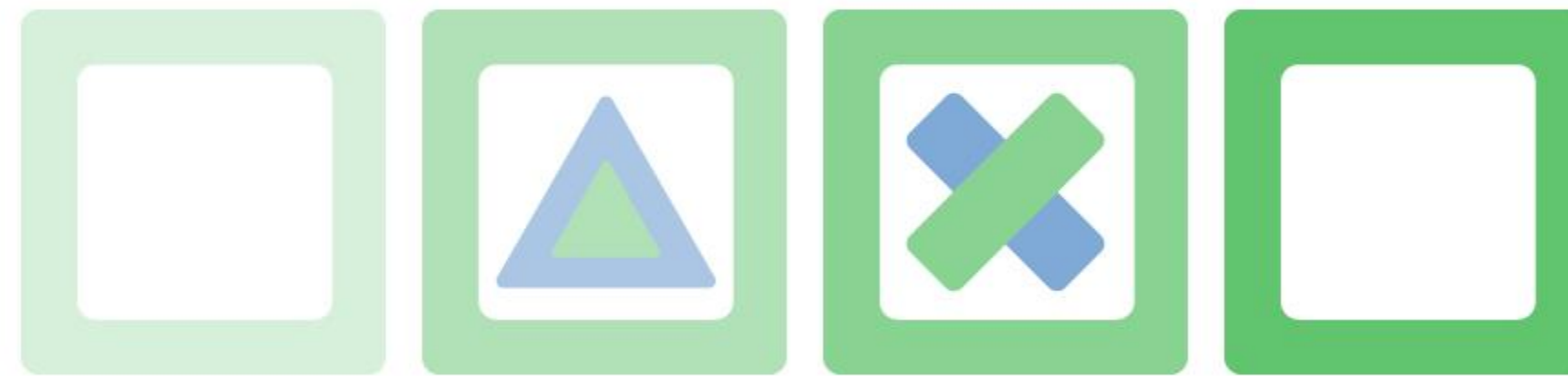


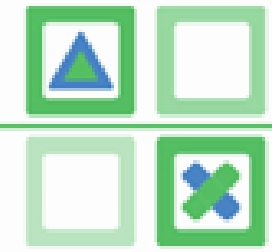
Finding the Future Potential



Marketing Budget Advisory Board 2017

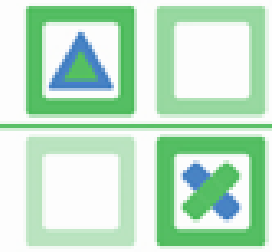
12th October 2016

GAMECO



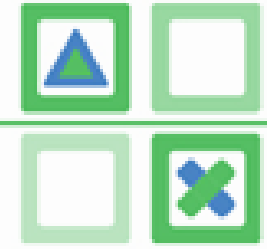
Procedure

1. What's the current situation?
 - Summarizing what we know, what's new and what's important
2. Focus on the regions
 - Looking at the ratio between sold units and count of published titles
3. Finding the Future Potential
4. Recommendations

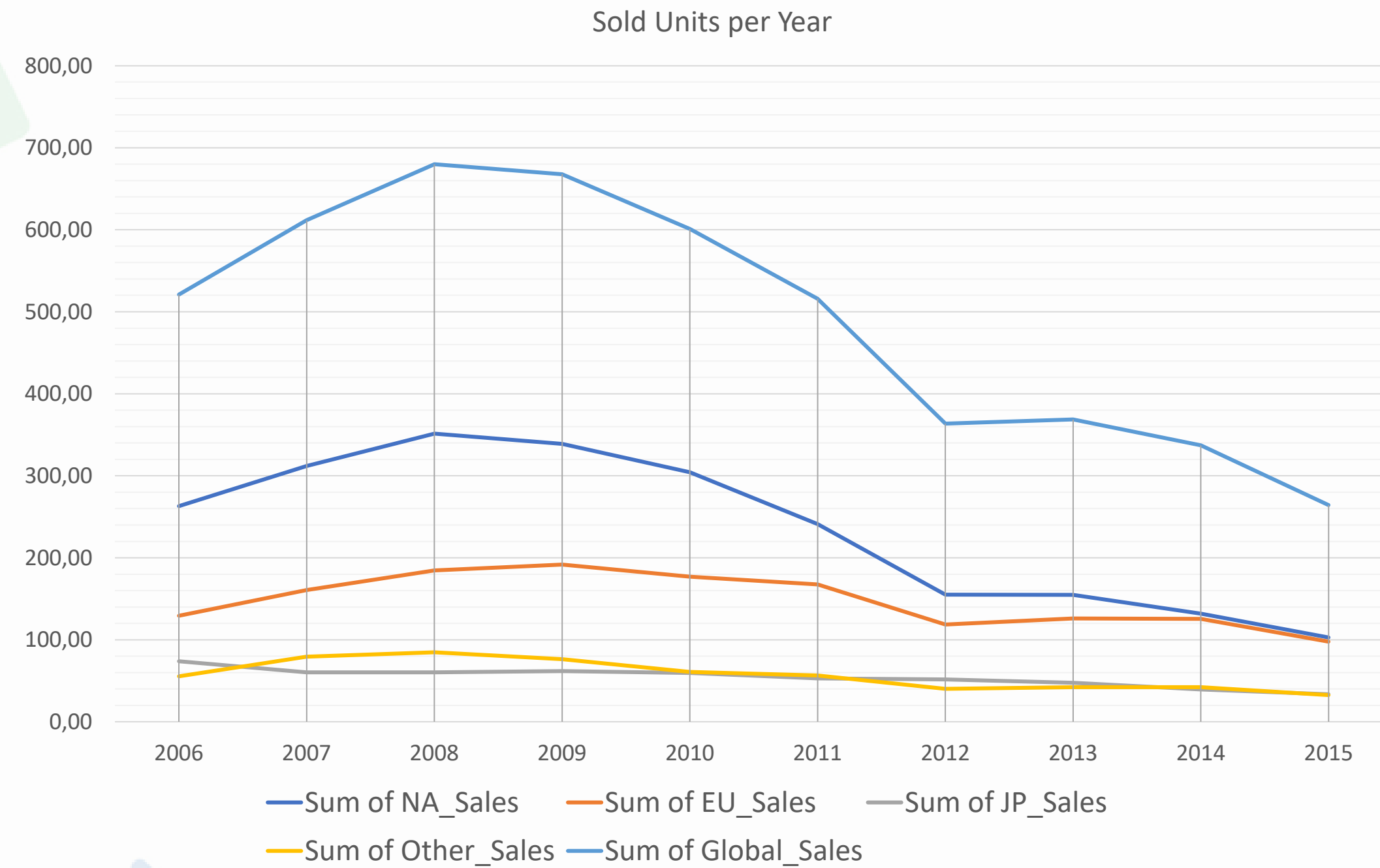


What you already know...

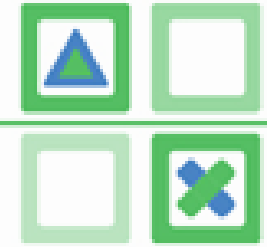
- Sales for the various regions stayed the same over the years
- Situation of the video game markets in the specific regions
- Unit of Sold games or Sales is always in 'Million Sold Units'



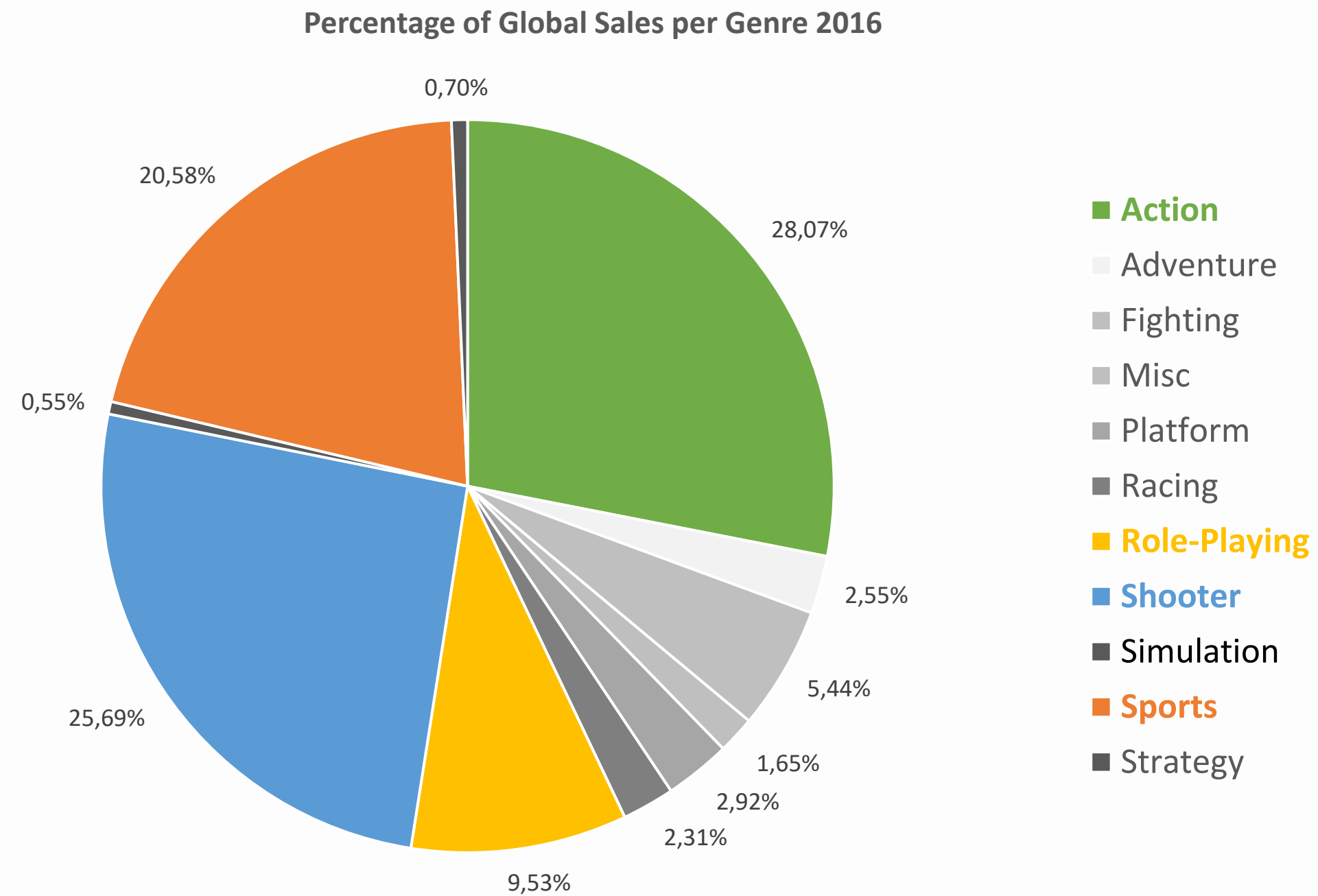
What's new...



- All Regions decreased since 2008
- NA dropped to around 71% of its former size



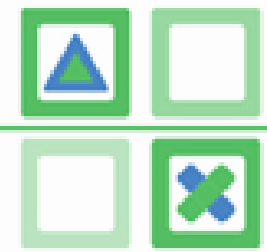
What's important...



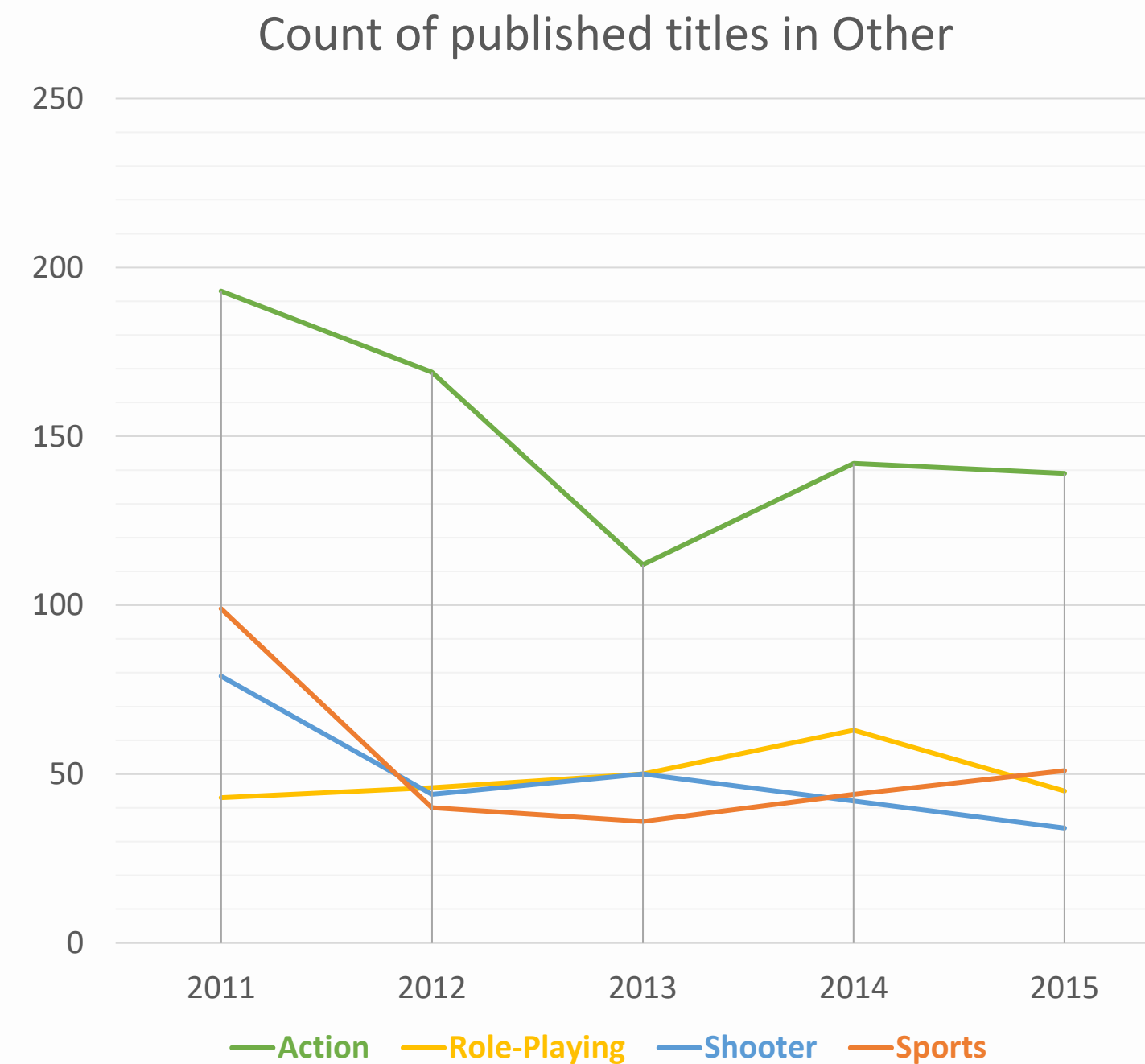
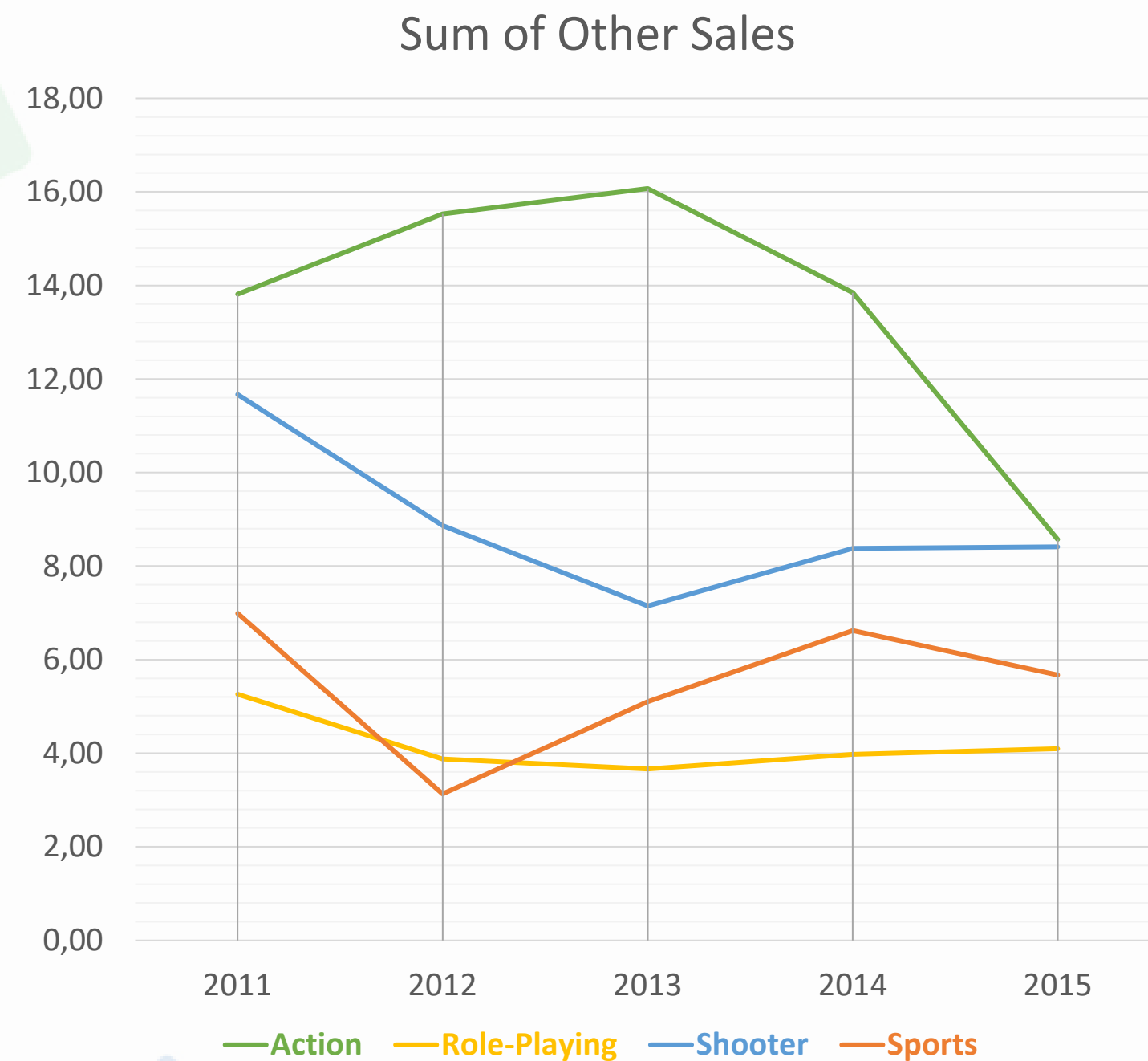
- The greatest Genre market share is hold by:

1. 'Action'
2. 'Shooter'
3. 'Sports'
4. 'Role-Playing'

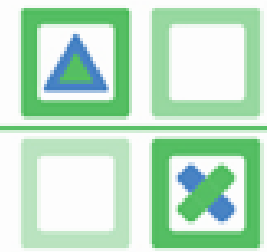
- Let's see how these Genres act in the regions...



Focusing on Other

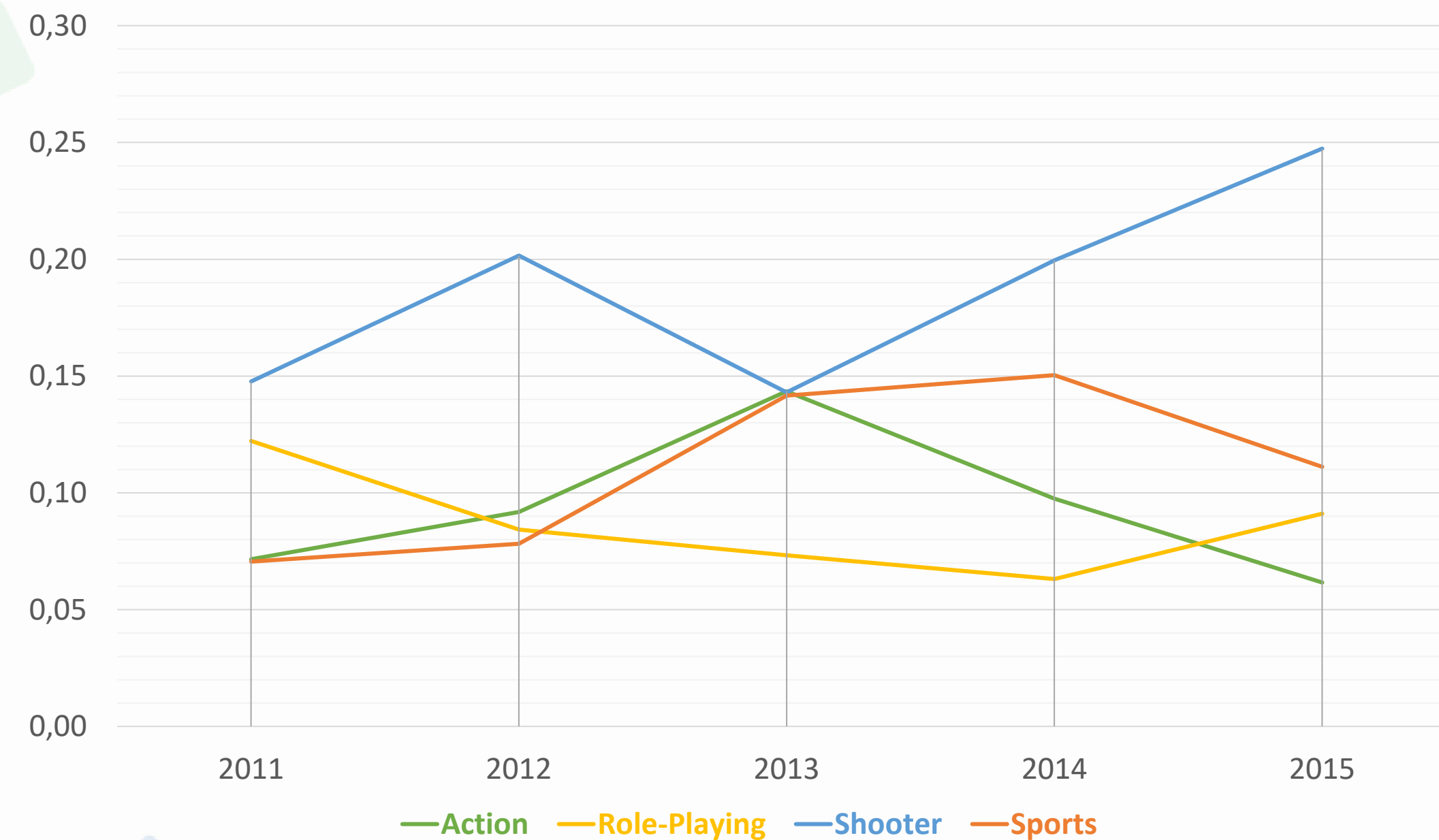


- ‘Action’ has the highest Sales but also the most published titles
- ‘Shooter’ has the second highest Sales and in 2015 the least published titles

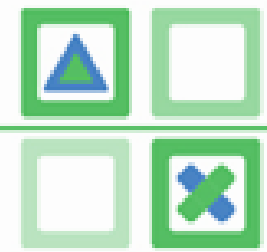


Focusing on Other

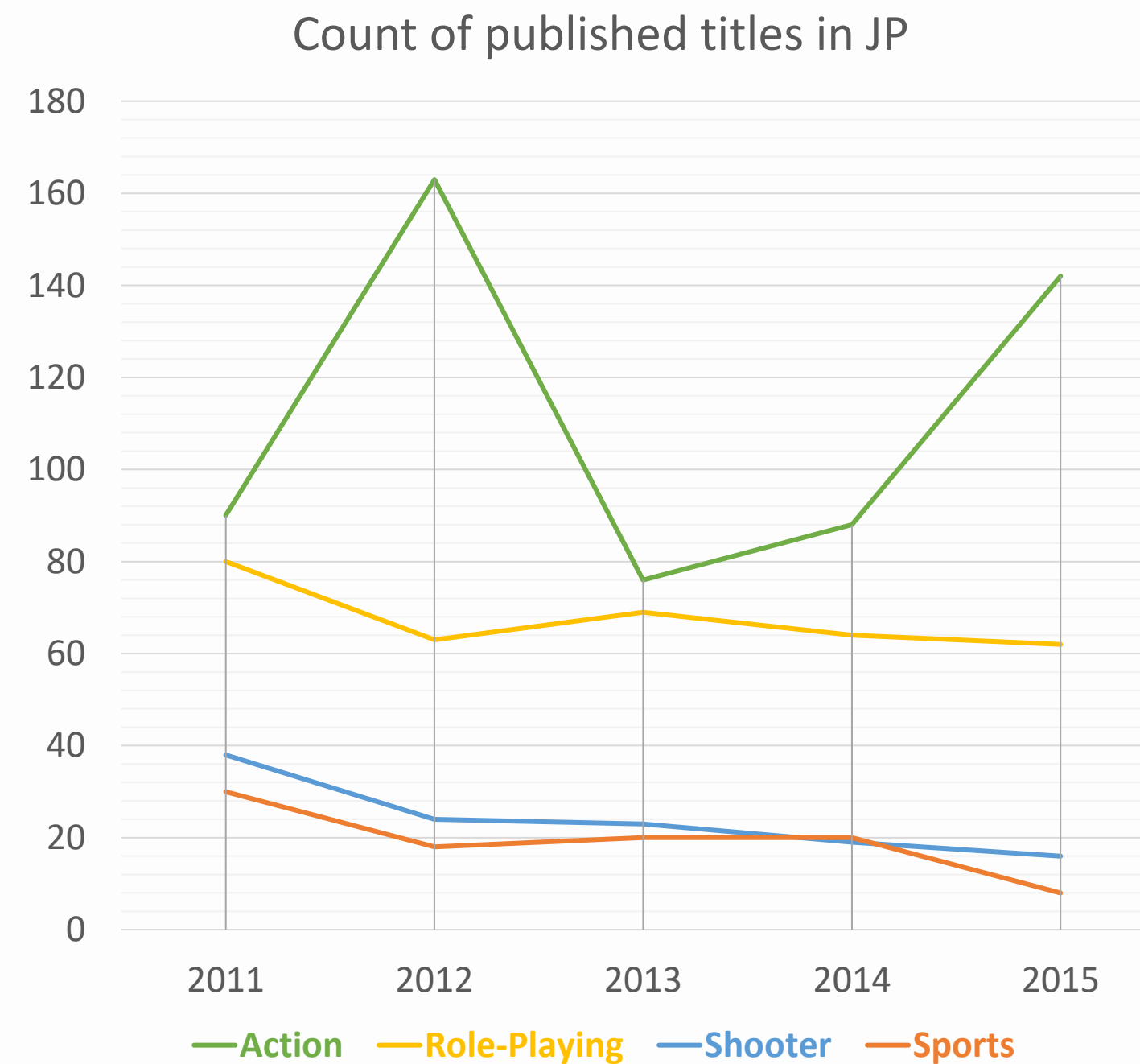
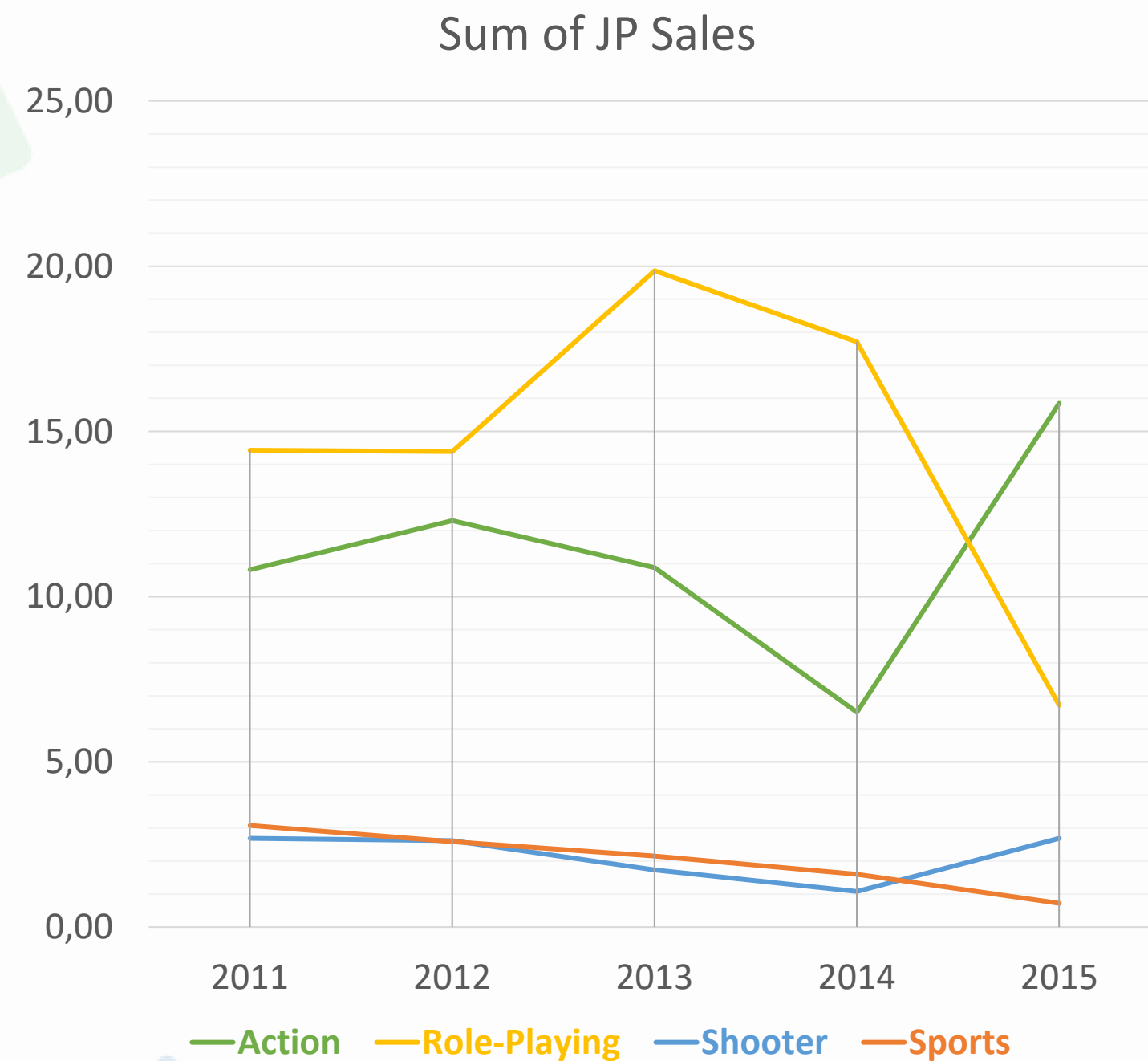
Ratio - Sold Units per Count of published titles in Other



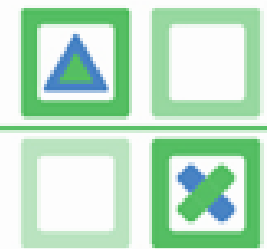
- The Genre 'Shooter' has the highest ratio
- 'Sport' has the second highest



Focusing on Japan

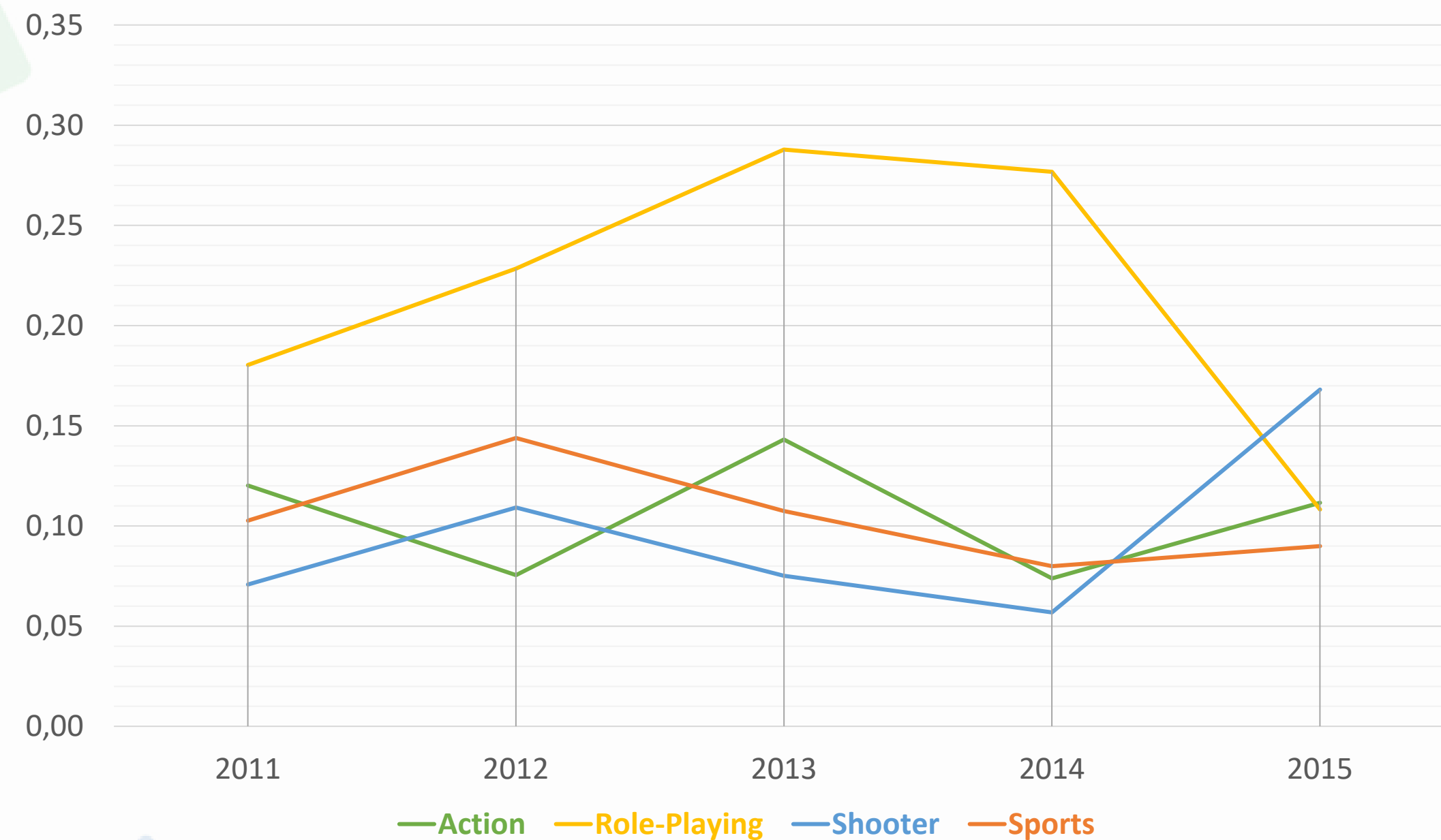


- Many 'Action' games are published, but only in 2015 it became the most sold Genre
- Steady amount of published 'Role-Playing' games, but hard loss on Sales in 2015

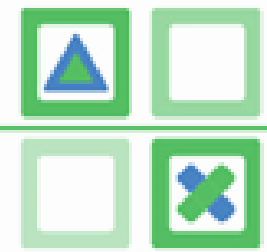


Focusing on Japan

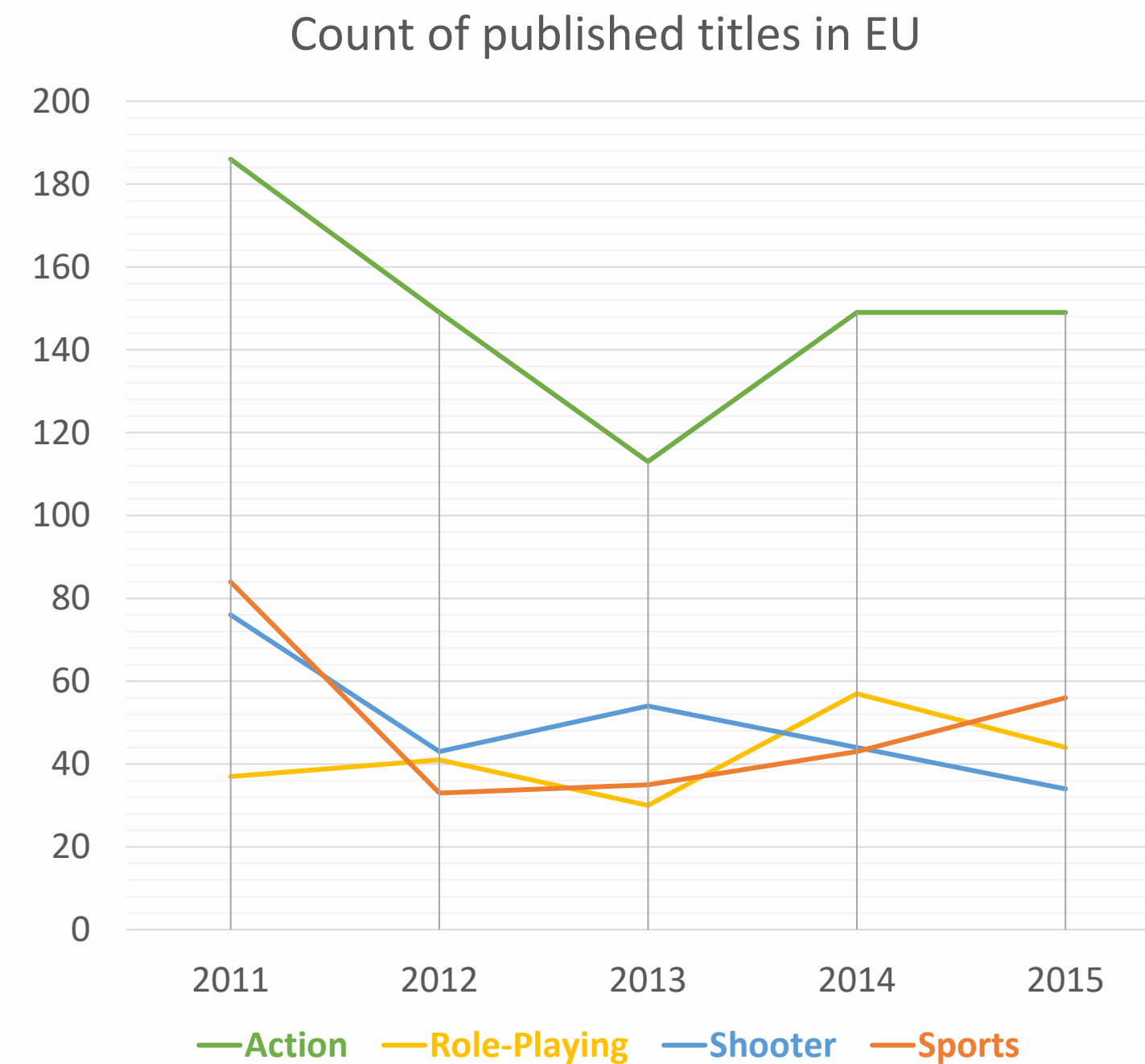
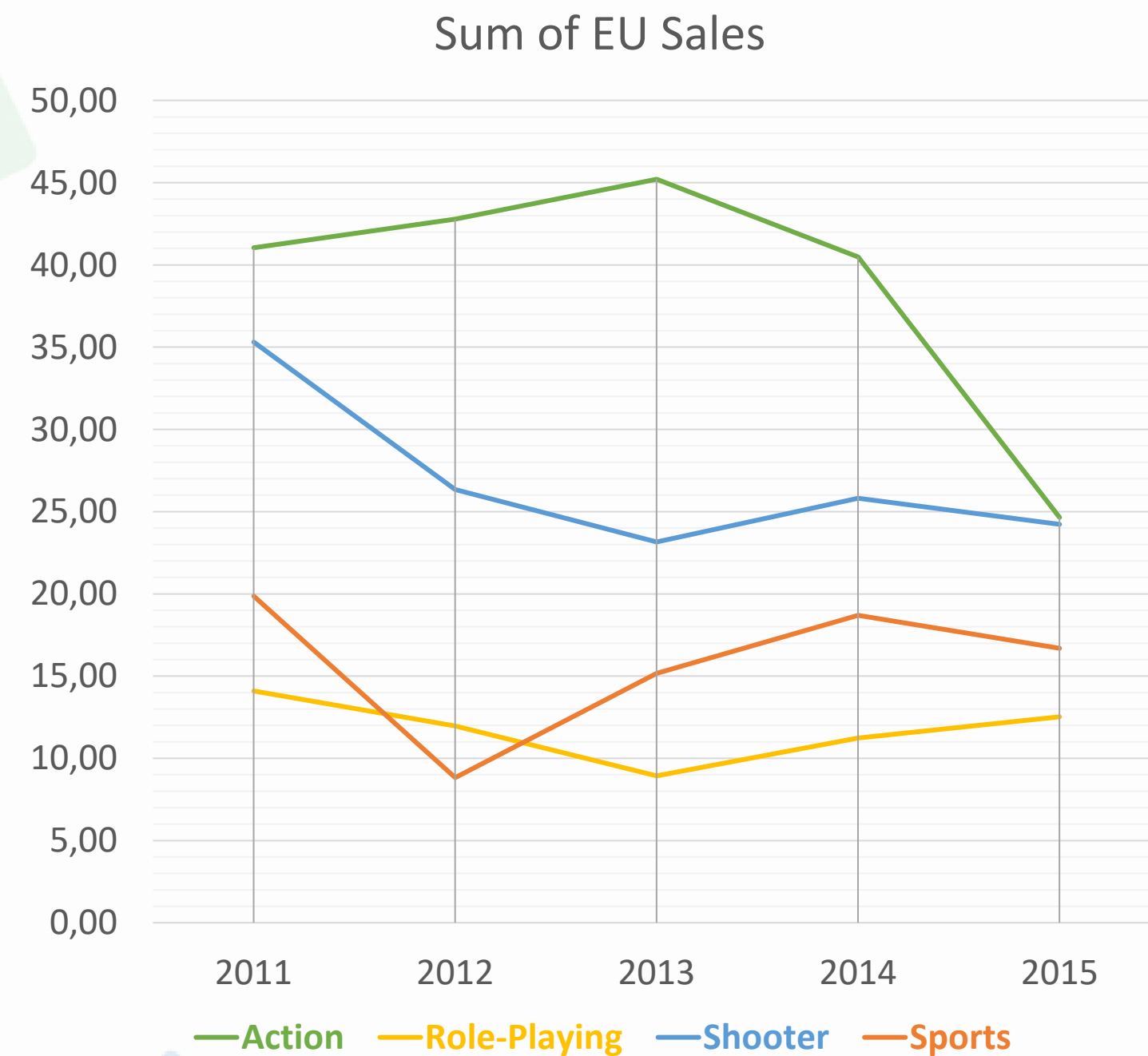
Ratio - Sold Units per Count of published titles in JP



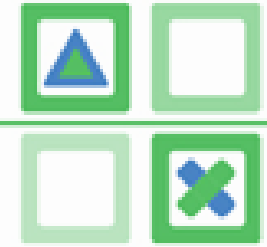
- 'Role-Playing' mostly at the top
- 'Shooter' surprisingly surpassed 'Role-Playing' in 2015



Focusing on Europe

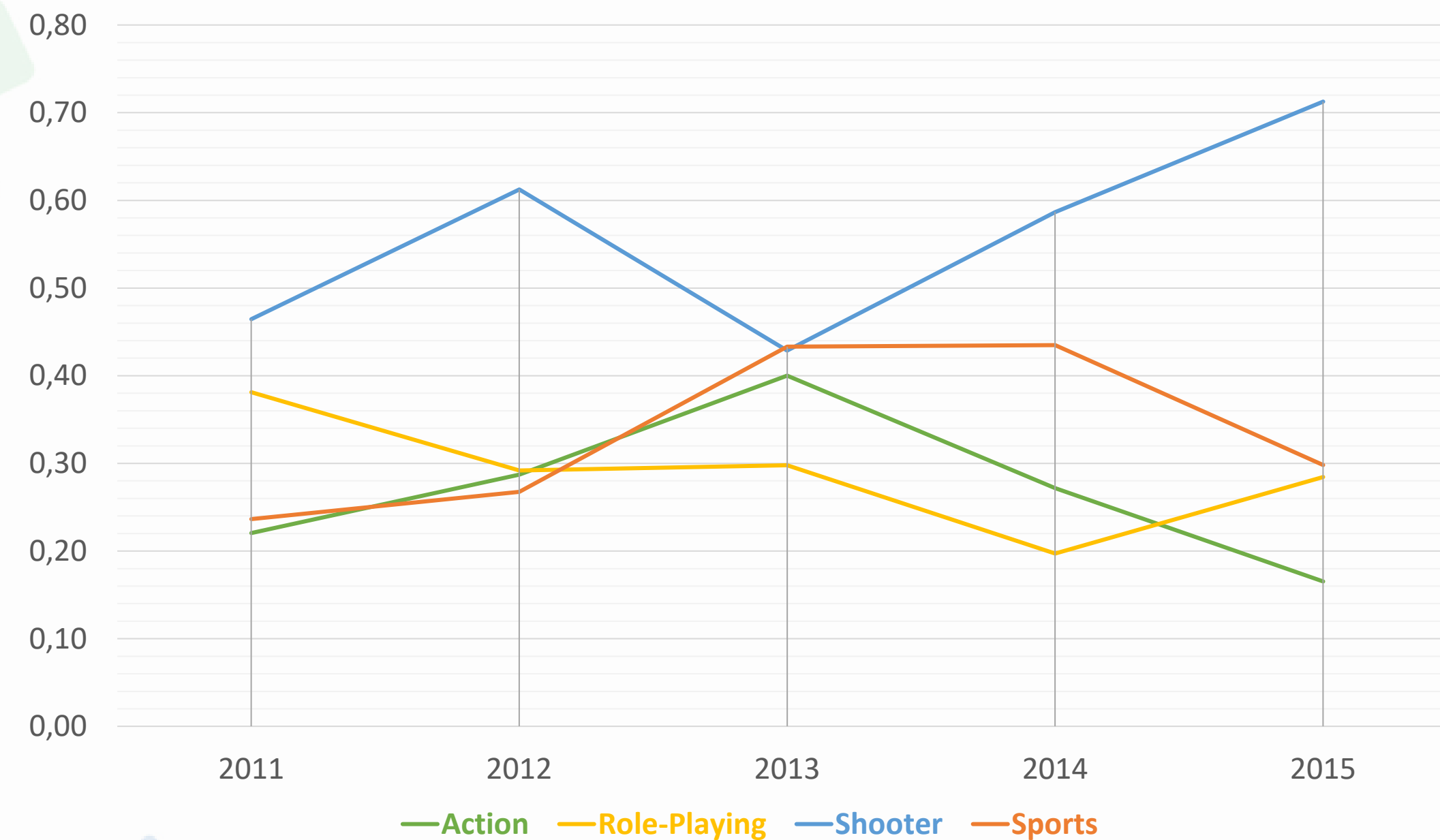


- ‘Action’ with most Sales and most published titles
- ‘Shooter’ second in Sales but low in published titles

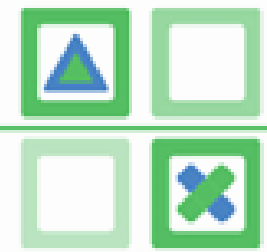


Focusing on Europe

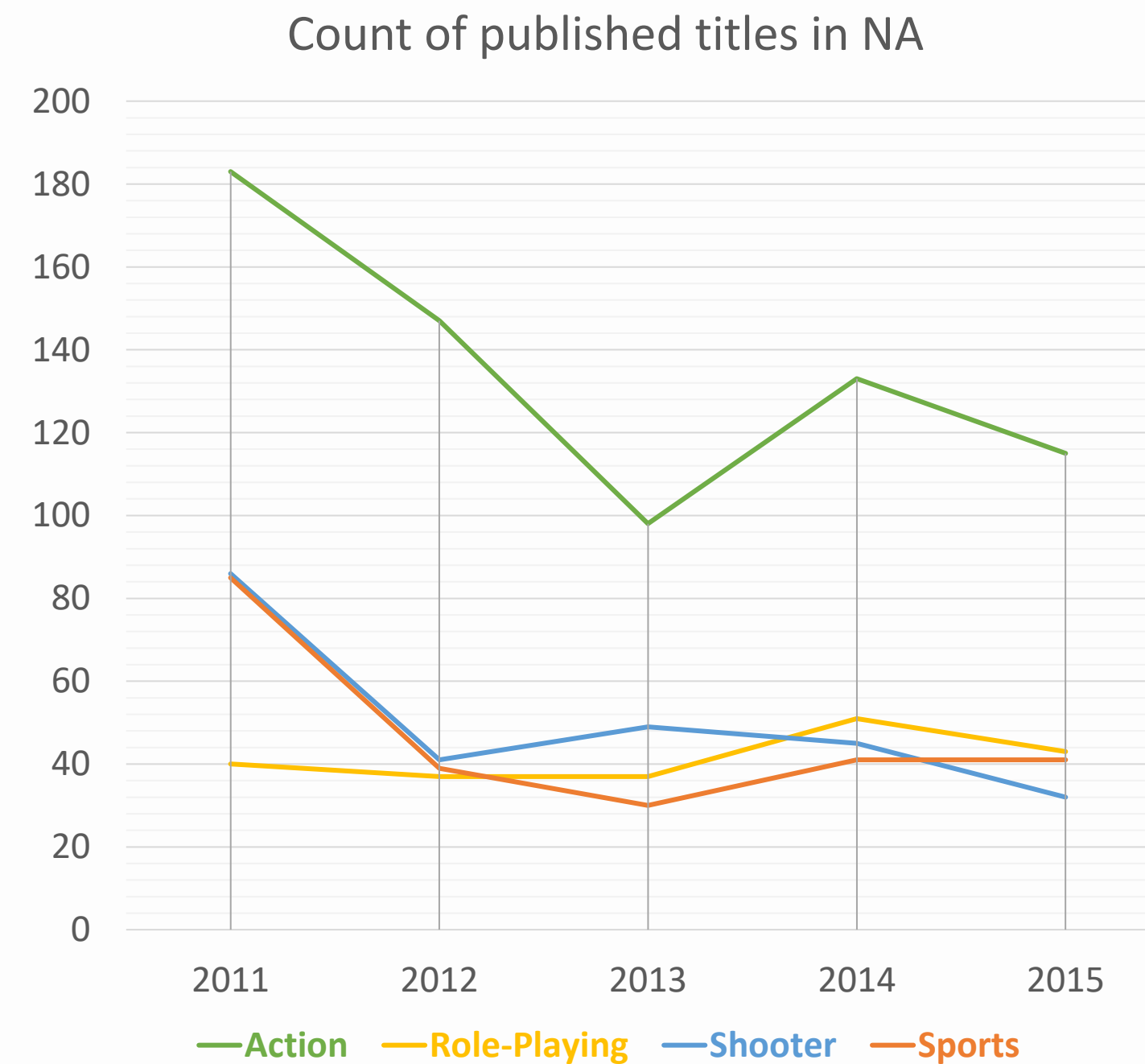
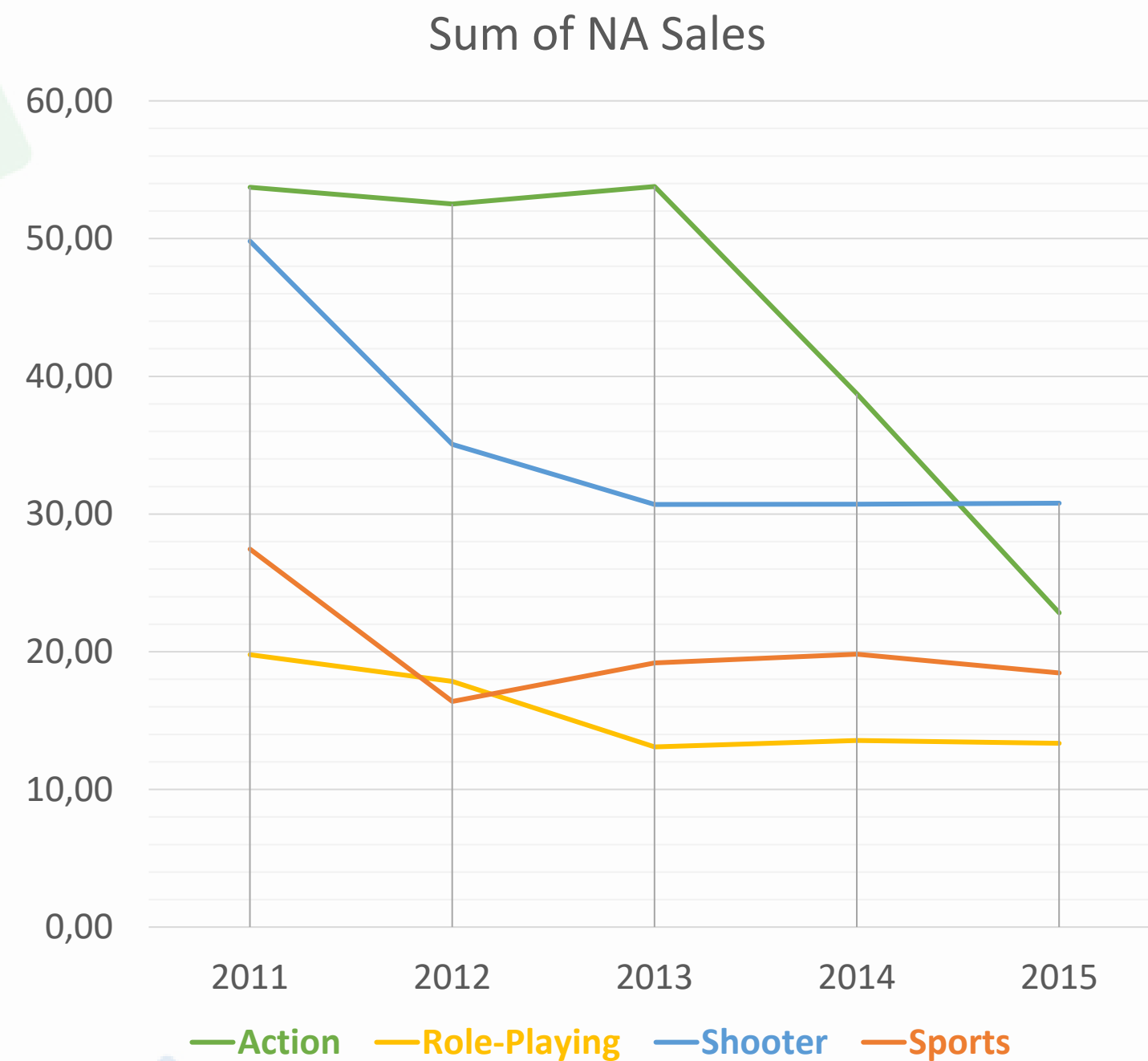
Ratio - Sold Units per Count of published titles in EU



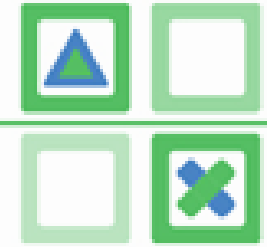
- ‘Shooter’ increased its ratio the most
- ‘Sports’ increased its ratio as well



Focusing on NA

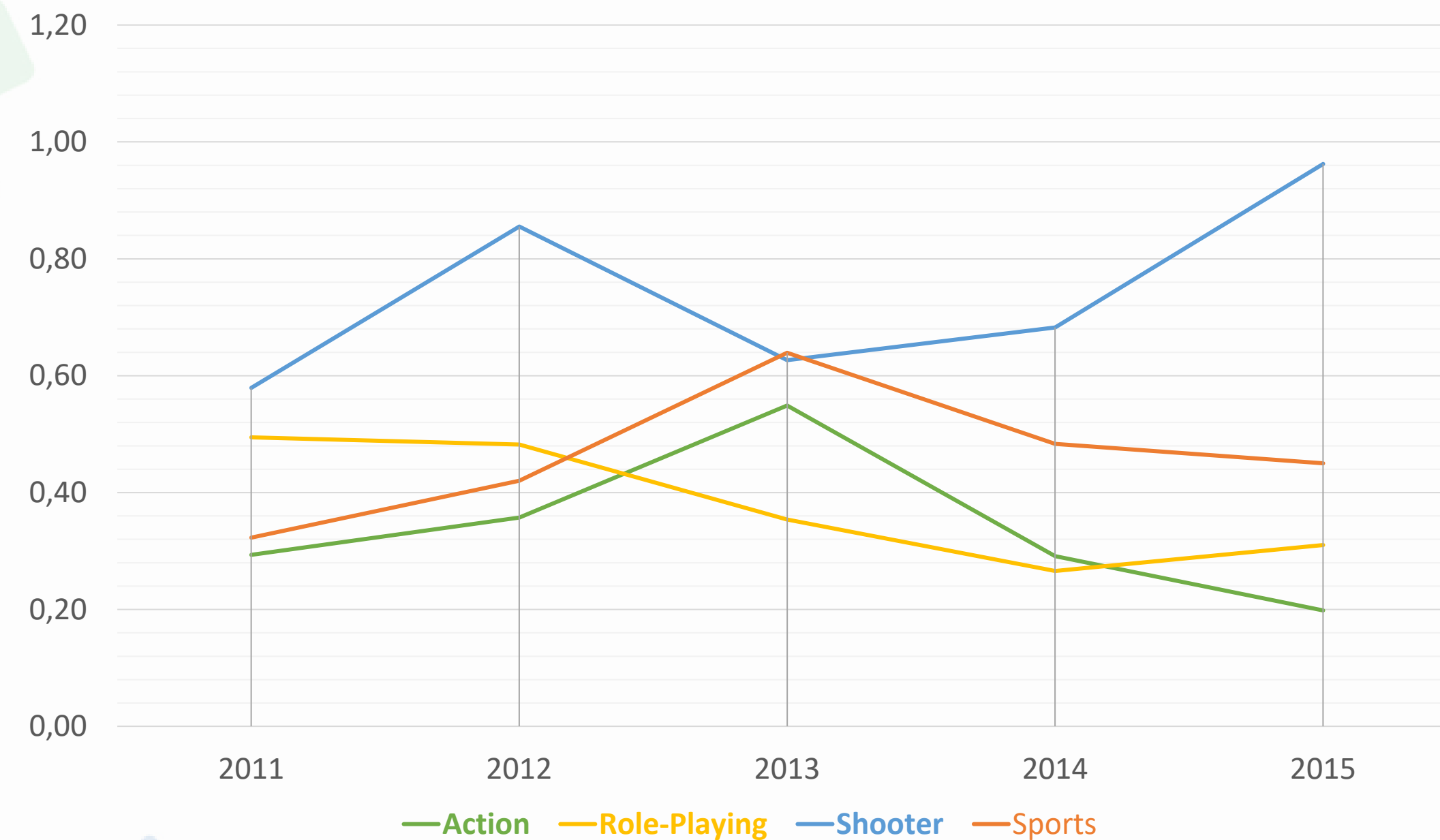


- All Sales decreased
- ‘Action’ has the most published titles
- ‘Shooter’ has the highest Sales and the lowest published titles in 2015

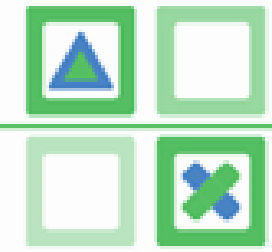


Focusing on NA

Ratio - Sold Units per Count of published titles in NA

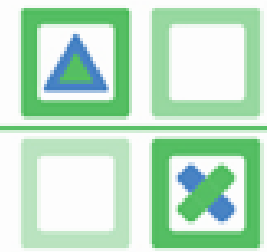


- ‘Shooter’ and ‘Sports’ increased their ratio, but ‘Shooter’ has the highest



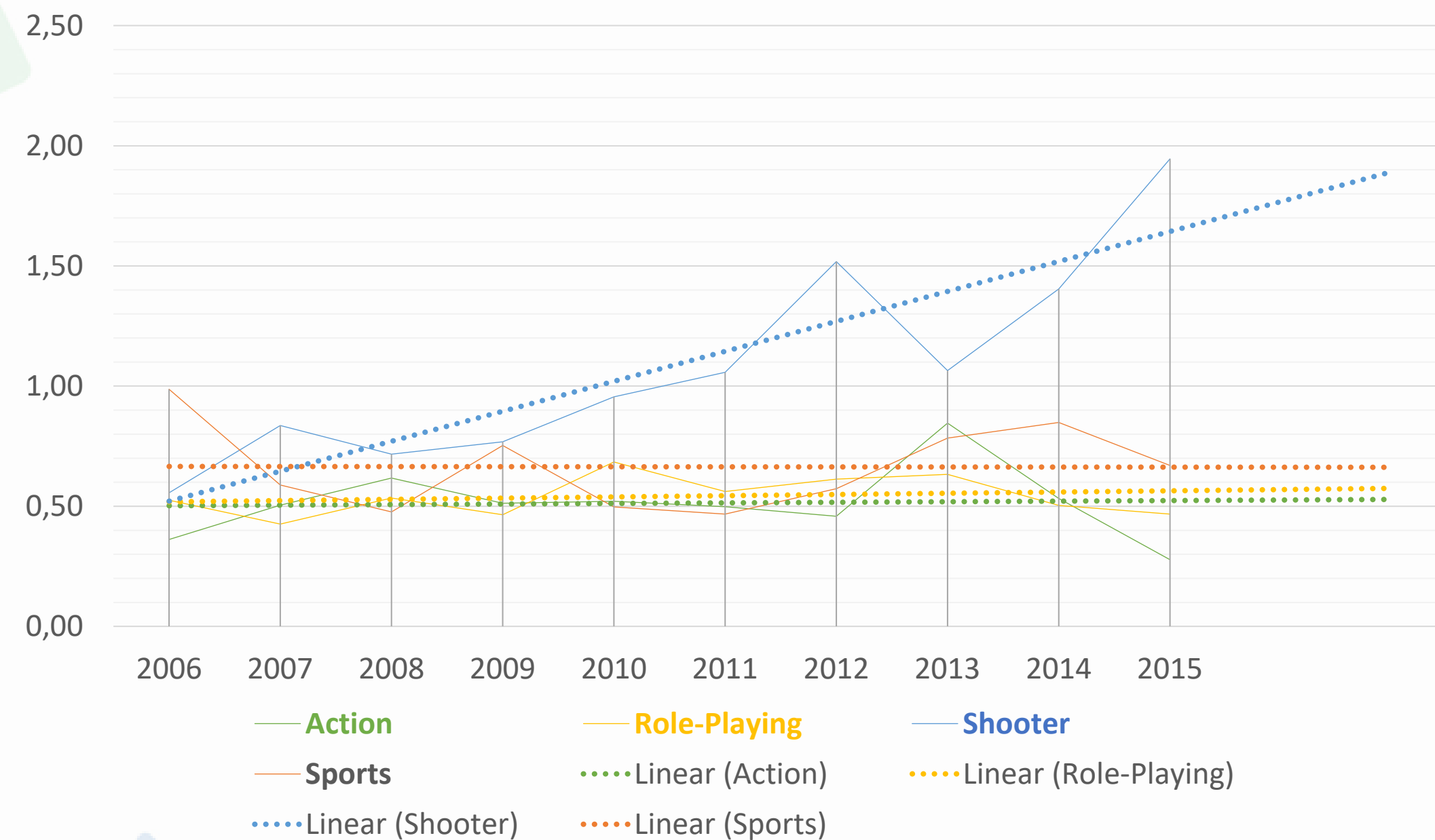
Finding the Future Potential

- In 2015 the Genre 'Shooter' has the best ratio of Sold Units per published titles in all regions
- It sold the most copies with the least published titles.
- This trend gives potential to be used in the future.

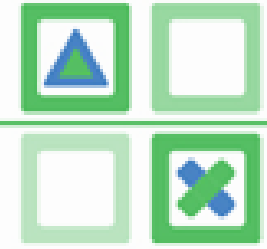


The Future Potential

Ratio - Sold Units per Count of published titles Global



- If we look at the ratio over the years, we can notice a steady upwards trend for 'Shooter'
- Although the Global Sales decrease and the number of published titles decrease as well, a certain need or popularity for 'Shooter' games established itself.
- In 2015 34 'Shooter' titles were published and 66,15 Million Units were sold



Recommendations

- **Marketing Budget**

- EU and NA have still the highest Market Share and need further support to keep the Sales steady
- EU will likely surpass NA in the next years, increasing the marketing budget for EU and decreasing for NA is welcome
- JP and Other are decreasing very slowly, the budget should be adjusted fractional

- **Focusing on 'Shooter'**

- The newfound popularity for 'Shooter' gives an opportunity to invest into the trend for increasing Sales

- **Decreasing Sales**

- Compared with the past the decreasing Sales should be investigated – are people switching to different systems (Mobile Gaming, Streaming, Cloud-Gaming Services,...) or is there a general decrease in the popularity of video games?