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Mobile Gaming: Act II

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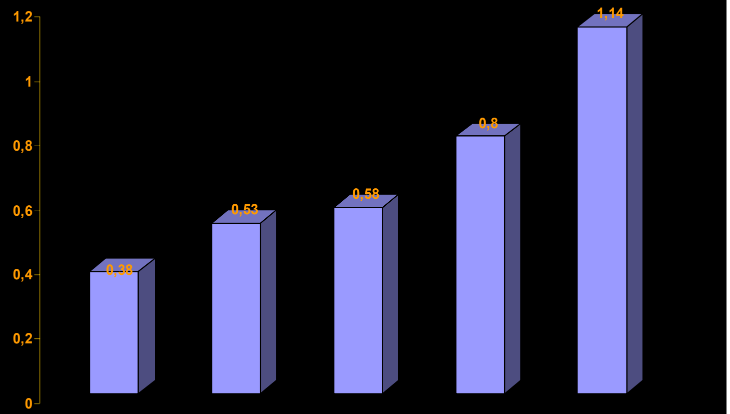
Market overview (1)



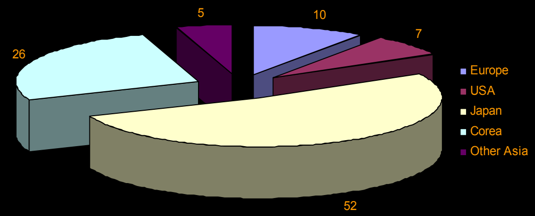
The Research Room - W2F - Informa Media - Frost & Sullivan - ARC Group

Mobile Game Market 2003 in B$ [IDATE]

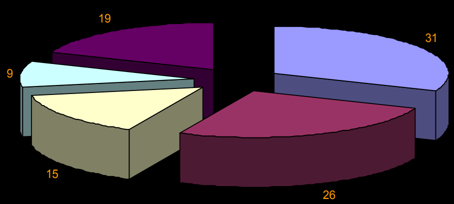
- Mobile Game 2004 : ~ 1 B$
- Entertainment 2008 : 8.3 B$ with 30% for games [ARC Group]

- More subscribers
- More multimedia mobiles
- Move from ringtones and images to music and games

2003



2008



[Journal du Net]

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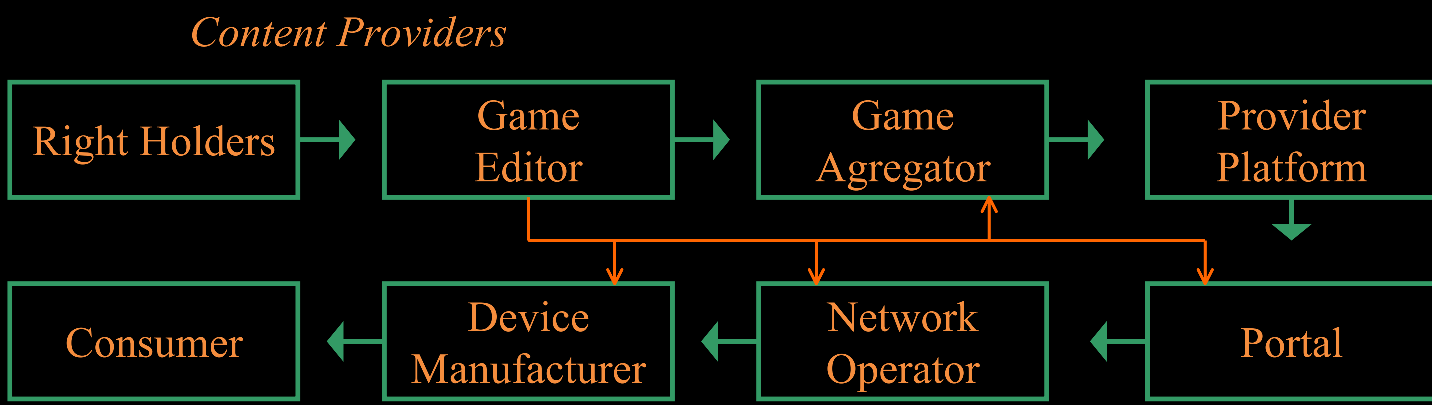
Market overview *(2)*

- Exemple : China
- Population ~1.300 M with >200 M subscribers
- Subscribers growth (China Mobile +2.2 M 11/03,
  China Unicom +1.9 M 11/03)
- Game market of 72 M$ in 2004 with more than 1 million players [China Tech News]
- Still dominated by SMS and WAP games
- 750.000 downloads/month – 4.2M$ monthly revenues for Java Games for the entire China market 2004 [Pacific Epoch]

Value Chain



[IDATE]

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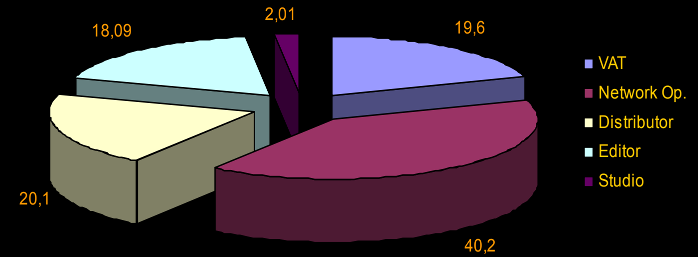
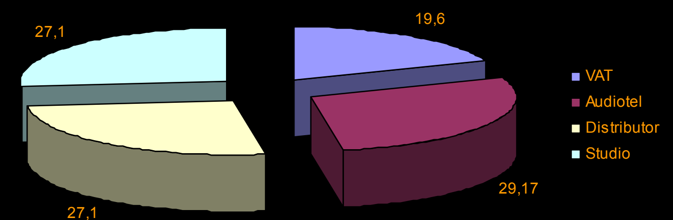
Revenue models

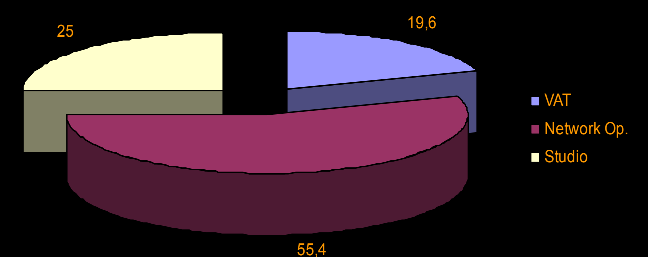
- Subscription to selected service
- Flat fee plus per transaction charge
- Volume based usage fee
- Per transaction charge
- Flat fee access to all services
- Free, sponsorship driven
- Free, advertising driven
- Free, operator paid



Licence game (download 5€)



Via distributor portal (download 3€)



Via network operator (download 3€)

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[Kaolink 2004]

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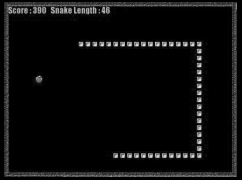

Game typology

- Pre-installed games in the phone
- Interactive WAP games
- SMS/MMS based games
- Downloaded Java games

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Opportunities

- Performance increase (Moore's law)
- New handset features: larger color screen, bluetooth, memory slot, MP3 player, touch screen, streaming video, digital camera, …
- From 2.5G to 3G
- Multi-Player interactive games
- Multi-Platform interactive games

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Challenges

- Limited performance at present on low-range units
- A game requires three versions for low, mid and high-range units
- Limited portability
- Increasing network operator constraints (increase time to market)
- Short development cycle (few months)
- Extensive testing to ensure quality on a large number of devices
- Game name crucial
- Mobile phones vs. handheld gears

Conclusion

- Most successful games are licenses
- Adaptation of existing games
- Need for original games using mobile phone exclusive features
- New marketing approaches to increase visibility
- New complementary approaches for distribution