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## Table of Contents

Introduction .....	1
La team.....	1
Trends .....	2
Cloud gaming .....	2
Game as a service (GaaS) .....	3
Abonnement .....	3
DLC et Season Pass et Loot Box .....	4
Le pourquoi du comment .....	6
Nouveaux modes de financement .....	7
Le jeu épisodique .....	7
Le crowdfunding .....	7
Beta et Early Access .....	8
Nintendo .....	9
eSports .....	11
Késako .....	11
Origine.....	11
Consécration ? .....	11
Zone d'ombre.....	12
XR .....	12
VR .....	12
MR.....	16
AR.....	18
Wallonia Export – Invest Agency .....	21
List of exhibiting companies .....	23
ABRAKAM.....	24
DOGSTUDIO .....	25
FIRE FALCOM.....	26
FISHING CACTUS .....	27
GEMOTIONS.....	28
IMAGE MATTERS.....	29
MOOD ME .....	30
REED .....	31
SWINGURU.....	32
TWIST .....	33
GDC-state of the game industry 2018 .....	37

Executive summary .....	37
How to raise money before launch?.....	56
Executive Summary (in french) .....	56
Belgian games café event on March 21 <sup>st</sup> .....	65
Superdata report: nowhere to go but up, the future of XR .....	66
Executive summary .....	66
La réalité mixte et augmentée dépassera la VR en chiffre d’affaire en 2021. ....	66
Les jeux, plus grande source de revenu en 2018 pour les logiciels VR. ....	66
Les titres de Bethesda en tête des ventes dans les jeux VR. ....	66
Près de 50% des utilisateurs pro de la VR sont des institutions publiques.....	66
L’AR sur mobile sera le principal moteur de richesse jusqu’en 2021.....	66

## Introduction



La Game Developers Conference est le plus grand évènement au monde réunissant les professionnels de l'industrie du jeux vidéo. 5 jours d'inspiration, de networking, de formation au travers des workshops, de conférence avec des designers, programmeurs, artistes, producteurs et professionnels du business.

## La team



## Trends

### Cloud gaming

L'une des tendances de l'industrie mais aussi dans le monde de la tech c'est le cloud. Déjà utilisées par différents acteurs tels que Sony, Microsoft ou Steam pour stocker les sauvegardes des joueurs, l'historique de leurs achats ou encore leurs profils.

Cette technologie est maintenant mise à profit pour le jeu. Le joueur via une interface (console, pc ou plus intéressant un mac) se connecte à des serveurs sur lesquels les jeux sont exécutés puis l'image est renvoyée au joueur.

Celui-ci interagit à nouveau et l'information est renvoyée au serveur qui traite et recrée une nouvelle image. La société française Blade et son service Shadow était l'une des pionnières, elle est maintenant rejointe par Sony avec son service PlaystationNow, Le géant de l'informatique Nvidia (fabricant de carte graphique) a lancé GeForce Now et selon les dernières rumeurs Google plancherait sur un projet similaire : nom de code Yeti.



Le modèle est intéressant car il déplace la nécessité de posséder un hardware puissant et coûteux mais aussi fréquent à renouveler du consommateur au prestataire de service. Le business model actuel consiste en un abonnement mensuel ou annuel donnant accès à une machine virtuelle seule sur laquelle les jeux doivent être achetés ou combinée un catalogue de jeux. Seul goulot d'étranglement actuel : la connexion internet !

En effet, le processus incessant d'échange d'information entre l'utilisateur et les serveurs entraîne une lourde charge pour la connexion. C'est pourquoi il est recommandé de posséder la fibre 1 gigabit/s afin de pouvoir profiter au mieux de cette technologie notamment sur les jeux récents. Fibre qui fait encore cruellement défaut dans de nombreux pays (en Belgique elle est réservée aux entreprises).

### Game as a service (GaaS)

Autre tendance intimement liée à l'évolution du cloud gaming, le jeu vidéo non plus un produit à achat unique mais un service à achats réguliers. Deux manières de monétiser cette évolution se dessinent.

#### Abonnement

Mensuel, trimestriel ou annuel comme évoqué plus haut pour le cloud gaming ou comme un accès à un catalogue de jeu téléchargeable sur la console ne nécessitant plus de connexion internet après l'installation du jeu. C'est le cas du Game Pass proposé par Microsoft pour ses consoles Xbox One. La firme de Redmond a d'ailleurs annoncé que dans le futur toutes ses exclusivités seraient disponibles via son service provoquant la colère de certains détaillants qui voyant là une attaque à leur business menacent d'arrêter de vendre les jeux Xbox.



Electronic Arts (EA) qui est l'un des plus gros éditeur/développeur de jeu n'est pas en reste puisqu'il propose un service similaire EA Access sur Xbox et Origin Access sur pc. La particularité étant de ne proposer que des jeux issus de leur catalogue, de proposer des rabais et de pouvoir jouer à certains jeux en avance de la date de sortie globale.

The advertisement features the Origin Access logo at the top center, with the text "Origin access" below it. The main headline reads "Endless PC gaming, just \$4.99 a month". Below this, a sub-headline states: "Play a growing collection of great PC games, try new EA games before they're released, and save 10% on Origin purchases. Cancel anytime." A prominent orange "Join Now" button is centered below the text. At the bottom, it specifies "ONLY FOR PC" with a Windows logo icon. The background is a collage of game covers including Battlefield, Dead Space, and Mass Effect.

#### DLC et Season Pass et Loot Box

Les DLC (downloadable content/contenu téléchargeable) et les Season Pass (pass saisonniers qui regroupent une série de DLC produits à un moment précis, sorte d'achat en gros) sont un autre moyen de garder l'attention du joueur et son portefeuille sur un jeu. Ils peuvent prendre plusieurs formes.

The banner features a dark background with a collage of game scenes. On the left, it says "16 FREE DLCs FOR EVERYONE" with a "LEARN MORE" link. Below this, four DLCs are highlighted with images and text:
 

- Temerian Armor Set**: Reserved for the finest of warriors who serve the kingdom of Temeria, the Temerian Armor Set includes a jacket, gloves, pants, boots, war horse armor and saddlebags expanding the inventory.
- Beard and Hairstyle Set**: Customize Geralt of Rivia to your liking with this amazing set of beards and hairstyles.
- Alternative Look for Yennefer**: Check out this entirely new look for the mighty sorceress Yennefer of Vengerberg!
- Contract: Missing Miners**: Contract: Missing Miners - Miners from a small Skellige village are disappearing. Investigate and find out what's happening!

 Below these, it says "Information about the remaining 12 DLCs coming soon". The bottom left corner features the "THE WITCHER WILD HUNT" logo.



Certains prolongent l'expérience de jeu en ajoutant du contenu scénarisé comme cela peut être le cas dans un jeu d'aventure en rajoutant des chapitres à l'histoire. D'autres augmentent le nombre de cartes ou circuits disponibles sur lesquels les joueurs peuvent s'affronter en local ou en ligne, augmentent le nombre de personnages ou véhicules jouables. Enfin viennent les contenus liés à la personnalisation des avatars ou objets utilisés en jeu. Cette dernière catégorie appelée également microtransaction est sujette à un débat tel que plusieurs états commencent à se pencher sur son cas.

Ce sont plus précisément les différentes autorités de régulation des jeux de hasard qui visent les « Loot Boxes ». Ces boîtes à butin payable le plus souvent en argent virtuel (qui s'obtient au fur et à mesure que l'on joue) et en argent réel pour les plus pressés débloquent du nouveau contenu de manière aléatoire. Quatre aspects majeurs de ce mécanisme posent aujourd'hui problème.

**Le type de contenu** : pour les jeux payant à l'acquisition, le joueur doit pouvoir terminer le jeu sans avoir recours aux microtransactions ce qui implique que celles-ci ne peuvent proposer à l'achat que du contenu dispensable, esthétique. Pour les jeux proposant des modes multi-joueurs en ligne, l'équilibrage des forces entre les joueurs passant à la caisse et les autres doit être maintenu afin qu'un groupe n'aie pas d'avantage sur l'autre.

**Le facteur temps** : S'il est généralement accepté de pouvoir accélérer sa progression en échange d'une contribution financière (time is money) sans que cela nuise aux autres, le temps moyen nécessaire pour avancer dans le jeu se doit d'être raisonnable (= 2 ou 3 heures de jeu par jour maximum soit le temps dont dispose une personne active dans le milieu professionnel ou encore en formation). Dans le cas contraire, le recours aux micro-transactions deviendrait quasi obligatoire pour tout joueur moyen souhaitant terminer le jeu. Concrètement, la quantité d'argent virtuel donnée au joueur pour son temps de jeu est le facteur principal de régulation.

**L'aléatoire** : la probabilité d'obtenir du contenu utile ou intéressant pour le joueur si elle est trop faible entraîne forcément une frustration et encourage le passage à l'achat. En effet, la quantité d'argent virtuel donnée au joueur étant limitée, plus le nombre de loot box nécessaire à l'obtention de l'objet désiré est grand plus celui-ci devra payer en argent réel. De plus, les probabilités d'obtenir un objet d'une catégorie (classée régulièrement en commun, rare, épique et légendaire) sont souvent cachées aux joueurs.

**Le public visé** : l'ensemble des mécaniques citées auparavant s'applique dans des jeux tout public. Si un adulte est censé avoir la maturité nécessaire pour y faire face, il en va de son libre arbitre, qu'en est-il des enfants et jeunes adolescents ?



C'est ce mélange entre argent, hasard et jeu qui est dans le viseur des autorités qui songent à inclure les loot boxes dans la catégorie des jeux d'argent impliquant une réglementation bien plus stricte qui aurait un impact financier certain pour les éditeurs.



Le pourquoi du comment

La transition du secteur vidéo ludique vers la « prestation de service » est motivée par une plus grande rentabilité de ce modèle. En effet l'éditeur Take Two/Rockstar qui est à l'origine de séries à succès telles que GTA (Grand Theft Auto) 2K sports (NBA, MLB, NHL) a rapporté \$480.8 million de ventes nettes pour son troisième trimestre fiscal se terminant au 31 décembre 2017 dont 32% sont dû aux micro transactions. (Makuch, Eddie, 2018)

Le développement de jeu est devenu plus long et plus coûteux : en moyenne 10 000 dollars/travailleur/mois, les grosses productions prennent entre deux et quatre ans pour être développées et comptent des équipes entre 300 et 400 équivalents temps plein soit des budgets de production entre 72 et 192 millions de dollars sans compter les frais de marketing et de serveur pour les jeux en ligne. Le budget total arrivant à plusieurs centaines de millions. (Schreier, 2017).

Ce nouveau modèle économique permet aussi d'avoir un revenu constant permettant le financement de nouveaux projets parfois plus risqués comme la création d'une nouvelle licence. Faire vivre plus longtemps un produit permet également de moins laisser le consommateur et de laisser plus de temps aux équipes de productions pour terminer leurs projets. Les grands éditeurs ont pour habitude d'avoir un rythme de sortie annuel sur leur grande licence telles que Call Of Duty d'Activision ou Assassin's creed de Ubisoft. Cependant l'allongement des temps de développement causé par l'évolution technologique les ont poussés à utiliser différents studios en rotations ce qui a eu pour effet de diminuer leur réactivité quant aux critiques qui sont émises. En effet si le prochain jeu utilise un processus de jeu critiqué par la presse et les joueurs, il est souvent trop tard car celui-ci est déjà dans sa phase finale de développement et aucun changement majeur ne peut y être apporté.

Malgré le système de rotation, de plus en plus souvent les produits finis sont défectueux par faute de temps et requièrent une série de patchs via des mises à jours. Enfin Les campagnes marketing commencent souvent plus d'un an avant le lancement, le consommateur se retrouve alors constamment abreuvé de publicités ce qui en réduit leurs efficacités. Devant la grogne montante des joueurs, certains éditeurs repensent leur calendrier de sortie comme ce fut le cas pour Ubisoft. Le GaaS propose alors une alternative viable de financement sur le long terme permettant aux studios de mieux étaler la sortie de leurs produits.

## Nouveaux modes de financement

### Le jeu épisodique

Il consiste à diviser son jeu en plusieurs parties disponibles à l'achat séparément ou en un morceau, fréquemment à un prix avantageux. Le temps entre chaque sortie de parties permettant aux développeurs de créer la suivante en recevant déjà des fonds. Traditionnellement l'apanage de petits studios indés ne disposant pas du budget nécessaire pour réaliser le projet en une fois, ce mode de financement est testé par de grands éditeurs tels que Square Enix (Final Fantasy, Kingdom Hearts, Hitman, Tomb Raider) qui est évalué en bourse à plus de 5 milliards de dollars (Bloomberg, 2018). En effet, pour sa licence mettant en scène un tueur à gage, Hitman, Square a décidé de sortir son jeu au format épisodique en découpant l'aventure par zone géographique. De plus il a annoncé que le futur remake de son jeu phare Final Fantasy VII, qui lui valut une renommée mondiale ; suivrait le même modèle car l'adaptation du jeu initialement sorti en 1997 avec des critères graphiques et des mécaniques de jeu modernes demanderait trop de temps et de ressources que pour le réaliser en un bloc. Cependant le motif financier n'est pas à oublier ; le fait de morceler le jeu permet d'une part de tester la demande et d'autre part d'autofinancer le projet par l'apport des ventes de la première partie mais aussi par celle du jeu entier qui sera disponible en même temps.

Nul doute que dans le futur plus de grands studios s'essayeront à ce modèle, leurs projets devenant toujours plus ambitieux et coûteux.

### Le crowdfunding

La tendance générale dans le monde du crowdfunding (financement participatif) est stable. La plus grande plateforme Kickstarter a vu les montant investis atteindre 16,596 millions de dollars <sup>1</sup> pour l'année 2017 soit une hausse de 4% par rapport à 2016 même si le nombre total de projets financés est en baisse depuis trois ans.

Quant à FIG, plateforme créée par d'anciens de chez Kickstarter, qui permet, en plus de donner son argent contre une récompense, de devenir actionnaire en achetant des parts, a vu la participation diminuée de 28% en comparaison avec 2016 mais 11 projets en 2017 contre seulement 6 en 2016 y ont vu le jour<sup>2</sup>.

Enfin Ulule, le petit poucet français du marché a vu son plus gros projet en 2017 avec le financement de « Noob le jeu video » à hauteur de 500 000 dollars.<sup>3</sup>

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<sup>1</sup> (Thomas BIDAUX, Ico Partners, 2018)

<sup>2</sup> (Charlie Hall, Polygon, 2018)

<sup>3</sup> (Thomas Bidaux, PC games insider, 2018)

Le crowdfunding est très volatile car il dépend fortement de la force des projets qui y sont proposés. Par le passe Star Citizen avait récolté à lui seul plus de 2 millions de dollars lors de sa campagne kickstarter et continue à recevoir des dons sur son site officiel qui affiche au compteur 175 millions de dollars<sup>4</sup>.

À noter qu'une série de projets n'ayant jamais vu le jour ou qui se sont révélés être des escroqueries ont également entaché ce mode de financement.

Autre facteur grandissant qui vient diminuer l'attrait du financement participatif pour les studios : le succès de l'early access (accès anticipé).

## Beta et Early Access

Beta (terme qui désigne un stade de développement d'un produit généralement technologique : software, il précède la commercialisation du produit) et Early Access ont le vent en poupe.

De plus en plus de développeurs se tournent vers l'early access pour financer leur jeu. En effet, le modèle permet de commencer à vendre un jeu qui est en cours de développement sans devoir garantir la date de finition ni même si celui-ci sera complété un jour. Seule contrainte pour le studio, présenter une version dite jouable (certains projets présentent tellement de bugs entachant l'expérience) au consommateur qui en achetant le jeu incomplet prend tous les risques.

Le concept s'appuie sur le modèle de la beta, sorte de démo qui permet aux studios de tester son infrastructure réseau s'il s'agit d'un jeu en ligne ou de récolter le feedback des joueurs afin de corriger certains bugs (terme désignant une anomalie dans l'informatique) mais aussi essayer d'attirer un nouveau public moins enclin à acheter le jeu sans l'essayer. Pour le joueur c'est l'occasion d'expérimenter un titre en avance et donc de pouvoir se faire un avis préliminaire. L'accès à ces versions tests des jeux est généralement gratuit, bien que dernièrement, certains studios réservent les betas aux personnes ayant précommander le jeu ou les incluent dans un autre jeu souvent moins populaire pour le promouvoir.

C'est sur cette base que Valve a lancé son programme d'Early Access en mars 2013. De ce fait, le consommateur a la possibilité d'acheter le jeu avant que celui-ci ne soit fini a un prix plus bas et le développeur fait rentrer l'argent nécessaire à la continuation du projet. Le concept a rencontré un énorme succès avec des jeux se vendant à plus de centaines de milliers d'exemplaires<sup>5</sup> comme Rust du studio Facepunch (1 million d'unités en deux mois), Ark: Survival Evolved de Wildcard (1 million d'unités en un mois) et plus récemment le phénomène de BlueHole studio, PlayerUnknown's Battleground ou PUBG pour les intimes (26 millions d'unités vendues pendant son early access soit 9 mois<sup>7</sup>).

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<sup>4</sup> (Clementoss, jeux-video.com, 2018)

<sup>5</sup> (Matthew Handrahan, Gamesindustry, 2018)

<sup>6</sup> (Matthew Handrahan, Gamesindustry, 2017)

<sup>7</sup> (ChewbieFR, jeuxvideo.com, 2018)

Pour comparer, un jeu majeur est considéré une réussite après quelques millions de vente dépendant du budget requis au développement et au marketing. Par exemple, le jeu le plus vendu de la licence Call Of Duty de Activision, qui fait partie des licences les plus vendues au monde, s'est écoulé à environ 30 millions d'unités en 7 ans. Les jeux en early access se vendent donc aussi bien voire mieux que certains jeux finis.

Ce modèle apparu initialement sur pc s'exporte aujourd'hui sur console et sur mobile avec l'annonce de Google d'intégrer le système sur son PlayStore<sup>8</sup>. Signe que l'Early Access a encore de beaux jours devant elle.

## Nintendo

La firme nipponne a lancé en mars dernier sa nouvelle console au concept hybride, mi console de salon mi console portable qui remporte un franc succès avec plus de 15 millions de ventes en moins d'un an remportant au passage quelques records de la console la plus rapidement écoulee.

La où Nintendo innove c'est dans son approche de voir le jeu vidéo différemment, pas un simple upgrade technologique mais une nouvelle manière de jouer. C'est précisément le cas avec leur nouveau projet : Nintendo Labo



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<sup>8</sup> (Ben Woods, Engadget, 2016)

Le principe est de mixer jeu vidéo et bricolage, en construisant son guidon de moto, sa canne à pêche, son piano ou encore sa pouponnière voire se transformer en robot. Le tout s'intégrant avec la switch et ses deux manettes. J'y vois un moyen formidable d'initier les enfants aux métiers de demain comme opérateur de mécha (robot piloté de l'intérieur par un humain) ou ingénieur en robotique et exosquelette.



## eSports

### Késako

Le terme eSport désigne les compétitions de jeux vidéo où chaque jeu est une discipline à part entière. Le jeu doit être compétitif, individuel ou collectif

### Origine

Les débuts de l'eSport sont à trouver dans les tournois amateurs opposant différents joueurs sur les bornes d'arcade dans les années 80. Le principal genre était alors le jeu de combat. Avec le temps et l'arrivée des pc et consoles de salon, le jeu vidéo est devenu plus populaire et de nouveaux genres tournés vers la compétition virent le jour comme le FPS (first person shooter) où le joueur voit l'action à travers les yeux d'un protagoniste armé, et les jeux de course automobile. Ce n'est qu'après la démocratisation d'internet dans les années 2000 que l'eSport a vraiment décollé pour atteindre aujourd'hui un marché évalué à plus d'un milliard et demi de dollars.

### Consécration ?

Avec une croissance à double chiffre du marché pour dépasser les 2 milliards de dollars, une base de téléspectateurs estimée à 320 millions, les publicitaires et investisseurs commencent à croire au potentiel du jeu vidéo professionnel avec pour l'année 2017 1,275 milliards de dollars investis.

De plus l'eSport sera présent aux jeux asiatiques de 2022 à Hangzhou en Chine après la décision du comité olympique asiatique (COA) d'inclure la discipline dans le calendrier officiel non plus en tant que démonstration mais en sport médaillé. Une étape vers les J.O? Définitivement, les organisateurs des jeux en 2024 à Paris se sont montrés ouverts à entamer les discussions sur l'entrée de l'eSport comme discipline olympique. Nous serons fixés après les jeux de Tokyo en 2020 date à laquelle les sports sélectionnés pour Paris seront annoncés.



## Zone d'ombre

Afin d'intégrer les J.O, l'eSport devra d'abord se mettre en conformité avec les règles en vigueur du comité international olympique, notamment concernant les paris, manipulations de match et les lois anti-doping.

De plus, pour assurer une croissance toujours aussi grande, il faudra veiller d'une part à maintenir la base installée qui dépend pour rappel de chaque jeu. Avec le risque que si certains opus, les plus populaires, tombent en désuétude, le marché s'écroulera avec eux. D'autres parts, les différents acteurs ont intérêt à étendre la base de joueurs et de spectateurs au-delà des jeunes générations à venir qui grandiront accoutumés aux jeux vidéo pour atteindre un statut plus mainstream si l'eSport veut rivaliser avec des sports plus traditionnels.

Enfin, une autre grande difficulté pour la discipline est de réussir à transmettre aux non-initiés l'effort et la dextérité nécessaires pour réaliser les performances vues au plus haut niveau dans les différentes compétitions. Car bouger une souris et taper sur un clavier sont des gestes de la vie commune et réussir à faire ressentir la prouesse d'un gamer, éliminant son adversaire de façon magistrale, de manière équivalente aux yeux de tous à la prouesse d'Usain Bolt franchissant les 100m en 9.58s, reste un enjeu de taille pour l'acceptance de l'eSport en tant que sport.

## XR

XR désigne l'Extended Reality(réalité étendue) dont le domaine comprend toute interaction entre l'Homme et une machine dans un monde combinant le réel et le virtuel. Les trois grandes catégories étant La VR (virtual rality), AR (augmented reality) et MR (mixed reality).

## VR

Fer de lance de la nouvelle ruée technologique, la réalité virtuelle continue d'accroître sa base de possesseurs de casque et abreuve régulièrement en nouveau contenu ses utilisateurs. Cependant, dans son plus grand vecteur de croissance et de revenu qu'est le gaming, les triple A se font rares et les studios tâtent encore le marché à coup de remaster. Aucune nouvelle grosse licence dédiée à la VR n'a encore vu le jour, ce qui après deux ans de commercialisation commence à frustrer les consommateurs et inquiéter les investisseurs qui se tournent désormais vers l'AR.



## Oculus

La tendance est au wireless, avec l'annonce de l'Oculus Go, casque stand alone permettant une utilisation assise ou debout munie d'une commande. Attendu dans les mois prochains, il sera vendu a un tarif de 200 dollars.



Mais la plus grosse inconnue reste le fameux projet Santa Cruz qui sera certainement la nouvelle itération de l'Oculus Rift avec une résolution améliorée grâce aux nouveaux écrans et une solution sans fil. De plus Facebook qui détient Oculus vient de teaser que des révélations majeures concernant la VR et l'AR seront annoncées lors de sa conférence des développeurs F8 le 1<sup>er</sup> mai.

HTC

De son coté, HTC a annoncé la sortie du Vive Focus, pour le marché chinois. Il s'agit d'un stand alone comparable a l'Oculus Go avec la possibilité de se mouvoir dans un espace de 2m et également muni d'une commande. Il est vendu 3999 yuans soit environ 633 dollars.



La grosse nouveauté pour la firme taiwanaise a été l'annonce du Vive Pro qui en plus d'être wireless, aura une résolution améliorée ainsi qu'une plus grande densité de pixel. Il est attendu pour 2018 et aucun prix n'a encore été dévoilé. Enfin, Le module sans fil sera compatible avec le Vive actuel.



## Lenovo

La firme chinoise n'est pas en reste puisqu'elle propose également un casque de réalité virtuelle autonome s'intitulant Mirage Solo. Vendu à 400 dollars avec sa télécommande, il permet de se déplacer dans un diamètre de 1,5m et intègre Daydream, la plateforme VR de Google, pour son contenu.



### *Sony*

Avec 1,6 millions de vente pour son casque, le PSVR, Sony a également introduit une V2 permettant une meilleure gestion des câbles ainsi qu'un boîtier permettant le flux direct de contenu HDR vers le téléviseur.



### MR

La où la VR se focalise davantage vers le B2C, La réalité mixte tend vers les professionnels, avec des efforts faits en ce sens par Microsoft et Magic Leap. Le premier usage étant le multi tasking sans perdre la connexion avec l'environnement ou ses collaborateurs. Elle requiert l'utilisation d'un casque ou de lunettes dans lesquelles sont projetées des éléments virtuels qui s'intègrent dans le réel.

### *Microsoft*

Premier à dégainer dans le secteur, Microsoft avec son Hololens s'était directement tourné vers la réalité mixte quand tous les yeux étaient rivés sur la renaissance de la VR. Il est disponible à la vente pour les développeurs au prix de 3000\$ et à 5000\$ pour les sociétés.



Pour ce qui est du grand public, Microsoft s'est allié avec partenaires HP, Lenovo, Acer, Asus, Dell et Samsung pour créer des casques MR plus abordables entre 399\$ et 449\$



### *Magic Leap*

Fondé en 2010, la start up basée en Floride a rapidement séduit les investisseurs qui ont investi pour 2 milliards de dollars. Utilisant une technologie propriétaire s'intitulant *Lightfield*, le casque envoie les données virtuelles par la lumière sous différents angles afin de reproduire le fonctionnement naturel de notre vision permettant une symbiose entre le réel et le virtuel ainsi qu'une utilisation prolongée. Ni le prix ni la date de sortie du premier casque Magic Leap One : Creator's edition n'ont été dévoilés à part un vague 2018 et un prix premium dont la base serait équivalent au prix d'un iPhone X soit 1150\$. Une annonce pour la GDC est fort probable.



## AR

Après l'énorme succès de Pokémon Go, ses 100 millions de téléchargements en quelques mois, 20 millions d'utilisateurs actifs par mois et plus d'un milliard de dollars de chiffre d'affaire, le monde a changé. La réalité augmentée n'est plus une technologie de geek mais est devenue mainstream en s'affichant à l'œil du monde entier. C'est à dire aux yeux des investisseurs également. C'est pourquoi l'AR attire désormais en montant le plus grand nombre d'investissement.

### Google

Google a lancé son ARCore en version 1.0 remplaçant le projet Tango qui est disponible sur son smartphone *Pixel* et sur les flagships de ses partenaires comme Samsung ou Huawei pour un total de 15 appareils différents. Google compte ainsi renforcer sa position dans le marché.

### Apple

De son côté Apple a introduit à partir d'IOS 11 l'ARkit qui est disponible pour tous les appareils sortis après l'iPhone 6. La dernière version (1.5) introduit la reconnaissance des plans verticaux c'est-à-dire des murs en plus des surfaces planes horizontales telles que le sol ou les tables. 2000 applications utilisant l'AR ont vu le jour sur l'App store depuis le lancement en juin 2017.

### Intel

C'était inattendu mais Intel se lance dans la course de l'AR non pas en tant que fournisseur de puce mais en proposant un produit fini, les Vaunt Glasses. Dans la veine des Google glasses dont Intel a bien compris les raisons de l'échec, les lunettes connectées n'ont pas d'appareil photo ou de micro (pour le moment), ne requièrent pas de swiper. Si ce n'était pas pour un léger faisceau rouge de temps à autres, on ne pourrait pas les distinguer des lunettes de vision traditionnelles. Côté fonctionnalité, elles permettront l'affichage de notifications ou de donner des directions quand elles sont couplées avec une app à la manière d'une smartwatch. Pour le futur Intel prévoit la compatibilité avec les assistants virtuels tels qu'Alexa, Siri ou Google en intégrant un micro.





# BELGIUM - WALLONIA at GDC 2018



March 19 – 23, 2018 - San Francisco,  
California  
Moscone Center BOOTH 101  
South Hall

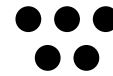




# Wallonia Export – Invest Agency

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BELGIUM  
Phone: +32-2-421 87 45  
Fax: +32-2-421 87 75

[www.awex-export.be](http://www.awex-export.be)  
[www.investinwallonia.be](http://www.investinwallonia.be)



Wallonia.be

EXPORT  
INVESTMENT

AWEX, partner of the international economic development of Wallonia.

The Wallonia Export-Investment Agency (AWEX) is in charge of the development and management of Wallonia's international economic relations.

With regards to foreign trade, the Agency has a promotion and information mission with regard to both the international and Walloon business community.

Intended for purchasers, decision-makers, importers and foreign prospects, the Agency can, on request:

- pass on economic data regarding Wallonia and its export potential;
- provide information on the products and services of Walloon businesses;
- seek Walloon businesses for the conclusion of international partnerships;
- distribute lists of Walloon exporters.

Vis-a-vis Walloon businesses, the Agency is their comprehensive international partner, providing a range of services and activities covering the entire export process:

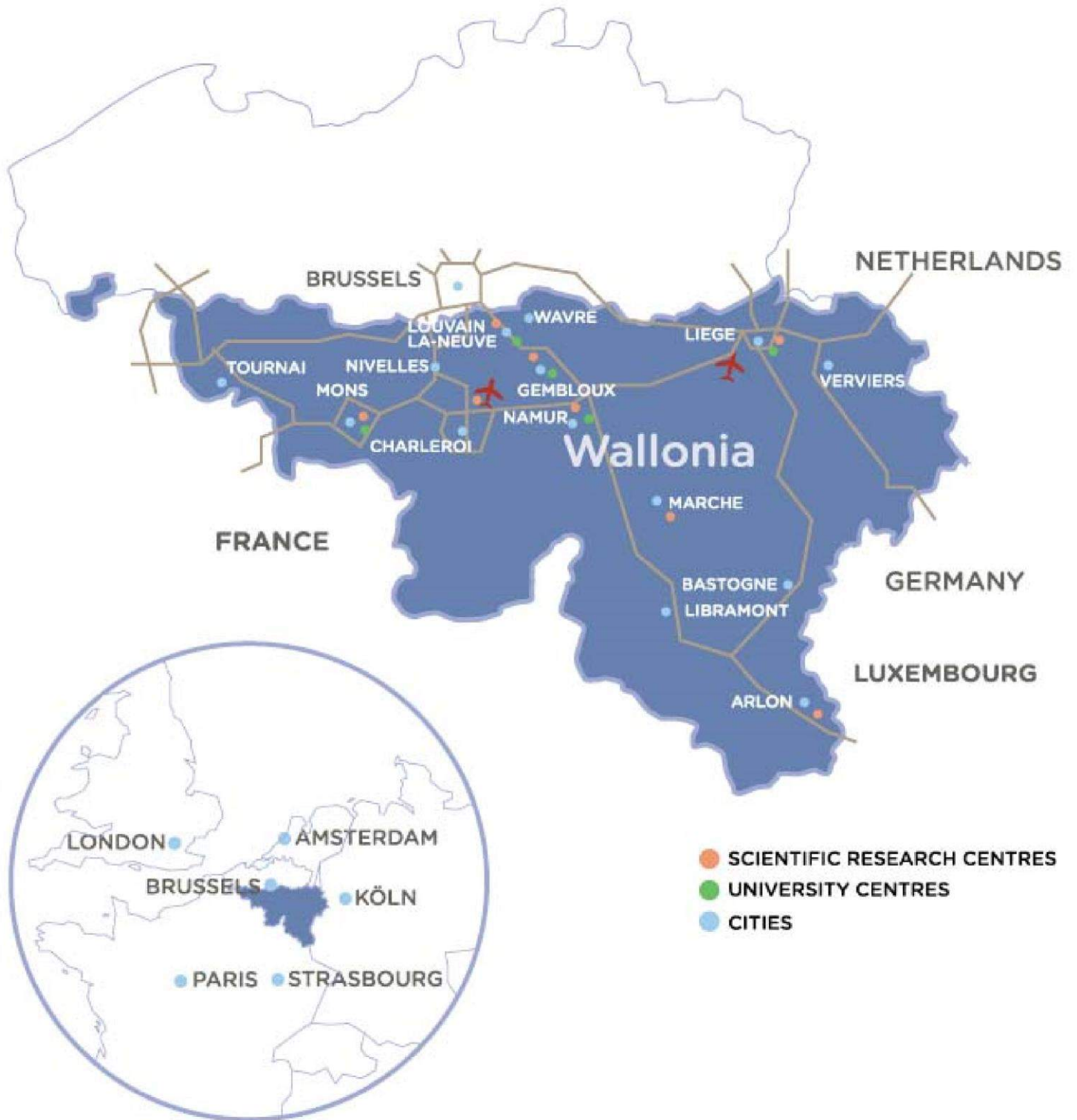
- General and commercial information on foreign markets;
- Production of individual market studies on request;
- Organization of commercial canvassing operations (participation in international shows, organization of economic missions, sector-based contact days, etc.);
- Contacts with international organizations;
- Promotion of Wallonia and its export potential;
- Financial support and funding for exports;
- Training and raising awareness of international professions.

With regards to foreign investment, the Agency provides general expertise in the areas of promotion, prospecting and informing potential investors. It also ensures active monitoring of investors based in Wallonia, as well a mission to find foreign buyers for Walloon industrial sites in the process of restructuring.

AWEX is also competent for the strengthening of the Wallonia brand image overseas.  
AWEX has a workforce of more than 400 people and about one hundred offices overseas.

## In attendance at GDC-San Francisco :

- **Guy VANPAESSCHEN** Project Manager North America, Brussels  
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[www.awex-export.be](http://www.awex-export.be)
- **Baudouin de HEMPTINNE** Trade & Investment Commissioner, San Francisco  
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[www.digitalwallonia.be](http://www.digitalwallonia.be)
- **Ashley LYON** Aeronautics & Space / ICT Expert, Namur  
[alyon@investinwallonia.be](mailto:alyon@investinwallonia.be)



# List of exhibiting companies

ABRAKAM

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DOGSTUDIO

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FIRE FALCOM

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FISHING CACTUS

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GEMOTIONS

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IMAGE MATTERS

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MOOD ME

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REED

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SWINGURU

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TWIST

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**ABRAKAM**

ABRAKAM  
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+44 7946 817468

Gary Morris  
Head of Community and Esports  
[gary@abrakam.com](mailto:gary@abrakam.com)

Abrakam is a video game studio founded in 2013 known for Faeria, with more games on the way for both mobile and PC players. Faeria is a high-quality fast paced collectible card game where players incarnate gods able to create lands on which they battle, offering PvP, solo, and co-op game modes. After a strong Kickstarter followed by a successful period in Steam's Early Access, Faeria launched for PC in March 2017 and will arrive on mobile devices this year.

DOGSTUDIO

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In attendance at GDC-San Francisco:

Nicolas Moies-Delval

Managing Partner

[teckel@dogstudio.be](mailto:teckel@dogstudio.be)



**dogstudio**

Dog studio is a medium-sized digital agency employing 25 experts in all aspects of the digital experience.

Our people are deeply into what they do, and they join forces to design and create user-focused interactive digital experiences and deliver ever-more mind-blowing creations.

As lovers of everything digital, we offer a wide range of services: developing digital strategies that are really out there, creating in-your-face digital identities, design and full-stack development of innovative websites, setting up interactive installations, creating Connected Things...and lots of other stuff!

Proud to be Belgian! We set up shop in Namur 10 years ago, and recently opened our first U.S. office in Chicago! We still work actively with local partners, but we also collaborate with world-famous brands such as Microsoft (Global), the Museum of Science and Industry (Chicago), The Kennedy Center (Washington DC), Quanta Magazine (New York City) Dragone (Macau/Belgium), Expo Milano 2015 (Milan), B-REEL (New York), and DDB (Paris), and we are actively seeking new international challenges.



FIRE FALCOM  
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[www.firefal.com](http://www.firefal.com) In attendance at

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Gauthier Billot,  
Owner  
[gauthier.billot@firefal.com](mailto:gauthier.billot@firefal.com) +32 497 11 12 47

Fire Falcom is a brand-new studio, founded by two industry veterans. We offer development services to create your games, port them, or help finishing a project. Our expertise includes C/C++, HTML5, Haxe, Flash ports and Unity. We work on all platforms including mobile and web. We also have experience with cloud systems. We are versatile and with our highly technical background, we are driven by new challenges.

Fire Falcom also develops its own games, based on original IPs. And we have games to show. If you are interested, contact us.

## FISHING CACTUS

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[www.fishingcactus.com](http://www.fishingcactus.com)



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Laurent Grumiaux

Commercial Director

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Fishing Cactus is a Belgium based indie game development studio. Our name showcases our originality and ability to thrive in a nation without many game development studios.

After the success of the atypical Epistory - Typing Chronicles, released in March 2016, we started working on two new internal productions, the world renown black and white game, SHIFT which is being developed on PC and consoles and Wormworld, a game based on the graphical novel supported by a large community of readers and fans.

Besides, Fishing Cactus has become an expert with Flash to HTML5 porting, currently working with some of the top web gaming platforms to ready their games for the next generation.

To learn more about Fishing Cactus, please visit <http://www.fishingcactus.com/>



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Gemotions ([www.gemotions.be](http://www.gemotions.be)) offers treasure hunts, whose clues and riddles to solve, sent on your mobile, let you reach different steps in order to win the game. You can play alone, with your friends or with other explorers of our community.

Our trails allow you to (re)discover a city in an unusual way or to simply enjoy a nice day in the middle of nature.

A unique experience to share with family, friends or colleagues.

Come and join the adventure, and do not forget your shoes, your phone, and your explorer hat.

More explorers on the trail, funnier is the adventure!



## IMAGE MATTERS

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<http://image.matters.pro/>



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Image Matters (<https://image.matters.pro>) develops innovative high-performance hardware and software tools for extreme imaging applications. Our electronics and software platforms help audiovisual equipment manufacturers to jump faster and easier into new video dimensions. Using a modular approach, Image Matters splits the electronics into pre-validated subsystems and provides an easy-to-use software environment to customize and build complete systems.

In order to support all imaging challenges, Image Matters gets the help origami ecosystem partners (<https://origami.connects.pro>) toward efficient image compression and easy image transport over internet.

Image Matters is proudly member of the Origami ecosystem, SMPTE sustaining member, TICO Alliance, Xilinx Associates.



MOOD ME

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CEO

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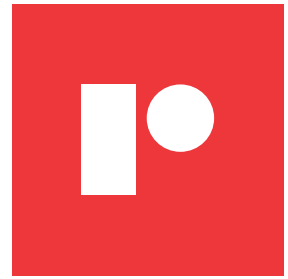
Ege Aydin  
Lead Unity  
[egeaydin@gmail.com](mailto:egeaydin@gmail.com)

MoodMe helps Brands, Games & Apps engage and sell with Face Augmented Reality experiences and measure them with Face Analytics.

MoodMe products are Face AR + Emotion Gender Age detection + Identification open toolkits.

REED

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**Reed**

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ED@reed.be

Reed is a digital studio focused on user experience based in Belgium. We build interfaces, communication strategy, games, transmedia architectures and digital products.

We experiment new ways to tell stories using art & code.

Reed is currently working with the company First Love Films on a game based on Riftworld Chronicles's licence, as a part of a broader transmedia experience.



SWINGURU

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Business Manager

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Brendan Zarrilli

US & Canada Sales Manager

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Swinguru is on a mission to reinvent the way we analyze and improve human movement in sports.

Golf, Baseball and Softball are at the forefront of

this journey. At Swinguru, we are passionate about Cedric Tombeur the intersection of sports and technology. We Head of Sales & Marketing believe the use of technology in sport can help [cedric.tombeur@swinguru.com](mailto:cedric.tombeur@swinguru.com) coaches and athletes improve performance in a way that was not possible before.

Swinguru applies the fundamentals of computer vision and body motion capture to help coaches and athletes see what the human eyes cannot see. Our innovative wireless, markerless, and sensorless software-based platform collects, analyzes and displays human motion data in real-time, raising both the understanding and improvement possibilities of movement in sports to whole new levels.

Swinguru designs Swinguru Pro, a revolutionary professional Swing Analysis solution, along with My Swinguru, the ultimate personal Swing Analyzer. Both products are interconnected through our cloud-based Swinguru Academy, a central hub to access, track, visualize and share swing metrics, videos and data.

Swinguru products are in use by top golf, baseball, and softball instructors and players, and offer a multitude of features such as:

- > 2D / 3D Capture (Video & Data);
- > 3D Motion Analysis;
- > 3D Balance Tracking;
- > 3D Interactive Posture Biofeedback;
- > Wireless & Markerless Technology;
- > Automated Drawing Tools;
- > Integration with External Devices (High speed 2D video, ball flight from launch monitor and center of pressure from pressure mat);
- > Cloud-based Video & Data Storage and Management

## TWIST

### TWIST

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www.twist-cluster.com



### CONTACT :

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TWIST is one of the main Belgian networks in the field of audiovisual and multimedia digital content & technologies. TWIST is focused on business & innovation and brings together the main Belgian players in digital media.

TWIST is mainly active on three markets

- The content producers market: Cinema, TV, Animation;
- The TV Channels market: development of broadcast and event technologies and facilities;
- The marketing/communication/Event/Sport/Museum market: development of immersive and interactive content and technologies.

BOOSTER of Immersive and Interactive technological or narrative IP

For years TWIST has been developing an expertise in the field of immersive & interactive technologies and contents together with numerous partners in Europe based notably in Paris, Malmö and Munich.

TWIST Network

Within 10 years, TWIST has built a triple helix network of some 100 members (representing 4.500 direct jobs and a turnover of 1 billion euros) including:

- 70% SMEs;
- 10% startups;
- 5 TV channels;
- 6 universities & research centers.

### FIGURES FOR THE SECTOR IN WALLONIA (ESTIMATE)

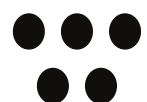
- Turnover of the sector: € 1 billion
- Number of jobs: 5,000 direct jobs and 2,000 indirect jobs

# Feel inspired



## Digital Wallonia Hub in San Francisco

*« Be part of our network and put the world at your feet ! »*



Wallonia.be

## Wallonia is full of great assets. Help spread the word!

You like Wallonia and you want to enhance its global reputation? Join our network of Wallonia.be Brand Ambassadors!

### One mission, lots of benefits!

We want to promote Wallonia and you can help us: share information from our website and social networks, add the Wallonia.be logo and slogan Feel inspired to your website, blog or email signature, inform us about development opportunities for the Wallonia Region, bring the brand to life by actively taking part in conversations on Facebook, Twitter or LinkedIn and by recruiting other Ambassadors...

In return, you get a chance to:

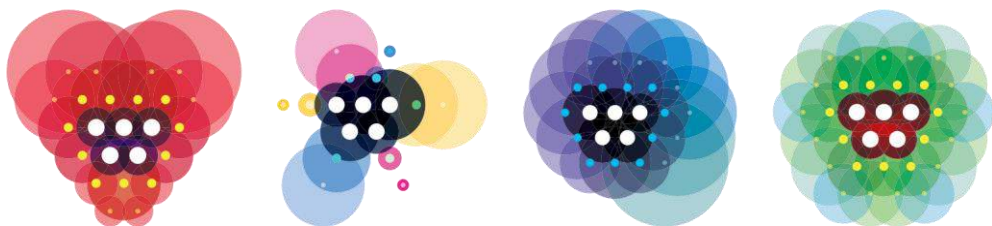
- promote your activities and share your success stories on the Wallonia.be Ambassadors' blog
- expand your network using the private area on the portal
- receive a newsletter about the Region and the Brand Ambassadors' network
- be invited to exclusive events
- use the Wallonia brand logo and benefit from the Region's reputation

### How to become a Brand Ambassador?

Complete the online application form on the website (<http://www.wallonia.be/en/ambassadors>). Simply answer three questions and we will let you know if your profile matches the network we want to implement.

### Do you want more information?

Contact : [ambassador@wallonia.be](mailto:ambassador@wallonia.be) !

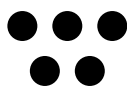


**Wallonia is open to the world !**

... with a sense of sharing, accessibility, technical know-how and quality of life



Wallonia.be



Wallonia.be

EXPORT  
INVESTMENT

## WALLONIA EXPORT-INVESTMENT AGENCY

### Foreign Trade

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### Foreign Investment

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Wallonia.be

Feel inspired





# GDC-state of the game industry 2018

## Executive summary

La Game Developers Conference a sondé près de 4 000 développeurs de jeux dans le cadre du sixième état annuel de l'industrie. Sondage qui fournit un aperçu de l'industrie du jeu et souligne les tendances de l'industrie avant la GDC 2018 en mars.

Les tendances significatives révélées par les résultats de l'enquête comprennent une légère hausse de l'intérêt envers la Nintendo Switch, les opinions déclinantes des concepteurs de jeu pour la VR, et un recul du mobile pour se concentrer sur les PC et consoles de salon.

Le rapport complet englobe également les idées glanées à partir de questions sur des sujets tels que "lootbox", "monétisation", le financement du développement de jeux, l'activité de l'esport (sports électroniques) et les meilleures façons de faire connaître votre jeu.

L'Enquête sur l'état de l'industrie de 2018 est la sixième d'une série de rapports annuels qui offrent un aperçu de la forme de l'industrie en prélude à GDC à San Francisco.

Organisé par l'UBM Game Network, GDC 2018 aura lieu cette année du 19 au 23 mars au Moscone Convention Center à San Francisco, en Californie

# STATE OF THE GAME INDUSTRY 2018

Presented by

# GDC

GAME DEVELOPERS CONFERENCE

MOSCONE CENTER  
SAN FRANCISCO, CA

MARCH 19-23, 2018  
EXPO: MAR 21-23, 2018



**The Game Developers Conference has surveyed nearly 4,000 game developers as part of the sixth annual State of the Industry Survey, which provides a snapshot of the game industry and highlights industry trends ahead of GDC 2018 in March.**

Significant trends revealed by the survey results include a notable uptick in interest in the Nintendo Switch, game makers' waning opinions of VR, and a move away from mobile to focus on PC and home consoles.

The full report also encompasses insights gleaned from questions on topics like "loot box" monetization schemes, game development funding, the business of eSports, and the best ways of getting the word out about your game.

The 2018 State of the Industry Survey is the sixth in an ongoing series of yearly reports that offer insight into the shape of the industry as a prelude to GDC in San Francisco. Organized by the UBM Game Network, GDC 2018 will take place this year March 19th through the 23rd at the Moscone Convention Center in San Francisco, California.

## PC and mobile are still the most popular platforms to make games for — but PC is rising, while mobile is slipping

Every year we check in with devs to see what platforms they're making games for, and for many years now the most popular answers have been either PC or smartphones/tablets.

That's true of this year's results, as well; when asked what platform their last game was released on, 50 percent of those surveyed said PC, 32 percent said smartphone/tablet, 23 percent said PlayStation 4 or PS4 Pro, and 19 percent said Xbox One or Xbox One X.

Incidentally, we made sure to offer Mac as a separate choice from PC this year, and you might be curious to know that 14 percent of respondents said their last game was released for Mac.

Compared against last year's results, we see an uptick in devs releasing games for the PC, the PlayStation 4 and the Xbox One — but a decrease in those releasing games for mobile devices.

Last year, 45 percent of respondents said their last game was released for PC/Mac, 35 percent said smartphone/tablet, 19 percent said PS4/ PS4 Pro, and 15 percent said Xbox One.

So what is everyone working on right now? When asked what platforms they're currently making games for, the majority of respondents (60 percent!) said PC, 36 percent said smartphone/tablet, 30 percent said PlayStation 4/PlayStation 4 Pro, and 26 percent said Xbox One/Xbox One X.

### Which platform(s) was your \*last completed\* game released on?

(Choose all that apply)

PC **50%**

Smartphones/Tablets **32%**

PlayStation 4 / Pro **23%**

Xbox One / X **19%**

VR Headsets **15%**

Mac **14%**

N/A - Not involved in development **10%**

Web browser **9%**

Linux **8%**

Other **6%**

Nintendo Switch **5%**

Xbox 360 **4%**

PlayStation 3 **3%**

AR Headsets **3%**

Tabletop Games **2%**

PlayStation Vita **2%**

Apple TV **2%**

Nintendo Wii U **1%**

Nintendo 3DS **1%**

**Which platform(s) are you \*currently developing\* games for?**  
(Choose all that apply)

PC **60%**



Platform	Percentage
PC	60%
Smartphones/Tablets	36%
PlayStation 4 / Pro	30%
Xbox One / X	26%
Mac	20%
VR Headsets	19%
Nintendo Switch	12%
Linux	11%
Web browser	11%
N/A - Not involved in development	10%
AR Headsets	7%
Tabletop Games	4%
Other	4%
Xbox 360	3%
Apple TV	2%
PlayStation 3	2%
PlayStation Vita	1%
Voice Powered Games (Amazon Alexa, Google Home, etc.)	1%
Nintendo 3DS	1%
Nintendo Wii U	1%

Smartphones/Tablets **36%**

PlayStation 4 / Pro **30%**

Xbox One / X **26%**

Mac **20%**

VR Headsets **19%**

Nintendo Switch **12%**

Linux **11%**

Web browser **11%**

N/A - Not involved in development **10%**

AR Headsets **7%**

Tabletop Games **4%**

Other **4%**

Xbox 360 **3%**

Apple TV **2%**

PlayStation 3 **2%**

PlayStation Vita **1%**

Voice Powered Games (Amazon Alexa, Google Home, etc.) **1%**

Nintendo 3DS **1%**

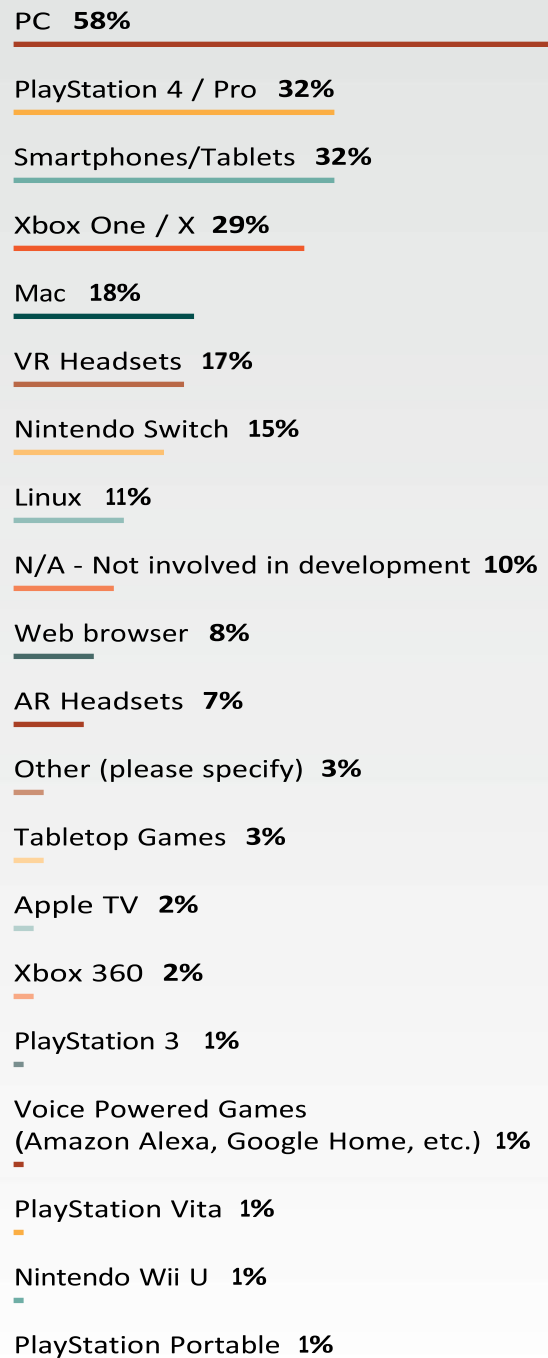
Nintendo Wii U **1%**

Once again, when compared against last year's results it appears that game devs are increasingly favoring the PC; last year, 53 percent of those surveyed said they were currently working on a game for PC/Mac, while 38 percent said their current project would see release on smartphones/tablets. 27 percent said PS4/4 Pro, and 22 percent said Xbox One.

Looking to the future, it seems that devs are increasingly interested in making games for the latest PlayStation and Xbox consoles. When asked which platforms they expected their next game would be released on, 58 percent of respondents said PC, 32 percent said smartphone, tablet, 32 percent said PS4/ PS4 Pro, and 29 percent said Xbox One/One X.

That's a small but significant uptick in interest in the PC and consoles compared to the results of last year's survey, in which 52 percent of respondents said they planned to release their next game on PC/Mac, 34 percent said smartphones/tablets. 29 percent said PS4/4 Pro, and 22 percent said Xbox One/One X.

### Which platform(s) do you anticipate your \*next\* game will be released on? (Choose all that apply)



## Interest in making games for Nintendo's Switch is rising fast

There's a notable newcomer on that list of platforms: Nintendo's new Switch console. It's not quite a year old, but in last year's survey 3 percent of respondents said they were already working on a Switch game, and 5 percent were planning to work on one in the future.

The future is now, and the results of this year's survey suggest dev interest in the Switch is surging. 5 percent of survey respondents say their last released game is available on the Switch, 12 percent said they were currently making a game for the Switch, and 15 percent expected their next game would be made available on Nintendo's new console.

## 1 in 3 devs thinks the Nintendo Switch is the most interesting console on the market

Sometimes, the console you're most interested in has nothing to do with your current project. With that in mind we asked developers which platforms (if any) interest them most right now, and "PC" proved the most popular answer with 59 percent — followed by PlayStation 4/4 Pro (39 percent) and, close behind it, Nintendo Switch (36 percent). This is a big deal for Nintendo, given that in our surveys respondents typically favor PC, mobile, PS4, and Xbox One. However, this year Switch surpassed Xbox and mobile in terms of developer interest; as mentioned, 36 percent of respondents said they were most interested in the Switch, while 30 percent said smartphones/tablets and 28 percent said Xbox One/One X.

Devs are bullish about how well Nintendo's Switch is resonating with the public

This year we wanted to get a sense of how well the gimmick of Nintendo's new console is being received by our survey respondents, so we asked them whether they thought the Switch's "console to handheld" concept was resonating with the public.

### Which platform(s) most interest you as a developer right now? (Choose all that apply)



The majority seemed to be bullish on the concept; 46 percent of respondents said “Yes, it’s the right product for the right time,” while 39 percent said “Maybe; it has some positives, but it just doesn’t seem to be world-changing.”

Meanwhile, 12 percent of those surveyed responded with “Don’t know” and just 2 percent said “No; people are just not that interested in its core premise.”

## Devs are overwhelmingly confident Nintendo’s Switch will outsell the Wii U

Last year, when polled about whether or not they thought the Switch would outsell Nintendo’s Wii U (which at that point had an install base of roughly 13 million, worldwide) in its lifetime, 50 percent of our survey respondents said yes, the Switch will outperform the Wii U. 14 percent predicted it wouldn’t, and 37 percent admitted they had no idea.

This year we asked the same question again, and as you might expect, dev confidence in the Switch (which has now sold over 10 million units) is riding high. 73 percent of respondents said yes, Switch will definitely outsell the Wii U in its lifetime, 5 percent said no way, and 22 percent said they still weren’t sure.

## Over a third of devs are making or are interested in making a game for Switch

We asked respondents of this year’s survey whether they’d released a Switch game, and very few (6 percent) said yes. However, another 8 percent said they hadn’t but were currently working on a Switch game, and 31 percent said they weren’t but were considering making a Switch game in the future.

Notably, over half of respondents (54 percent) said they hadn’t made a Switch game and had zero interest in doing so.

Most devs’ games sell as well or better on Switch as on other consoles

The comparatively small size of the Switch game market has many devs wondering whether it would be a good place to release their game, if only to take advantage of greater visibility among customers.

**Since launching your game on Nintendo Switch, how have Switch game sales compared to the average across all the platforms you've launched on? (Choose all that apply)**

N/A. (I have only launched on Switch, or other issues.) **33%**

---

Switch sales have been greater than average. **28%**

---

Switch sales have been average. **23%**

Switch sales have been less than average. **16%**

We wanted to learn more about this, so we polled survey respondents about how well their games on Switch had sold compared to the same game on other platforms. 28 percent said their game had sold more than average on Switch, 23 percent said their sales on Switch had been average, and 16 percent said their game or games had sold worse on Switch than on other consoles.

## Devs embraced VR, but interest now seems to be waning

A number of high-profile virtual reality headsets launched in 2016, and our survey results suggest dev interest in the tech has risen steadily since then — but may currently be on a bit of a downswing.

When asked what platform their last game was released on, 15 percent of survey respondents said “VR headsets” and 3 percent said “AR headsets”. 19 percent said their current game will release on VR headsets, and 7 percent said AR headsets.

However, when asked what platform(s) they expected their next game would release on, only 17 percent said VR headsets and 7 percent said AR headsets. It’s a very slight dip, but it does suggest that some devs working in VR are not expecting to continue making VR games, while

## Devs working on games for AR headsets remains steady.

Compared to last year’s survey, a greater share of this year’s respondents have just released a VR game (13 percent last year vs. 15 percent this year), but fewer are working on VR games or plan to in the future — last year 24 percent said they were working on a VR game, and 23 percent said their next game would be in VR.

## HTC Vive narrowly remains the most popular VR platform among devs

Last year the HTC Vive overtook the Oculus Rift as the most popular VR platform among devs, and that trend continued through to this year’s survey results.

When we polled respondents about which platform their last VR game was released on, 15 percent said Vive, 14 percent said Oculus Rift, and 7 percent said Gear VR. 67 percent said they weren’t currently involved in VR development at all. These numbers are roughly in line with the results of last year’s survey, though they all went up a bit, suggesting that more devs have had time to build and release VR games.



Similarly, 17 percent of respondents said they were currently working on a game that's coming to the Vive, 16 percent said their current project is releasing on Rift, and 9 percent said PlayStation VR. 69 percent said their current project isn't coming to VR at all. Looking ahead, the split remains roughly the same; 19 percent of respondents believe their next project will release on the Vive, 17 percent believe it will release on the Rift, and 11 percent think it will come to the PlayStation VR. 66 percent said the question wasn't applicable to them.

**Which VR/AR headset(s)/platform(s) most interest you as a developer right now? (Choose all that apply)**

N/A - Not involved in development for VR/AR headsets **47%**

HTC Vive (Valve/HTC) **33%**

Oculus Rift (Oculus) **26%**

PlayStation VR (Sony) **20%**

HoloLens (Microsoft) **18%**

Gear VR (Samsung/Oculus) **11%**

Magic Leap (Magic Leap) **10%**

Google Daydream (Google) **9%**

Google Cardboard (Google) **5%**

Other **4%**

When we took the focus off of actual projects and simply asked respondents what VR platform(s) interested them most right now, as a developer, the most popular answer was HTC Vive with 33 percent of respondents. 26 percent of respondents said they were most interested in the Oculus Rift, and 20 percent said PlayStation VR.

Intriguingly, 18 percent said they were most interested in Microsoft's HoloLens headset, and 10 percent were most focused on the upcoming, somewhat mysterious Magic Leap goggles. Meanwhile, just 47 percent said they weren't interested in VR development or the question wasn't applicable to them.

### Faith in the long-term sustainability of the VR/AR business is slipping

This is the third year in a row we've asked respondents whether they believe VR/AR is a long-term, sustainable business, and for the first time we're witnessing a rise in the number of "No" answers.

For the past two years, the split has been roughly 75 percent “Yes” to 25 percent “No”. However, this year just 71 percent of respondents said “Yes” and 29 percent said “No”, they don’t see VR/AR as a sustainable business.

We gave respondents room to elaborate on their “Yes” or “No” answer, and some of them shared some interesting opinions on the issue.

“VR adoption and uptake depends on finding that killer game that becomes a must have,” wrote one respondent. “Until there is a ‘must have’ game for VR (at the same level of interest as say, Minecraft or Halo for the original Xbox), there just won’t be a large enough player base to support full time VR/AR dev.”

“I believe AR will be bigger than VR in terms of reach and utilization,” wrote another. “A lot of people already have a smartphone, and there are already many apps that demonstrate clever usages of AR.”

“Games like Pokemon Go have shown that it's possible to have mainstream appeal in an AR game,” opined another. “I'm skeptical of VR in its current incarnation, as I think it needs more accessible hardware/space requirements and better ways to involve a group of people in the living room before it can take off.”

“Honestly, at the moment, it might not seem like it's going far fast, but it's steady,” wrote another. “More and more developers are starting to make games with VR or are starting to look more into VR, which in turn lets them create new content or change past content and make it more interesting. This allows for a more broad spectrum for game development.

Right now you have some horror games that are taking advantage of this and others are starting to develop FPS games. Next thing you know, you'll have great games coming out that are neither and are artistically vibrant and unique, which will bring more players to start playing more VR games. It may not grow like mobile games, but it will, I feel, take its time to be a medium that interests a decent percentage of players.”

*“I'm skeptical of VR in its current incarnation, as I think it needs more accessible hardware/space requirements and better ways to involve a group of people in the living room before it can take off.”*

## Most devs think it will be a long time, if ever, before VR/AR headsets are as common as game consoles

Looking ahead, most devs seem to think it will be a year or two before VR/AR headsets have a meaningful install base and several years (if ever) before these headsets are as common as game consoles.

When we asked our survey respondents when they thought VR/AR headsets would exceed a 10 percent household install base rate in the United States, the most popular answer (31 percent of respondents) was 2021-2022. Next was 2019-2020 with 17 percent of the vote, followed by 2023-2034 with 15 percent.

However, when we asked them when VR/AR headsets might surpass the 2015 U.S. household 40 percent install base rate of game consoles, the most popular answer among respondents (25 percent) was “Never”. 22 percent said “After 2030”, and 14 percent went with 2025-2026.

## Most devs think mobile will be the dominant “immersive reality” tech in 5 years

Is the future virtual, or augmented? We wanted to know how respondents felt about the subject, so we asked them what they thought the dominant “immersive reality” tech would be in 5 years. Nearly half (42 percent) chose mobile AR/VR, 21 percent went with PC/Console VR/AR, and 13 percent figured the two technologies (now broadly distinguishable as “mobile” vs “tethered”) would be equally popular.

## Android is still beating out iOS in terms of mobile dev interest

Last year, for the first time in the history of the GDC State of the Industry survey, Android surpassed iOS in terms of what platform mobile devs were making games for.

This year Android once again proved a more popular target among mobile devs than Apple’s platform; when asked which platform (if any) their companies were currently making games for, 53 percent of respondents said Android and 49 percent said iOS.

Both of those numbers are a smidge lower than last year (when it was 54 percent Android/51 percent iOS), which suggests fewer respondents are working on mobile games.

## Less than a quarter of devs are working with a publisher on their next game

To get a sense of how game makers are working to get the word out about their work, we asked survey respondents to tell us which outreach services (if any) they’re using for the release of their next game.

Over a third of respondents (38 percent) said they do marketing work themselves, in addition to working on their game. 34 percent said they paid for full- or part-time help from marketing or public relations professionals who worked internally; just 11 percent said they paid for assistance from an external marketing or PR firm.

**Which services are you using for the release of your \*next\* game?**  
(Choose all that apply)

I do marketing myself in addition to helping to develop the game. **38%**

Full-time or part-time internal marketing and/or PR individuals that we pay ourselves. **33%**

A publisher that has paid us an advance and takes a percentage of sales. **17%**

Other **16%**

An external marketing and/or PR agency that we have paid ourselves. **11%**

A publisher that has not paid us an advance, and takes a percentage of sales. **6%**

Meanwhile, less than a quarter of respondents said they were working with a publisher on their next game. Specifically, 17 percent said they were working with a publisher who has paid them an advance and will take a percentage of sales, while 6 percent said they were working with a publisher who would take a cut of sales but had not paid them an advance.

It's interesting to compare these numbers to the results of last year's survey, when we asked respondents whether they were working with publishers on their current project, and whether they planned to work with publishers in the future. At the time, just 23 percent said they were currently working with a publisher, but 34 percent said they planned to on their next project.

### European and North American devs still make up the majority of respondents

When asked which continent or major region they reside in, 63 percent of those surveyed said North America and 22 percent said Europe. 8 percent said Asia, 4 percent said South America, and 2 percent hailed from Australia or New Zealand.

That's roughly the same spread as last year's State of the Industry survey, in which 67 percent of respondents said they resided in North America, 22 percent said Europe, 8 percent said Asia, and 3 percent said South America.

### Nearly 20 percent of respondents identify as women

17 percent of survey respondents marked "Female" and 80 percent marked "Male" when asked what gender (if any) they identify with. The rest of the respondents either marked "Other" or declined to answer.

It's a small shift from last year, when 78 percent of survey respondents identified as "Male" and 20 percent identified as "Female".

## Most have been making games for roughly 5 years

As part of our annual check-in we surveyed respondents on how long they'd been making games, and the largest share of those polled — 32 percent — said 3-6 years.

17 percent said they'd been making games for 7-10 years, and 14 percent said 1-2 years.

That's neck and neck with the number of respondents who said they'd been in game development for 11 to 15 years (13 percent), but careers longer than that seemed significantly less common.

8 percent of respondents said they'd been making games for 16 to 20 years, 5 percent said 21 to 25 years, and just 4 percent of respondents said they'd been making games for over 25 years.

These numbers are well in line with survey results from the last two years, which suggests the industry (or at least, the portion of it that goes to GDC and/or reads Gamasutra) hasn't seen too many major influxes or departures of talent in that time.

For comparison's sake, in last year's survey, 37 percent of respondents said they'd been making games for 3-6 years, 17 percent said 7-10 years, and 13 percent said they'd been in the industry for just 1-2 years.

## Most devs either work in very small teams or very large companies; 1 in 10 saw their teams shrink this year

We regularly survey game developers to get a sense of what their work situation was like during the year, and we typically find that the largest share of respondents either work in very large (500+ staff) companies or very small (less than 5 people) ventures.

This year was no exception; when asked how many people work at their company, the most popular answer among respondents was "Over 500" (19 percent), followed by "Myself only" (19 percent) and "2 to 5" (15 percent).

Moreover, it seems most respondents' companies either expanded or stayed the same size in 2017. 48 percent said their company had grown (in terms of staff) during the year, 39 percent said their company had stayed the same, 11 percent said they lost staff, and 2 percent said their company had shut down completely.

## Most of the game industry is still self-funding — and more often now, that's personal funds

For years now we've seen survey respondents tell us they predominantly selffund their work, either using their company's existing funds or the money in their own pockets.

Results of this year's survey continue that trend, but the ratio of devs relying on their own personal funds is rising. When asked to mark the places their funding comes from, 49 percent of respondents said their company's existing funds, 34 percent said their own personal funds, and 16 percent said an external publisher.

That's a small but significant shift away from the results of last year's survey, when 55 percent of respondents said they relied on company money, 29 percent said personal funds, and 15 percent used funding from an external publisher.

## Interest in crowdfunding remains low

The luster of crowdfunding platforms like Kickstarter and Fig seems to have faded among game devs, as respondents we survey continue to express low interest in using them for their work. When we polled their opinion on crowdfunding, the largest share of survey respondents (45 percent) said they had no interest in it. 25 percent said they'd never tried crowdfunding but were planning to in the near future, and 15 percent said yes, they'd worked a crowdfunded project. Meanwhile, 5 percent said they'd tried and failed to crowdfund a project. Intriguingly, the ratio of responses to the same question last year were almost identical.

## 1 in 10 devs is working on a game that will monetize using "loot boxes"

Given the raucous conversation in 2017 about the implementation of "loot box" mechanics in games, we wanted to check in with devs to get a sense of how they plan to monetize their next game.

When we asked them to select which business model(s) they were planning to use for their next game, nearly half (49 percent) said "pay to download" and 39 percent said "free to download." 23 percent said their next game would feature paid downloadable content (DLC) updates, and 22 percent said it would feature in-game items sold for real money.

### Which business model(s) are you planning to use for your \*next completed\* game? (Choose all that apply)

Pay to download **49%**

Free to download **39%**

Paid DLC/Updates **23%**

Paid in-game items **22%**

Paid in-game currency **21%**

Free DLC/Updates **20%**

Ad supported **14%**

Paid subscription **13%**

Other **12%**

Paid item crates **11%**

Notably, 11 percent said their next game would include "paid item crates", suggesting that roughly 1 in 10 game makers is figuring out how to implement something like a "loot box" mechanic in their next project.

We also gave our survey respondents room to write in their own thoughts on the controversy around “loot crates” and microtransactions in games, and many shared some intriguing opinions.

“It's only acceptable when it is vanity cosmetic items,” wrote one respondent. “When it vastly controls the outcome of the game when playing against other people it's a problem.”

“Time is money,” wrote another. “So long as A) the content is also accessible by playing the game; and B) this and all parts of the game are balanced for gameplay FIRST and monetization second; then I see no legitimate basis for complaints.”

“There are certain markets in which loot crates are always going to be successful — in East Asia (China and Japan) they are a very common mechanic, and the laws are designed to prevent abuse,” opined another. “In the West, there is a big cultural difference and they need to be used in a way that does not turn the game into ‘Pay to Win.’ Skins are an effective way to do that. Heavy use of RNG, like Hearthstone, is another accepted way. Game developers will need to find ways that work for them because the revenue is required. Game devs often do not generate enough revenue from sales to support the team required to make the games the audience demands. Microtransactions have to be a part of your strategy in AAA gaming. So everyone will need to figure out what works for them — I'm sad [Star Wars] Battlefront [II] got it so wrong. This whole controversy will have a lasting impact on the industry and I am most worried it will affect game creators' jobs more than anything.”

*“Microtransactions have to be a part of your strategy in AAA gaming. So everyone will need to figure out what works for them — I'm sad [Star Wars] Battlefront [II] got it so wrong. This whole controversy will have a lasting impact on the industry and I am most worried it will affect game creators' jobs more than anything.”*

## Social media seen to be the #1 most effective way to get the word out about your games

Like last year, this year we asked survey respondents to share (by ranking them) what promotional methods had been most effective in helping their last completed game get discovered. This year, we asked them to rank the 10 options by allocating 100 points based on value; each option started with equal value (so, 10 points) and then devs could shift those points around to highlight which options had (and hadn't) proven useful to them.

The most popular answer proved to be “Social Media”, with an average of 22 points. “Real-Time Communications” (think: Slack, Discord, etc.) proved least popular, with an average of just 5 points allocated. For easy reading, here's the list of ten possible responses sorted in order of most (average) points allotted to least:

**Which methods were most effective for discovery of your \*last completed\* game?** (Allocate 100 points across the answer options; there are 10 options, so default would be 10 points to each method then add/subtract accordingly)

Social media (Twitter, Facebook) **22**



Method	Points
Social media (Twitter, Facebook)	22
Promotion on a platform's digital storefront	19
Word of mouth	17
Paid advertising	12
YouTube videos	12
Traditional press and bloggers	11
Live events	8
Forums	7
Twitch streamers	7
Real Time communications (Discord, Slack)	5

Promotion on a platform's digital storefront **19**

Word of mouth **17**

Paid advertising **12**

YouTube videos **12**

Traditional press and bloggers **11**

Live events **8**

Forums **7**

Twitch streamers **7**

Real Time communications (Discord, Slack) **5**

The breakdown was fairly similar when we asked respondents to rank these options in terms of what they thought would be most effective for their next game. Social media was most popular (again, with an average score of 22) and real-time communication platforms like Slack were seen to be least effective, with an average score of 6 points.

However, respondents did seem to put more stock in Twitch streamers when thinking about their next project. Here's the full ranked list of average points allotted:



**Which methods do you anticipate will be most effective for discovery of your \*next completed\* game?** (Allocate 100 points across the answer options; there are 10 options, so default would be 10 points to each method then add/subtract accordingly)

Social media (Twitter, Facebook) 22

---

Promotion on a platform's digital storefront 19

---

Word of mouth 16

---

YouTube videos 13

---

Paid advertising 13

---

Traditional press and bloggers 11

---

Twitch streamers 10

---

Live events 8

---

Forums 7

---

Real Time communications (Discord, Slack) 6

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## Confidence in eSports as a long-term, sustainable business continues to rise

This year we once again asked our survey respondents whether they thought eSports (games built to be played competitively at a professional level) was a sustainable business, long-term, and 91 percent said yes. That's a very slight increase over the two prior years, when 90 and 88 percent of respondents (respectively) said yes to the same question. "StarCraft exists, so by definition it is a sustainable business," wrote one respondent. "I am not particularly interested in getting involved in the development of an eSport, however. Being tied down to developing and supporting a single game for the rest of my career sounds pretty hellish, in fact." "[I believe in eSports] as much as I believe in football or basketball as a sustainable business. These traditional sports games simply had centuries to develop their relevance and audience," added another. "I bet the same is going to happen with eSports — or should I say, it's already happening. Besides, they are the kind of games business in which you

can literally sustain the same game over long years and keep players engaged. I myself intend to be making eSports in the near future.”

“As long as there is a way for viewers to understand the technical expertise that an eSports player or team shows, we'll love watching it and admiring said players,” another respondent wrote. “We'll just keep inventing different sorts of balls to throw around and scoring people for being really good at throwing and/or kicking them.”

*“[I believe in eSports] as much as I believe in football or basketball as a sustainable business. These traditional sports games simply had centuries to develop their relevance and audience. I bet the same is going to happen with eSports — or should I say, it's already happening.”*



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UBM

## How to raise money before launch?

### Executive Summary (in french)

Voici un guide pour préparer un bon deck à même de convertir les investisseurs.

Il s'articule autour de ces 6 points :

**Tag Line:** une phrase simple qui caractérise et synthétise ce que vous offrez et vos valeurs

**Problem:** décrire la situation avant votre intervention et en quoi elle pose problème à vos futurs clients.

**Solution :** comment proposez-vous de remédier au problème précédemment énoncé.

**Core risks :** quels sont les obstacles majeurs vous empêchant de mettre en place votre solution mais aussi les aspects qui peuvent en menacer l'efficacité

**How to spend the money :** en quoi l'argent récolté vous permettra de mitiger ou supprimer les risques de l'étape précédente.

**Why you? :** en quoi êtes-vous la personne de la situation qui pourra mener à bien votre projet car simplement avoir la bonne idée n'est pas suffisant.  
Mettre en avant votre expérience mais surtout vos capacités.



Delian Asparouhov

Investing at Khosla Ventures | previously Teespring, Nightingale, YC, MIT Feb 2

## How to raise money before launch

An analogy we use at KV is that building a company is like laying cement. Early on the cement is liquid and malleable – you can stir it around with your hands. As time passes, the cement hardens. Once it solidifies, adjustments require a jackhammer. And jackhammering leads to cracks and lots of noise.

As a result, we prefer to get involved as early as possible in a company so we can help founders lay the foundation correctly. In fact, our favorite checks to write are \$1–3M checks where we provide the first institutional capital in the company. But since we get involved so early, there aren't many metrics or traction to help us build conviction. In fact, many of the companies have not even launched a product yet. For example we've funded all of these before launch ([Opendoor](#), [Forward Health](#), [IndigoFair](#), [Go Insurance](#), [Ever. AI](#)).

In order to build conviction, we rely on founders to tell us a compelling story, almost always in the form of slides. We've funded companies almost entirely because of the quality of their seed decks. Poor deck? We'll likely pass on the opportunity.

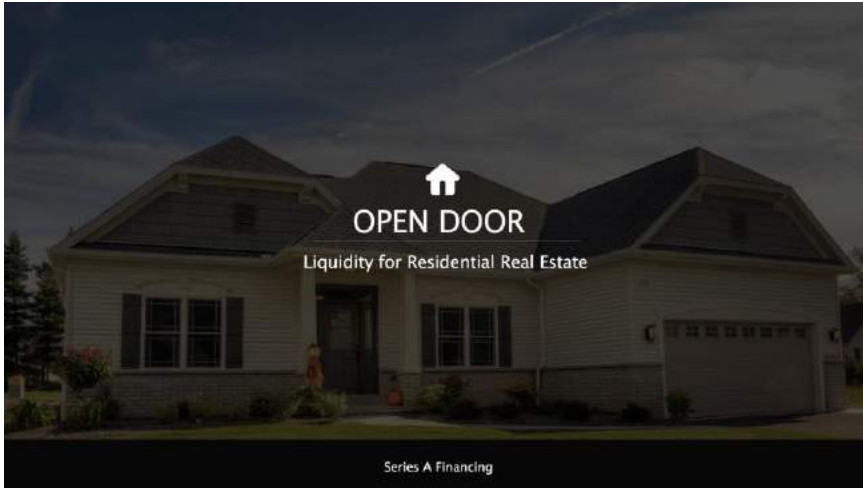
Because seed decks are distinct from later fundraising decks, which often rely on metrics, cohorts, and other empirical evidence of traction, here are the best patterns we've seen from some of our favorites. Full links to the decks here ([Opendoor](#), [Wanderjaunt](#), [Even](#))

## The one-liner on the First slide

The best companies are founded from a simple-to-understand value proposition. The first slide highlights that value proposition.

Your first slide is your first impression to investors; the one-liner on it should describe the company vision to employees, and the value to potential customers.

Opendoor was founded on a single value proposition. "Liquidity for Residential Real Estate"



Great decks often provide analogies to help investors understand the business they pitch, e.g. a new twist on a well understood business model. This one got a little clever, and it works:

**wanderjaunt** | 'wändər, jōnt/ |

*noun*

1. the first customer-obsessed decentralized hoteling brand that enables a seamless travel experience for both guests and homeowners
2. the best domain name the founders could find for \$12/year

*"we stayed at a wanderjaunt because we knew what we would get"*

*analogies:* Opendoor for short-term rentals, Starwood/Hilton/Marriott for vacation rentals and serviced apartments

hello@wanderjaunt.com

## Each title tells a story

The next step in building your deck is distilling the story you'll tell into a single paragraph. Each slide in your deck should then dive deep into each particular sentence from that paragraph – the sentence is the title. Below are the titles of each slide in the Opendoor deck:

## THE PROBLEM

Residential real estate is one of the largest asset classes, yet one of the least liquid.

Moving is often cited as one of the most stressful events in life.

## OUR EXPERIENCE

Simple, Certain & Fast

In all assets, sellers demand and will pay for liquidity.

We are mitigating these three core risks in this first phase.

We have better economics that allow us to optimize data for every home we value.

For every home we purchase, we ensure accuracy.

You can read those headers out loud one after another – it's essentially an elevator pitch for Opendoor. The goal is to have the investors think QED at the end.

## What problem are you solving? What about the current state of the world sucks?

One powerful technique is to tell a customer persona story. Even introduced a single mom who works at Starbucks, Amy. Amy's landlord calls her one day and says he will no longer accept late rent payments, and wants this month's rent by tomorrow or he is evicting her:



Amy takes out a payday loan to cover this sudden expense, but the fees and high interest of the loan spiral her into poverty.



Even's team ends the story with a powerful single slide:



***THIS IS FUCKED UP***

The problem is clear, the current world sucks, and it makes a reader want to drive change.

## How is your state of the world better?

Even's deck continues with the story, and shows how the world is better with it around: Even is the friend who can spot Amy, as opposed to the predatory sharks like payday lenders.



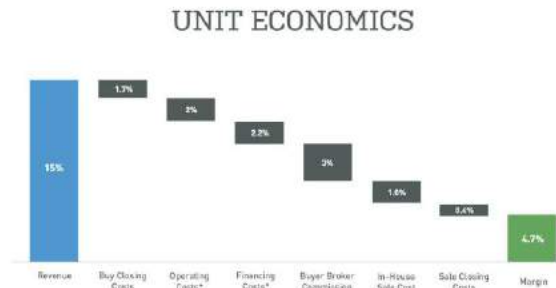
Even better if your business model explains why; rather than being incentivized to increase credit utilization, Even is incentivized to decrease it. Even will also cut out most of the costs of running a lending business (e.g. the brick and mortar retail locations).

We're flipping the business model and aligning it towards helping people escape wealth transience

	Payday Loan	Even
Revenue source	APR	Flat monthly fee
Incentive	Increase credit utilization	Decrease credit utilization
Regulatory burden	Extremely focused and highly variant by state	Grey area

## Where's the money?

The next section should explain who you expect to buy for what. These can be as complex as your projected unit economics:



Or as simple as a headline price for a subscription:

**\$0.66/day**

## What are the risks? What needs to happen for your state of the world to exist?

Between now and you becoming a billion dollar company, what needs to be true? These things can be simple, like “can we scale our customer acquisition while keeping our payback period reasonable”. Or complicated, like “the laws of physics may not permit our technology to be viable”. Opendoor’s were valuation error, outliers, and capital:



## How much money do you need to remove what risks in what timeframe?

A common metaphor used in VC is investing is like playing poker. At the beginning, we only have a single card in our hand. It might be an Ace; the next four cards could be terrible, or they could be a royal flush.

In order to get the next card and find out, you have to invest more capital. At the beginning of the hand, the possibilities are endless. As you get closer to 5 cards, the possibilities become more limited.

You want to show how the first money in will let you draw a good card. Or better yet, two good cards!

## SERIES A FINANCING

Key Objectives	Milestones to Achieve
<b>Build AVM</b> Gather real-time MLS data, location data, seller inputs, and proprietary offline data to build an AVM.	<b>&lt; 8% Error Instantly, &lt; 4% Error Post-Process</b> We will be able to instantly price homes with less than 8% median error. Post-process (inspection), have less than 4% median error of the homes we purchase.
<b>Acquire Sellers</b> Acquire a large sampling (n=500) of real sellers looking to sell their home instantly online.	<b>Validate Seller Discount Curve</b> Analyze both accepts and rejects to statistically validate conversion rates across various discounts and seller types.
<b>Acquire and Sell Homes</b> Acquire, rehab, maintain, and sell 50-150 homes in one year.	<b>Validate Cost Structure</b> Confirm the cost structure of acquiring, financing, maintaining, and selling properties.

We're raising \$9m in our Series A to execute on three key objection.

## Why are you the team that can do this?

The best thing you can do is explain why you are the team best suited to tackling this problem, over anyone else in the world. Startups are really fucking hard, why do you have an unfair advantage?

The worst thing you can do is give us a bunch of photos, names, logos, and university emblems. This is complete u and tells me nothing about why you're more likely than others to solve a specific, hard problem.

One of my favorite team slides is from [IndigoFair](#):



Daniele Perito

As Director of Risk and Security for Square Cash, Daniele designed and implemented the anti-abuse and anti-fraud systems that make Cash possible. He got his PhD in Computer Science with a focus on security and machine learning.



Marcelo Cortes

Marcelo has over 18 years of software experience. He led the engineering team that launched Google+ for Android, before leading the server team for Square Cash since the project started almost 4 years ago.



Max Rhodes

As a Director of Product at Square, Max was a founding team member on several key initiatives, including Square Capital (\$1Bn deployed), Square Cash (\$M MAUs), and Caviar.

INDIGO FAIR | 41

When you see this slide, you immediately grok that these guys have an unfair advantage serving SMBs.

If you've followed this guide then please send us your seed deck, we'd love to chat. Email me at [da@khoslaventures.com](mailto:da@khoslaventures.com)

Belgian games café event on March 21<sup>st</sup>



Don't forget to invite your contacts

**DESCRIPTION**

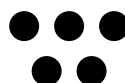
Join us for the second #BelgianGamesCafe at GDC!  
Powered by Cronos and Digital Wallonia we invite you to network and chat about #BelgianGamesIndustry and many other exciting topics. We're serving food and drinks. We even have Affligem Blonde beer.  
Around 9pm, Flemish minister of Media Sven Gatz and Baudouin de Hemptinne from Digital Wallonia will host a short speech.  
Please bring your EventBrite ticket (printed or digital) AND your valid photo ID. Due to Tradition bar license, no one can be permitted entrance without an ID showing you are over 21 years old. NO exceptions can be made to this, no matter your age. If maximum capacity is reached, Tradition bar is allowed to (temporarily) refuse entry to valid ticket holders.

**DATE AND TIME**

Wed, March 21, 2018  
7:30 PM – 10:00 PM PDT

**LOCATION**

Tradition  
441 Jones Street  
San Francisco, CA 94102



Wallonia.be

EXPORT  
INVESTMENT

## Superdata report: nowhere to go but up, the future of XR

### Executive summary

La réalité mixte et augmentée dépassera la VR en chiffre d'affaire en 2021.

Il est attendu qu'en 2021, le chiffre d'affaire de la MR et AR aura doublé pour atteindre 3,2 milliards de dollars dont les plus gros contributeurs seront des app AR telles que Pokémon Go ou le prochain Harry Potter : Wizards Unite.

Les jeux, plus grande source de revenu en 2018 pour les logiciels VR.

Les consommateurs sont plus prompts à dépenser dans des jeux que pour du contenu comme les films VR. Le marché du divertissement devra donc continuer à compter sur les revenus publicitaires.

Les titres de Bethesda en tête des ventes dans les jeux VR.

Les portages en VR des séries phares du studio ont pris la première place alors qu'ils ne sont sortis qu'en fin d'année. Fallout 4 VR sur PC et Skyrim VR sur PSVR ont su s'imposer.

Près de 50% des utilisateurs pro de la VR sont des institutions publiques

Une majorité d'écoles ou hôpitaux ont un intérêt à utiliser la VR mais disposent de moyens limités. A l'inverse, un petit nombre de conglomérats dans les secteurs du retail et de l'automobile sont prêts à investir substantiellement dans la VR.

L'AR sur mobile sera le principal moteur de richesse jusqu'en 2021

Le prix des casques AR et MR resteront trop coûteux pour le grand public pour que le marché atteigne une masse critique et génère plus de revenus.



# NOWHERE TO GO BUT UP: THE FUTURE OF XR

February 2018

# About Us

## Who we are

**SuperData is the world's leading provider of market intelligence on games and interactive media**, helping our customers understand what people play, connect to, watch, and spend on. SuperData offers quantitative and qualitative insights on digital and downloadable games in the free-to-play, console, mobile, and PC markets. We also provide research on interactive content such as streaming videos, esports, and both consumer and enterprise XR.

## What we do

**SuperData's quarterly XR data and insights cover both the consumer and enterprise markets**, providing a comprehensive look at industry drivers and KPIs such as headset shipments, market sizing, forecasts, persona breakouts, and more.

## How we do it

**The XR Data Network is the industry's first collaboration to quantify and validate the global XR market**, and is a keystone to our XR methodology. Our partners include headset makers, developers and ad networks who provide us with real data that we use to share the most accurate research possible.

**For more information on our products and services, contact Sam Barberie at [sam@superdataresearch.com](mailto:sam@superdataresearch.com).**



# XR QUICK FACTS

## AR/MR MARKET SIZE, 2021

**\$20.3B**  
2017: \$1.2B

## VR MARKET SIZE, 2021

**\$19.0B**  
2017: \$2.2B

## VR GAMES REVENUE, 2021

**\$3.3B**  
2017: \$306M

## VR INSTALL BASE, 2021

**74M**  
2017: 13M

\*Not including Google Cardboard products

## XR INVESTMENTS, 2017

**\$1.8B**

\*Not including Magic Leap

## TOP PC VR GAME, 2017

**\$4.7M**  
*Fallout 4 VR*

## TOP PSVR GAME, 2017

**\$2.2M**  
*The Elder Scrolls V: Skyrim VR*

## TOP MOBILE AR GAME, 2017

**\$892M**  
*Pokémon GO*

All data included in this report is as of February 16, 2018 and is subject to change. For more information on our latest research, please contact Giancarlo Chaux at [giancarlo@superdataresearch.com](mailto:giancarlo@superdataresearch.com).

# EXECUTIVE SUMMARY

# Executive Summary

**Consumer augmented and mixed reality revenue is set to overtake VR by 2021.** AR and MR revenue will more than double to \$3.2B this year with most of these earnings coming from mobile AR apps like Niantic's *Pokémon GO* and the upcoming *Harry Potter: Wizards Unite*.

**Games will continue to earn the majority (58%) of virtual reality software revenue in 2018.** Consumers are willing to pay for games whereas they are still reluctant to spend on content like VR videos. Non-gaming entertainment will need to rely more on advertising than direct revenue to make money.

**Bethesda titles topped the charts in 2017, with top earners *Fallout 4* on PC and *Skyrim VR* on PSVR.** Despite a disappointing release for *Doom VFR*, ports of Bethesda RPGs still beat out other games of 2017.

**Nearly half of VRs' enterprise users are educational companies and institutions.** Schools and hospitals are using VR but can have limited spending power. A smaller number of major conglomerates in fields like retail and automobiles are willing to invest substantially in VR.

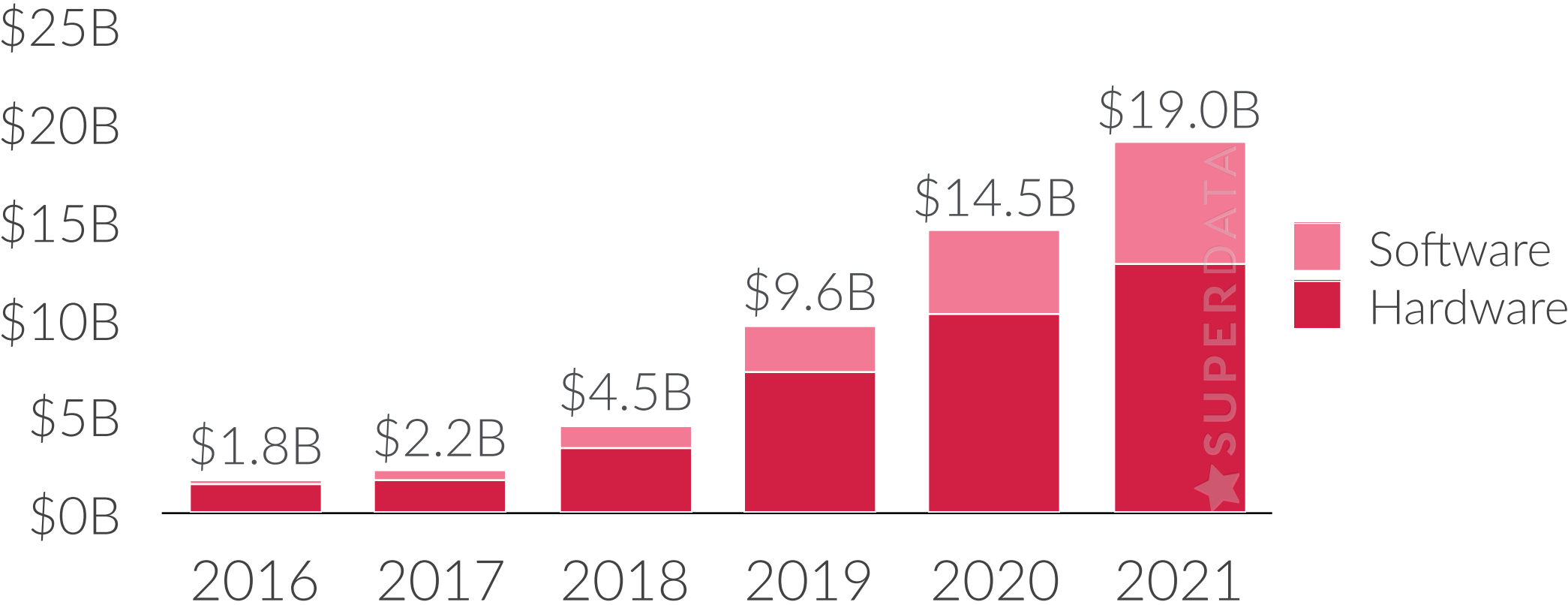
**AR and MR are on track to pull in \$1.4B of the \$1.9B invested in immersive technology this year.** The proliferation of mobile AR solutions and the development of compelling MR technology is becoming a more interesting proposition to investors as VR goes through its gap of disappointment.

**Mobile AR will be the primary driver for revenue through 2021, earning roughly twice as much as software for AR/MR headsets.** AR and MR headsets will remain costly for the general population in the next few years, making it difficult for the audience to reach critical mass and generate significant software earnings in the near future.

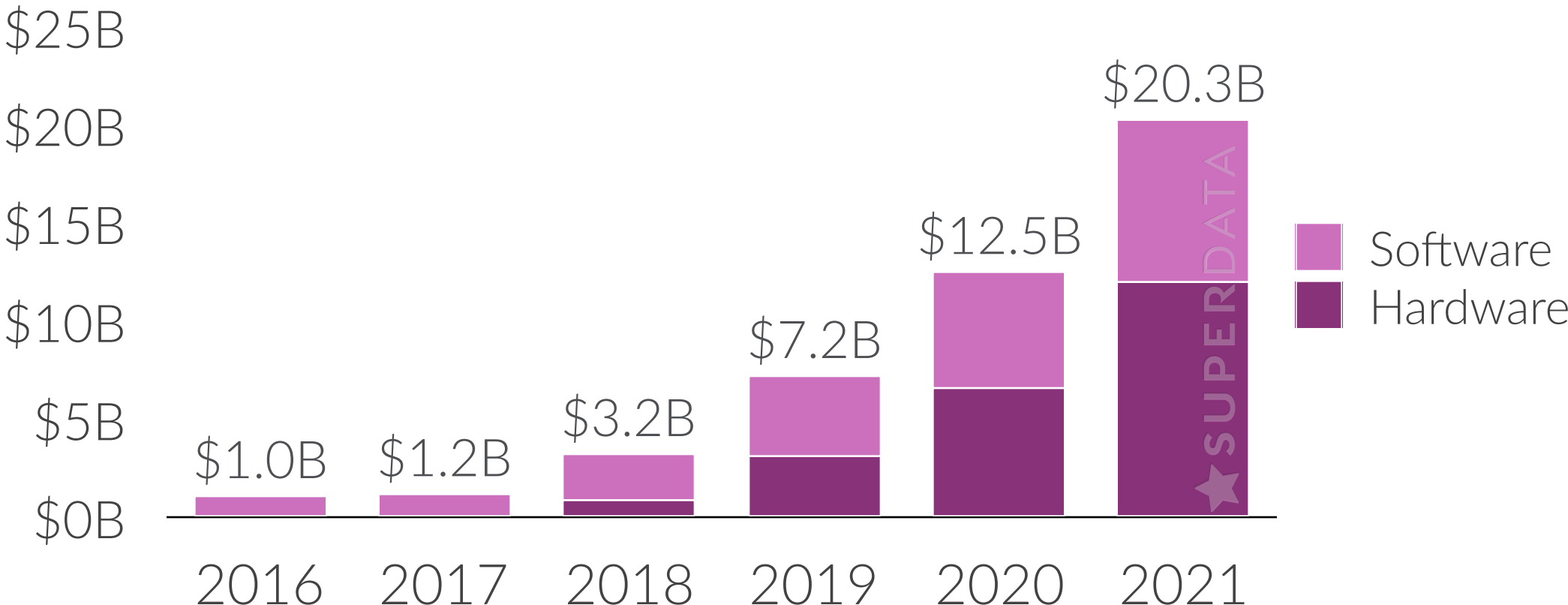
# VR MARKET OUTLOOK

# Augmented and mixed reality earnings are set to surpass virtual reality by 2021

Consumer VR revenue



Consumer AR/MR revenue



Hardware will continue to earn the lion’s share (75%) of VR revenue in 2018.

High headset prices and a small catalog of software means most consumer dollars will go toward hardware until experiences are more easy to monetize.

AR and MR are set to take the lead in 2021 thanks to a combination of accessible smartphone software and high-end devices like Magic Leap and Microsoft HoloLens.

AR in particular has the potential to be fully integrated into the daily lives of users now that ARKit is available on all current iPhones and Google is aiming to reach 100M Android users with its ARCore platform. On the other hand, VR will serve the needs of those who want the most high fidelity immersive experiences possible, making it less interesting and less accessible for some users.

# Hardware price cuts and AAA games were most effective in moving VR headsets in 2017

**Samsung Gear VR sales fell 18% year-over-year as the device continues to suffer from a lack of compelling content.**

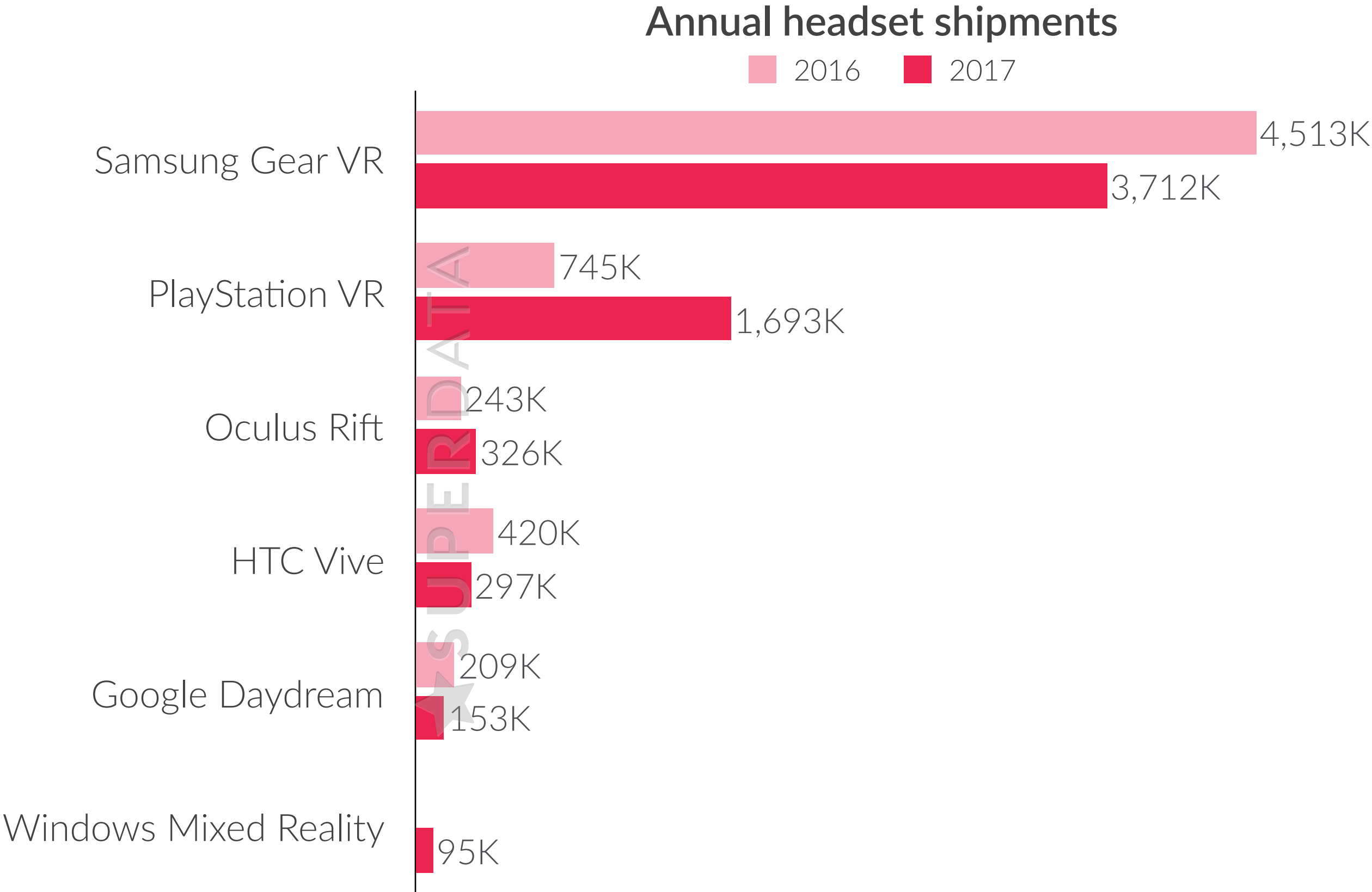
Among high-end headset owners, 85% have paid for at least one game compared to only 59% of Gear VR owners. Consumer hesitation to spend on mobile content has led VR developers to limit investment in apps and games for that platform, making mobile headsets less enticing.

**Playstation VR had positive momentum in its second year thanks to gamers who wanted to be immersed in their favorite game franchises.**

Nearly 400K people played *Resident Evil 7* on PSVR according to Capcom, and *The Elder Scrolls V: Skyrim VR* became 2017's highest-earning PSVR title even though it launched in November.

**Oculus Rift sales surpassed those of HTC Vive last year after aggressive price drops.**

The cost of an Oculus Rift with Touch motion controllers fell from \$800 to \$400 by the end of the year. In a continued effort to reach as many users as possible, Oculus' parent company Facebook will release the standalone Oculus Go headset for an accessible \$200 price tag. Meanwhile, HTC is positioning Vive as a higher-end brand and is targeting businesses and enthusiasts with the Vive Pro headset.



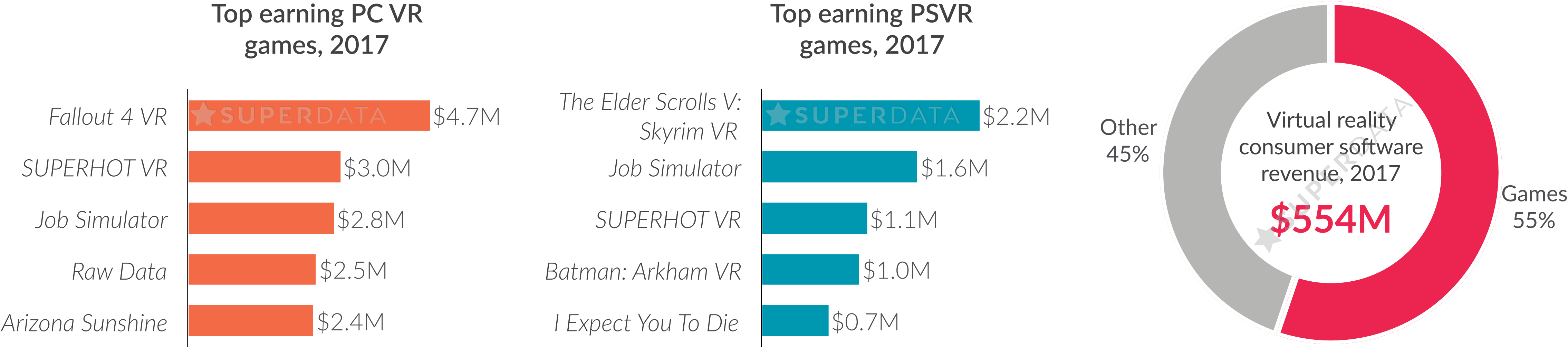
# The best-performing VR games show players are hungry for feature-rich VR experiences

Games earned 55% of VR software revenue in 2017 thanks to consumers who want to pay for content upfront.

Devices like the HTC Vive and PlayStation VR have attracted hardcore gamers who own the requisite console or gaming PC. Roughly four in five high-end headset owners use or plan to use VR to play games. While mobile VR leads in user numbers, the platform earned only 15% of VR games revenue last year.

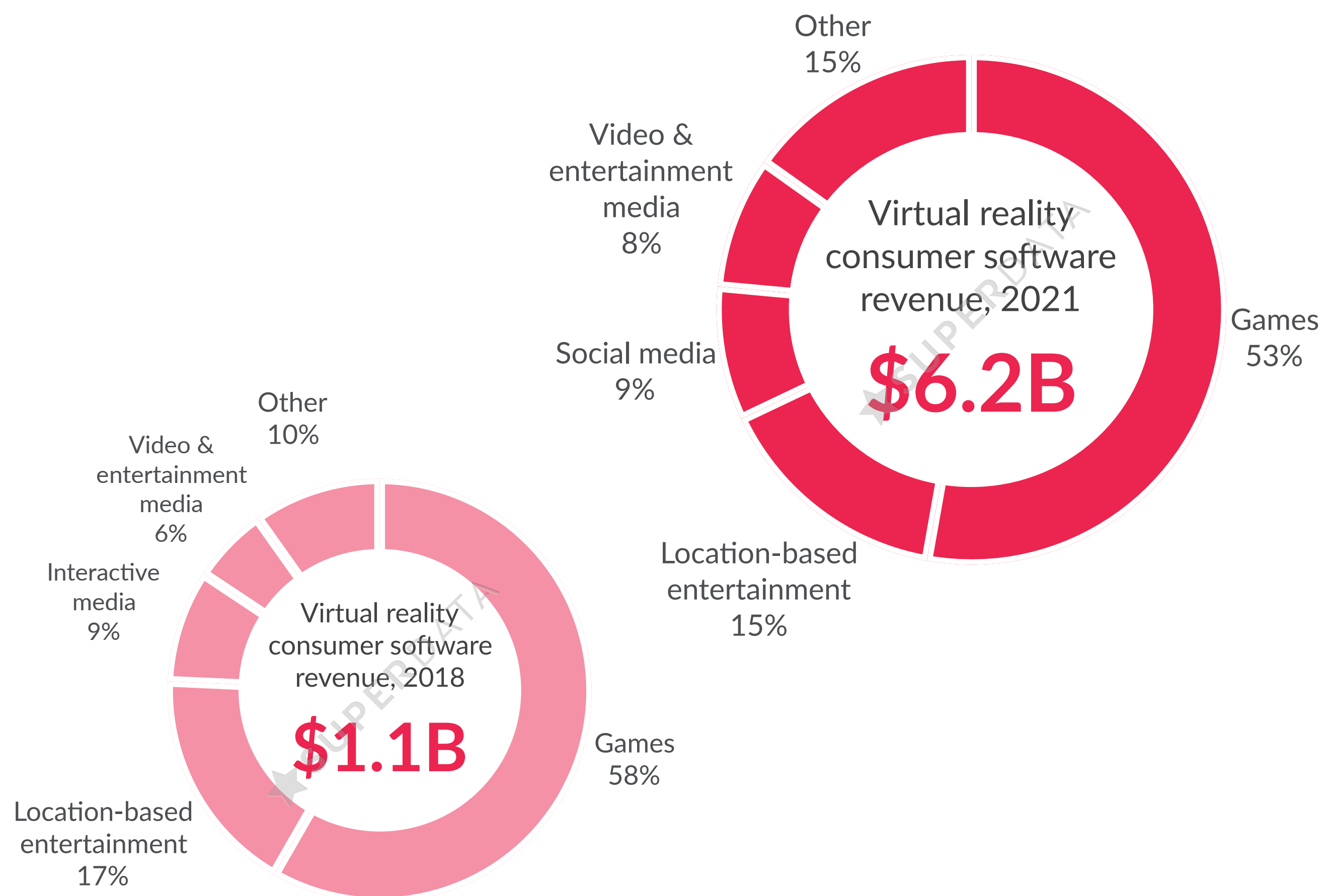
Bethesda was the big winner among publishers in 2017, releasing last year’s highest-earning PC and console VR titles.

Most VR owners want longer immersive experiences, but with such a small audience most VR publishers cannot invest in long, big-budget games. Bethesda managed to get ahead of the curve, adapting existing role-playing games *Fallout 4* and *The Elder Scrolls V: Skyrim* for the medium.



Title-level rankings only include games exclusive to VR platforms, not titles with optional VR modes.  
 STATE OF THE XR MARKET, FEBRUARY 2018 | © 2018 SuperData Research Holdings, Inc. All rights reserved.

# VR software revenue will grow by a CAGR<sup>1</sup> of 76% through 2021 as high-quality, monetized content becomes available



The share of VR revenue from software will rise from 25% in 2018 to 33% by 2021.

Outside of games, most VR content still takes the form of early “proof of concept” experiences, which are available for free. As developers spend more time with the medium, the number of paid experiences like Guided Meditation VR will grow.

**Without a clear path to direct monetization, video content creators will rely on ad-supported models.**

Two in three VR owners use or plan to use their headset to watch videos, but media platforms have had difficulty charging them directly for content. The limited number of videos on offer means mandatory subscription fees are not yet feasible for services like Jaunt. Through 2021, most VR video revenue will come from ads. There is potential for some direct monetization from sources like optional subscriptions to remove ads or provide other minor enhancements.

**Location-based VR is the second best performing software segment as few consumers currently have access to high-end headsets.**

VR arcades using off-the-shelf hardware appeal to casual VR fans in the short term. However, future growth will largely come from higher-end setups with premium experiences that cannot be replicated at home.

<sup>1</sup>Compound Annual Growth Rate (CAGR): Defined as the nth root of the total percentage growth rate, where n is the number of years in the period being considered. It represents the year-over-year growth rate of a figure over a specified period of time, assuming it is growing at a steady rate.



# The Void is exposing consumers to VR with free-roam location-based experiences that incorporate popular entertainment brands

The Void is a big contributor to the location-based market, combining VR with large physical play areas for a truly immersive experience.

Participants in Void experiences wear VR headsets along with backpacks that contain computing hardware. Rather than being limited to a fixed space, they move through a set consisting of multiple rooms. Elements like walls and doors appear in both VR and the real world.

**Disney and Sony Pictures have been sold on The Void's potential as a new category of attraction.**

The company currently offers experiences based on *Star Wars* and *Ghostbusters* in eight worldwide locations. Recognizable intellectual properties have the potential to draw in customers even as the novelty of VR wears off.

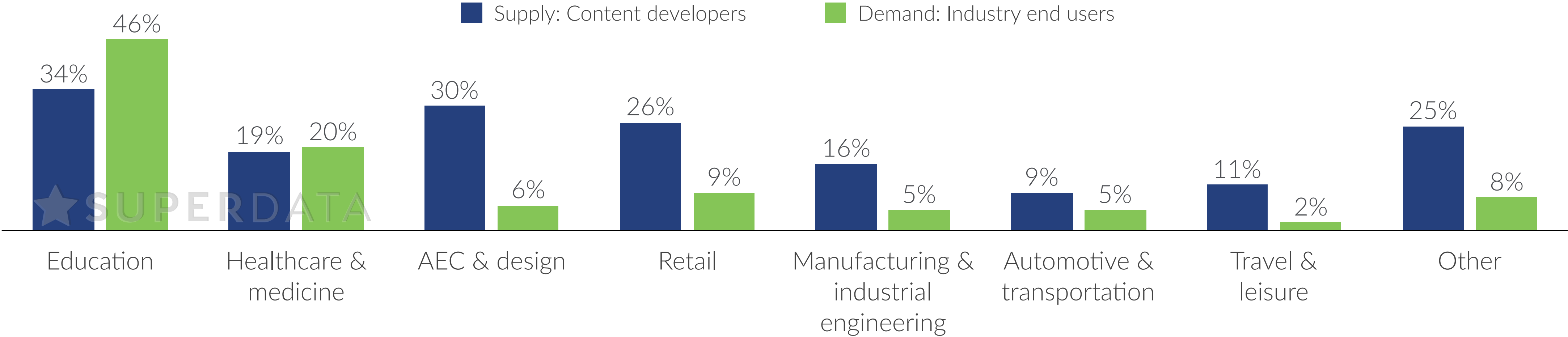


# Developers are focusing most on fields like design, retail and manufacturing despite an overwhelming demand for education and healthcare solutions

Organizations are most interested in VR for education and healthcare as supply in those fields rises to meet demand.

As interest in education solutions grow, many schools and hospitals are using VR. However, these institutions can have limited spending power compared to major conglomerates. On the other hand, large retail corporations like Walmart and Lowe’s are willing to invest in applications that make training safer and cheaper.

Share of organizations offering or using enterprise VR services

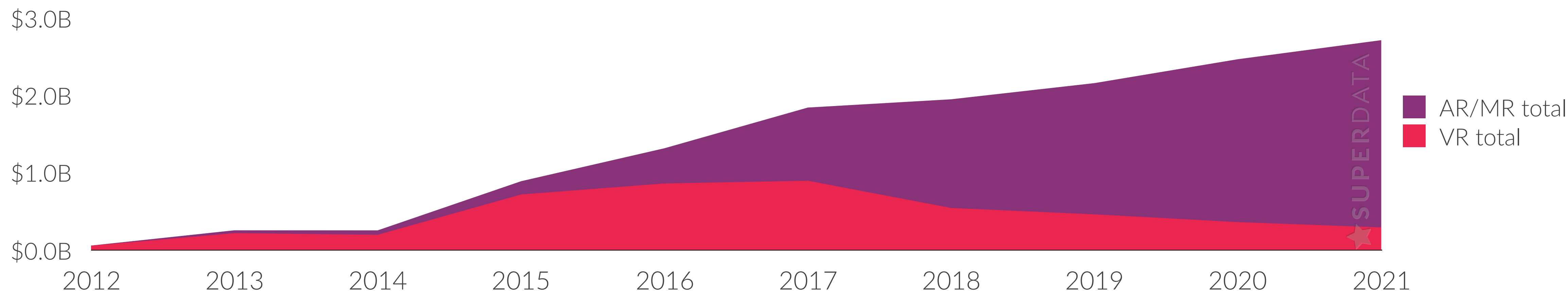


\*Supply share measures the percentage of all developers in the VR industry who are focused on each segment. Supply percentages do not add up to 100% due to overlap of suppliers who work on multiple segments. Demand share measures the percentages of all organizations looking for VR solutions who are focused on each segment. STATE OF THE XR MARKET, FEBRUARY 2018 | © 2018 SuperData Research Holdings, Inc. All rights reserved.

# AR/MR MARKET OUTLOOK

# 2017 was the the first year augmented and mixed reality investment pulled ahead of VR, with the trend set to continue through 2021

## Venture investments in XR

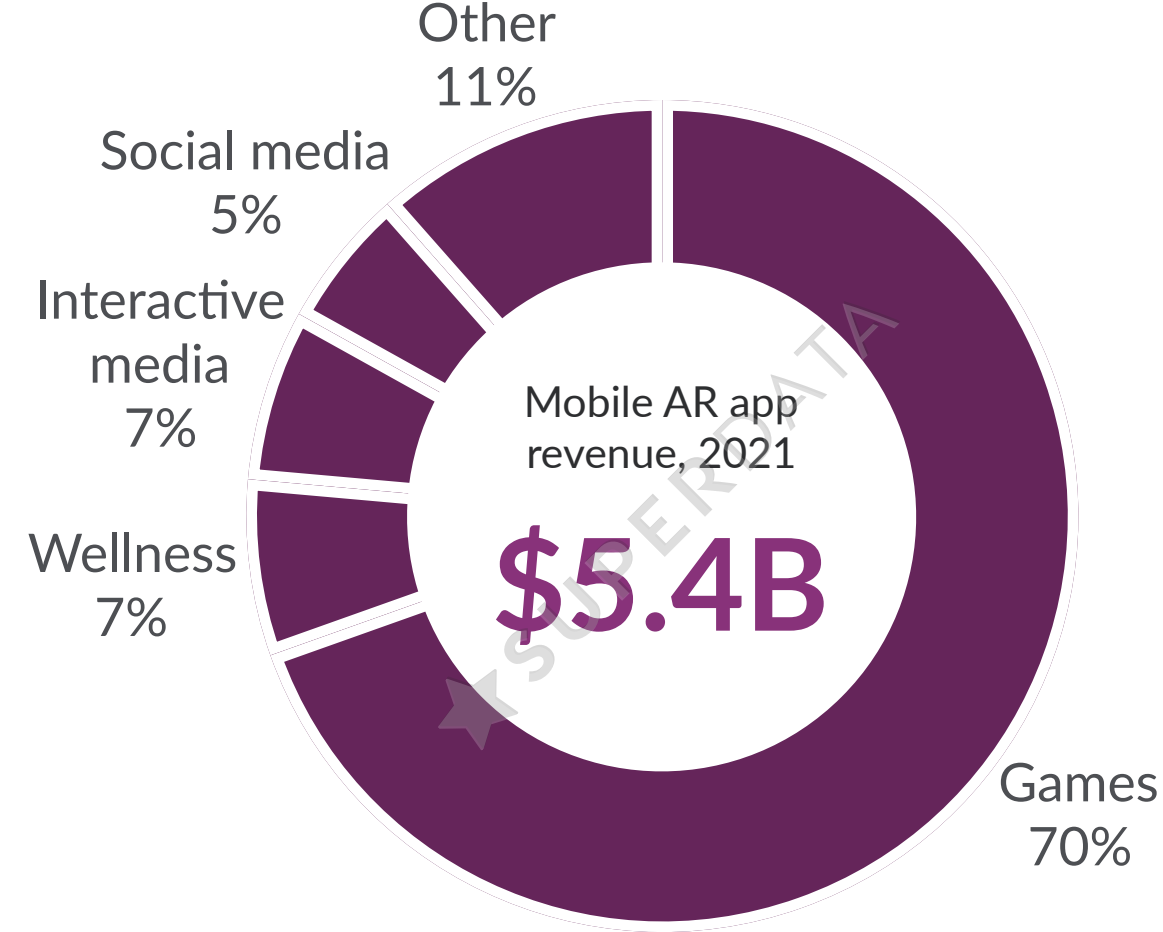
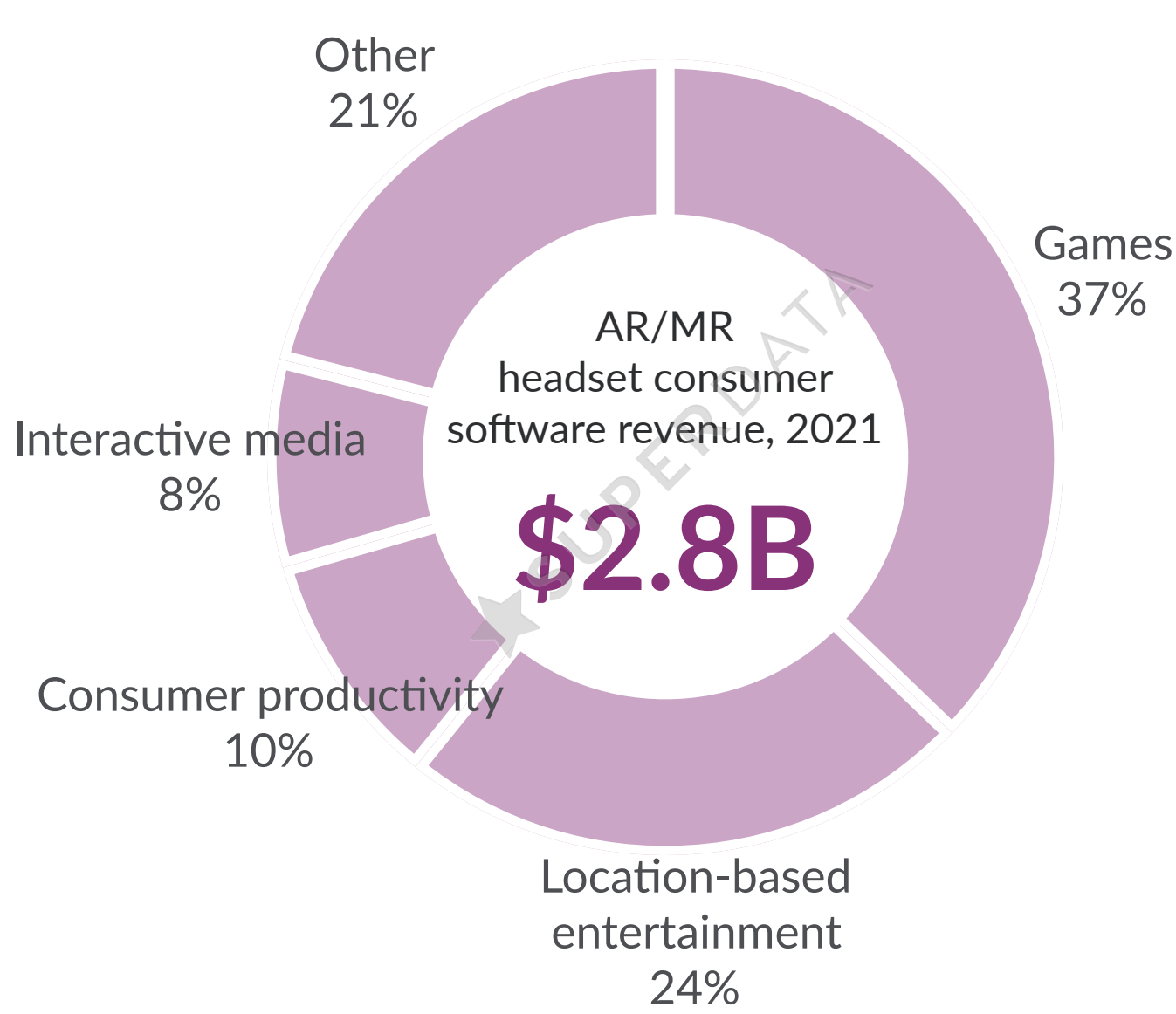
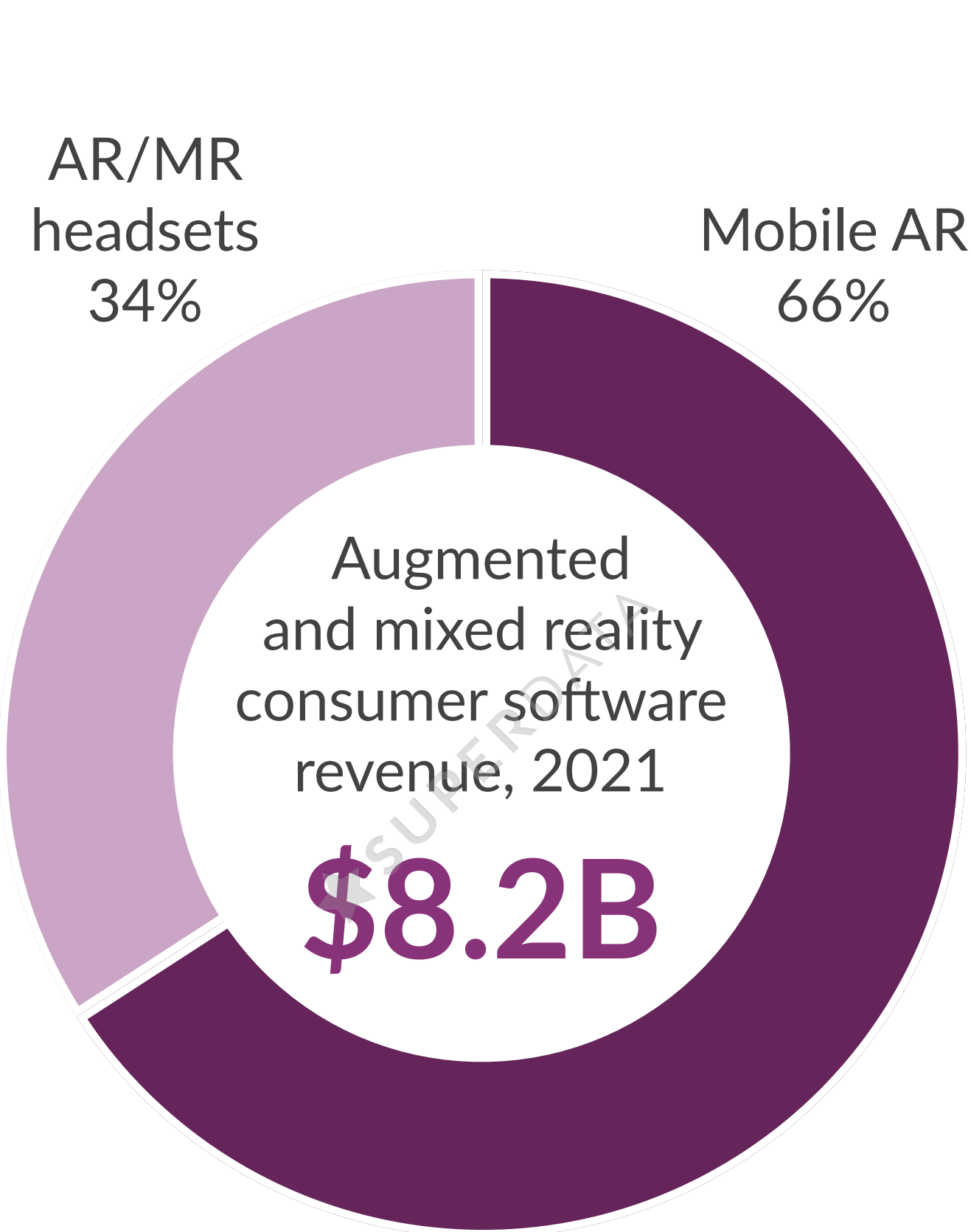


AR and MR investments overtook VR fundraising in 2017 with the emergence of accessible mobile AR apps and the long-term potential for MR headsets.

Investments in immersive technology grew 40% year over year in 2017, with 51% of the year's total going to AR and MR. Investor interest in AR has grown after the proven earning potential of products like *Pokémon GO*, which made \$1.8B since its launch in 2016. The unveiling of the Magic Leap headset at the end of last year marked the first significant hype-wave for MR, sparking even more investor excitement. However, venture investments in VR will continue to fall as the market matures and monetization remains elusive.

\*The following are not included due to their outsize impact on investment totals: Facebook's acquisition of Oculus in 2014 and Magic Leap investment rounds.  
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# Mobile apps will be the breadwinner for augmented reality through 2021, earning twice as much as AR/MR headset software



Games will be a heavy-hitter for mobile and headset AR/MR, earning a combined \$4.8B across both platforms.

Games drove 91% of mobile AR revenue in 2017. This trend will continue as titles like *Pokémon GO* continue to usher consumers into the world of monetizable AR.

Location-based entertainment for AR/MR headsets will make more money than any other non-game segment on the platform, giving consumers an affordable way to get a taste of this new technology.

AR/MR headset prices will remain high for the next few years, making it difficult for consumers to buy their own devices. Location-based entertainment offers users high-end experiences that will help convert them into future consumers — the same philosophy that will lead VR attraction revenue to surge past \$900M in 2021.

# Users want to see the world through AR as three in five favor apps that incorporate real locations

Locations and landmarks not only help attract users to AR apps, but they also provide revenue opportunities through advertising.

In the same way that sites like Google Maps and Yelp feature their sponsors on maps, AR apps can leverage the natural combination of location-based experiences with advertising.

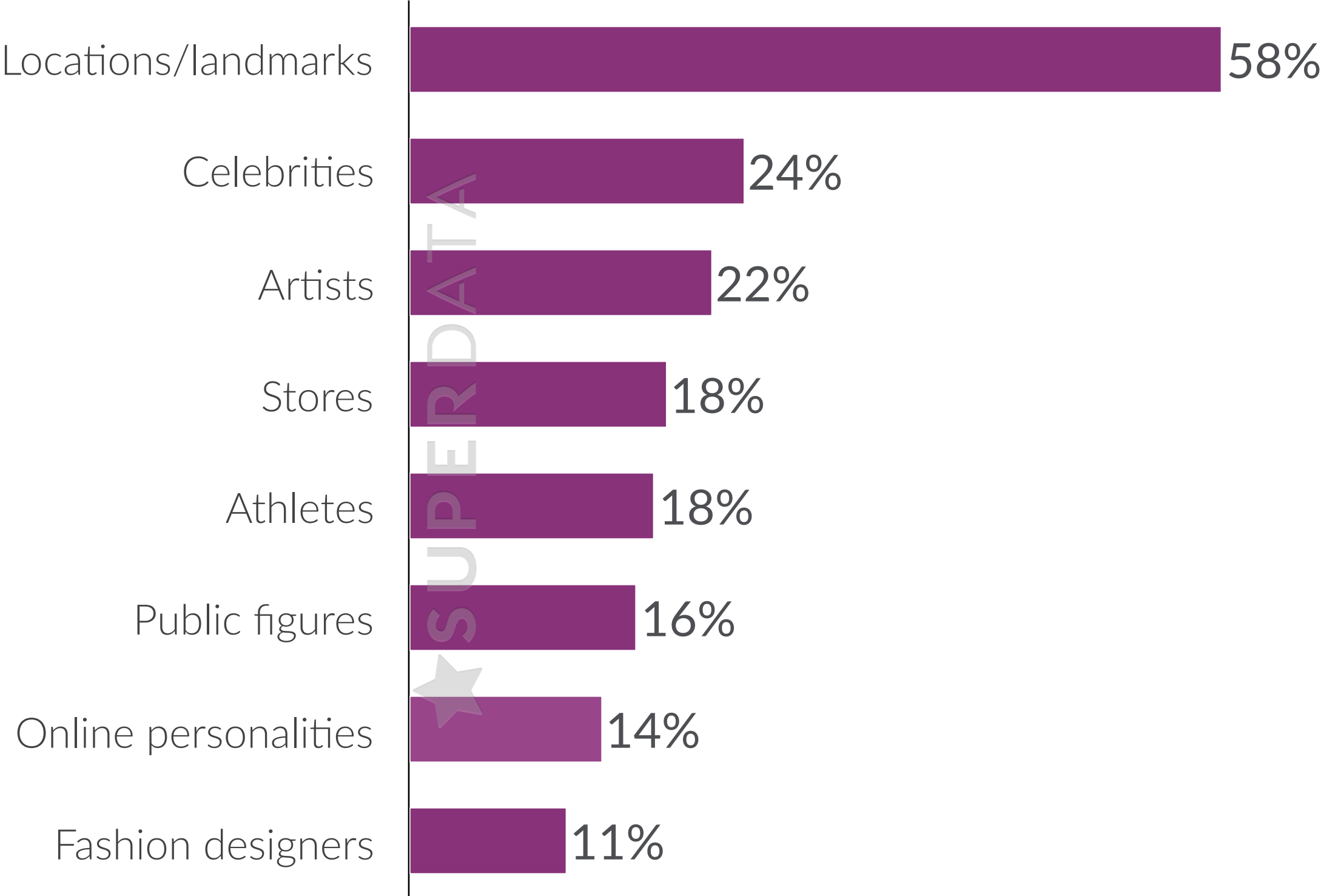
**Companies in retail and fashion ramp up AR development even with lukewarm interest from consumers.**

Fewer than 20% of mobile AR users are interested in apps that feature fashion designers even as consumers' experiences with AR apps have mostly been entertainment-based. High-quality apps that make home shopping easier could expand user interest but getting users to download branded apps to have an in-store experience will be trickier.

**With new AR games like *Harry Potter: Wizards Unite*, Niantic shows how to combine the platform's highest-earning segment (games) with the elements consumers want.**

The developer has established itself as the current leader of location-based AR games, earning \$1.8B from *Pokémon GO* alone since the title's launch in 2016. By combining some of the most popular IP in the world with consumer excitement around AR navigation, game creators have the first blueprint for how to combine augmented elements in a lucrative way.

### Elements mobile AR users want to see in apps



# Magic Leap remains an enigma even after unveiling its MR device



Magic Leap finally unveiled its headset after raising \$2B in funding over three years.

The mysterious South Florida-based company sparked skepticism after being valued at \$6B without showing a device. The 'creator's edition' and development kits are scheduled to launch this year.

**Despite a glimpse at the device, it is still shrouded in mystery.**

The general public may know what the device looks like, but continues to rely on concept videos (which caused controversy as some were outed as "inaccurate") and word of mouth (with mixed reviews from journalists and celebrities like Beyoncé and Ricky Gervais).

**Partnerships with Disney's Lucasfilms, comic book publisher Madefire and Icelandic rock band Sigur Rós give consumers something familiar to look forward to.**

While most of the world is still mostly in the dark, Magic Leap is building consumer interest by working with popular brands. The company still hasn't announced the breadth of partnerships it has established, but it has alluded to collaborating with more big names.

# Terminology

## XR platforms

- **Virtual reality:** Experiences that completely replace a user's view with a simulated virtual environment. Examples: HTC Vive, Samsung Gear VR, Oculus Rift
- **Mobile augmented reality:** Experiences that overlay or mix simulated images with the real world as seen through a smartphone camera and on the screen. Examples: *Pokémon GO*, Snapchat
- **Mixed/Augmented reality :** Experiences that require a headset and allow the user to view environment-aware, virtual imagery superimposed onto the real world, or real world imagery superimposed onto a virtual world. Examples: Magic Leap, Microsoft HoloLens

## VR hardware:

- **Console:** VR headsets that require a connection to an external video game console. Example: PlayStation VR.
- **Mobile:** Headsets that require users to slide their smartphone inside. Examples: Samsung Gear VR, Google Cardboard.
- **PC:** Headsets powered by an external computer. Examples: HTC Vive, Oculus Rift
- **Standalone:** Untethered, self-contained headsets that do not require external hardware to function. Examples: Oculus Go, Lenovo Mirage Solo



# Terminology, cont'd

## XR software

- **Games:** Experiences that feature goals, challenges or competition with others. Examples: *Job Simulator*, *Raw Data*
- **Location-based entertainment:** Experiences that utilize a physical location. Examples: The Void, Gear VR roller coasters, IMAX VR
- **Consumer productivity:** Software tools used to increase the productivity of individuals, including creative software. This also includes enterprise-focused software purchased for consumer use. Example: MeasureKit, Virtual Desktop
- **Video & entertainment:** Content like movies, shows, sports, and news that users watch and cannot affect. Examples: Jaunt, NextVR
- **Interactive media:** Applications where users actively participate or explore instead of just watching. Examples: Google Earth VR, Tilt Brush
- **Social media:** Social apps and virtual hangout spaces. Examples: Altspace VR, VRChat
- **Wellness:** Consumer health, fitness and diet applications. Examples: *Guided Meditation VR*, VirZoom

For additional definitions of platforms, terms, and geography, visit [superdataresearch.com/terminology](https://superdataresearch.com/terminology)

# Contact Us

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Twitter: @\_SuperData



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<https://www.statista.com/statistics/321374/global-all-time-unit-sales-call-of-duty-games/>

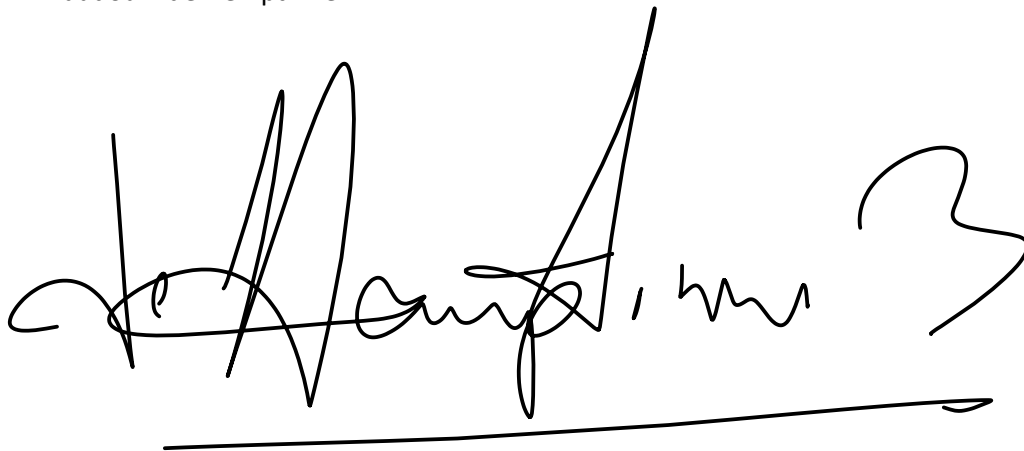
Thomas Bidaux, PC games insider. (2018, February 13). *INSIGHT: Ico Partners' Thomas Bidaux tells us about the video game crowdfunding market in 2017*. Retrieved from PC games insider:  
<http://www.pcgamesinsider.biz/news/66559/insight-ico-partners-thomas-bidaux-tells-us-about-the-video-game-crowdfunding-market-in-2017/>

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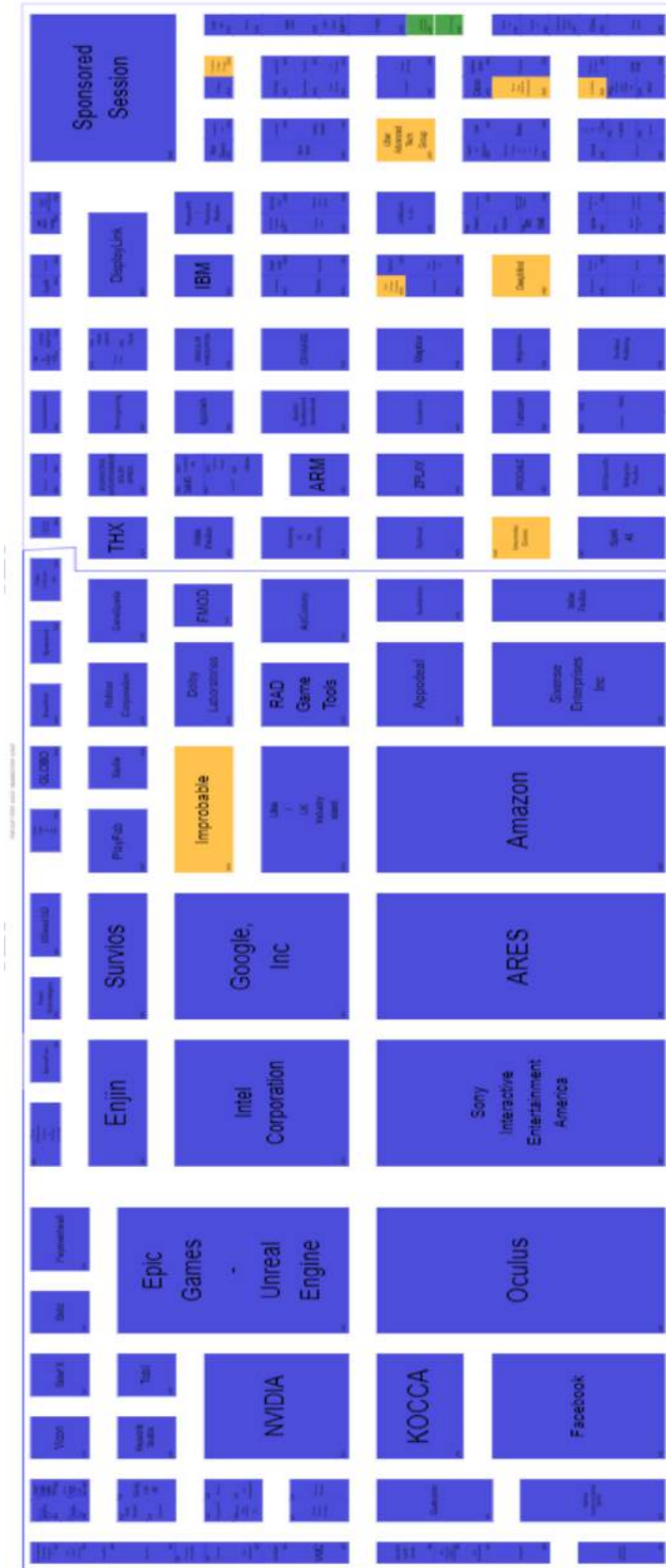
## Special Thanks to Contributors

- Gaëtan Ampin
- Audra Martyn Spall
- Guy François Vanpaesschen
- Laura Meurant

Baudouin de Hemptinne

A handwritten signature in black ink, appearing to read 'Baudouin de Hemptinne', with a long horizontal line underneath it.

# South hall



# Moscone Center Plan

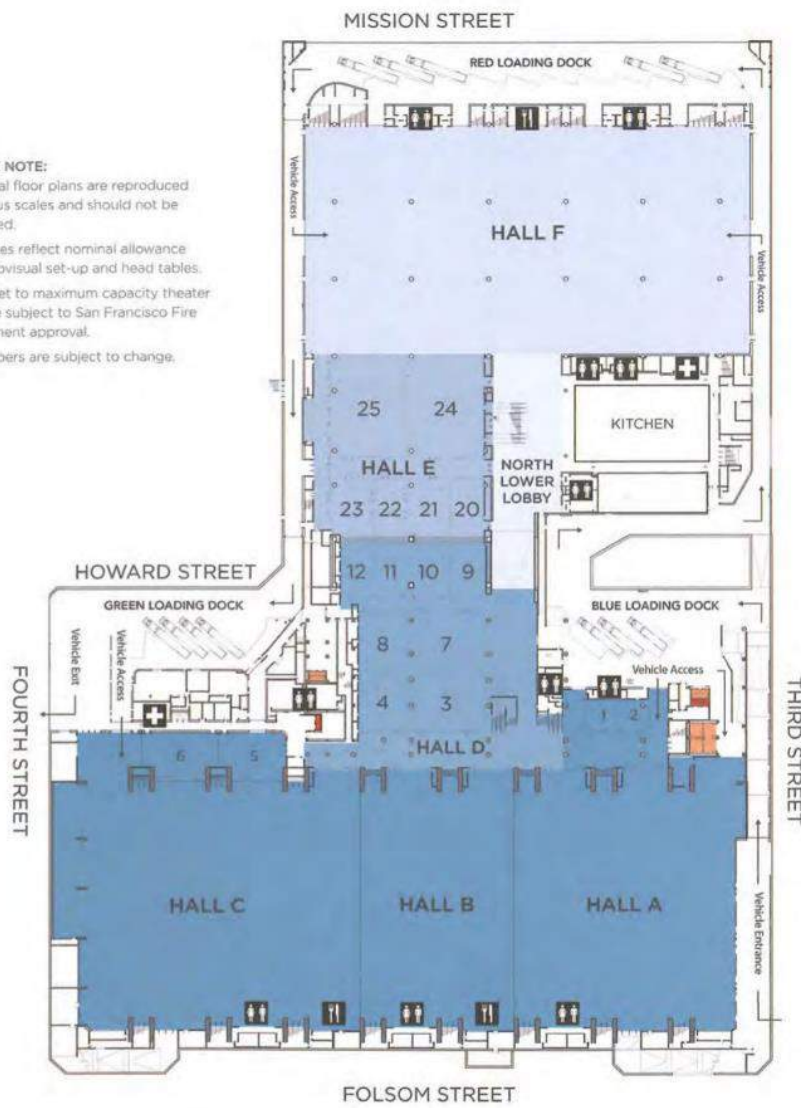
**PLEASE NOTE:**

Individual floor plans are reproduced at various scales and should not be compared.

Capacities reflect nominal allowance for audiovisual set-up and head tables.

Floors set to maximum capacity theater style are subject to San Francisco Fire Department approval.

All numbers are subject to change.



■ Passenger Elevator   
 ■ Freight Elevator

