

The background of the slide features a repeating pattern of overlapping, rounded, organic shapes in shades of orange, yellow, and light beige. These shapes resemble stylized hills or waves, creating a sense of depth and movement across the entire frame.

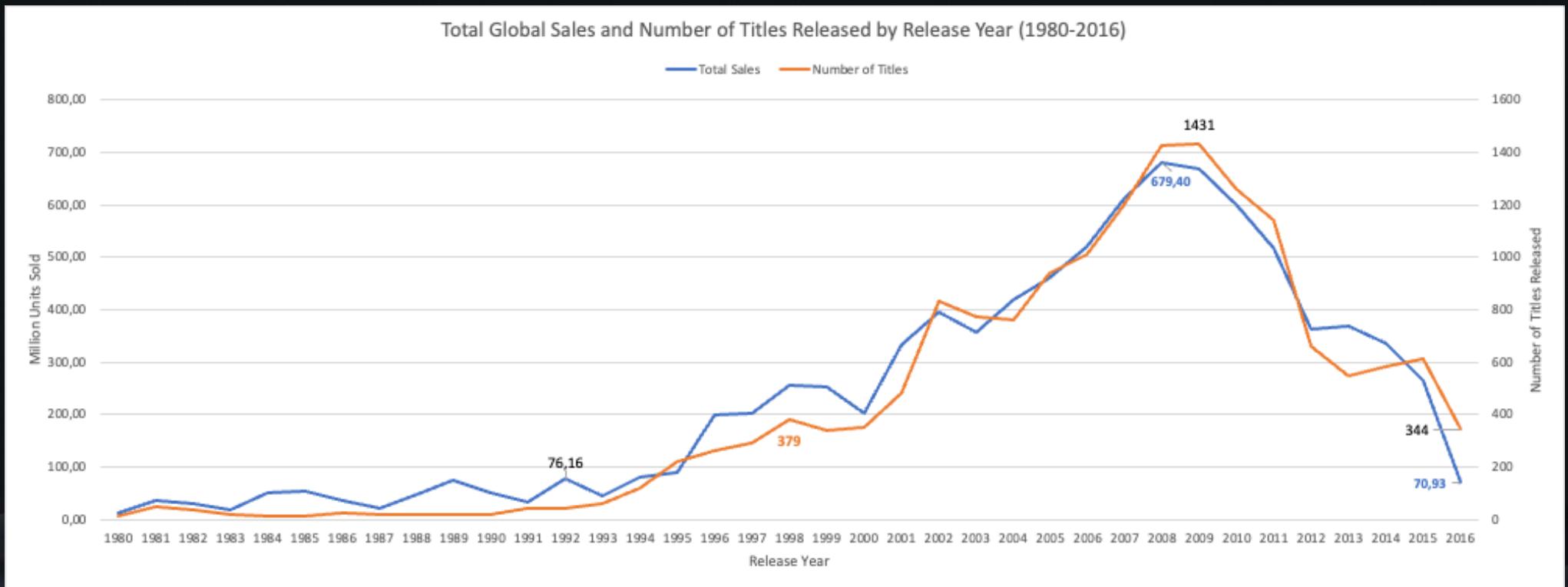
GameCo

Video Game Market Analysis

David Griesel - April 2024

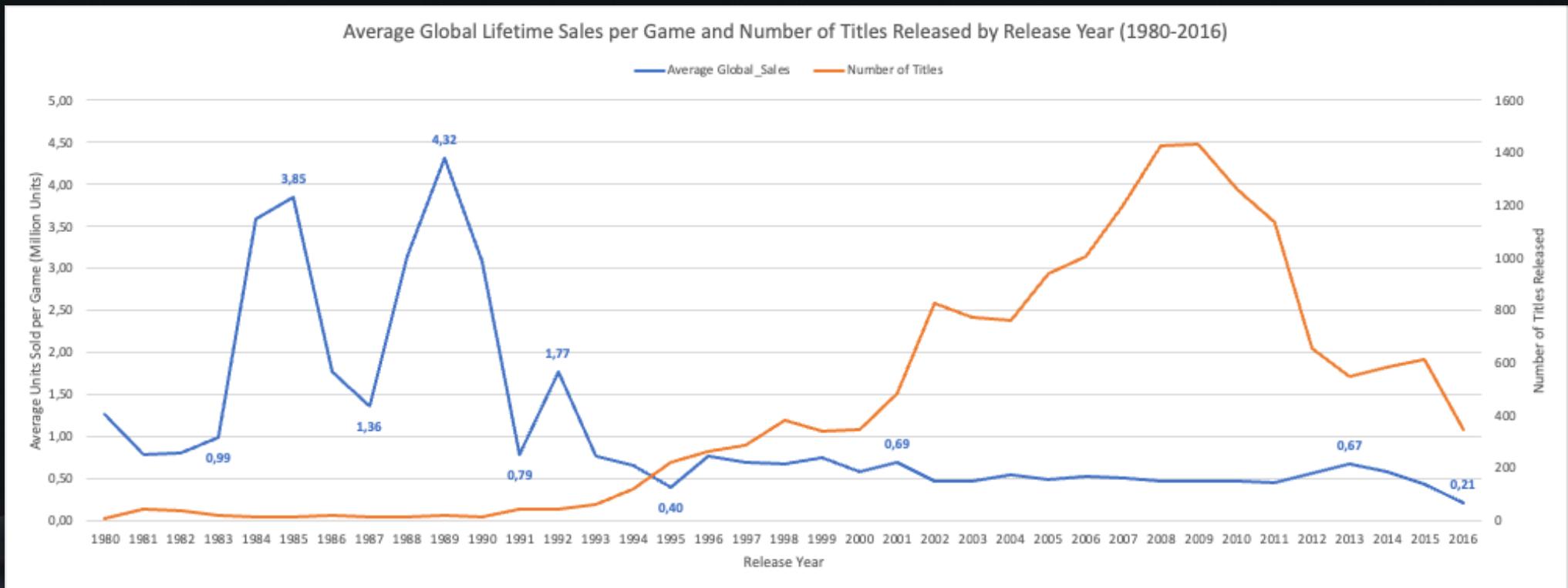
Sales trends and market shares
have remained consistent.

The Market Peaked in 2008 and Has Since Declined



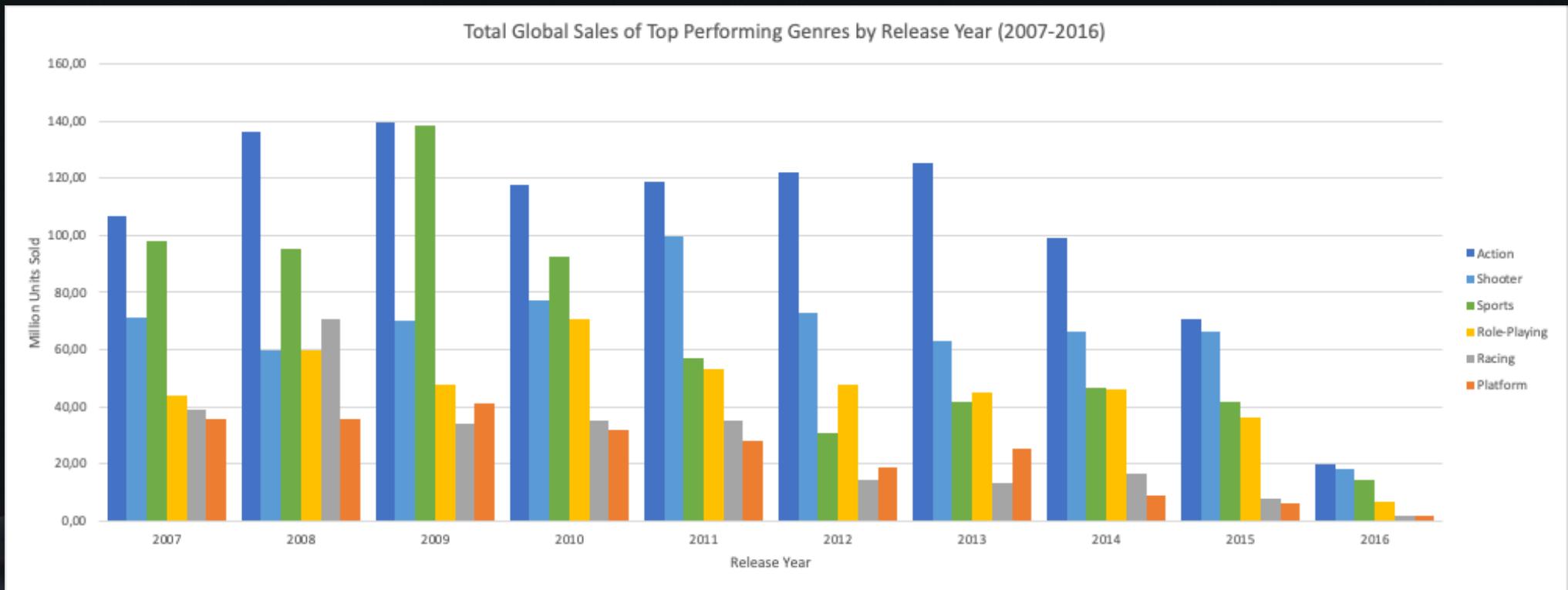
The global physical game market expanded rapidly from the mid-1990s, peaking in 2008-2009. Since then, both sales and title output have contracted sharply — returning to early-1990s levels by 2016.

Despite Decline, Per-Game Sales Remained Stable Despite Decline, Per-Game Sales Remained Stable – Until 2016



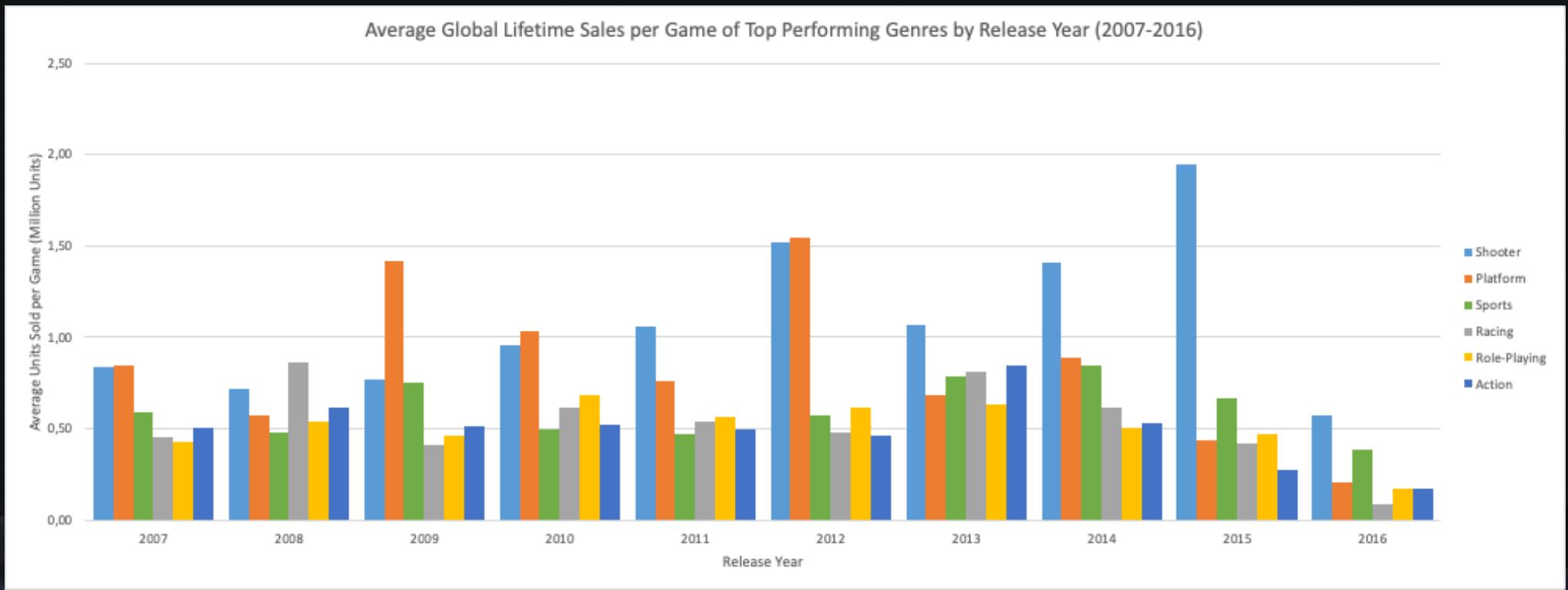
From the mid-1990s, average sales per game levelled off, reflecting a more stable and competitive market – until a sharp drop in 2016.

Global Genre Leaders: 2007-2016



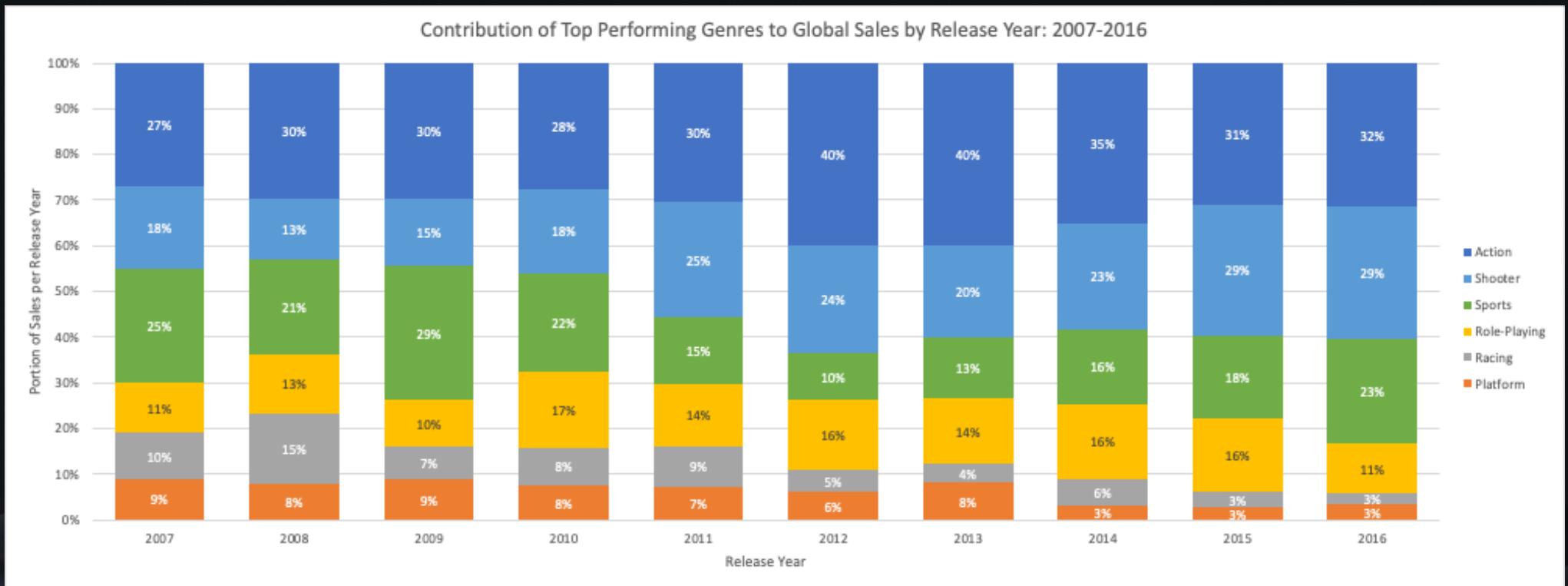
Action consistently led global physical game sales across the last decade, followed by Shooter and Sports.

Most Popular Genres ≠ Highest Return Per Game



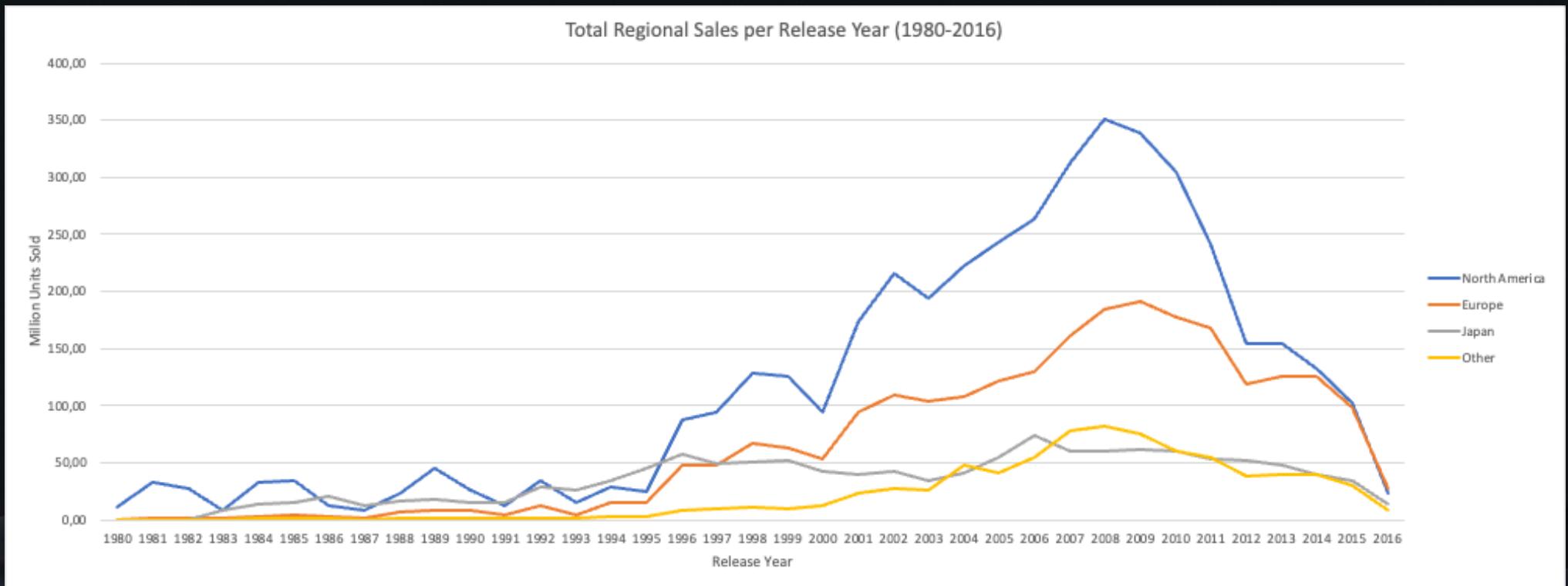
Platform and Shooter genres offered the highest average sales per title. Action delivered only moderate per-title performance.

Genre Shifted Over the Last Decade



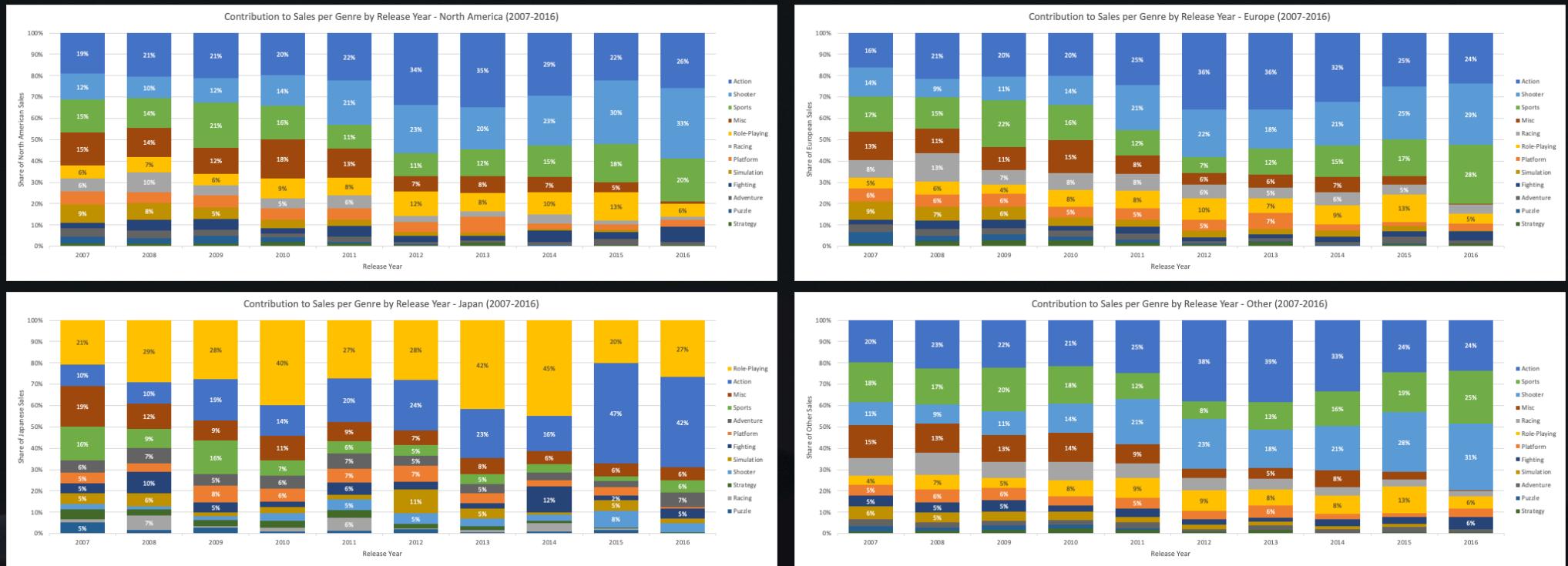
Shooter gained share throughout the decade. Platform and Racing declined. Action remained strong but fell slightly.

Europe Gained Ground as North America Contracted



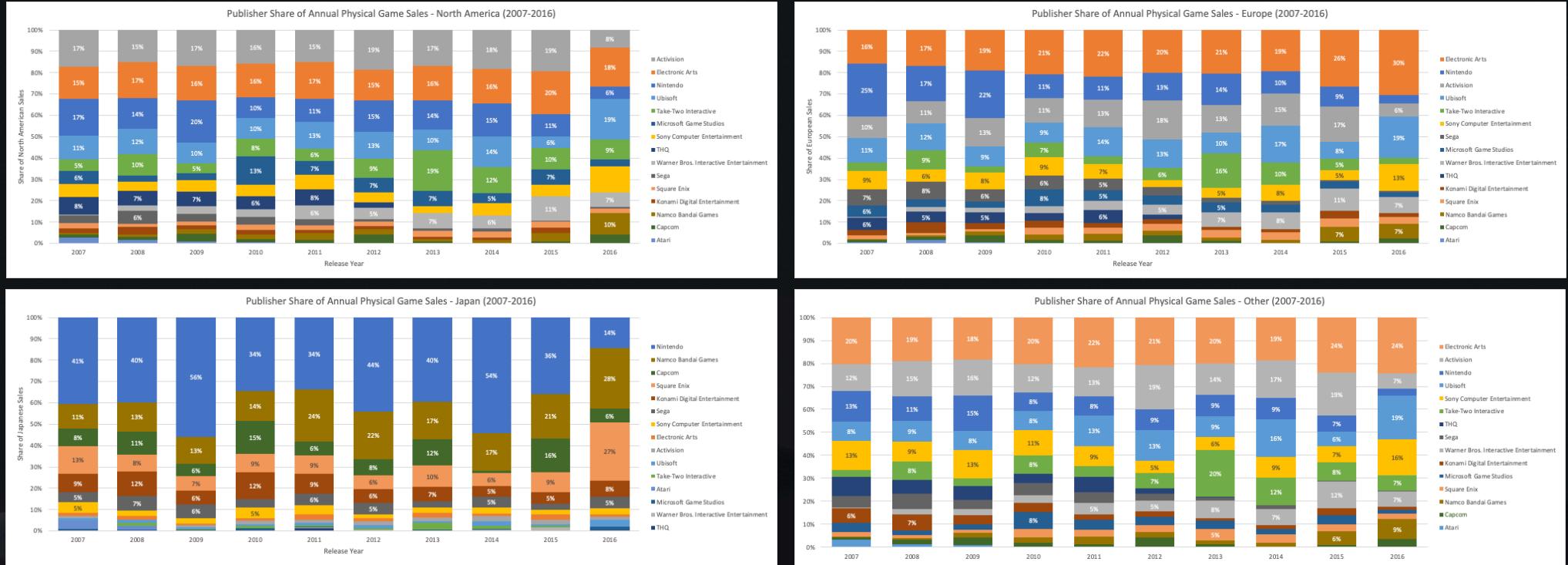
Europe overtook North America in physical game sales by 2016. Japan declined gradually. Other region remained modest but stable.

Genre Preferences Differ by Region (2007-2016)



North America and Europe are led by Action, Shooter, and Sports. Japan favours Role-Playing. Other region is more fragmented.

Regional Shifts in Publisher Share



EA and Activision gained in NA and EU. Japan remains domestically dominated. Other is fragmented with no clear leader.

Key Findings from Market, Genre, and Competitive Analysis

• Market Trends

- The physical market contracted sharply since 2008, returning to early-1990s levels by 2016.
- Average sales per genre remained stable, suggesting contraction without collapse.

• Global Genre Trends

- Action, Shooter, and Sports lead in sales.
- Shooter and Platform performed best in average sales per game.
- Genre share evolve over the decade.

• Regional Insights

- Europe grew steadily, overtaking North America in 2016.
- Genre preference varied largely across regions.
- Publisher share also shifted regionally.

Sales trends and market shares have not remained consistent.

The physical market has contracted, likely due to digital disruption. Preferences and competitive share have evolved, requiring updated strategy.

Refined Understanding & Strategic Recommendation

- **Genre Strategy**

- Prioritise Action, Shooter, and Sports.
- Emphasise high title performance of Shooter and Platform.

- **Regional Focus**

- Japan - Role-Playing | NA & EU - Action, Shooter | Other - Flexible, adaptive approach
- Consider budget reallocations.

- **Competitive Intelligence**

- Track shifts in publisher share for strategic opportunities.

- **Assess the Digital Transition**

- Investigate growth in digital to validate marketing contraction and if physical insights apply to digital space.