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ONLINE GAMING IN AUSTRALIA

WHAT IS IT?

- ✗ Electronic Games

 - + Offline Games

 - + Online Games – Connected via a network

 - ✗ PC

 - ✗ Console

 - ★ E.g. XBOX Live

 - ✗ Browser

 - ★ Flash, etc

GAME STYLES

- ✘ Most games are one of
 - + Simulation
 - + Strategy
 - + First Person Shooter
 - + Role Playing
- ✘ Online is particularly suited to the last three
- ✘ Massively Multiplayer is a well-known subclass

WHO'S DOING IT?

- ✘ Games industry biased towards Victoria and Queensland
- ✘ Young industry with most companies established within last five years
- ✘ Employs only around 1600 people
- ✘ AUD 110M p.a.
- ✘ Primarily export focussed

ASSOCIATED INDUSTRY

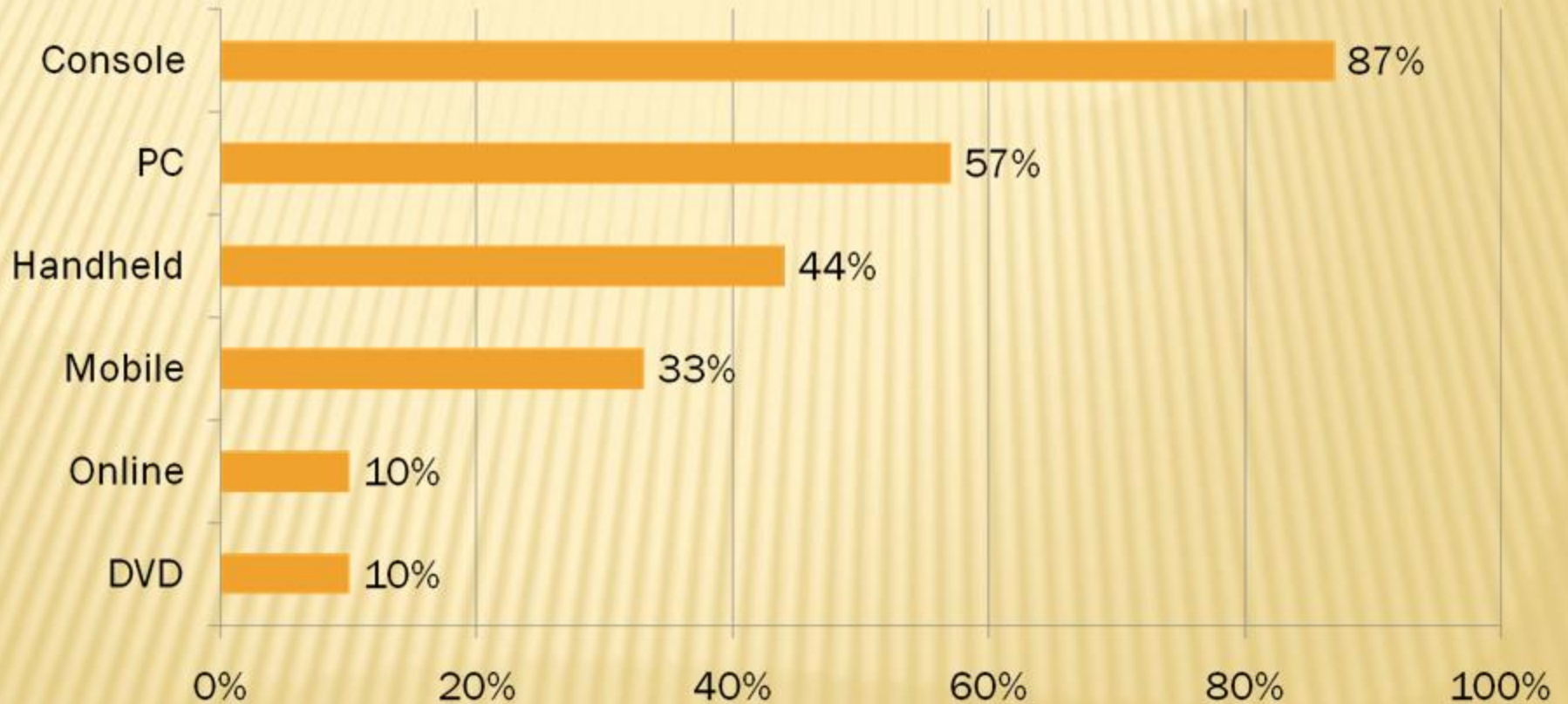
- ✘ Games developers are only part of the picture
 - + Content Owners
 - + Advertising Agencies
 - + Distribution
 - + Hosting

REVENUE MODELS

- ✘ Purchase
- ✘ Subscription (World of Warcraft)
- ✘ Hybrid (Second Life, Habo Hotel)
- ✘ Advertiser Funded (Coca Cola MMORPG)

PLATFORMS

Percentage of Companies Developing for each Platform



HOW DO WE COMPARE?

- ✘ Cog in a global market
- ✘ Australia represents 2% of the global Internet in traffic terms
- ✘ We outperform this in gaming
- ✘ Greatest threats seen as limited talent pool and difficulty raising finance

THE FUTURE

- ✘ Typical 'gamer' only uses a title for 30 hours. This is reducing.
- ✘ Trend is towards entertainment in 'bite sized chunks' – reflected across all media.
- ✘ This provides significant opportunities online.
- ✘ More than 90% of Australian online gaming companies expect to expand in the next 3 years.

