

The Jon Peddie Research Gaming Market Press

Conference

- All Gaming Hardware
- Virtual reality
- Real color

AMD



PORTRAIT
DISPLAYS

QUALCOMM

KRONOS
GROUP



A close-up photograph of two people sitting on a couch, each holding a black Xbox 360 controller. The person on the left is wearing a grey t-shirt and blue jeans, and the person on the right is wearing a grey hoodie and blue jeans. The image is overlaid with a semi-transparent dark grey filter. The text 'GAMING MARKET' is centered in a bold, yellow, sans-serif font, with a reflection effect below it. Below the main title, the subtitle 'The market for hardware and software' is written in a smaller, italicized, yellow font. In the bottom right corner, the text 'Monotype Studio' is visible in a small, white font.

GAMING MARKET

The market for hardware and software

JPR@GDC

by Invitation
Jon Peddie Research hosts a
breakfast briefing
on the game industry

For Press and Analysts

JPR
Jon Peddie Research



Jon Peddie Research

Focus and emphasis on Visualization, Graphics, and forms of reality
Consulting and market research - Advisor to industry leaders and
investors

Bi-weekly report, various Digital Technology Market Studies

Product testing and benchmarking

Conferences

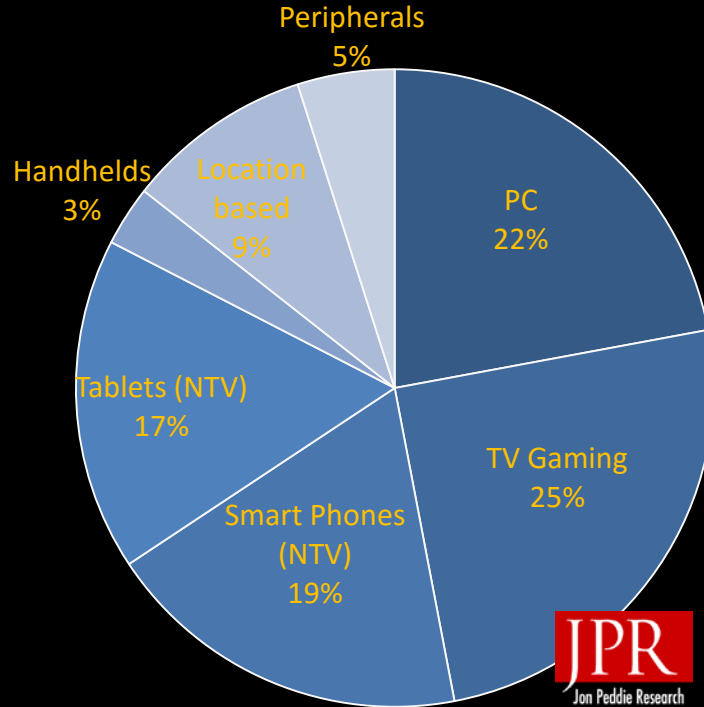
The Business of Multimedia and Visual Magic

Agenda – Why are we here?

- | | | |
|------|--|--|
| 8:15 | Registration and Continental Breakfast | Come early and meet the presenters over coffee and bagles. |
| 8:30 | Opening Introduction | Dr. Peddie gives an introduction and presents an overview of the PC graphics hardware and market trends. |
| 8:45 | TV Gaming presentation | Ted Pollak gives an analysis of the TV Gaming market |
| 8.55 | Overall Game Market presentation | Wanda Meloni gives an overview of the game market as well as the Open Gaming Alliance |
| 9:05 | Overview of APIs | Neil Trevett provides an overview on Khronos activities including Vulkan, WebGL 2.0 and glTF. |
| 9:15 | Panel Discussion on Virtual Reality | Tim Leland focuses on VR in your hand
Martin Fishman on changing gamut while in game/VR
Roy Taylor on VR in movies |
| 9:45 | Q&A and refreshments | |

2015 Gaming Hardware Market

\$131 Billion Gaming Hardware Market 2015

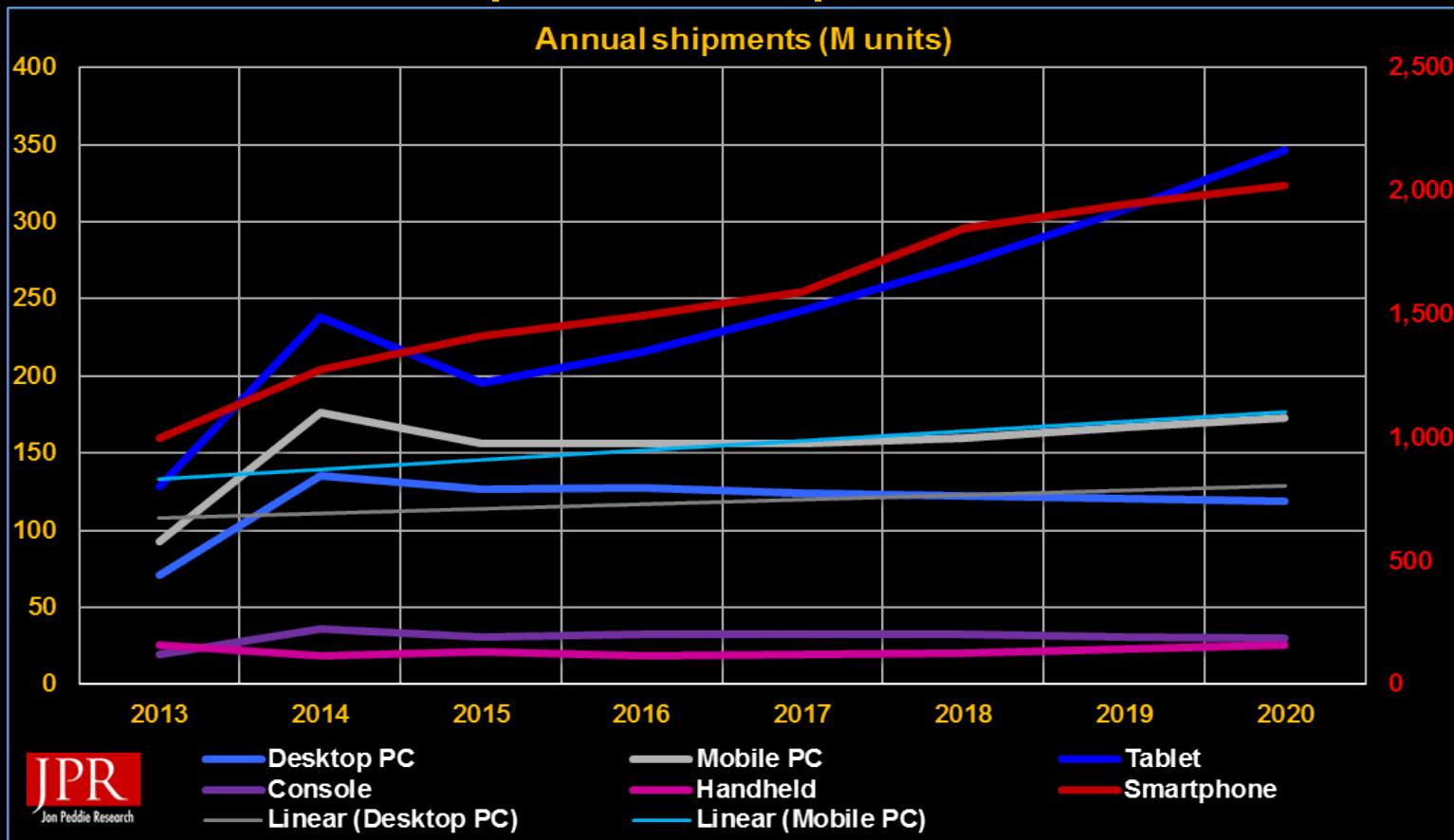


These are not either-or:

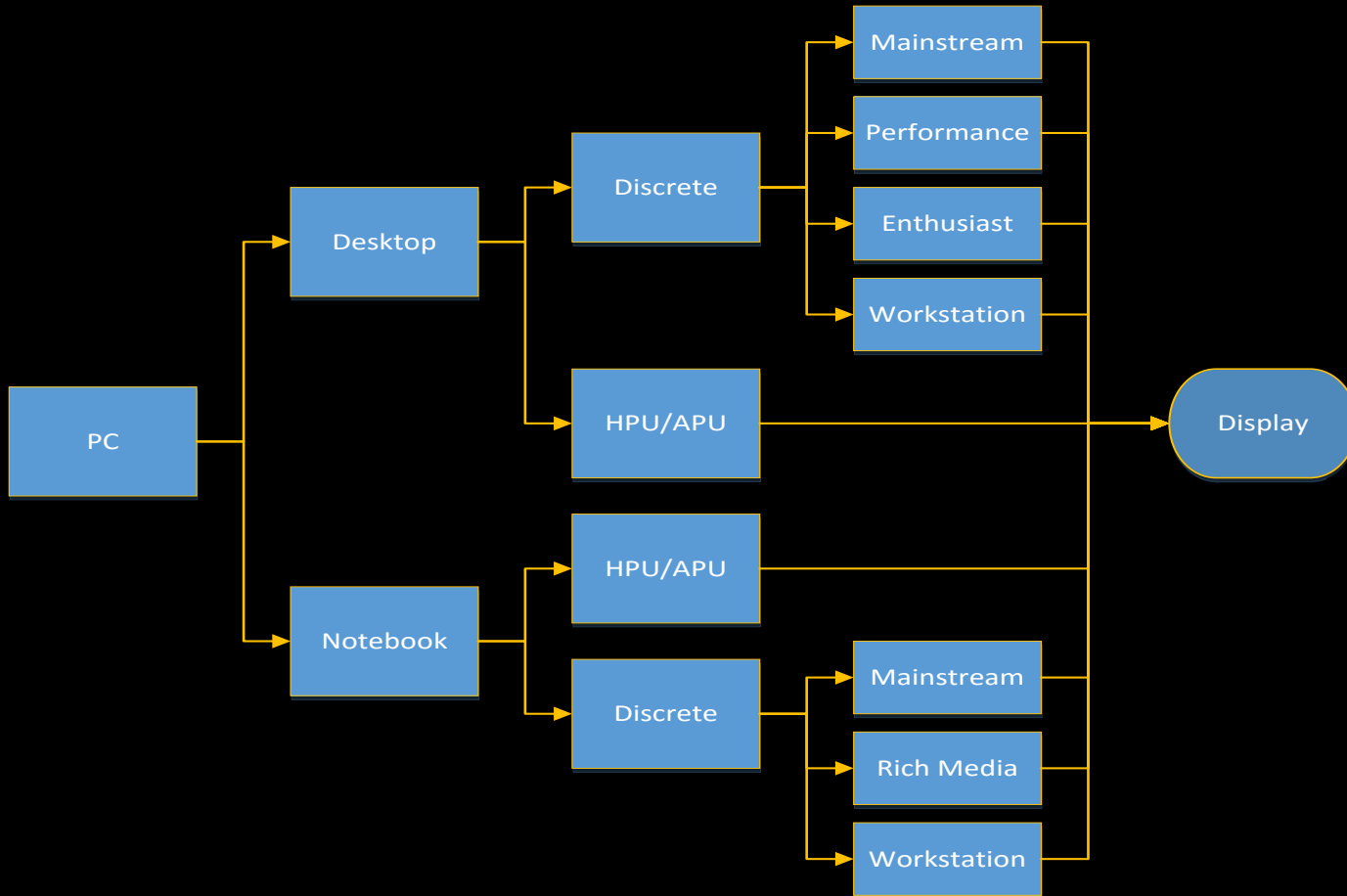
Gamers have most, if not all of these machines (except maybe arcade)

NTV = does not include TV gaming

Graphics chips overview

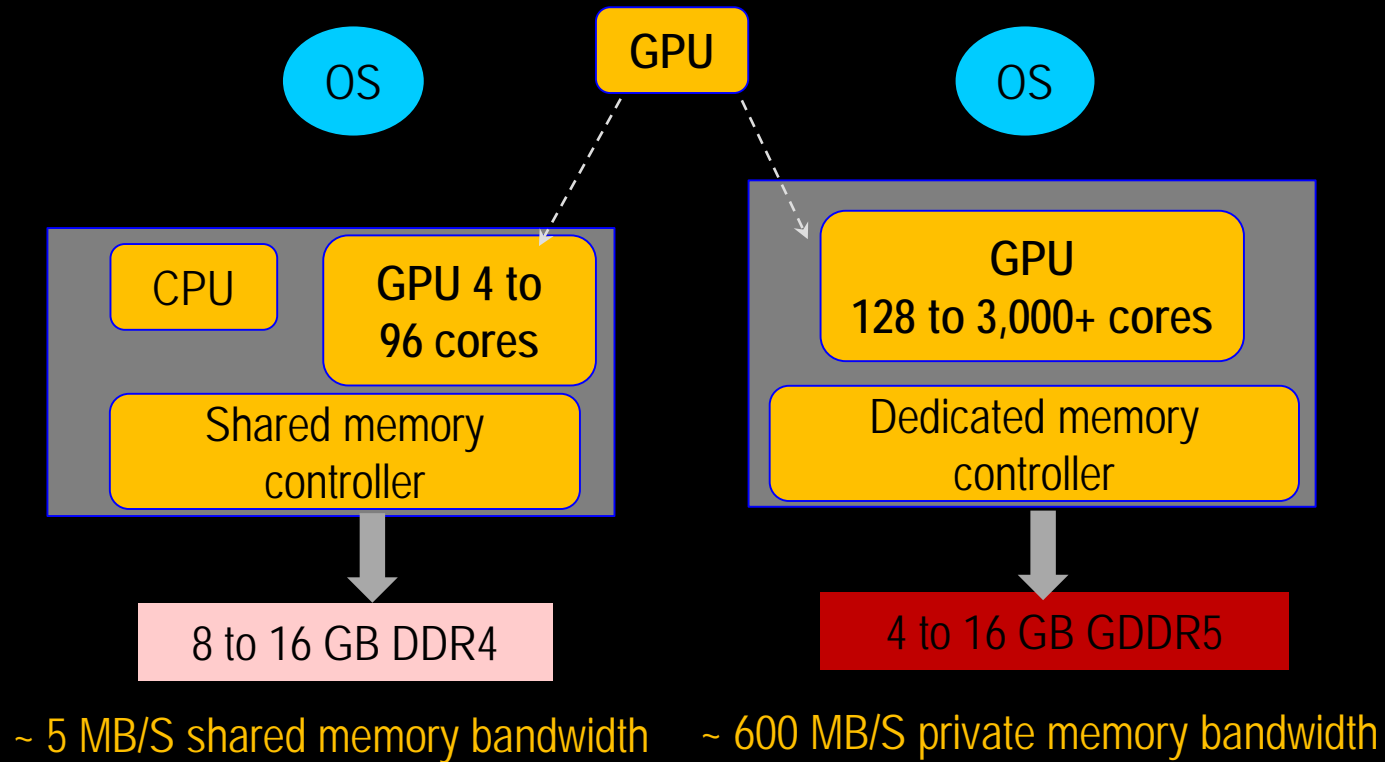


PC Segments

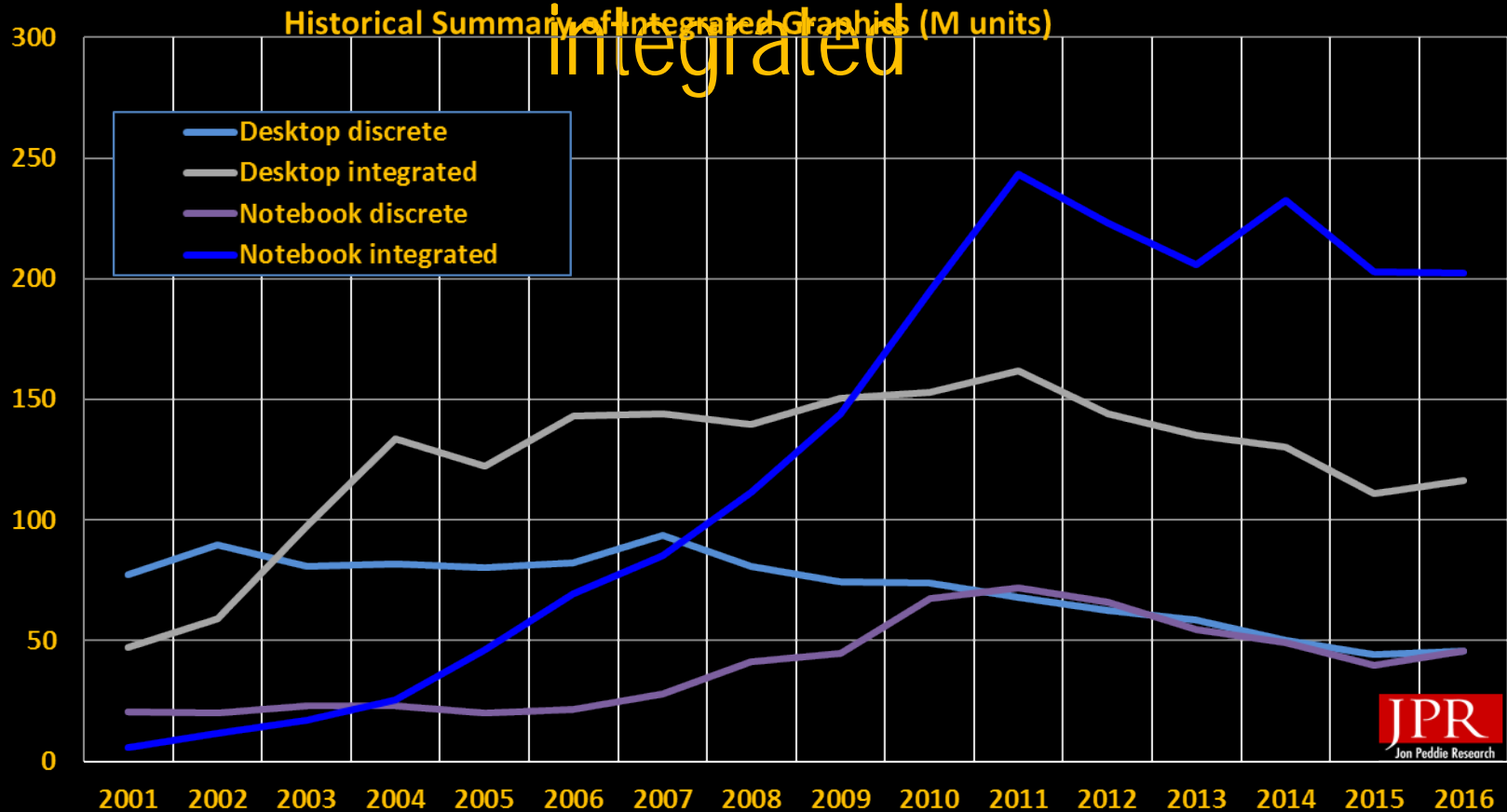


GPU overview—PC discrete vs. integrated

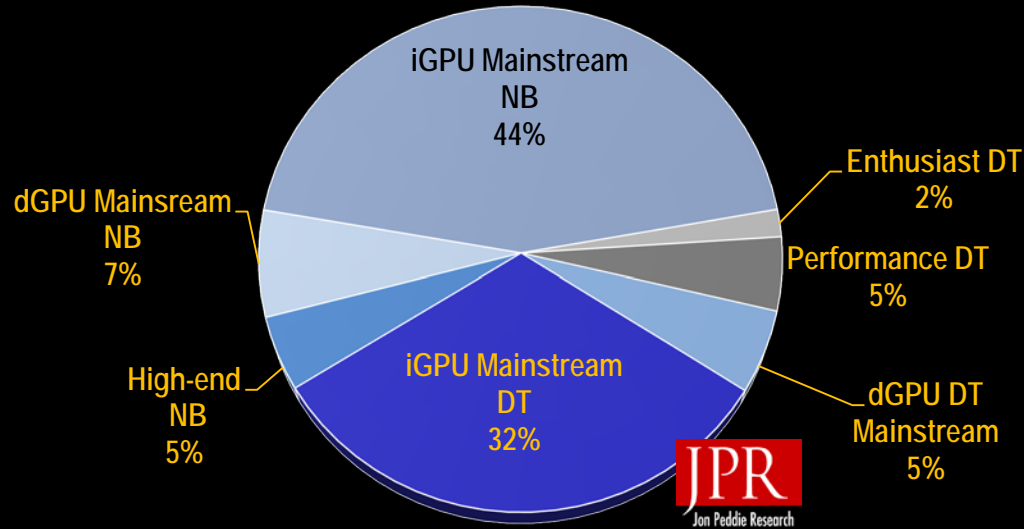
Aren't integrated graphics catching up?



GPU overview—PC discrete vs. integrated

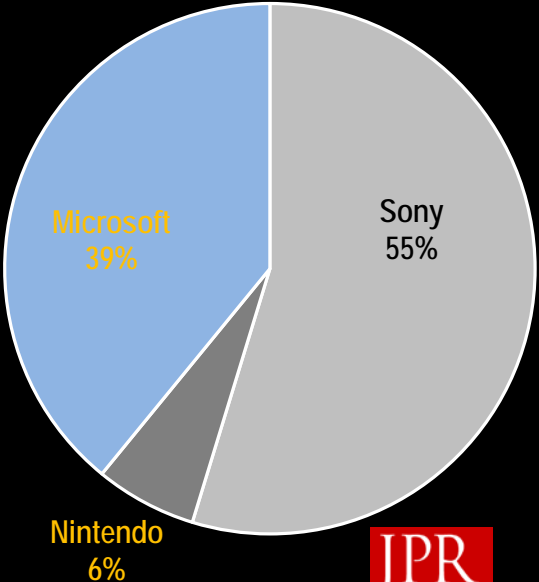


PC Units Market Share 2015

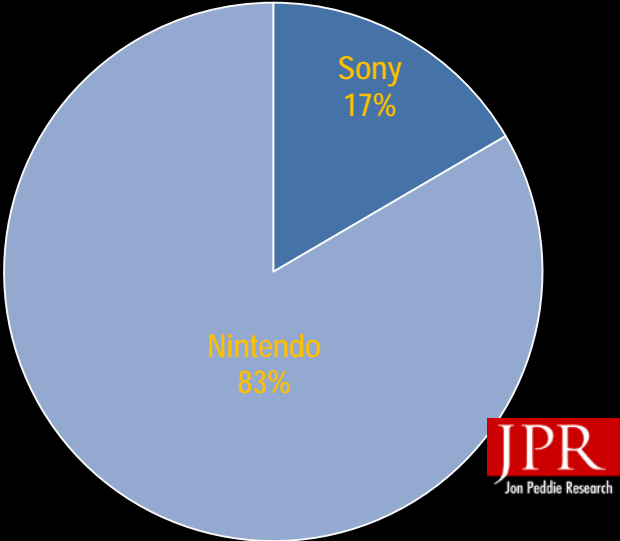


Adoption is not just the purchase of the device but the persistent use of it.

Console Units Market Share 2015



Handheld Units Market Share 2015





Our Panel



Martin Fishman
Co-CEO,
Portrait
Displays



Tim Leland
Vice
President of
Product
Management,
Qualcomm



Michael Lim
Director,
Industry
Analyst
Relations,
Nvidia



Roy Taylor
Corporate
Vice
President of
Alliances,
AMD



Kim Pallister
Director of
the VR
Center of
Excellence,
Intel