



Ganymede

Social games

How did we get here
And where to now?



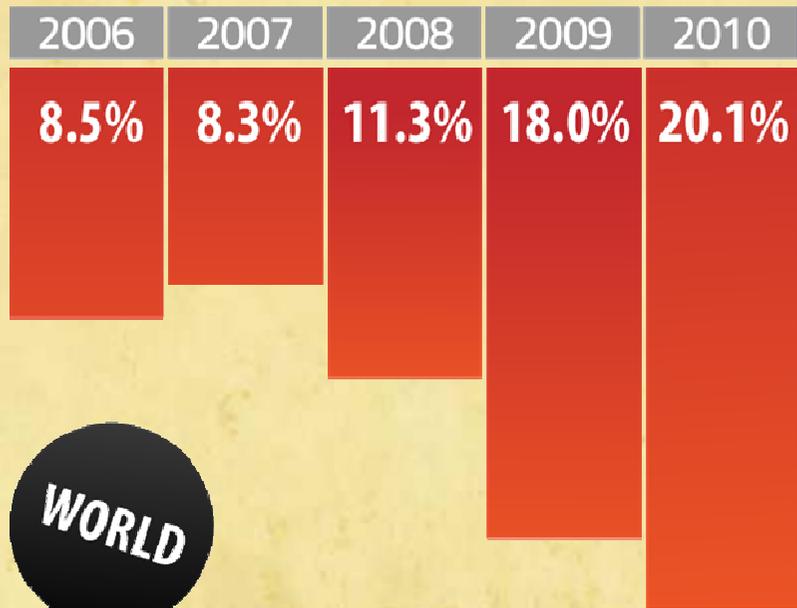
World is playing

- Facebook has more than 900 M active users - half of them play games.
- Social games represent 40% of usage time on Facebook.
- Zynga has 240 M mobile and 300 M Facebook users (CityVille itself 84,2 M).
- Angry Birds was downloaded 648 M times and have 200 M MAUs.
- There are 652,054 total active apps in AppStore available for download.
- 1.2 B downloads of AppStore apps in the last week of December.
- 133 games are daily submitted to AppStore.



During crisis people need fun

GAMES



WORLD

Worldwide social gaming market, source CGA

- The global mobile gaming market will grow at **16.6 %** to reach **\$18 B** in 2014.

Unemployment rate in Spain

Big acquisitions

- In 2011, **77** game companies were acquired for at least **\$2.827 B**,
- Electronic Arts bought PopCap Games for up to **\$750 M**,
- Disney bought Playdom Games for up to **\$763 M** (2010),
- Caesars Entertainment Casion Group bought Playtika (**51%**) for up to **\$50M**,
- Zynga bought *Draw Something* maker Omgpop for up to **210 M**.



Social games USPs

- Freemium,
- Consumer driven marketing,
- Cross-platform,
- Frictionless payments,
- In-depth analysis.



Business model: fun vs friction

Premium

Freemium

Paymium



Consumer driven marketing

Marketing is:

users acquisition

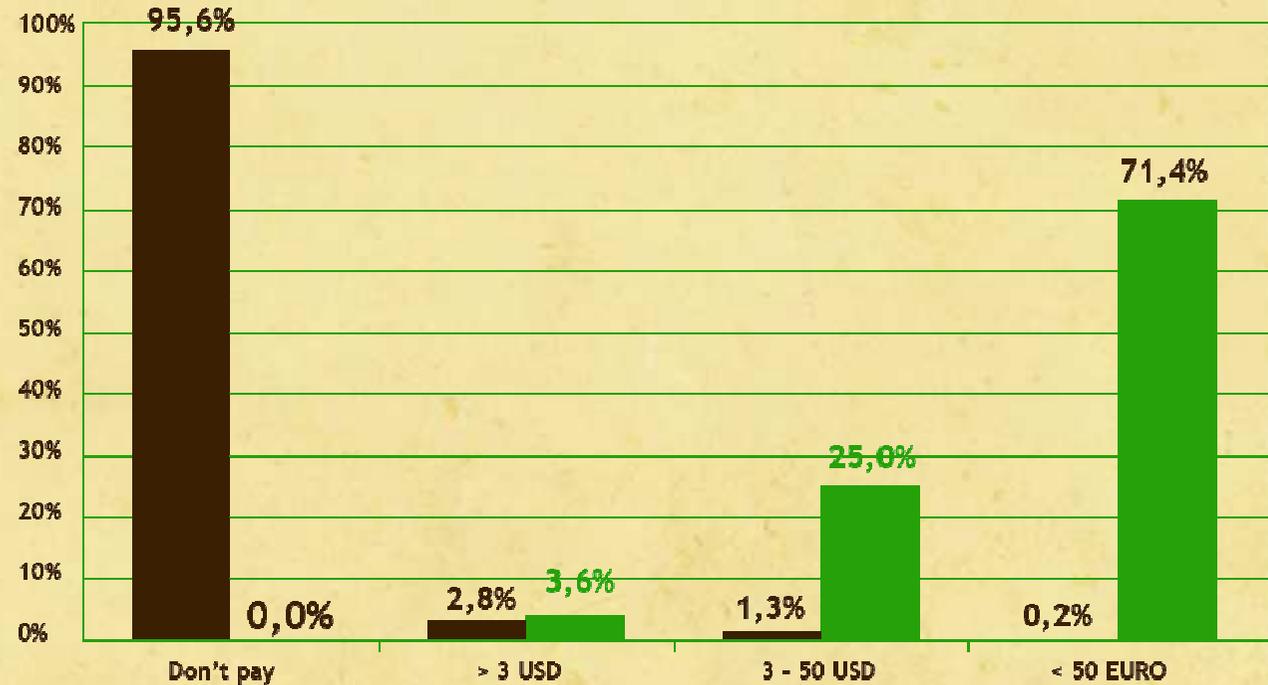
monetisation

retention (building community)



Users acquisition and monetisation

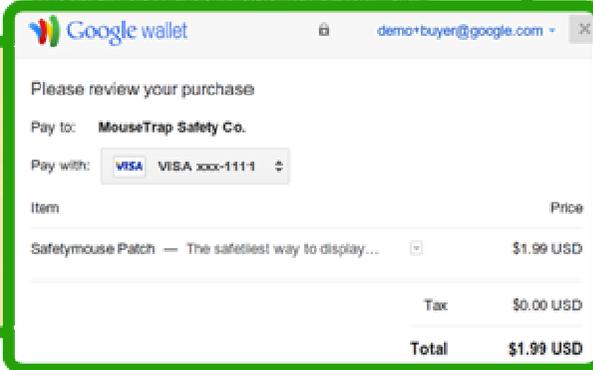
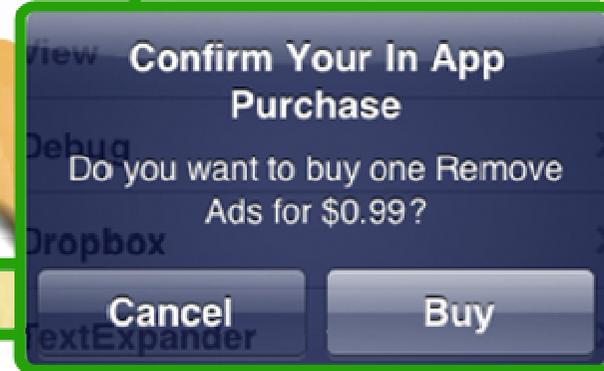
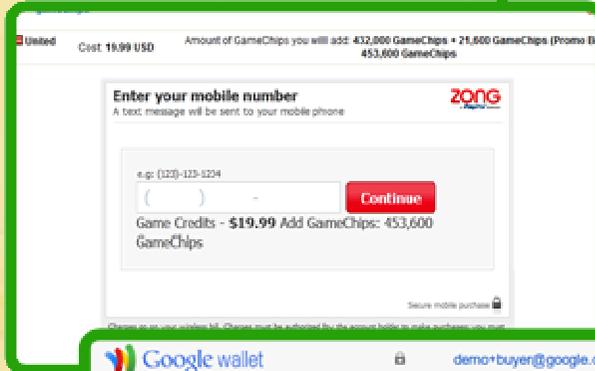
- CPI on Facebook is 1,5\$ or even more, at Christmas it was \$1,81,
- CPC on Facebook increased 23% versus Q4 2011,
- ARPU \$0,41 and ARPPU \$4,50 (monthly),
- 3% of users are paying ones.



It is so easy to pay

amazon appstore for Android

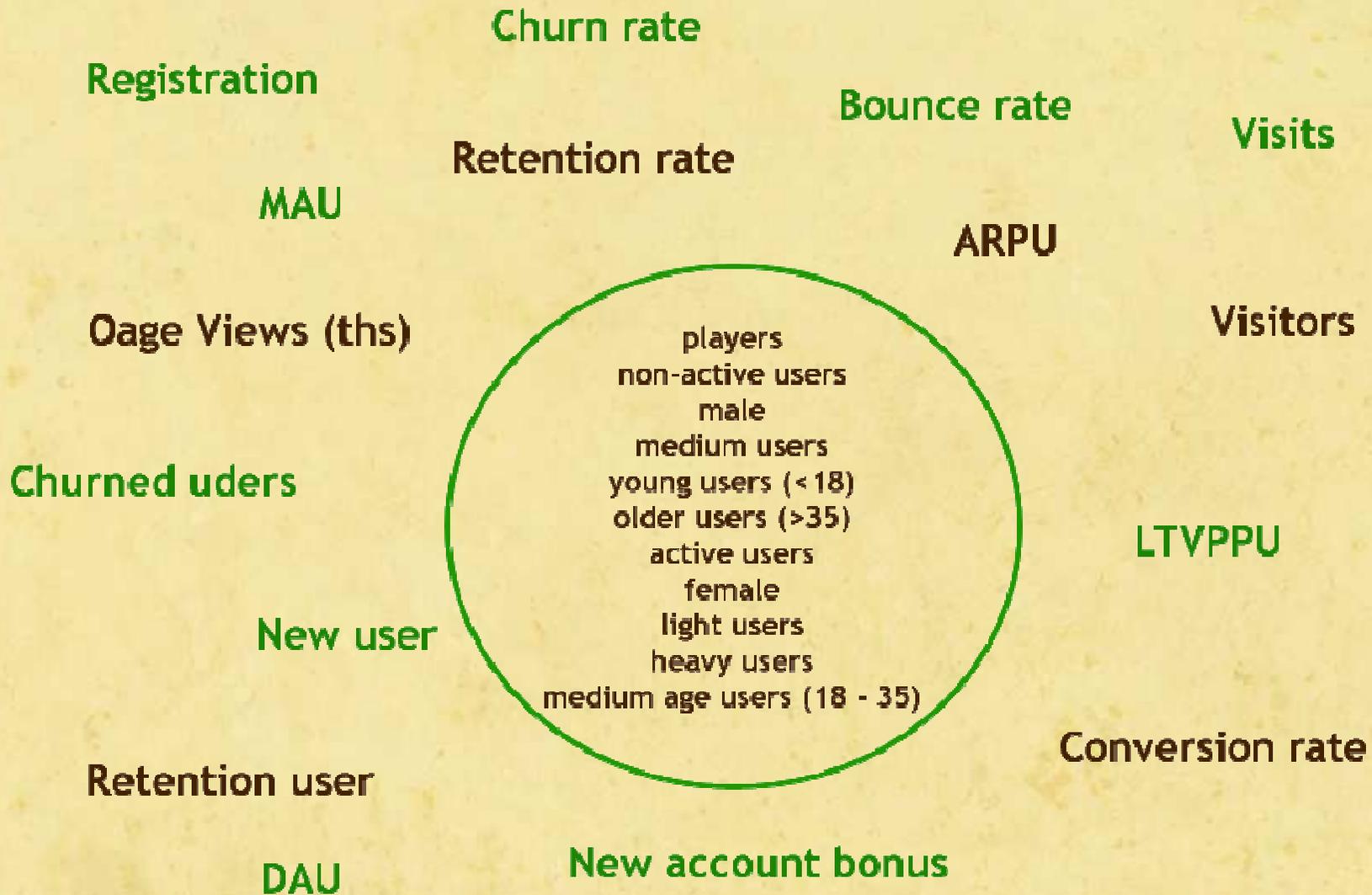
1-Click



Anytime and anywhere



There is a lot of data

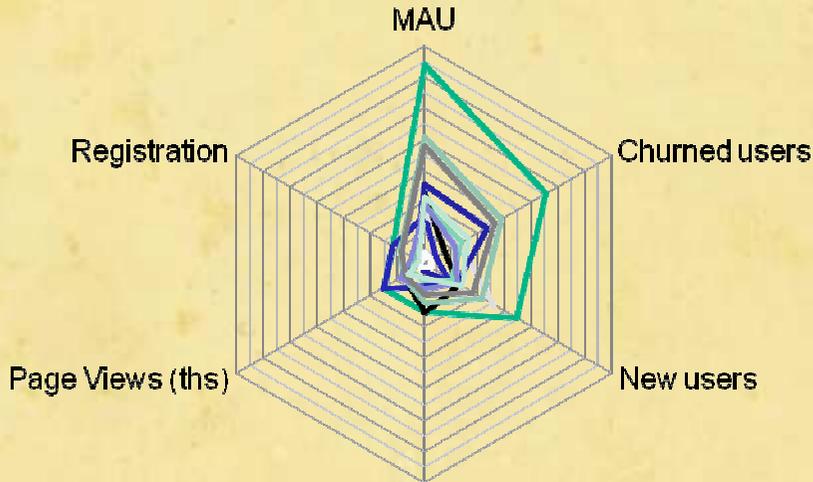


... and it is complicated

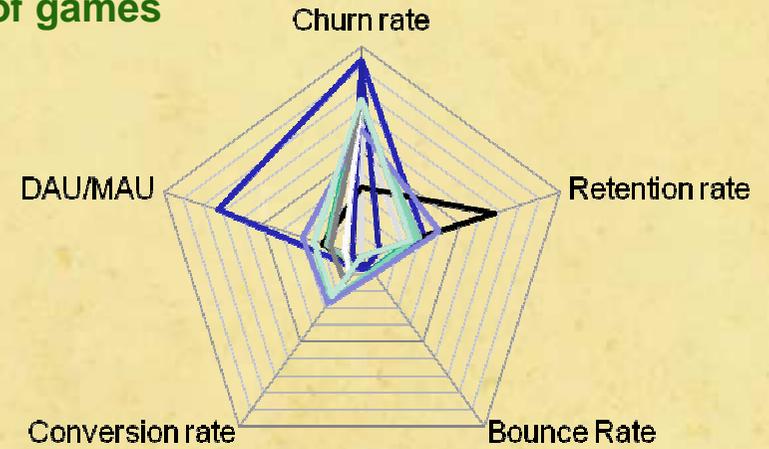
- players
- non-active users
- male
- medium users
- young users (<18)
- older users (>35)

- active users
- female
- light users
- haevy users
- medium age users (18- 35)

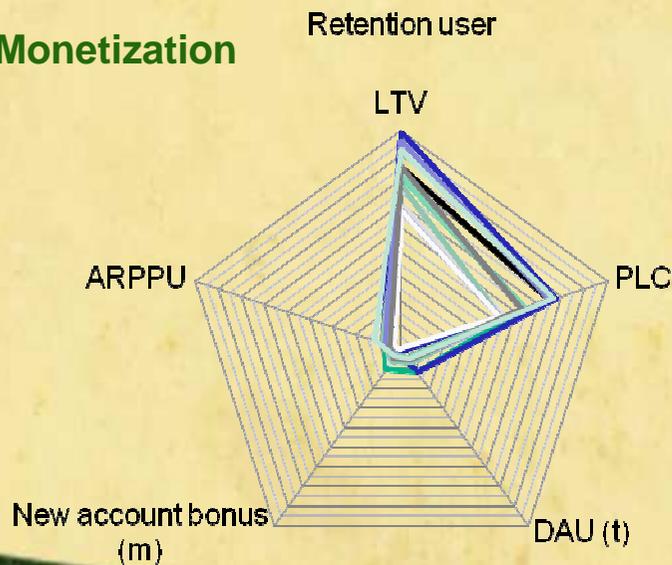
State of GameDesire



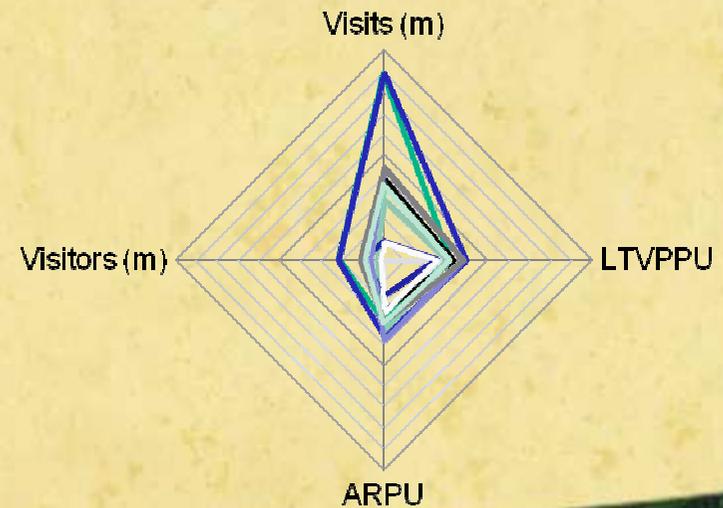
State of games



Monetization



Potential monetization



Impossible is nothing

Be bold - World of Goo.



It is not too late - Rovio.



Never give up – Guitar Hero.



Sky is the limit



Entropia Universe.

Don't follow the crowd



Minecraft.

Where to now?

- Master freemium.
- Go beyond Facebook.
- Go beyond performance marketing.
- Take the most from AppStore war.
- Hire talents.





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