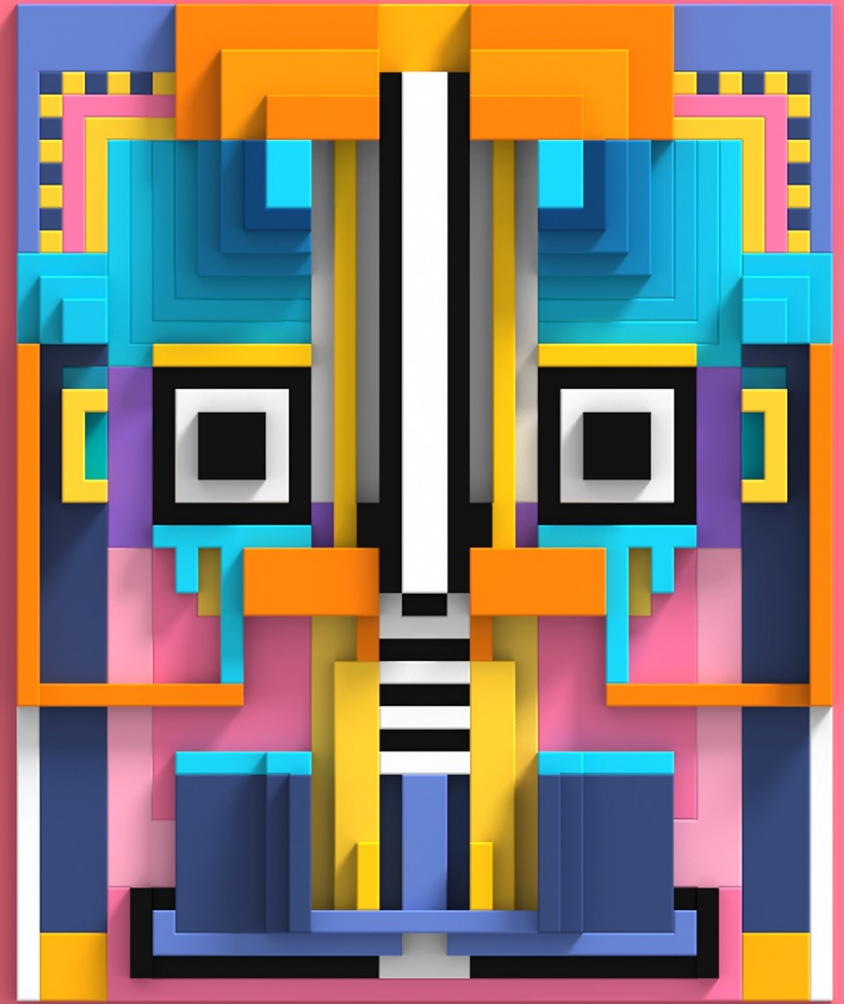


# Trends & Opportunities for 2017

A Data Analysis for GameCo  
by Noortje Offreins



# Is 2017 going to be like 2016?

How do we allocate our budgets for growth?

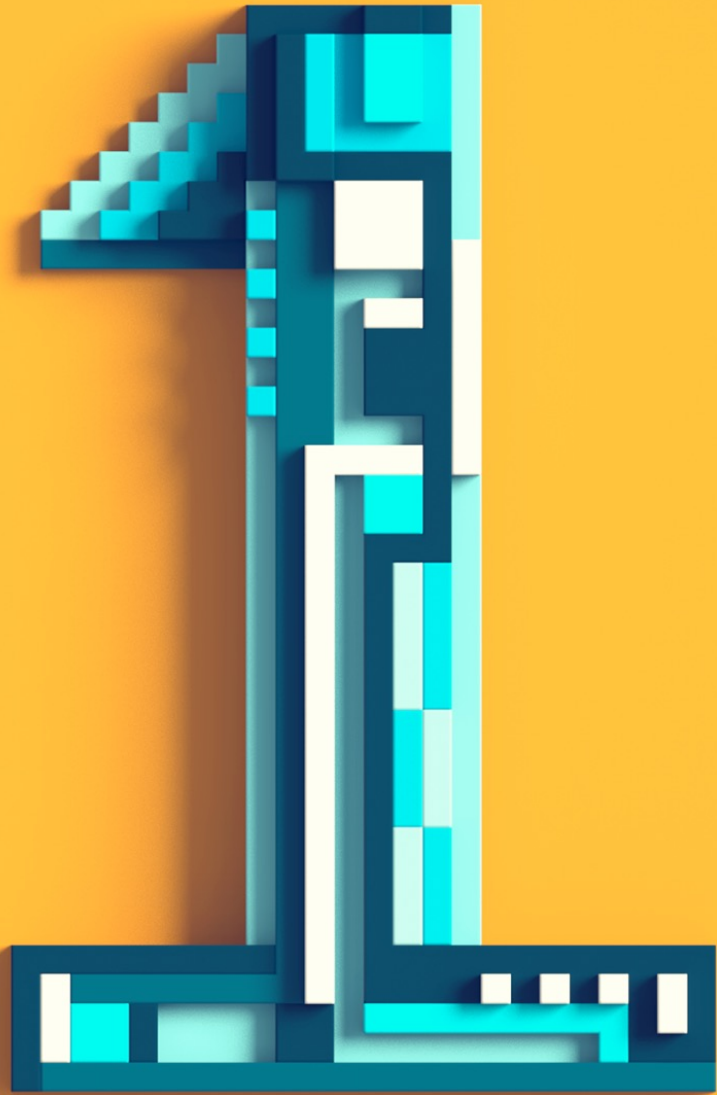
# AGENDA

## 1. Trends

Patterns & shifts seen in 2016

## 2. Opportunities

Potential for growth & success



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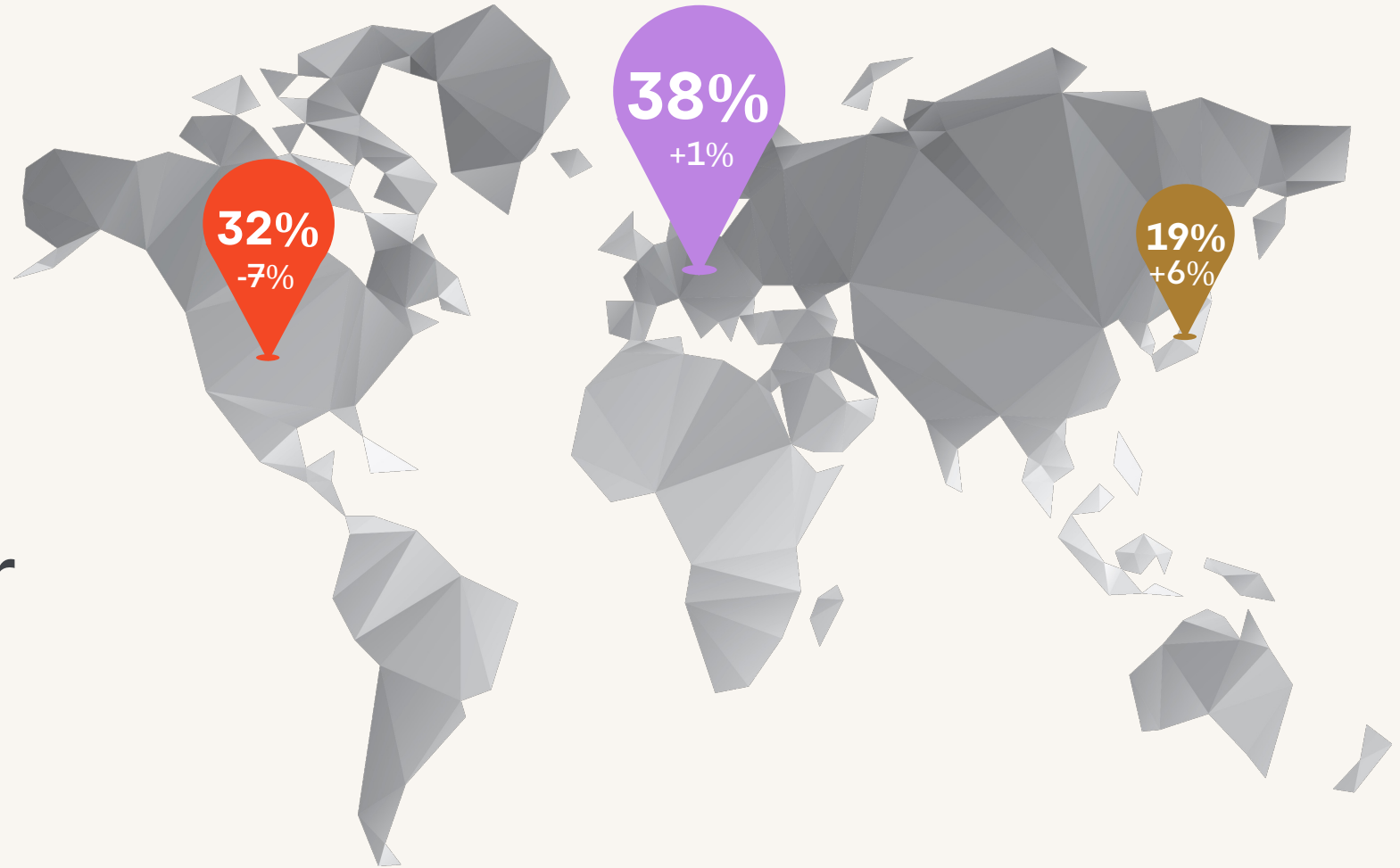
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## A New Order Among Top Tier Markets: Europe Premier Taking the Lead in Global Market Share

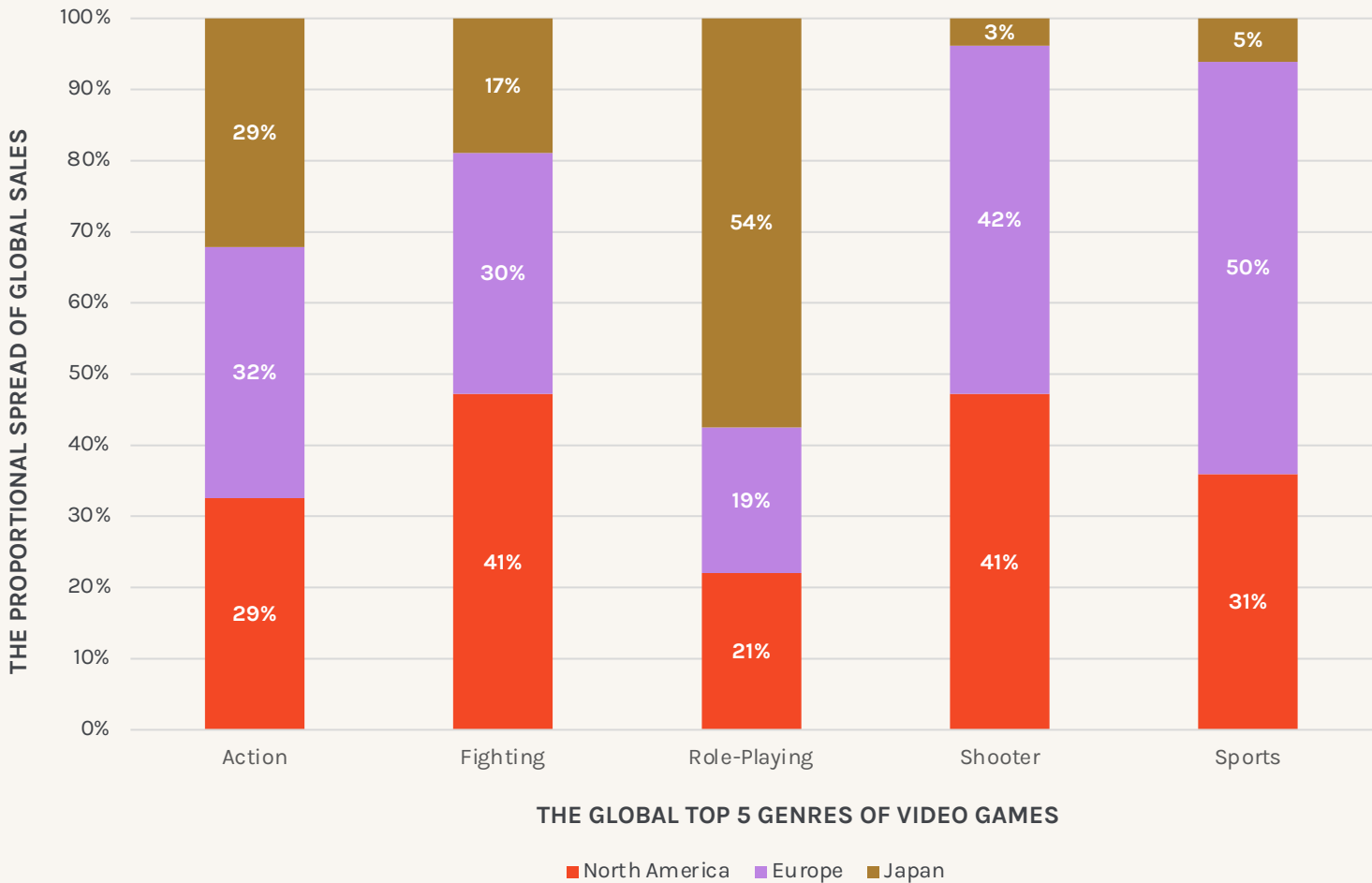
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For the first time  
in 20 years, North  
America lost top  
position in global  
sales to newcomer  
Europe.



# Exploring Top Tier Markets Identity: A Genre Popularity Analysis

2016 Global Sales Breakdown for Top 5 Genres in Top Tier Markets



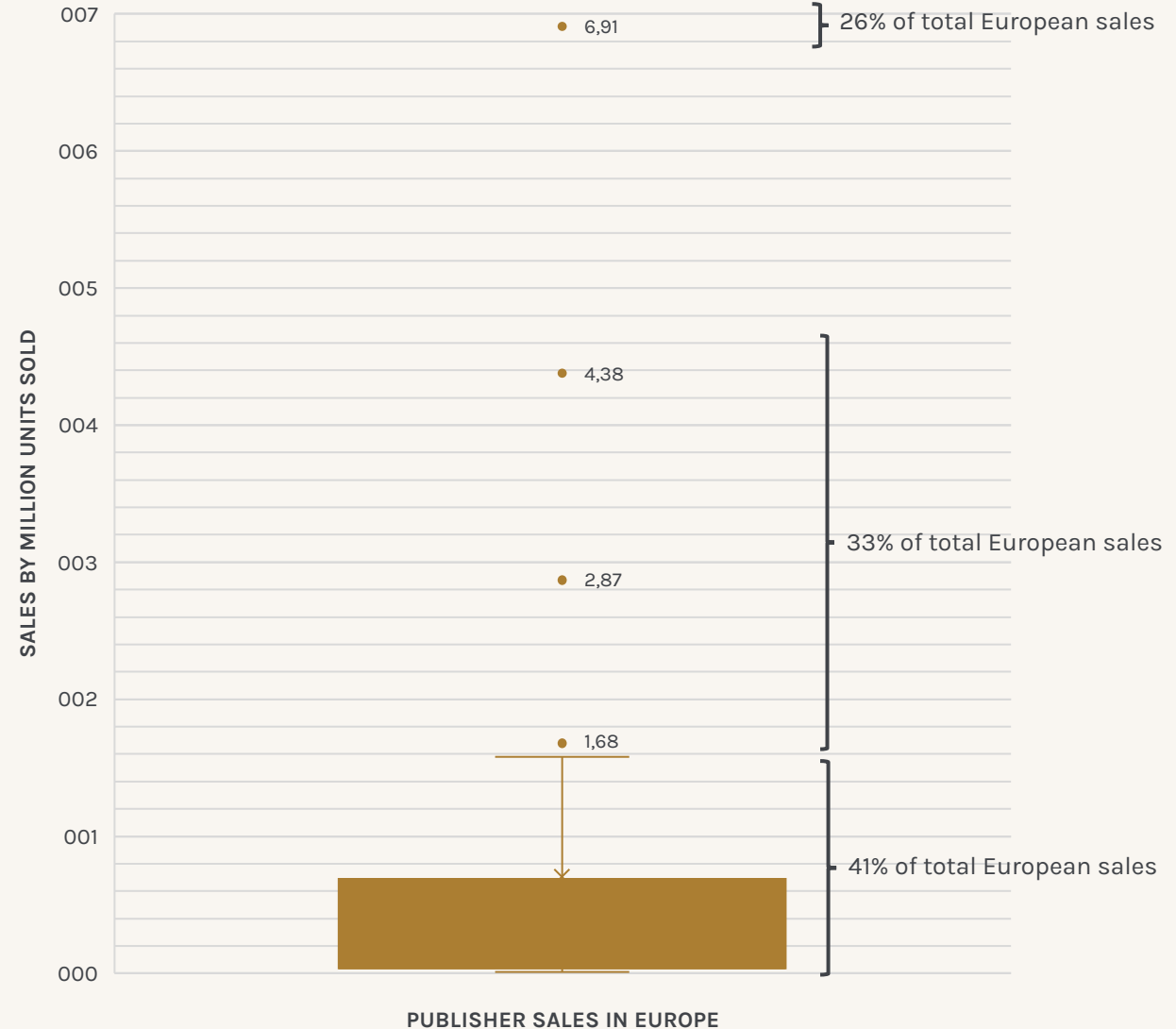
Fighting & Shooter  
reign North  
America, Role-  
Playing rules  
Japan, and Sports  
run Europe.

## Analyzing Sales Distribution in Europe: 4 Publishers are the Driving Force Behind European Success

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Electronic Arts'  
drive a quarter of  
all sales in Europe;  
owns 85% share of  
the total sales in  
Sports; generated  
for 88% by FIFA17.

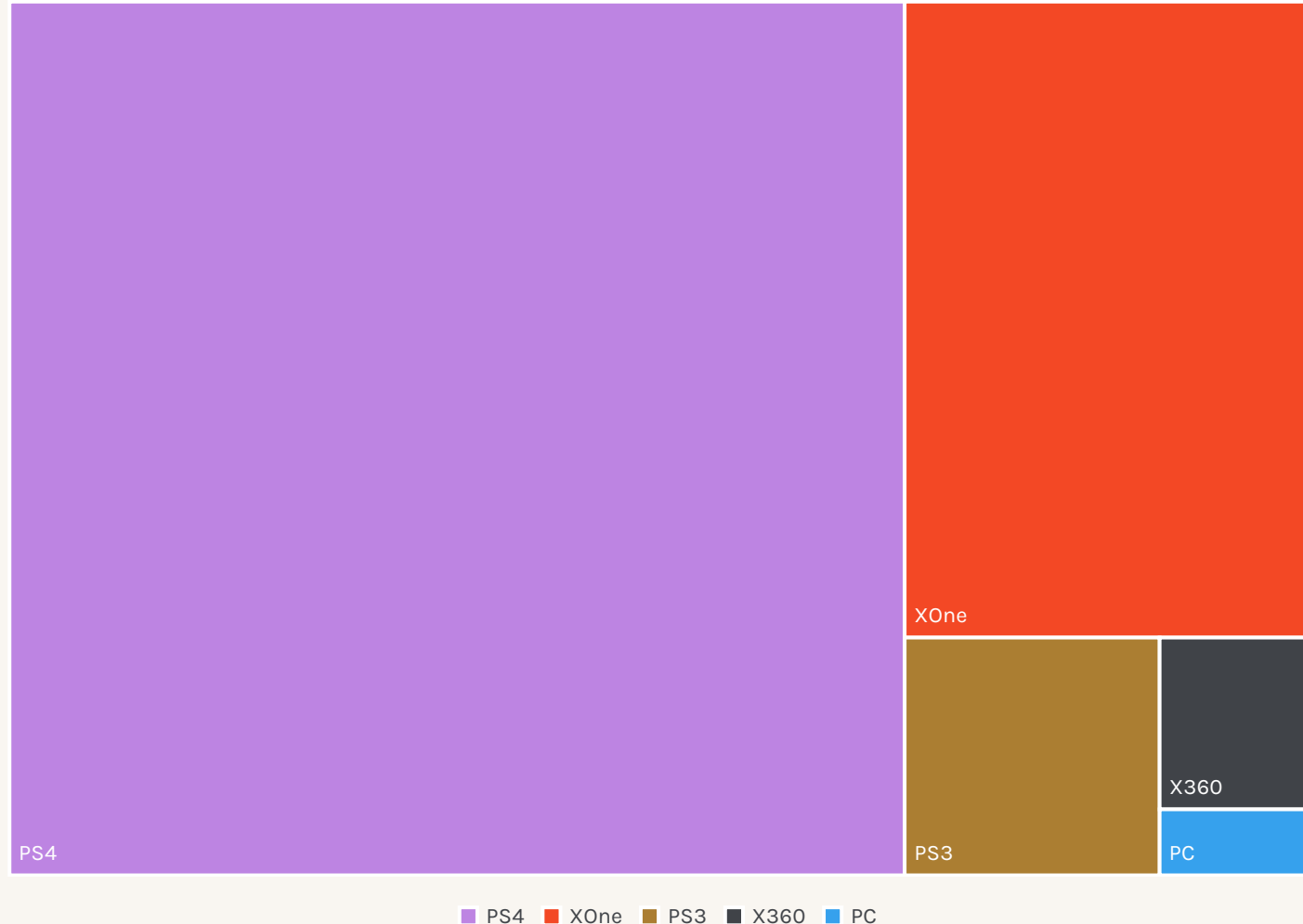
The Spread of Video Game Sales in Europe by Publisher



## Understanding the Root of FIFA17 Impact: Delivering Significant Platform Diversity

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Platform Availability & Popularity for FIFA17



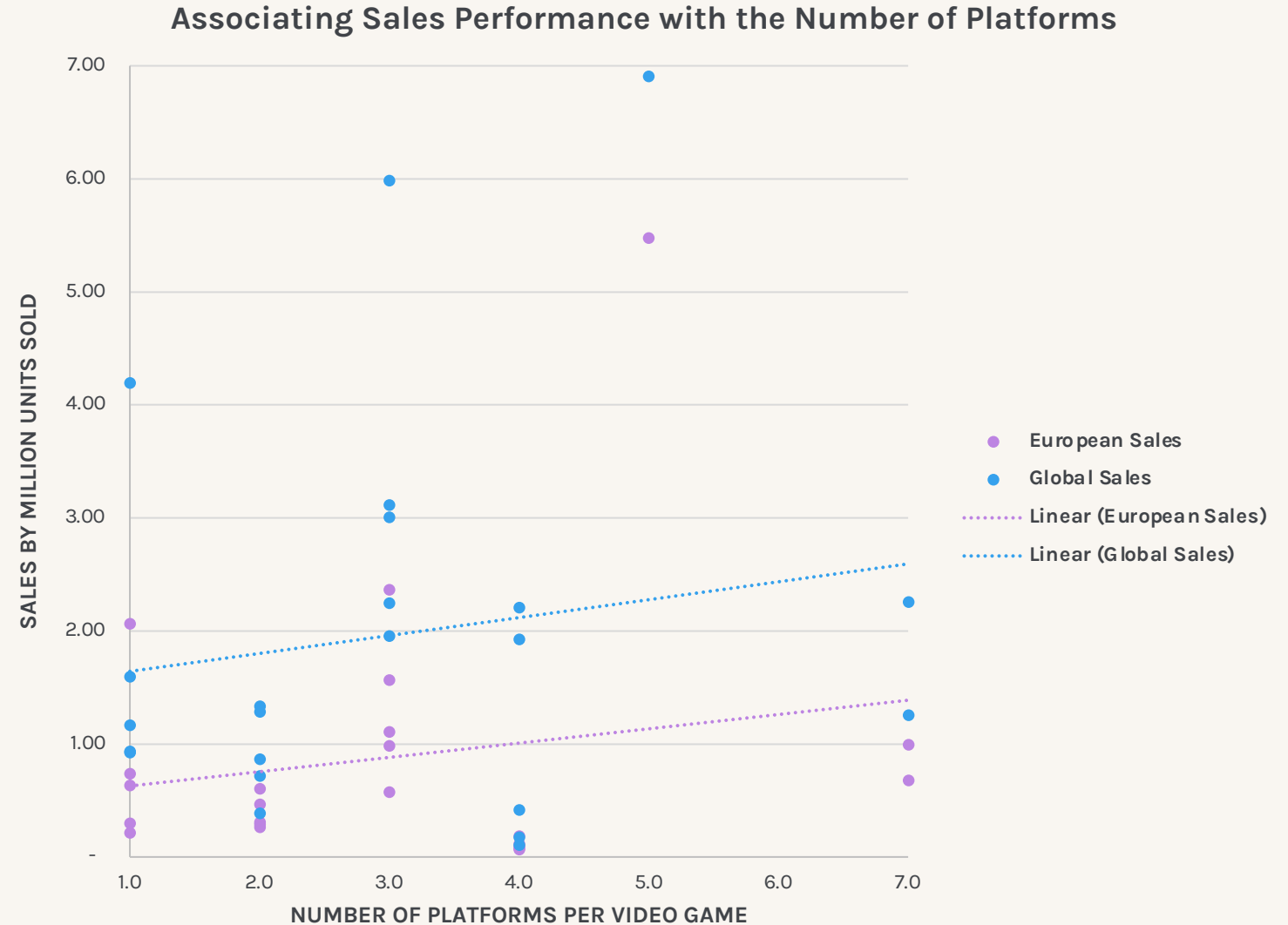
Electronic Arts  
executes a game  
plan, launching  
FIFA17 across 5  
platforms and  
impacting success  
in Europe.



## Platform Power: Confirming a Positive Sales – Platform Relationship

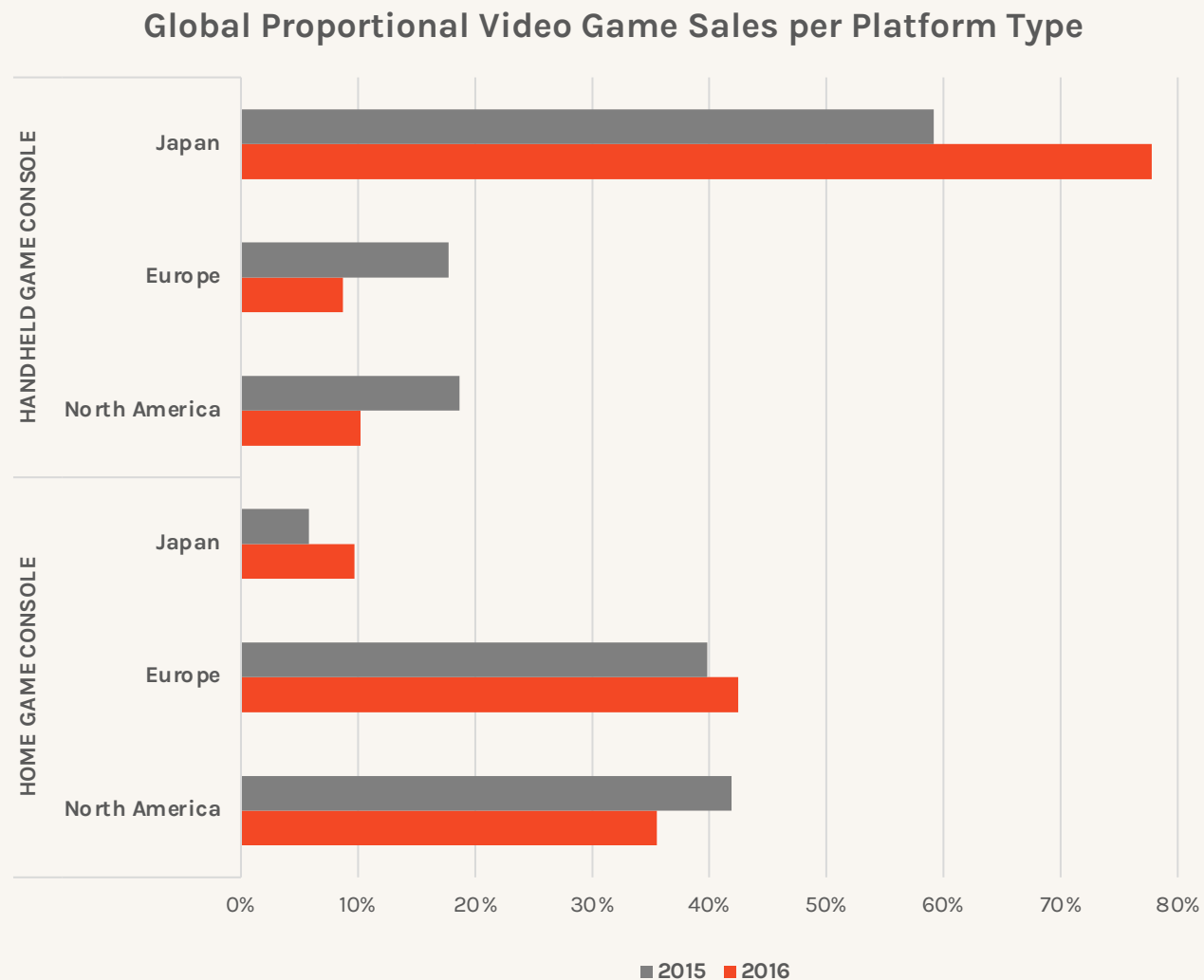
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The wider the availability of platforms for a game, the greater its sales volume.



# Platform Growth Dynamics:

## Europe's Home Console Surge while Japan Shows Dual Adoption Trend



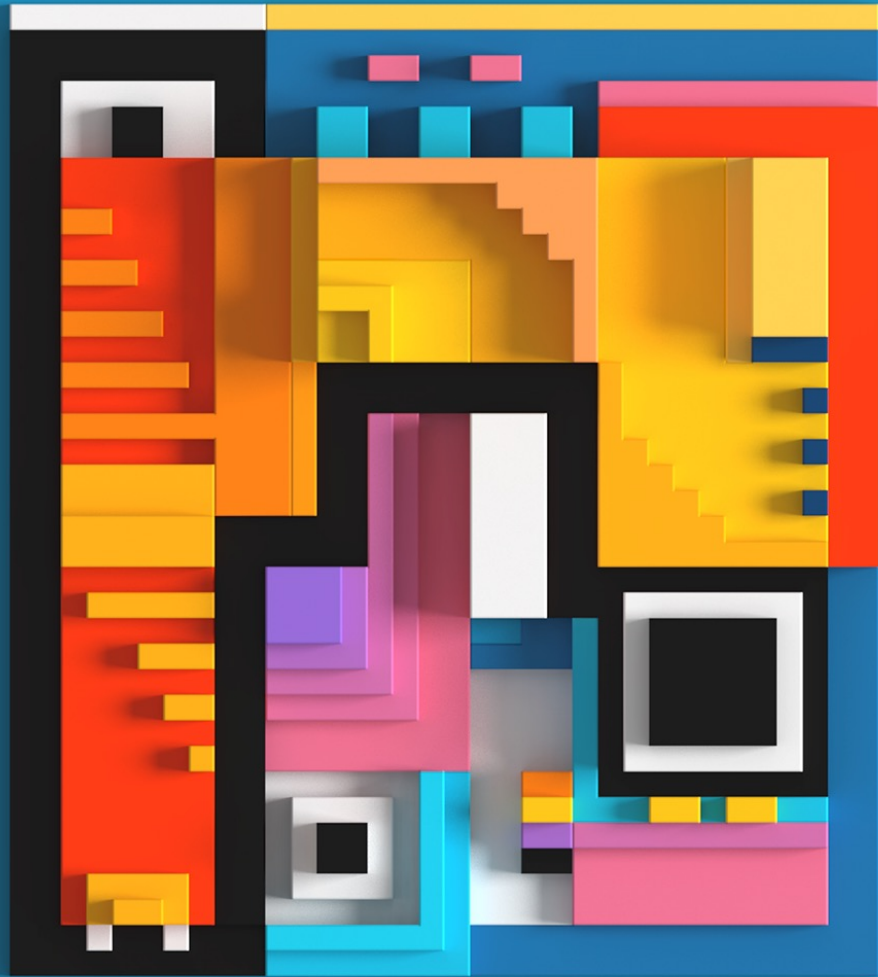
The February ‘16 launch of the Pokémon-themed New Nintendo 3DS bundle likely boosted handheld console sales.

Source: [Pokémon Sun and Moon](#)

# 2016 Global Video Game Sales Plummet: Publishers Experience an Average Sales Decline of Nearly 70%

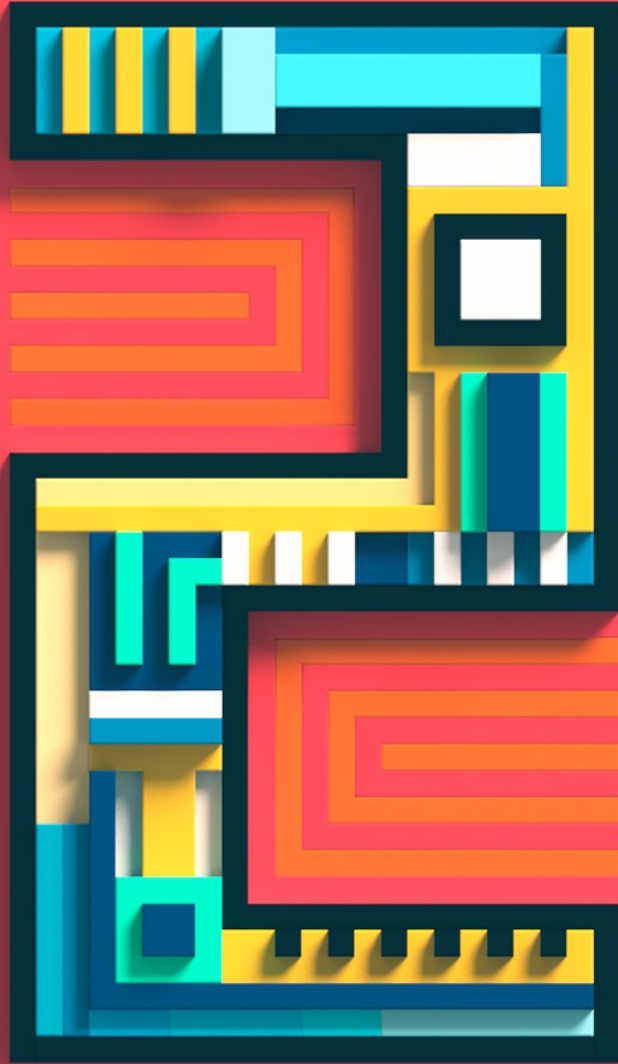


Nintendo and  
Activision sales  
plummet by 90%,  
falling short in  
Platform, Role-  
Playing and  
Shooter games.



**“Mobile gaming  
draws gamers  
away from their  
home video  
game consoles.”**

Source: 2016 in Video Games



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**We're entering the next level of the gaming industry, where markets power up, niche themes gain strength and mobile gaming emerges as a new player.**

# Opportunities 2017 and Beyond: Turning insights into Take-Aways

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- 👉 **Adapt to the evolving market dynamics:** Europe's ascendancy over North America as a top tier market leader and Japan's remarkable progress signify a shifting landscape that demands strategic adjustments.
- 👉 **Understand the significance of genre popularity in shaping market identities:** North America falls for Fighting genres, Japan embraces Role-Playing, while Sports dominates in Europe.
- 👉 **Recognize Electronic Arts' stronghold:** FIFA17 commands 25% of the European market, leveraging strategic platform tactics to maximize reach and impact.
- 👉 **Embrace the influence of platform diversity:** Global confirmation reveals that releasing games across multiple consoles significantly boosts sales numbers.
- 👉 **Reaffirm the importance of bundling:** Expanding video game experiences across platforms leaves a substantial impact on the market as a whole.
- 👉 **The rise of mobile gaming is capturing hearts and hands,** anticipate this new platform in future planning & actions.

## Action Items: Next Steps Towards Success

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### MAXIMISE ROI

Bet on Sports and Role-Playing which are leading growth in markets. Consider Action as a reliable genre in all markets.

Adopt a holistic strategy by integrating platform tactics into the genre & video game approach.



### GENERATE REVENUE

Optimize market presence across key and emerging European market.



### IDENTIFY GROWTH

Nintendo and Activision failed to deliver on popular genres, paving way for competitors.

EA leaves no room for competition, reigning genre, market and platform availability.



# Thank you,

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