UBM TECH
GAME NETWORK

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UBM Tech

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The Video Game Industry

According to Reuters, global video game market revenue will increase from **$65 billion** in 2011 to **$72.1 billion** in 2015.*

DFC Intelligence forecasts the greatest growth area for the game industry is PC games and games for mobile devices such as smartphones and tablets. Total worldwide sales of online games are expected to increase from **$19.3 billion** in 2010 to **$37.9 billion** by 2016. This includes revenue from PC online games, console online games and mobile online games including mobile phones and tablets. **

According to Game Developer Research***:

- More than **43,000** professionals are involved in the art and business of making games in the US with an additional **12,200** professionals in Canada
- Almost **600** game companies operate in North America alone
- An estimated **10,400+** game related organizations and businesses exist worldwide in **74** countries****
- The computer and video game industry sells an incredible **9 games** every second

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Network of Sites

The UBM Tech Game Network of Sites includes over **1,300,000** unique users per month, and over **5,000,000** monthly page views*!

GAMASUTRA
The Art & Business of Making Games

GAME CAREER GUIDE.COM

GDC Vault

INDIE GAMES

Source: Omniture Site Catalyst statistics, 2012 average

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Key Metrics*

- **1.3 million** viewers per month (see table to right)
- **5 million** page views per month (see table to right)

Audience Statistics**

- Gamasutra Network's audience is on average **30 years** old and comprise of **89%** male
- They have worked in the game development an average of **5.3** years, have worked on **7.3** titles, and manage teams of the average size of **10** people (direct and indirect)
- **66%** of our audience is involved in purchase decisions

| Publication	Total Unique Visitors	Total Page Views	Monthly Unique Visitors	Monthly Page Views
GAMASUTRA The Art & Business of Making Games	12,361,939	43,083,925	1,030,162	3,590,327
GAME CAREER GUIDE.com	698,034	2,020,539	58,170	168,378
GDC Vault	344,715	1,205,718	28,726	100,477
INDIE GAMES	2,935,893	14,413,095	244,658	1,201,091
Total	**16,340,581**	**60,723,277**	**1,361,715**	**5,060,273**

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Game Developers Conference®

The **Game Developers Conference®** (**GDC**) is the largest professionals-only industry event dedicated to the creation of games, including computer, console, mobile, tablet, smartphone, and online games. It is the central forum for learning, inspiration, and networking in the game industry.

The GDC attracts more than **23,000*** attendees, and is the main global forum where programmers, artists, producers, game designers, audio professionals, business decision makers and others involved in the development of interactive games gather to exchange ideas and shape the future of the industry.

*"**GDC is where we go to get real business done.**"*
— Marc Rein, Vice President, Epic Games
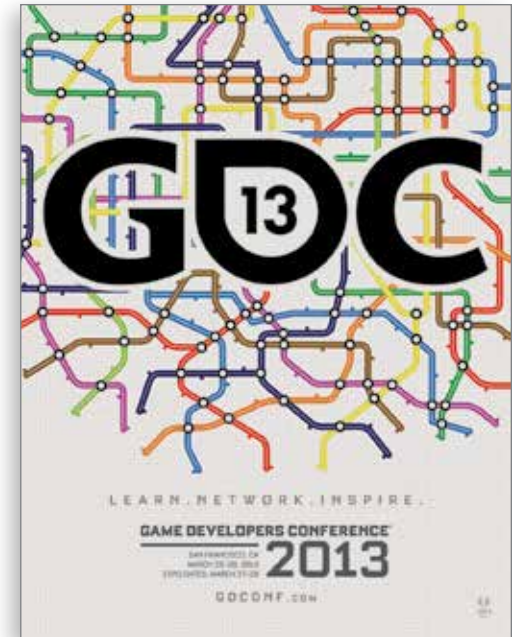
* Based on 2013 conference records

Who are Game Developers?

- Average age 35

- Predominantly male

- Creatively oriented

- Technically savvy, passionate, and invested in what they do and the industry itself

- Includes: programmers, producers, writers designers, artists, composers, publishers and other job functions

How Do We Best Serve This Audience?

- **Training** & **Education**

- **Networking opportunities** with peers and industry luminaries

- **By creating unique and meaningful interactions** with professionals who face similar issues

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March 17-21, 2014
Moscone Convention Center
San Francisco, CA
GDConf.com

GDC

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Game Developers Conference®

With humble beginnings as an informal gathering of about 25 developers in the living room of a notable game designer 27 years ago, GDC continues to be the **premier event** for the game development community.

Five day event includes:

- Six focused tracks

  - Design
  - Business, Marketing & Management
  - Audio
  - Programming
  - Production
  - Visual Arts

- Featuring more than **400** lectures, panels, tutorials and roundtable discussions

- Eight summits & two full days of tutorials

- GDC Play

- Independent Games Festival

- Game Developer Choice Awards

- Game Career Seminar

- **23,000** attendees*

- **300+** exhibitors & sponsors

Based on 2013 conference records.

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GDC Two- and One-Day Summits

Our summits address unique interests and specific trends/sectors within the industry. These summits evolve year after year to meet the needs of developers and respond to new genres and opportunities today.

GDC13 Summits included:

AI
ARTIFICIAL INTELLIGENCE
— SUMMIT —

QUALITY ASSURANCE
— SUMMIT —

LOCALIZATION
SUMMIT

INDEPENDENT GAMES
— SUMMIT —

GAME NARRATIVE
— SUMMIT —

F2P
FREE TO PLAY
SUMMIT

SMARTPHONE & TABLET GAMES
SUMMIT

GDC EDUCATION
— SUMMIT —

* Noted summits are based on 2013 line-up. Check back at GDConf.com in the fall for 2014 GDC summit lineup.

March 17-21, 2014
Moscone Convention Center
San Francisco, CA
GDConf.com

GDC

Game Developers Conference®

GDC 2013 Attendee Demographics:

- Visual Arts - 28.6%
- Programming / Engineering - 41.7%
- Game Design - 44%
- Audio - 15%
- Production - 36.6%
- Business / Management - 39.8%
- Other* - 32%

GDC 2013 conference attendees currently develop for these platforms:

- Console - 13%
- PC/Mac - 48%
- Smartphone & Tablet - 55%
- Web - 30%

Relevance

88% of GDC 2013 attendees heard something useful within their craft they didn't know before
91% of GDC 2013 attendees were inspired

Geography

65% of GDC 2013 attendees are from North America with the balance mainly coming from Western Europe (10%) and Asia (6%)

* *"Other" includes students, educators, press/media, and other job functions. Information is based on 2013 GDC Post Show Survey conducted by Audience Insights, the GDC State of the Industry survey January 2013, and conference management records.*

GDC conference attendees:

- Have an average of **5.9 years** of experience
- Have worked on an average of **10** games
- Manage an average of **10** people directly or indirectly

Top four actions attendees have taken as a result of attending GDC 2013:

- Visited an exhibitor's website
- Sent an email
- Requested more information from an exhibitor
- Viewed a GDC Session from GDC Vault

March 17-21, 2014
Moscone Convention Center
San Francisco, CA
GDConf.com

GDC

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Game Developers Conference™ Europe

The **Game Developers Conference™ Europe** is the premiere pan-European developer event bringing together developers and business professionals from across the continent and worldwide. Held in conjunction with gamescom, Europe's leading game publisher,

business meeting, and consumer event, GDC Europe provides the essential forum for learning, networking, business, and inspiration. The event targets exhibitors featuring the latest tools and services within the games industry; business professionals; and developers and students interested in further developing their skills and knowledge within specific game development fields.

In 2012, GDC Europe hosted over **2,200** game professionals from over **69** countries, **118** speakers, **83** exhibitors and sponsors, and **349** media and press representatives. The conference held over **87** sessions with tracks on **Business & Marketing**, **Design**, **Production**, **Programming**, and **Visual Arts**.

GDC Europe is supported by:

GDC Europe Key Stats*

GDC Europe Conference attendees

- Have on average been involved in game development for **5.7 years**
- Have worked on an average of **10.2 games**
- Employ a median number of **75 employees** in their office or studio
- Manage a median number of **8** employees
- Have an average development budget of **$4.6 million** and median budget of **$300,000**
- **55%** spend over **5 hours** on the expo floor

GDC Europe attendees currently develop on these platforms

- **18%** Console
- **10%** Handheld console (Vita, 3DS, etc.)
- **43%** Smartphone
- **39%** Tablet
- **36%** Web
- **39%** PC/Mac

86% of attendees take action after attending GDC Europe including

- Visiting an exhibitor's website
- Requesting more information
- Sending an email or contacting an exhibitor
- Setting up a post GDC Europe meeting
- Purchased a product or service

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August 19-21, 2013
Cologne Congress-Centrum Ost
Cologne, Germany
GDCEurope.com

GDC Europe

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* Based on 2012 GDC Europe Post Show Survey conducted by Audience Insights

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Game Developers Conference® Next

Game Developers Conference® Next (the successor to GDC Online) is a brand new developer event focusing on creating the game experiences of the future, including how we will play games, on what we will play them, and how we will monetize, distribute, market,

and share them. Whether you are a designer, programmer/architect, producer, artist, marketer, businessperson or all of the above, you'll find this show vital to making great games – and – making money in the most vibrant new areas of the game industry. Coming to the U.S. West Coast next year, GDC Next will debut **November 5-7, 2013** at the Los Angeles Convention Center, and will be co-located with the App Developers Conference.
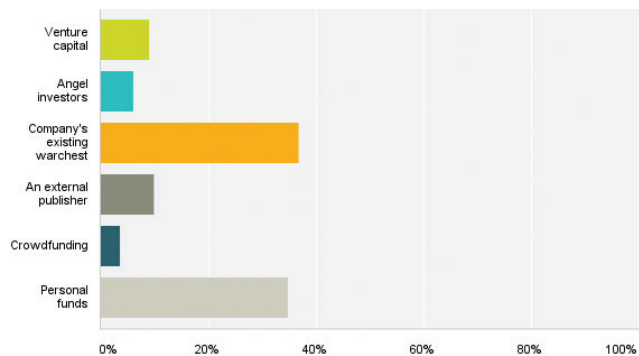
In 2013, GDC Next features tracks focused on **The Future of Gaming**, **Next Generation Game Platforms**, **Free to Play & New Business Models**, **Smartphone & Tablet Games**, **Cloud Gaming**, and **Independent Games**, with additional focus in the disciplines of Business & Marketing, Customer Experience, Design & UI, Monetization, Production, and Programming & Architecture.
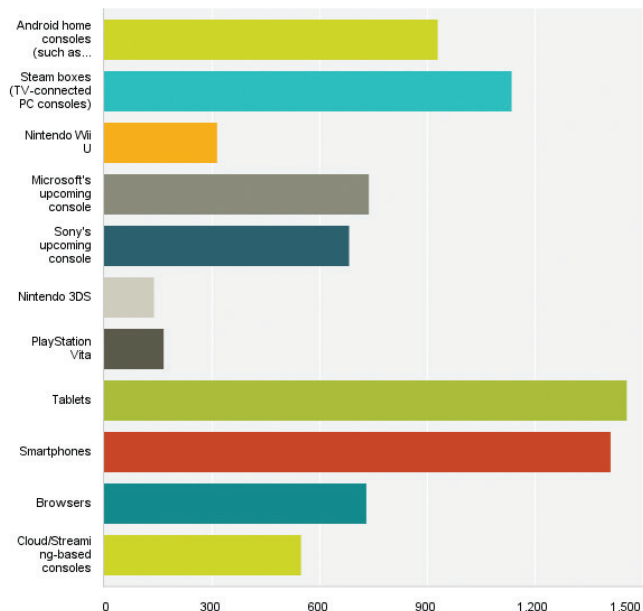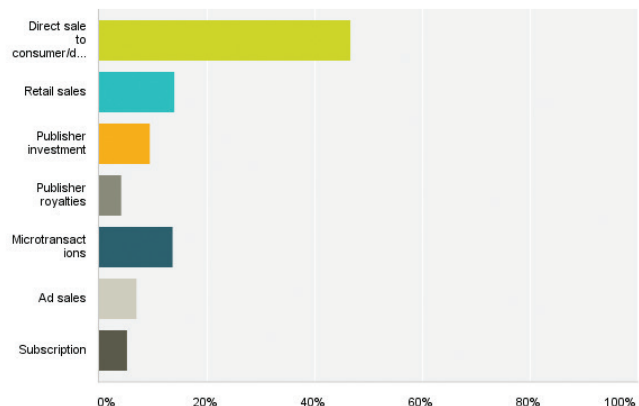
Sources of Funding

Venture capital
Angel investors
Company's existing warchest
An external publisher
Crowdfunding
Personal funds

0% 20% 40% 60% 80% 100%

Newer Markets of Interest

Android home consoles (such as...
Steam boxes (TV-connected PC consoles)
Nintendo Wii U
Microsoft's upcoming console
Sony's upcoming console
Nintendo 3DS
PlayStation Vita
Tablets
Smartphones
Browsers
Cloud/Streaming-based consoles

0 300 600 900 1,200 1,500

Sources of Profits

Direct sale to consumer/d...
Retail sales
Publisher investment
Publisher royalties
Microtransactions
Ad sales
Subscription

0% 20% 40% 60% 80% 100%

UBM TECH
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November 5-7, 2013
Los Angeles Convention Center
Los Angeles, CA
GDCNext.com

GDC 13 NEXT

Source: GDC State of the Industry Survey, January 2013

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App Developers Conference

From the creators of the Game Developers Conference (GDC), the **App Developers Conference** (ADC) is a brand new app conference focusing on the very best development, UI, marketing and business of apps. We'll be recruiting the very best app creators, whether they be on mobile devices, on the web, or even further afield, and getting them to present their best practices to you.

ADC 2013 will debut **November 5-7, 2013** at the Los Angeles Convention Center, and will be co-located with GDC Next.

ADC is built around six primary content tracks and three app market disciplines. This year's primary content tracks include the following: **Entertainment Apps**, **Enterprise Apps**, **Health/Wellness Apps**, **Lifestyle Apps**, **Brand Marketing Apps**, and **Education Apps**. Disciplines include: **Design & UI**, **Business & Marketing** and **Programing & Architecture**.
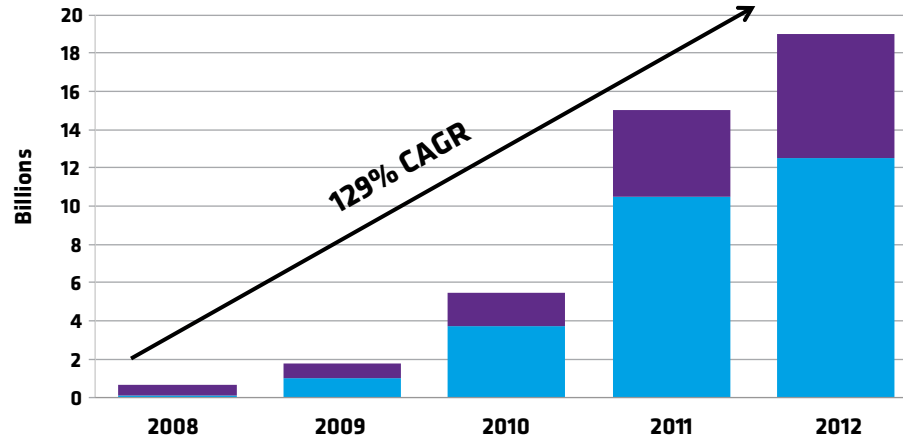
App Development Audience Data:

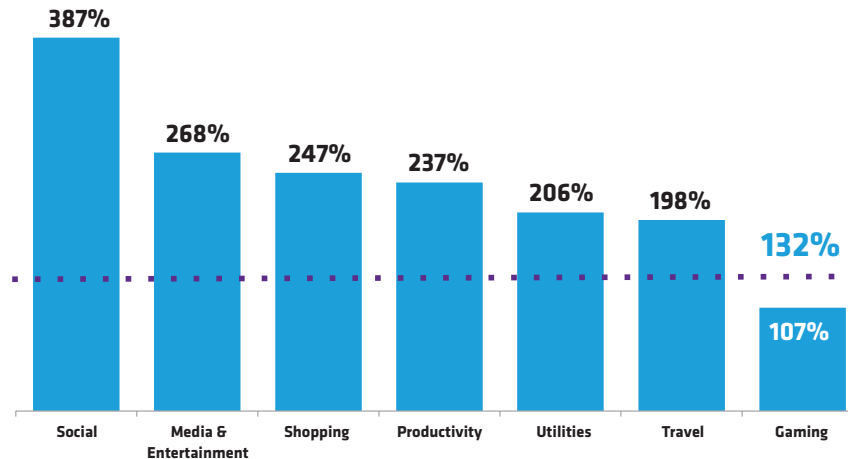## App revenue is scaling

Virtual Goods

Advertising

Source: Flurry Analytics; eMarketer, Mary Meeker (KPCB)

129% CAGR

Billions — 2008, 2009, 2010, 2011, 2012

Disruption across multiple industries

WW Session in iOS and Android Apps (Dec 2011 – Dec 2012)

Source: Flurry Analytics December 2011-December 2012

387% Social
268% Media & Entertainment
247% Shopping
237% Productivity
206% Utilities
198% Travel
132%
107% Gaming

November 5-7, 2013
Los Angeles Convention Center
Los Angeles, CA
ADConf.com

ADC 13
APP DEVELOPERS CONFERENCE

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Game Developers Conference™ China

China is one of the most prolific regions for video and computer gaming today. Its online gaming sector represents one of the largest and fastest growing industries in the world and is a prime market for game development and business opportunities.
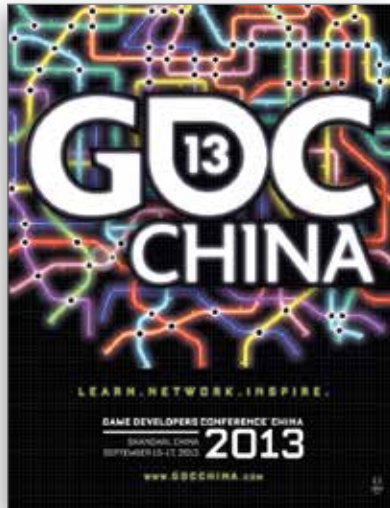
The **Game Developers Conference™ China** (GDC China), serves this thriving region by focusing on the challenges of game development across borders, tackling subjects within **Smartphone & Tablet Games** and **Independent Games**, while addressing the latest ideas, innovations, and processes in the conference's Business & Marketing, Design, Production and Programming tracks.

GDC China serves as the premier developer event in China by offering a forum for learning, networking, & inspiration to further the games industry in this region. GDC China also features the annual **Independent Game Festival China**, and is currently the only game developer conference officially endorsed by the Ministry of Culture of the People's Republic of China.

GDC China Key Stats*

GDC China 2012 by the numbers

- **Over 700** attendees including conference & expo attendees
- **42** press & media representatives
- **58** speakers
- **53** sessions

GDC China Attendees currently develop on these platforms

- **25%** Smartphone
- **11%** PC/Mac (retail/downloadable)
- **22%** Web Browser
- **15%** Tablets
- **22%** Consoles

Top 3 primary lines of business for GDC China Attendees

- Smartphone Game Market
- Console Game Market
- Web Browser Game Market
- **Top job titles include:** CEO/President/C-Level, Business Development, Game Designer, Marketing/PR/Sales, Project Lead

November 15-17, 2013
Shanghai Exhibition Center
Shanghai, China
GDCChina.com

GDC China

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Based on GDC China 2012 Post Event Report and Publishers Records

GDC Play

GDC Play is a unique opportunity for emerging developers to showcase their games in a low cost turnkey solution to key distributors, publishers, press and investors attending the conference.

GDC Play participants will have access to the official **GDC Business Matchmaking software**—the catalyst for business at GDC. Request and receive meetings from major publishers, distributors, All-Access Pass holders and exhibitors attending the event.

GDC Play includes special events to further encourage B2B meetings, including an invitation-only **VIP Reception** and **Networking Lounge** the duration of the conference.

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Below are a sample of the organizations that participated at GDC Play 2013.

Over 70 Publishers, Investors, and Agents including:

2K Games, 505 Games, 6waves, Activision/Blizzard, Atlus, Big Fish Games, Cartoon Network, Digi-Capital, Digital Chocolate, Disney Mobile, EA Partners, GameHouse/Real Networks, Glu Mobile, Indie Fund, Joystick Labs, Konami, Microsoft Game Studios and more

Over 300 GDC Exhibitors and sponsors including:

Google, Unity, Epic Games, Crytek, Sony, Blizzard, Activision, WB, Riot Games, BigPoint, Disney, Onlive Amazon, Playspan, NCSoft and more

In addition, over 250 Top Media Outlets will be attending GDC Play, including:

GameSpot, MSNBC, The New York Times, AOL Games, 1UP, Spike TV, G4 TV, Joystiq, IGN, Reuters and more

GDC Play is also supported by the largest number of International Governments and Trade Organizations, including:

Belgian Trade Commission, Koelnmesse GmbH, Newfoundland and Labrador, Nova Scotia, Canada, Korea Game Developers Association,Prochile Scottish Development, International Swedish Trade Council, Game Developers Association of Australia, Foreign Affairs and International Trade Canada, TIGA, Quebec Government, Queensland Department of Employment, Economic Development and Innovation

Gamasutra.com

At the heart of the Game Network of media sites is **Gamasutra**, an industry leading and award winning online community. It's been the top source for information on the "Art & Business of Making Games" since 1997.

Gamasutra.com features:

- One of *Time Magazine*'s **"50 best websites of 2012"**

- **Daily news**, **technical articles**, **exclusive content** and **community driven thought leadership** by and for the game industry

- An engaged community of over **550,000 registered members** located across the globe

- Targeted content sections by **market vertical** including SmartPhone/Tablet, Console/PC, Social/Online & Independent Games

- A directory of **game developers and companies** providing services to game industry professionals

- Most importantly, Gamasutra offers a unique opportunity to **reach a targeted audience** made up of the best and the brightest minds in game development!

Gamasutra.com Stats

- Over **5** million page views per month
- Over **1.3** million unique visitors a month

Source: Omniture Site Catalyst statistics, 2012 average

- **Gamasutra.com members average 5.3 years experience and have published an average of 7.3 titles**

- **Gamasutra.com members are deeply involved in their organizations' decisions to purchase products.**
  - **66%** are involved in purchasing hardware, software and services

- **Gamasutra.com members prefer to purchase their tools online:**
  - **63%** purchase their tools (products or technologies) over the web

- **Gamasutra.com members develop on multiple platforms:**
  - **46%** - PC/Mac   - **36%** - Console   - **65%** - Handheld Devices (Mobile Platforms)

- **Gamasutra.com members are part of the global gaming community:**
  - **34% (187,000)** are international—representing over 57 countries

Gamasutra.com

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Recruitment on Gamasutra

Looking for a recruitment resource that's more than just a job board? Look no further than Gamasutra! It's the leading community in the videogame industry, offering recruitment tools integrated with journalism.

Gamasutra Recruitment features:

- All job postings extend beyond the job board, offering access to **passive candidates**, and are fed to Gamasutra, GDC event websites, newsletters, social media and more!

- **Global Resume Database** containing game industry professionals with experience across all disciplines and platforms - all newer than 18 months

- **Customized media solutions** including site skins, banners and content based ad products

GDC Vault

GDC Vault, the only premium online content resource curated by the folks who organize GDC, offers a trove of in-depth design, technical and inspirational talks and slides from the influencers of the game development industry. Product offerings range from sponsorships on the site itself to recordings of sponsored sessions to be archived in GDC Vault, extending your reach beyond the live event.

Tape your GDC Sponsored Session

GDC will professionally record your sponsored session and sync the video with the slides for an integrated viewing experience. All sponsored sessions on GDC Vault are free to view; you will **receive the leads** of everyone who opts-in to view the sponsored session.

Purchase an exclusive GDC Vault Event Media Package

Align yourself with the industry's most valuable and up-to-date content with this partnership, and receive high impact ad units and cobranded headers on Gamastura and GDC Vault. About 2 weeks after each event, when sessions go live on GDC Vault, the game industry revisits everything they missed at GDC on GDC Vault – don't miss out on this unique advertising opportunity.

GDCVault.com

Gamasutra Affiliated Sites

GameCareerGuide is a leading website for students and educators in the game industry offering information and resources for aspiring and entry-level game developers. Established in 2006, this site is a valuable resource offering access to the next generation of game developers.

The site has expanded from the already successful education coverage on sister website Gamasutra, to an online community in its own right with news, coverage on the cutting edge of game industry education, and a myriad of resources for aspiring game developers.

GameCareerGuide features:

- Educational **news**, **information** and **analysis** about game development
- International **school directory** of 400+ game development educational programs
- Showcase of student **games**, **postmortems** and student **gallery**
- Student **resources** including Digital Counselor, information on internships, discussion forums and more!

GameCareerGuide.com Stats

- Over **168,000** page views per month
- Over **58,000** unique visitors monthly

Source: Omniture Site Catalyst statistics, 2012 average

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IndieGames.com the weblog was established to discover, report on, and encourage innovation in game development, and to recognize the best independent game developers.

IndieGames.com Stats

- Over **1,200,000** page views per month
- Over **224,000** unique page visitors monthly

Source: Omniture Site Catalyst statistics, 2012 average

IndieGames.com features:

- Latest **news, features, and interviews** in independent game development

- **Reviews and coverage** for emerging games across desktop, console, and mobile platforms

- Official IndieGames **Podcast**

IndieGames.com

Game Advertising Online

Advertise your game to over 65 million gamers!

The UBM Tech Game Network is proud to now offer new business to business opportunities with **Game Advertising Online**.

Game Advertising Online (GAO) provides a **cost-effective** solution to acquire new players for online games, utilizing a **user friendly** self-service interface for advertisers to carefully manage their spend. The simple **pay-per-clickthrough** (CPC) model enables advertisers to easily fine-tune their campaigns to pay only for placements that perform to their requirements. Additionally, a unique, optional **profit-tracking system** and **'concierge' service** for inventory management for top clients allow even more flexibility for those looking to promote their free-to-play MMO or online game.

Game Advertising Online (GAO) provides a **cost-effective advertising solution** for games and gaming related products or services. Whether your goal is player acquisition or brand awareness, GAO can work on various buying models (CPM/CPC/CPA) to meet your objectives. GAO offers a **full-service agency style solution** or a **user friendly self-service interface** to carefully manage campaign performance.

GAO Key Stats

Audience & Exposure*

- **65 million** unique viewers monthly
- **5.5 billion** ad impressions monthly
- Core audience consists of 15-35 year old gamers

In-game advertising & banner placements on:

- Browser-Based/Web-Based Games
- MMORPG Portals
- Casual Games Sites
- Gamer Communities
- Review & Fan Sites
- Web Comics
- eSport Portals & more