokyo Game Show 2012

1   Introduction

The Tokyo Game Show (TGS), together with the E3 in Los Angeles and the Gamescom in Cologne, is one of the biggest events organized by the video game industry. The following report provides an overview of the Tokyo Game Show and its implications for stakeholders in Switzerland.

Before the Game Show is evaluated, it is necessary to have a basic understanding of the video game industry. The following section will begin by briefly discussing the global video game industry before analyzing the Japanese and the Swiss industries in particular.

On this basis, the Tokyo Game Show 2012 is evaluated, focusing on current trends and the Swiss presence at the fair.

The analysis concludes with a review of the most important issues raised by the report.
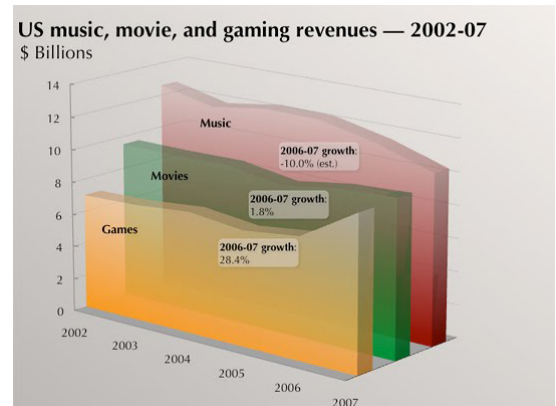

Figure 3.
US music, movie and gaming revenues 2002-2007
Eric Bangeman, 2008

1.1.   The Global Video Game Industry

As seen in Figure 3, the scope of the gaming industry is comparable to the other prominent entertainment industries such as music and movies. Moreover, it continues to grow while the rest of the economy remains subdued, as the following quote shows:

"The real annual growth rate achieved by the U.S. game software industry exceeded 16.7% for the years 2005 through 2008. For the years 2005 – 2009, the real annual growth rate of the video game industry was 10.6%. During the same years, real growth for the U.S. economy as a whole was 2.8% (2005 – 2008) and 1.4% (2005 – 2009)." (Siwek 2010: 27).

Video game sales in the U.S. for 2011 amounted to $16.54 billion (cf. ESA 2012), which is slightly bigger than the Japanese video game sales at ~$15.5 billion (¥ 1,235 billion, cf. DCAJ 2012). Unfortunately, there has been no comparable survey published for the video game sales in Switzerland, but it can be expected to be at maximum 1-2% of the U.S. market (cf. Kuster 2012).

We can therefore conclude that the interactive entertainment industry is relevant to the global economy and offers a dynamic market with a high potential. However, both Switzerland and Japan are special cases compared to the United States who is dominating the global market. Those differences will be outlined below.

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1.2.   The Video Game Industry in Switzerland

The video game and hardware sales in Switzerland amounted to approximately 300M CHF in 2011 (Kuster 2012), excluding mobile apps. The types of video games sold are similar to those sold in the U.S., however, unlike in the U.S., most of the products are not created domestically. For example the web site *gamedevmap.com,* which is currently listing more than 2500 game development companies, shows only 8 based in Switzerland (as of October 2012).

Additionally, video game publishers are not trying to create traditional game development studios in Switzerland. Electronic Arts (EA), expecting a net revenue of approximately $4 billion in fiscal 2013, bases its European publishing headquarters in Geneva and employs a workforce of about 100 people there, but does not directly work with any game developer based in Switzerland (Electronic Arts 2012). The exception is UbiSoft, who recently created a studio dedicated to online games in Zurich, presumably to develop Facebook or browser games (cf. *zurich.ubisoft.com*).

Recently, the president of the union for cultural creators (*Suisseculture*) strongly criticized the initiative of Pro Helvetia to support game development through the *"GameCulture"* program (Graber 2011). In response to the media reaction to this story, the president of the International Game Developers Association (*IGDA Swiss Chapter*) published a defence of the GameCulture programme (Sala 2011). In this defense, they ask that the Swiss Confederation participates in international video game fairs in order to stay competitive with the international competition:

"Um mit der stark geförderten internationalen Konkurrenz schritthalten zu können, fordern wir, dass nicht nur mehr Werkbeiträge und Preisgelder für die Entwicklung, sondern auch Geld für die geförderte Publizierung gesprochen und die Schweiz offiziell international an Messen sichtbar werden muss." (Sala 2011: 4).

However, the *"traditional"* video game industry in Switzerland is not very grand. The most successful computer game created in Switzerland is the *"Farming Simulator"* by Giants Software, which is a niche product and not a major title (see Suter 2010: 11, Rossignol 2009, Walker 2010, Meer 2011). In comparison, the emerging mobile development space is offering a window of opportunity for Switzerland to establish itself as a country where video games are not only consumed, but also developed.

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Introduction to the Video Game Industry

1.2.1. Game Development Companies in Switzerland

Video game development in Switzerland is, just as the awareness of it (the inception of GameCulture was in 2009), relatively young and focused on mobile devices, as the following list of game development companies demonstrates.

Because most game development companies in Switzerland are comparatively small and many are young start-ups developing for the mobile gaming market, it is difficult to create a complete list of Swiss game developers. What follows is compiled from data obtained from Suter (2010), *igda.ch*, *siea.ch* and *gamedevmap. com* and aims to provide an idea of the current state of video game development in Switzerland.

Bitforge, *Deep Silver CH* (*Koch Media AG*), *Electronic Arts*, *EverdreamSoft*, *Funcom*, *Gametime AG*, *Gbanga*, *Giants Software*, *Hexagame*, *Karios Games*, *Microsoft Schweiz GmbH*, *Sony Computer Entertainment Schweiz*, *Ubi Games SA*, Nintendo (*Waldmeier AG*), *Nothing*, *Pixelux*, *Procedural*.

1.2.2. Academic Interest in Game Development

There are several academic institutions indicating interest in video games and offering courses connected to the creation of games. The following is a list of educational institutes offering courses related to video games:

Institution	Education / Course
CAS PAI Yverdon	Certificate of Advanced Studies: Introduction à la production de jeux vidéo sérieux avec Flash pour Android et iPhone (*http://www.cas-pai.ch*)
EPAC	Bachelor / Master in Fine Arts (*http://www.epac.ch/index.php/en/epacgb*, *http://www.epac.ch/index.php/en/formation-gb/ema-in-game-art*)
EPF Lausanne	Visual Computing/ Immersive Interaction Group (*http://iig.epfl.ch/page-40272-en.html*)
ETH Zurich	Game Programming Laboratory, Computer Graphics Laboratory ETH Zürich (Collaboration with Disney Research Lab Zurich) (*http://graphics.ethz.ch/*, *http://graphics.ethz.ch/teaching/gamelab12/home.php*)
Geneva University of Art and Design	Bachelor / Master (*http://head.hesge.ch/media-design*)
SAE Zurich / Geneva (Qantm Institute)	Gamedesign (Diploma of Interactive Entertainment), 3D Production (*http://zuerich.sae.edu/de/home*)
University of Geneva	MIRALab is an interdisciplinary research lab working in domains as Mixed Reality, Personality and Emotion Models, Social Robotics, 3D Medical Simulation, Cultural Heritage, Virtual Humans, 3D multimedia application and simulation of Hair and Clothes (*http://www.miralab.ch/*).
Zurich University of Arts	Bachelor (*http://www.zhdk.ch/index.php?id=28100*) / Master (*http://master.design.zhdk.ch/studium/fields-of-excellence/interaktion*)

Table 1.
Academic Institutions and Video Games

Suter 2010: 49-20

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1.3.   The Video Game Industry in Japan

Unlike Switzerland, Japan has a strong video game industry, best exemplified by the fact that there is a Tokyo Game Show. However, the Japanese industry and market are historically very different from the rest of the world. The following table shows a comparison between the most popular games for the year of 2008 in the United States and Japan, respectively. It shows that the games developed in Japan are also principally played in Japan and while the most popular games in the U.S. were for consoles, in Japan games were mainly played on handheld devices.
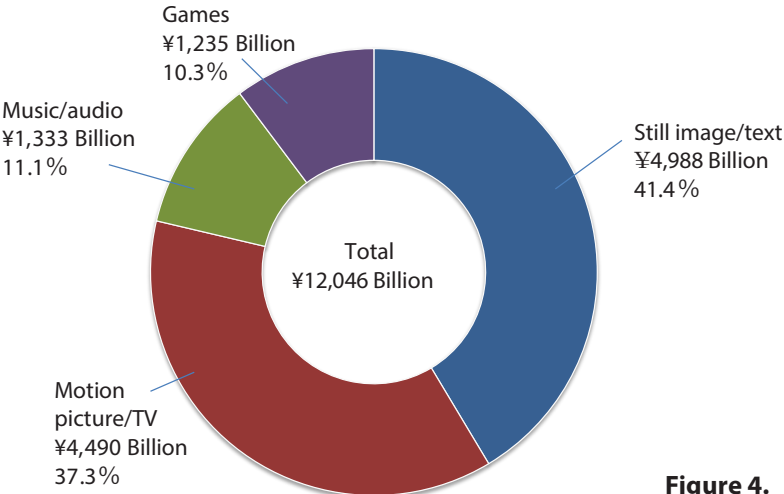
United States	Japan
Grand Theft Auto: San Andreas (2004) - 9.4M (Volume Sales)	Pokémon Red/Green/Blue 10M (Volume Sales)
Guitar Hero III: Legends Of Rock (2007) - 8.2M	Pokémon Gold/Silver 7.9M
Madden NFL 07 (2006) - 7.7M	Super Mario Bros. 6.8M
Grand Theft Auto: Vice City (2002) - 7.3M	Pokémon Diamond/Pearl 5.5M
Madden NFL 06 (2005) - 6.6M	Pokémon Ruby/Sapphire 5.3M
Halo 2 (2004) - 6.6M	New Super Mario Bros. 5.2M
Madden NFL 08 (2007) - 6.6M	Brain Age 2 4.9M
Call Of Duty 4: Modern Warfare (2007) - 6.3M	Animal Crossing: Wild World 4.7M
Grand Theft Auto 3 (2001) - 6.2M	Tetris 4.2M
Madden NFL 2005 (2004) - 6.1M	Super Mario Land 4.2M

Table 2.

Games in Japan and U.S. Ranked According to Volume Sales
Forbes / Famitsu
2008

The economic impact of the video game industry in Japan should not be underestimated, as it accounts for 10.3% of the Japanese content industry (Figure 4) and while the overall content sales shrank by 1.2% in 2011, the video game sales increased by 5.8% (DCAJ 2012).

This has a profound effect on the Tokyo Game Show, as the exhibitors focus on the domestic market of Japan, whereas in both the E3 in the U.S. and the Gamescom in Europe, the exhibitors have a global market in mind.

However, as the Japanese market size amounts to ~$15.5 billion and is very different from the global market, it is sensible to have a trade fair adapted to the local video game culture in Japan. This shall be discussed in more detail in the next section describing the Tokyo Game Show 2012.

Games
¥1,235 Billion
10.3%

Music/audio
¥1,333 Billion
11.1%

Still image/text
¥4,988 Billion
41.4%

Total
¥12,046 Billion

Motion picture/TV
¥4,490 Billion
37.3%

Figure 4.

Market Size of the Content Industry in Japan
DCAJ, 2012

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2   The Tokyo Game Show

2.1.   Overview of the Game Show

The Tokyo Game Show 2012 was similar to the previous year in size and scope, with its clear focus on the Japanese market (Tokyo Game Show 2012b). The following quote taken from the Daily Yomiuri (2012) gives an idea of the current trends at the game show:

"Social networking games and makers are in the spotlight at the world's biggest game exhibition, the Tokyo Game Show 2012. The social game market has been expanding thanks to the rapid spread of smartphones and tablets. Social game giant Gree Inc. secured one of the largest exhibit spaces. Software makers expanded their exhibits of social games in addition to games for conventional dedicated consoles. A total of 209 companies from all over the world participated with more than 1,000 game titles and related devices. Nintendo Co. skipped the show again, while Microsoft Corp. also refrained from running a booth."

The floor map (Figure 5) also suggests that while the observation of a focus on mobile games might be justified, the claims by the Daily Yoimuri were also somewhat over-exaggerated, as the mobile area was restricted to the violet area in hall 5 of the exhibition. And while the pavilions of the social game developers Gloops and Gree were bigger than in the previous years (Halls 6-C and 5-S, Figure 6), overall they amount to 2 of 11 equally sized main pavilions. Of interest were also the Game School Area (Hall 6-N, shown in Figure 7) and the International Pavilion (Hall 3-N, shown in Figure 8).

This should not give the impression that the social games did not demonstrate an impressive growth; The area grew from virtually 0 to ~16% of the total exhibition space in the course of only three years and remains the driving force behind the growth of the Japanese video game industry (cf. DCAJ 2012).
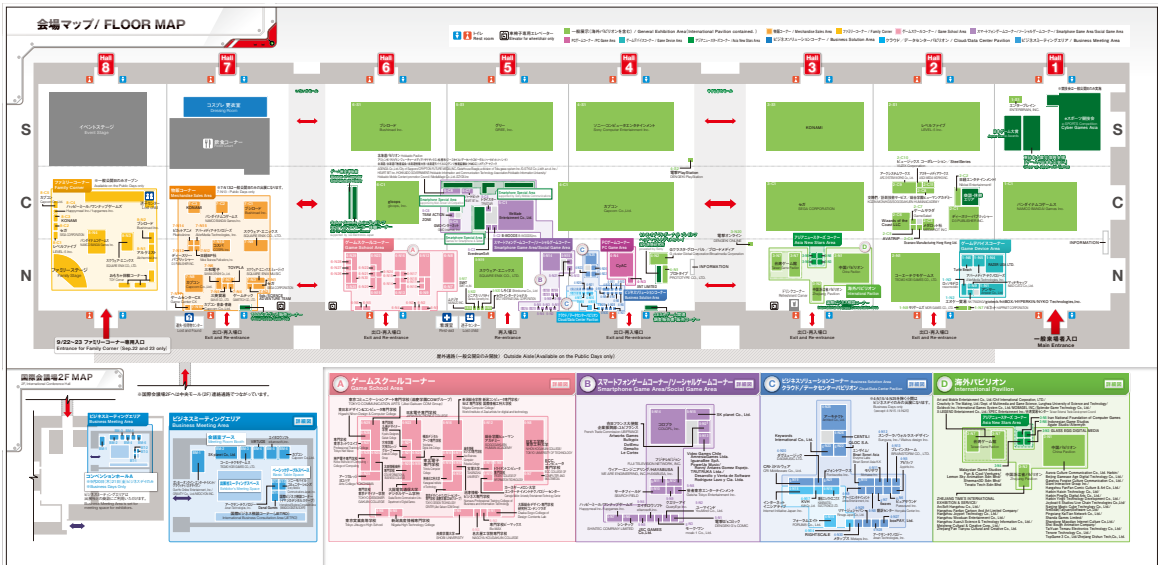

Figure 5.
Floor Map
Tokyo Game Show, 2012c

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2.2.   Key Participants

In addition to Gree and Gloops, most other key participants were the major powerhouses in the Japanese video game industry, with only Nintendo abstaining from participating, in line with its company policy. Namely, the participants were Capcom, Square Enix, Sony Computer Entertainment, Konami; Sega, Namco Bandai Games, Tecmo Koei Games and Level-5. The last main pavilion was Bushiroad, a producer of collectible card games.

The absence of important foreign video game producers (e.g. Microsoft, Activision-Blizzard, Electronic Arts, Ubisoft or Nexon) is another piece of evidence for the shows strong focus on Japan.

Figure 6.
Gree, Inc.
Ochsenbein, September 2012

2.3.   Nation-States at the Game Show

There were four nation-states showcasing computer games produced by companies of the respective countries at the International Pavilion (Figure 8). The international pavilion was dominated by China and Taiwan, but Iran and Indonesia also had one booth each.

With these four mainly Asian states and without significant international companies, the fair offers a good opportunity to reach out to the Japanese market.

2.4.   Universities at the Game Show

A surprisingly big area of the game show was dedicated to Universities and High Schools related to the video game industry. The area was comparable to a pavilion of any primary exhibitor as well as to the area dedicated to smartphones (excluding Gree/ Gloops). The students of the academic institutions presented their projects, resulting in a diverse and interesting space within the game show.

Figure 7.
Game School Area
Ochsenbein, September 2012

2.5.   Swiss Presence at the Game Show

At the Tokyo Game Show 2012, there were representatives of three Swiss companies present, presenting themselves in one shared booth. They spent roughly CHF 4'500 for the booth (Figure 12), where EverdreamSoft's mobile game *"Moonga"* was promoted. The companies also used the event as a networking opportunity to meet Japanese companies.

Figure 8.
International Area
Ochsenbein, September 2012

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2.5.1. Booth Babes and Gender Issues

One other observation that should be mentioned, is the rampant usage of scantily-clad models (*"Booth Babes"*) to promote the booths of the different participants (cf. figures 2, 9). By comparison, the booth of the Swiss companies featured a more moderate display, without relying on such models.

This objectification of the female gender has come under some scrutiny and has even been banned by two big video gaming fairs (Penny Arcade Expo *"PAX"* and the Eurogamer Expo, cf. Cox 2012).

While this arguably misogynistic practice should not be supported, it should be noted that there is an observable correlation between the amount of models and the money the exhibitors invested, and it seemed that the practice was endorsed by a majority of the exhibitors and participants.

One solution to this dilemma could be found in gender-neutral cosplay during the public days, examples are shown in figures 10 and 11. For the business days, a Japanese business attire could be used.

Figure 10.
Cosplay
Ochsenbein,
September 2012

Figure 11.
Cosplay
Ochsenbein,
September 2012

Figure 9.
Cosplayers
Ochsenbein, September 2012

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Conclusion

3 Conclusion

It has been argued that the Tokyo Game Show is the definitive video gaming trade fair for Japan. This distinguishes the fair from other trade fairs. Therefore, the Tokyo Game Show is a unique opportunity for Swiss stakeholders to reach into the difficult Japanese market and to facilitate collaboration between Japanese and Swiss actors.

To enable an evaluation of the costs and benefits of a participation in the Tokyo Game Show 2013, the next chapter offers a tentative action plan which can be seen as a reference for the efforts created by such a participation.

Furthermore, it would be necessary to contact the different stakeholders in Switzerland to explain the advantages of a participation in the game show and to inquire whether they would be interested. It is probably safe to assume that many institutions might wish to participate if they are offered suitable assistance.
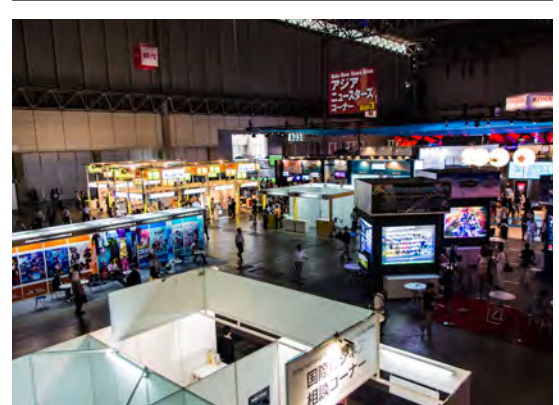
Especially Swiss Universities offering courses related to video games might want to use the opportunity to meet representatives of the Japanese Universities gathered at the show in order to exchange knowledge.

Figure 12.
Moonga Booth
Ochsenbein, September 2012

Figure 13.
International Area
Ochsenbein, September 2012

Figure 14.
Game School Area
Ochsenbein, September 2012

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3.1.   Action Plan

In this chapter, recommendations for the next actions that would have to be taken in order to participate in the Tokyo Game Show 2013 are outlined. They are neither exhaustive nor prescriptive, but they act as a guideline to enable a successful cooperation.

3.2.   Precedents

Up to now, Pro Helvetia, swissnex and Presence Switzerland have participated in comparable events promoting games from Switzerland in foreign countries. This section gives two short samples of precedents as to show how the involvement of the Swiss government in the organisation of events comparable to the Tokyo Game Show has been.

3.2.1.   GDC San Francisco

The *"Game Developers Conference"* in San Francisco is the biggest worldwide event held for the creators of video games. Swissnex San Francisco has been participating in the GDC 2012 (Swissnex 2012) with a booth promoting the following Swiss game titles: *Gbanga*, *Krautscape*, *Mirage*, *Moonga*, *Shadow Government LTD*. Sponsors were Pro Helvetia (Gameculture.ch), Zürich and Greater Zurich Area.

3.2.2.   Swiss Game Design in London 2012

For the Olympic Games in London 2012, Presence Switzerland organized the promotion of Swiss Game Design (House of Switzerland 2012). They created three games promoting the country of Switzerland and in the *"Swiss Game Lounge"*, they presented three desktop and 17 mobile games (*Feist*, *Daina the Herbarium*, *Mirage*, *Oko*, *EMC*, *Monospace*, *Colorbind*, *Macrocosm*, *Mehrspur*, *Gravity Lander*, *Gravimaze*, *Beyond Ynth*, *Grooh*, *Ladders to Heaven*, *Hollow Ground*, *Discrimination Pong*, *Orbital*, and the following games without web presence: Swiss Games, Magnetics II, and Foxx Kids). Sponsors were Pro Helvetia, the City and Canton of Zurich and HEAD Geneva. Furthermore, they organized the *"Zürich Creative Day"*, where game developers and universities interested in Game Design could participate (namely the Disney Research Lab, the Zurich University of the Arts (ZHdK), the Swiss Federal Institute of Technology in Lausanne (EPFL) and HEAD).

3.3.   Schedule

For the Tokyo Game Show 2012, EverdreamSoft had to book the booth by the June 1ˢᵗ, the preparations for a participation would probably have to begin in March 2013, to get a rough idea of participating exhibitors and sponsors by the end of March (complete exhibitor's guide can be found at Tokyo Game Show 2012a).

The material and participants should be organized by the end of August and the event will be held from September 19 to September 22, 2013 (Tokyo Game Show 2012c).

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Abbreviations   14

Abbreviations

Acronym	Meaning
CESA	Computer Entertainment Supplier's Association
DCAJ	Digital Content Association of Japan
EPFL	Swiss Federal Institute of Technology in Lausanne
ESA	The Entertainment Association
ETH Zurich	Swiss Federal Institute of Technology in Zurich
GDC	Game Developers Conference
HEAD	Haute école d'art et de design
IGDA	International Game Developers Association, Swiss Chapter
NPD	NPD Group (National Purchase Diary)
SIEA	Swiss Interactive Entertainment Association
TGS	Tokyo Game Show
ZHAW	Zurich University of Applied Sciences
ZHdK	Zurich University of the Arts