

Korea' s Game Industry



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Broad view

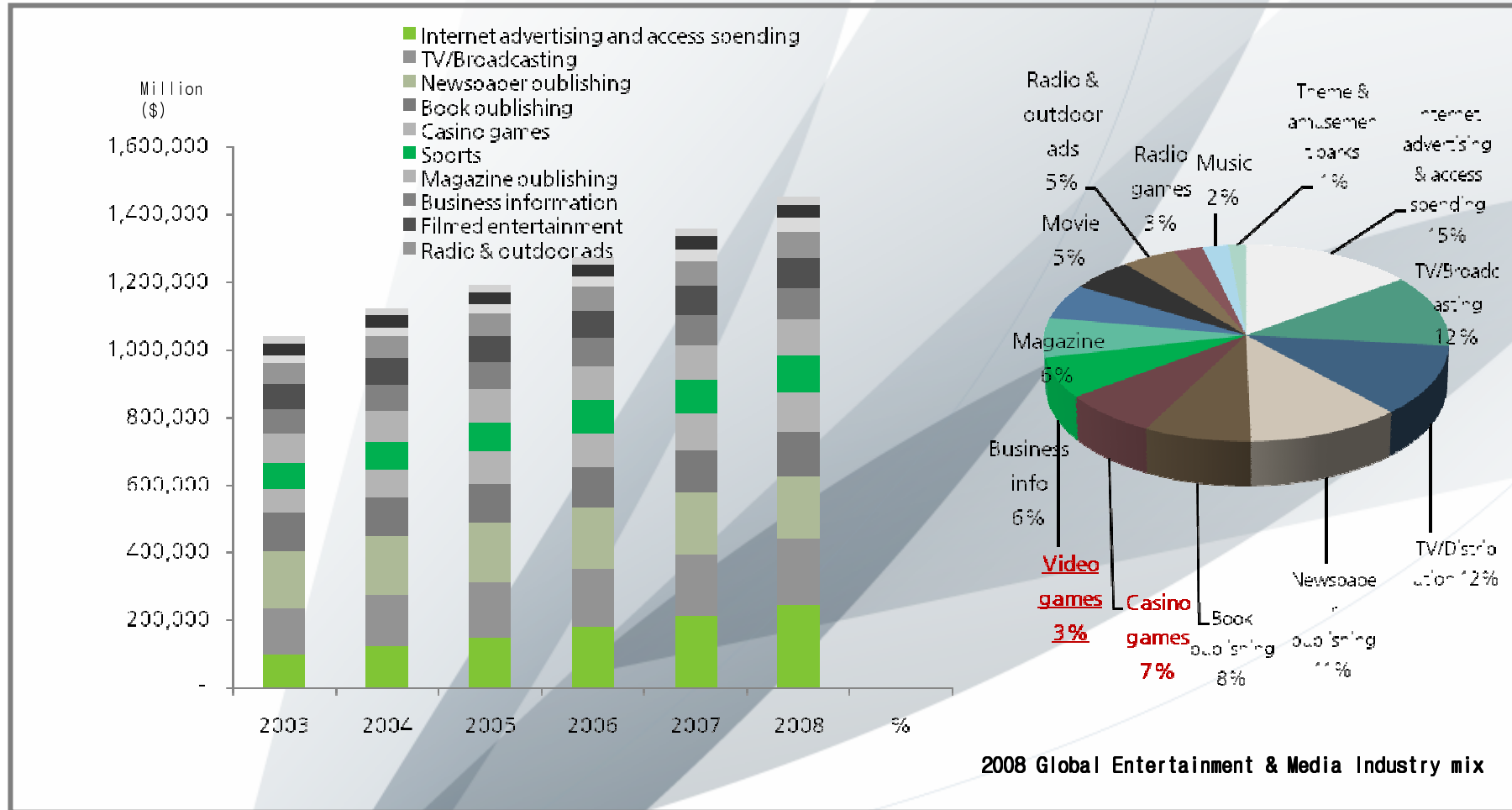
II. Korea's Game
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In-depth view

Korea's Game Industry

Broad view

I-1. Global Entertainment & Media Market by Segment

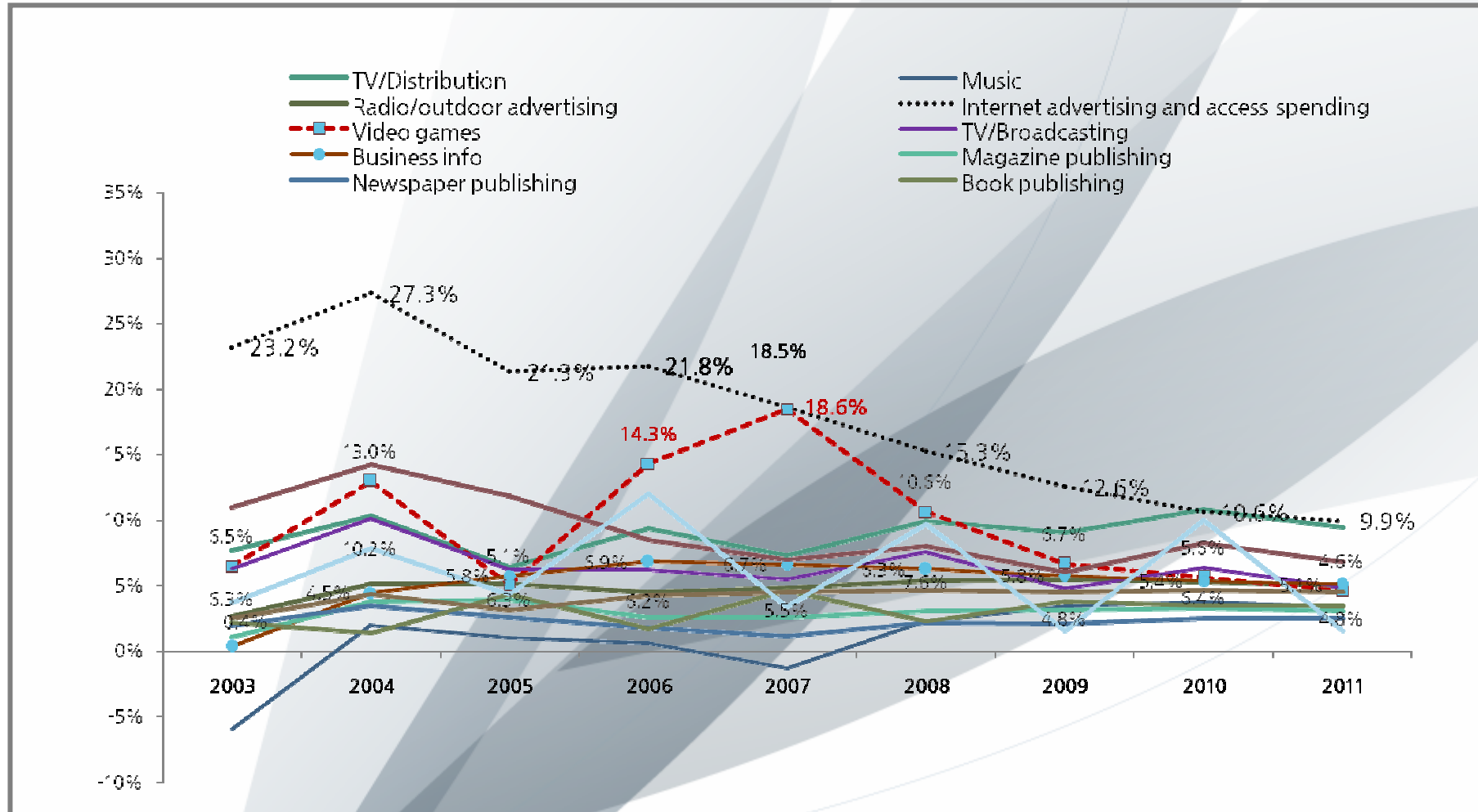
Image 1. Global entertainment & media market size per year



Source : PricewaterhouseCoopers <Global Entertainment and Media Outlook:2007-2011>

I-2. Global Entertainment and Media Market_ Growth rate

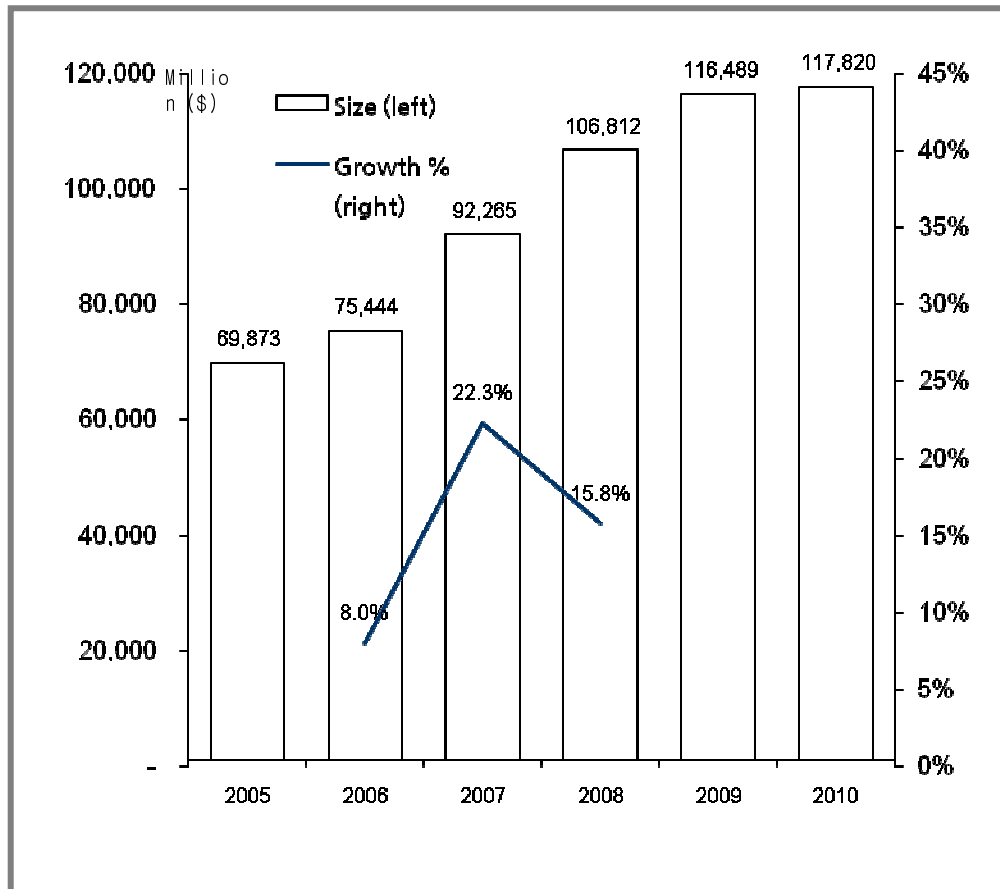
Image 2. Global growth rate per year



Source: PricewaterhouseCoopers <Global Entertainment and Media Outlook:2007-2011>

I-3. Global game market : Current status

Image 3. Global game market size/growth per year



2005~2010 CAGR =11.0%

- Global game market size (2008)

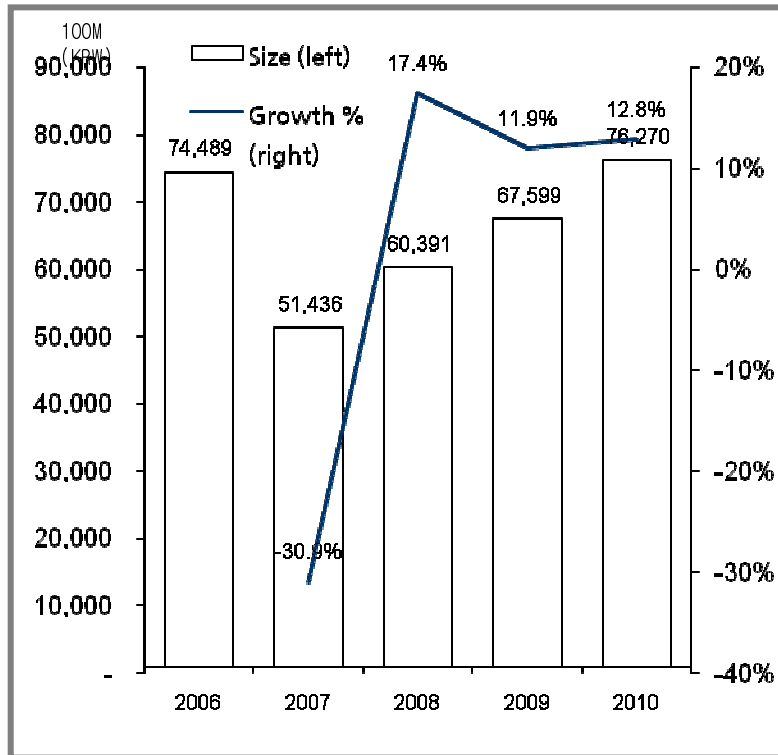
- Total : Approx 106 bn

- Global game market growth

- 22.3% (2007)

I-4. Korea's Game Industry: Current Status

Image 6. Korea's game market size/growth by year



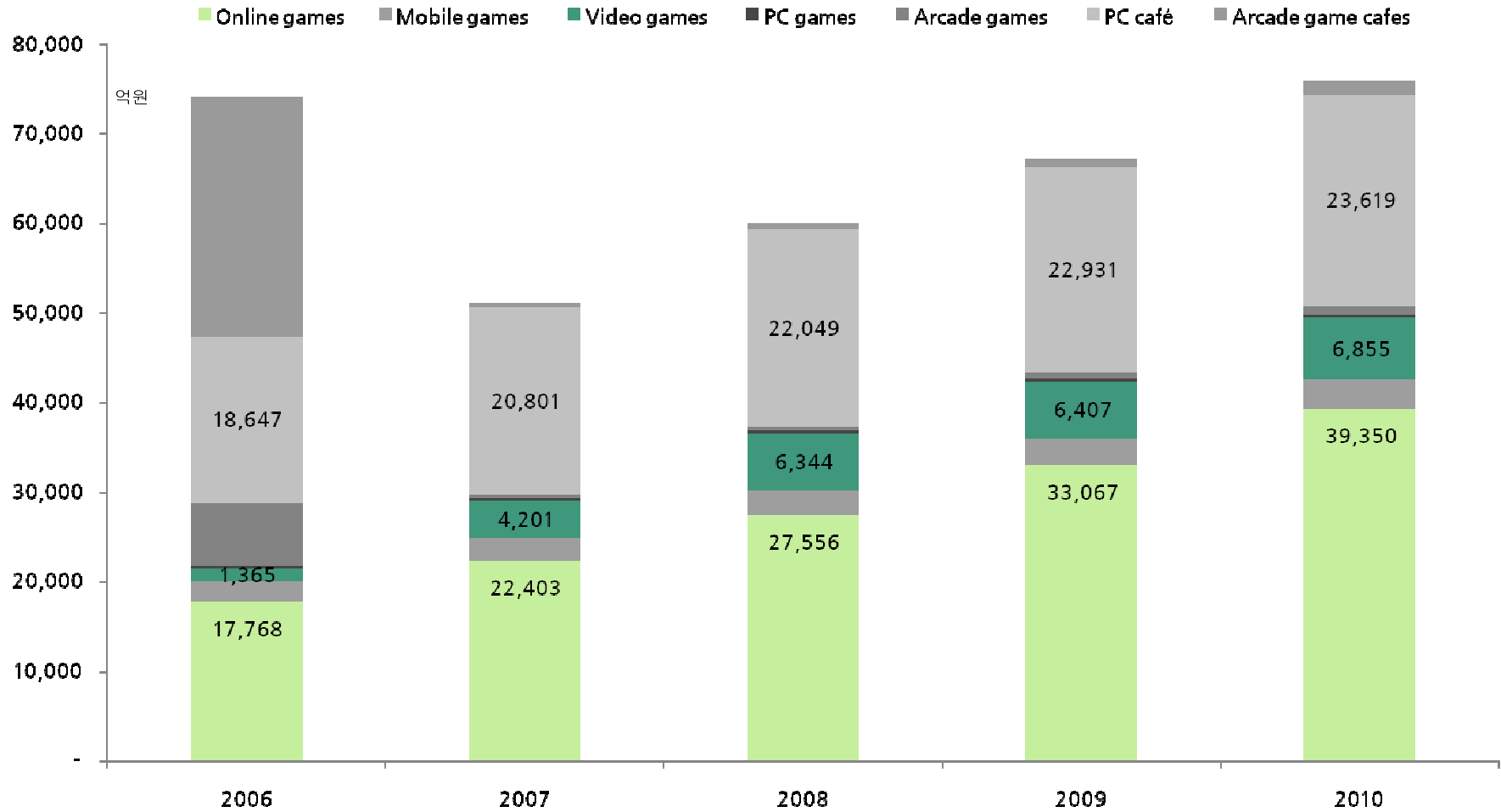
2006~2010 CAGR =0.6%

2007~2010 CAGR =14.0%

- Korea's Game Market Size (2008)
 - Total: Approx KRW 6 trillion

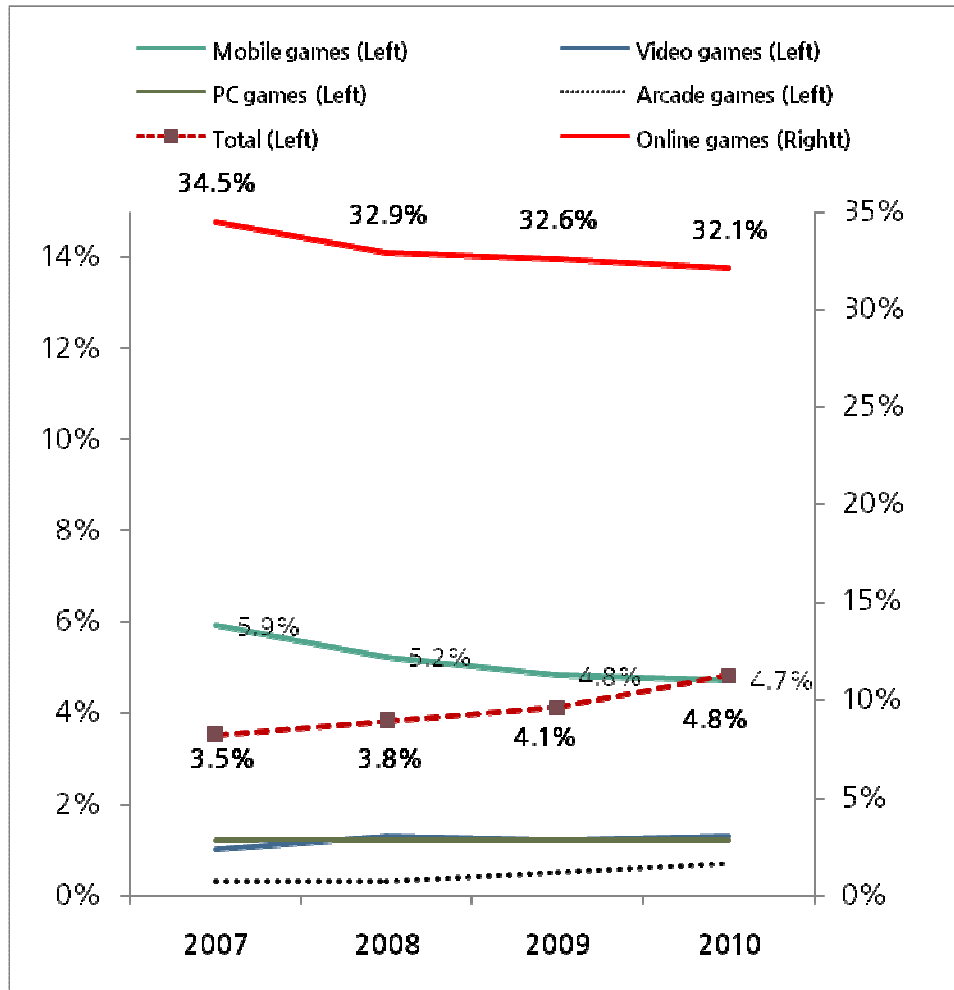
1-5. Korea's Game Industry _Market size per platform

Image 7. Korea's game market size per platform



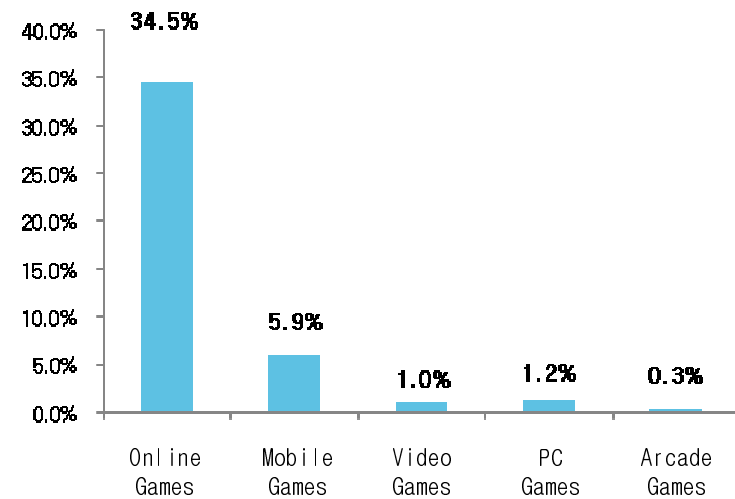
1-6. Korea's Game Market _ Global share per platform

Image 5. Global MS of domestic games per platform



3.8%

Image 5-1. Global MS of domestic games per platform (2008)



1-7. Comparative positioning: Game industry vs other domestic entertainment business

Game Business in Korea

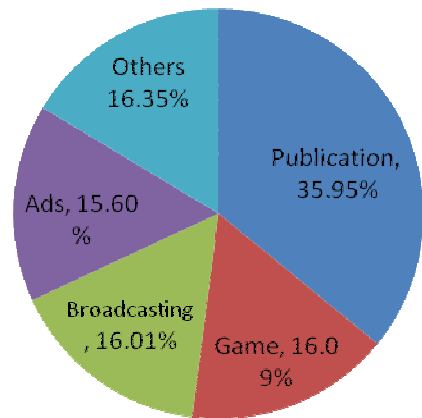
Korea' s Game Industry

In-depth view

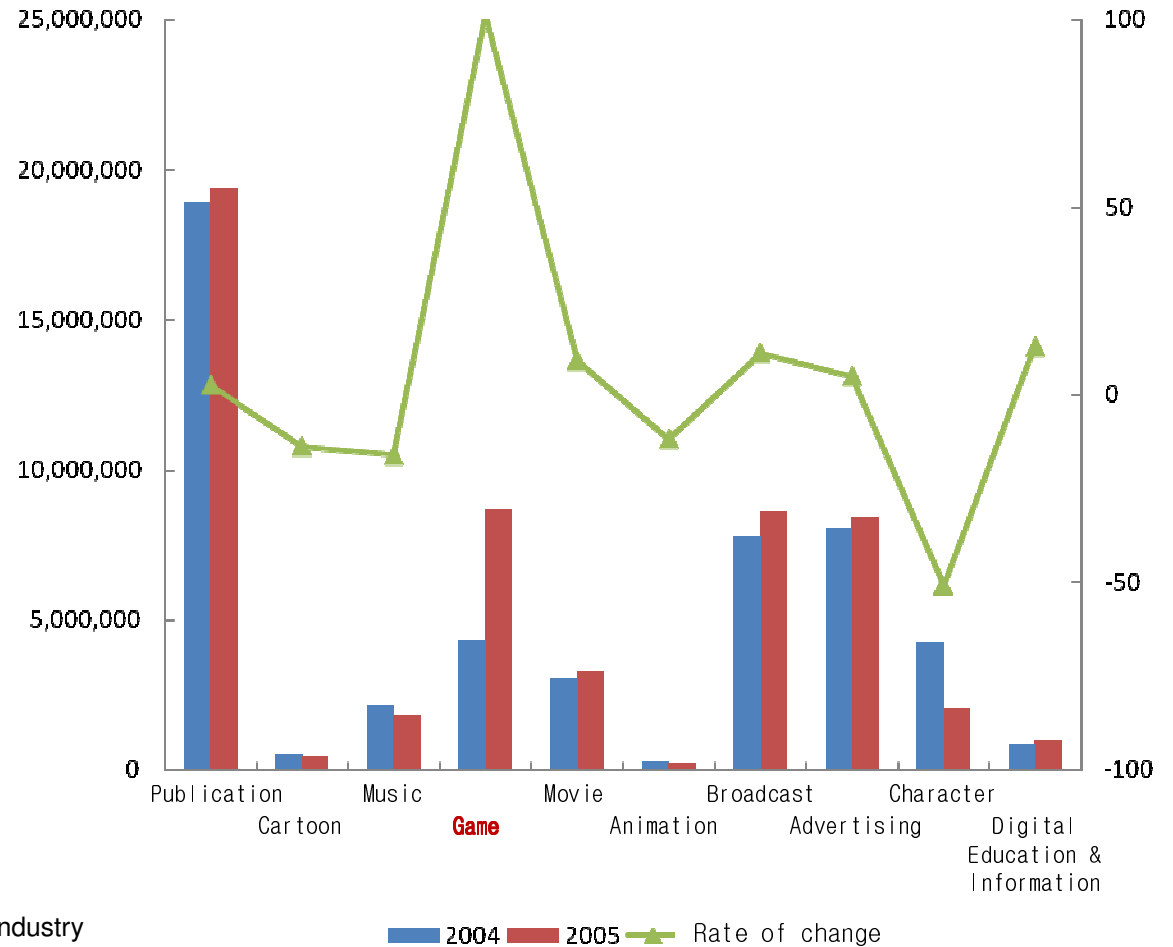
Games – Represents a growing share of entertainment & media industry

Games account for an increasing share of Korea's entertainment and media sales

Comparison of sales in entertainment and media segments



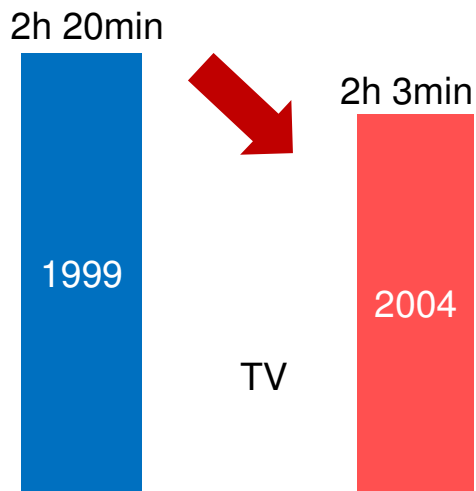
Sales growth by segment



Source: 2006 Statistics Report on Entertainment and Media Industry

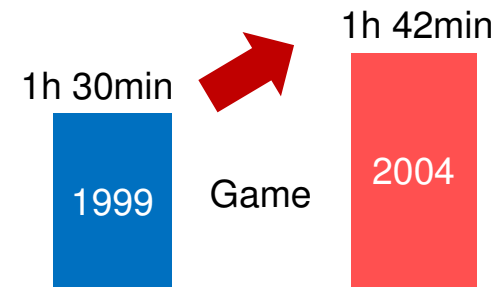
Games – Game playing hours

TV



17 minutes down from 5 years earlier

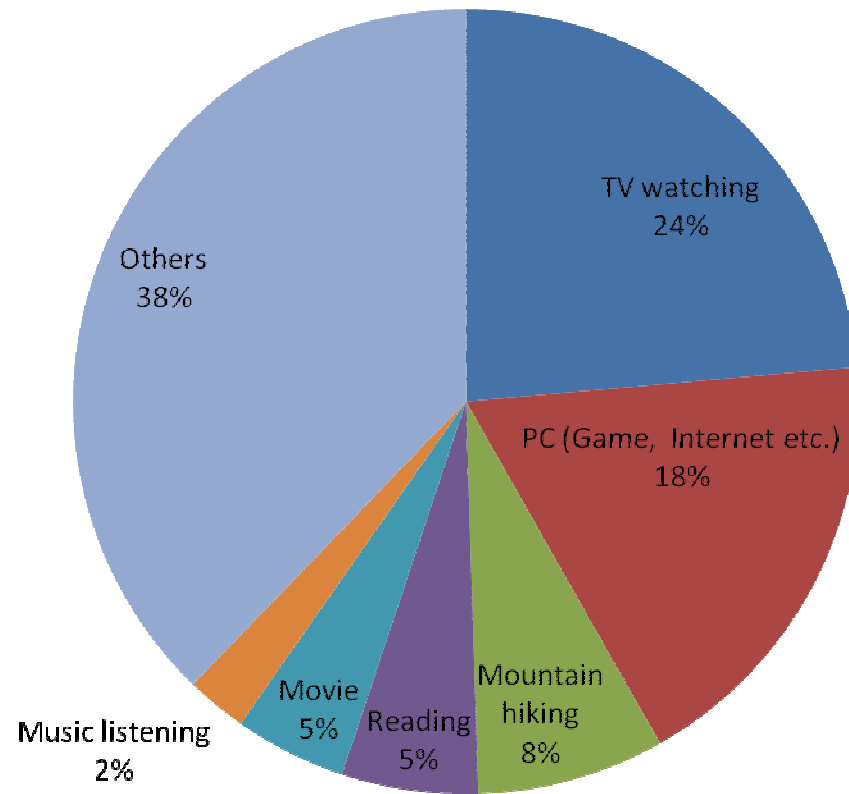
Game



12 minutes up

Source: 2004 Report on National Pastime

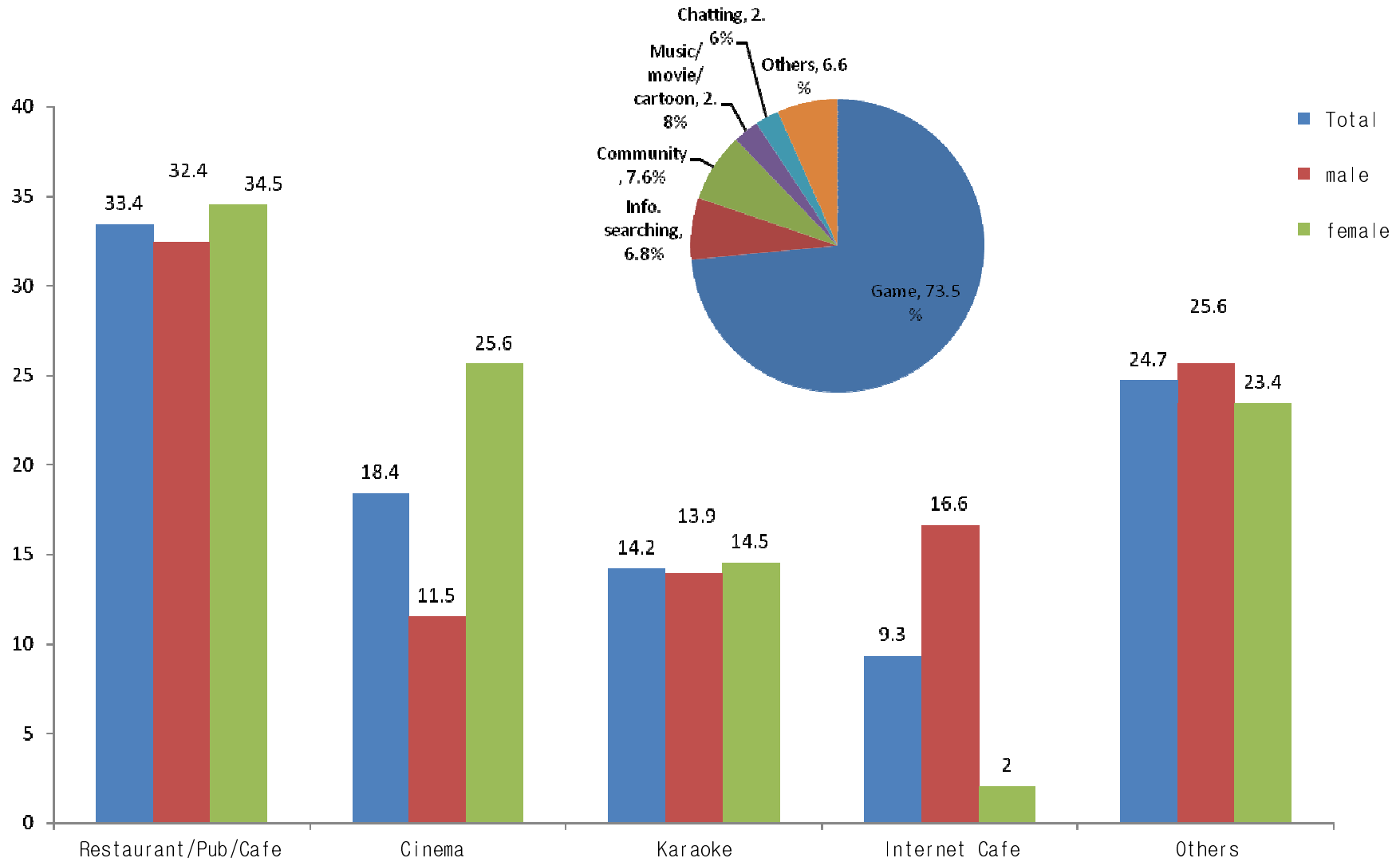
Games – Past-time (2006)



Source: Changes in Media Usage and Spending
Korea Broadcasting Institute, 15 Feb. 2007

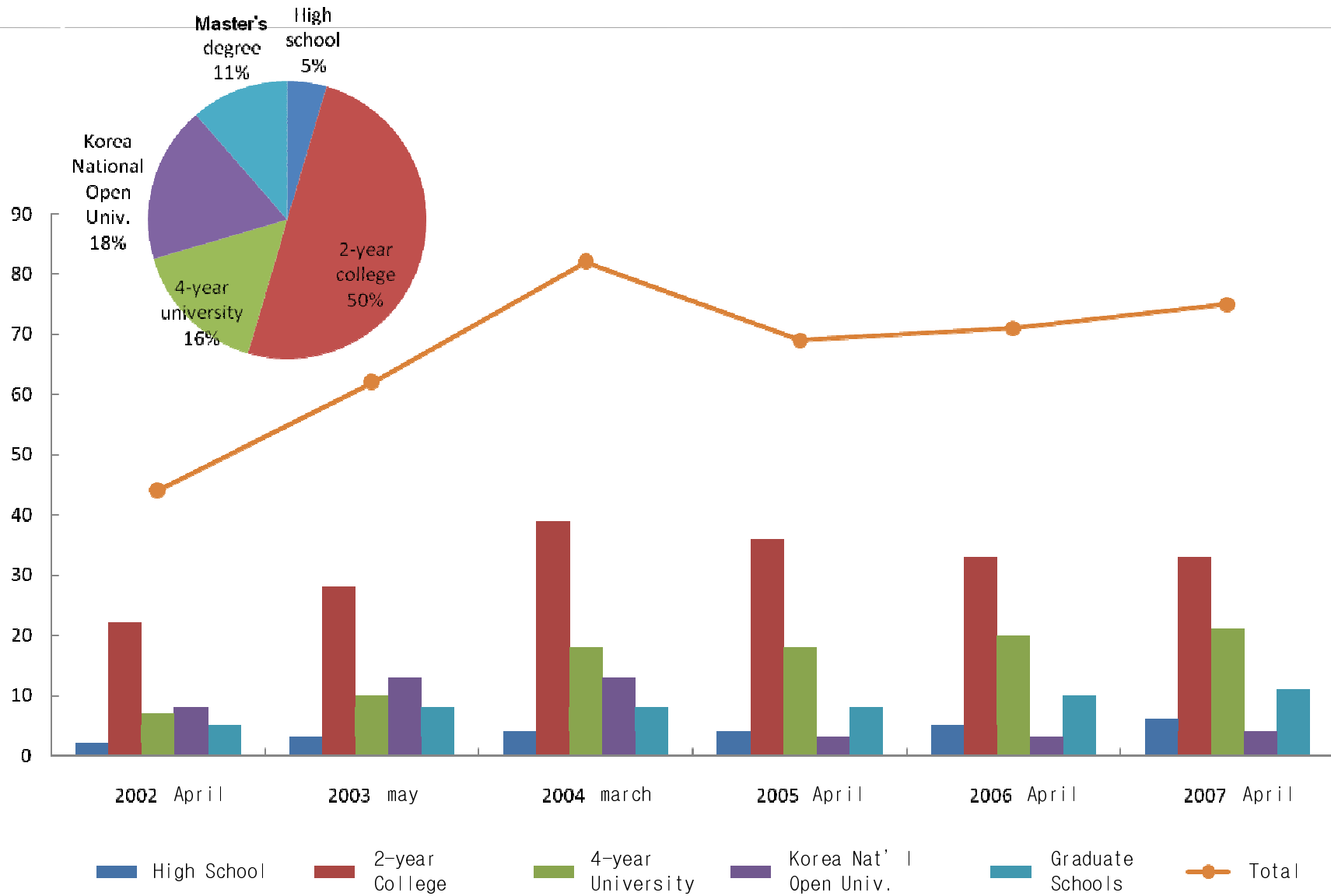
Games – Play Culture

Main activities at Internet cafes



Where do you hang out with your friends most often? (Multi-answers allowed)

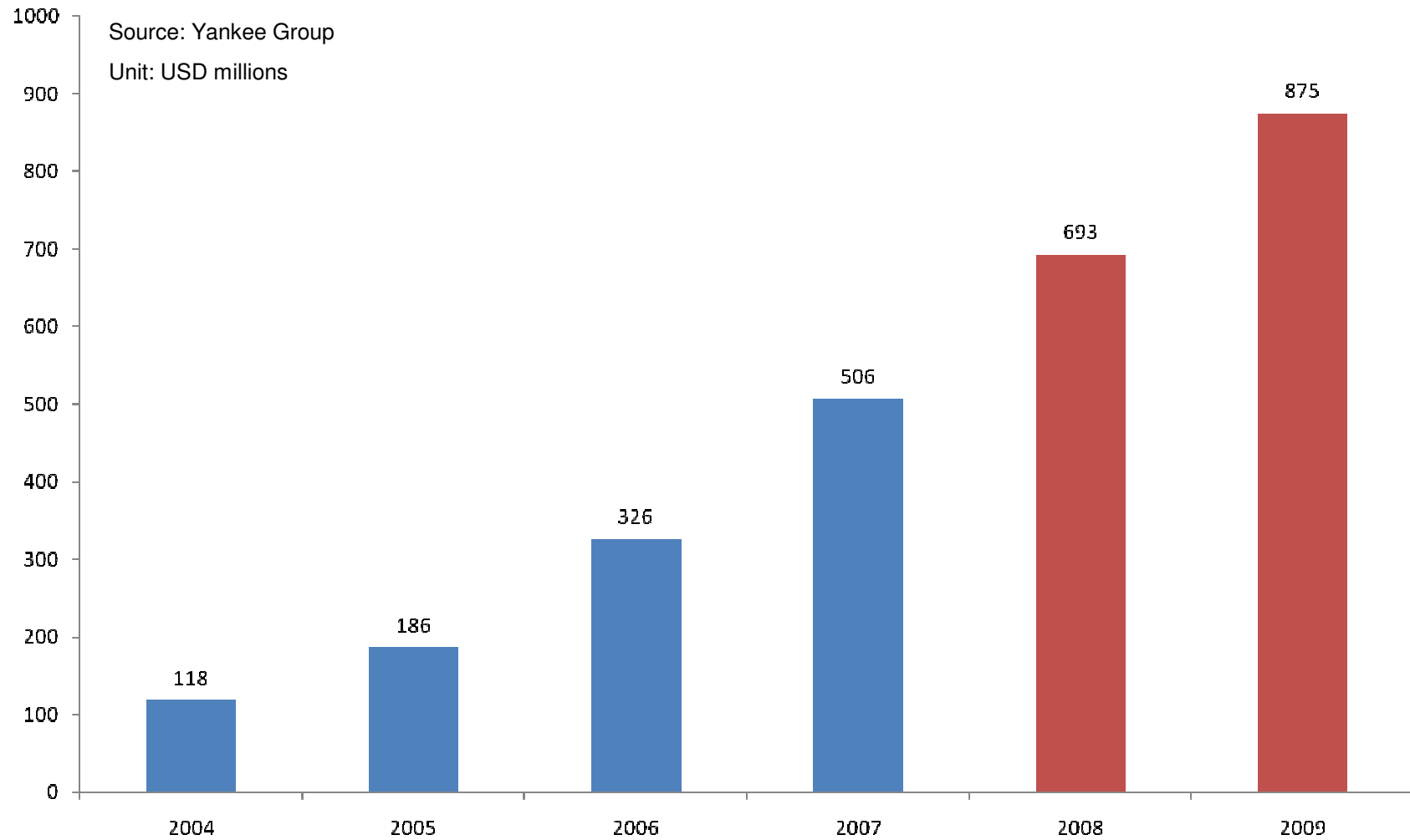
Games – Growing share of higher education workforce



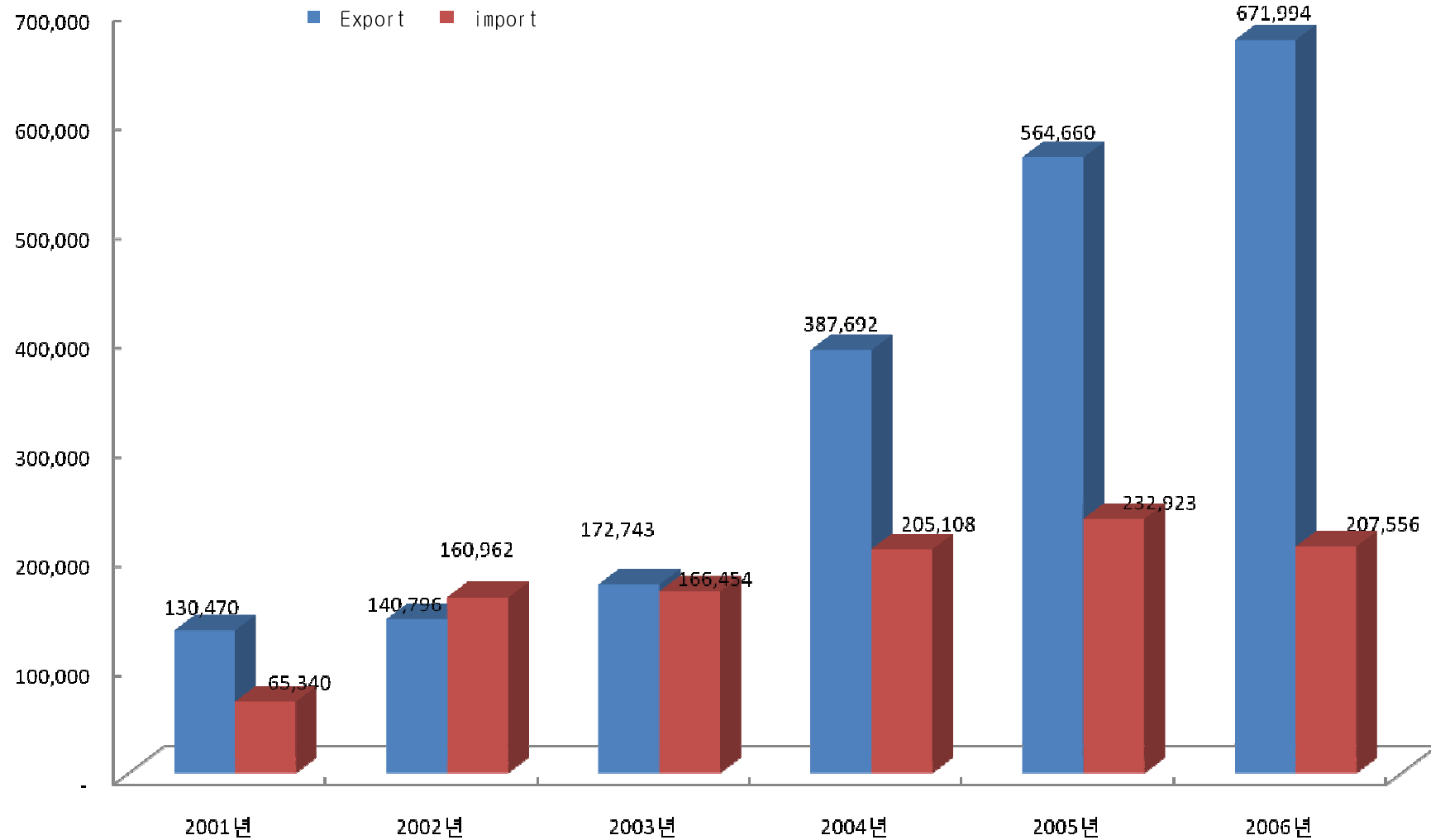
Games – Games and advertisement industry

대외비

Today and tomorrow of the global in-game advertising market



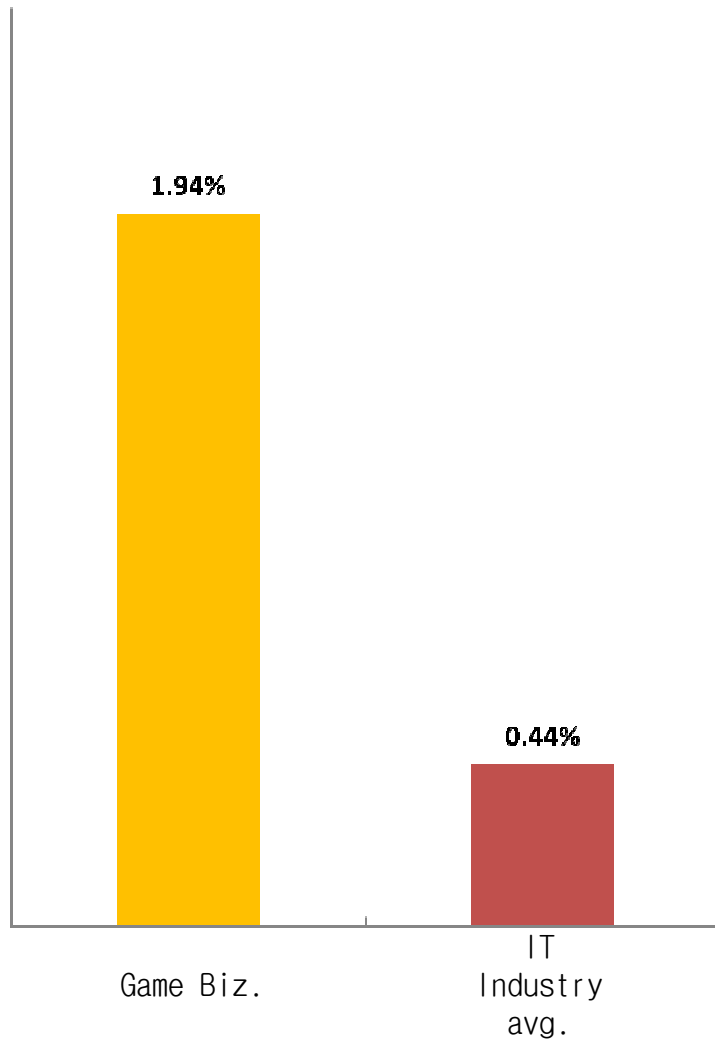
Games – Imports and Exports



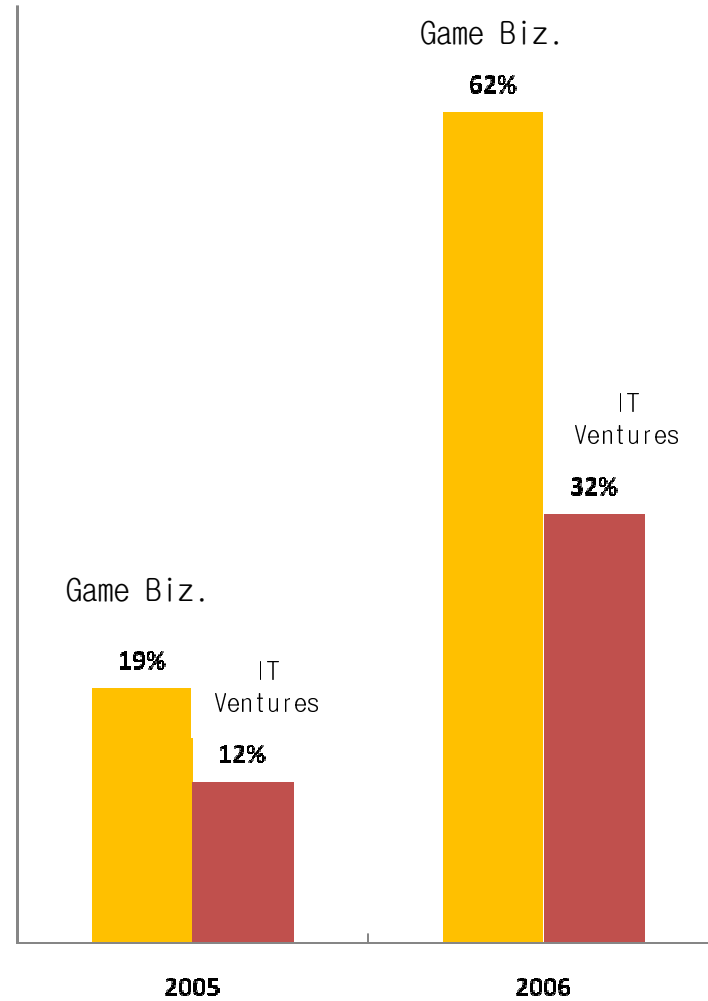
Games – Corporate bottom lines

Game companies' financial performance

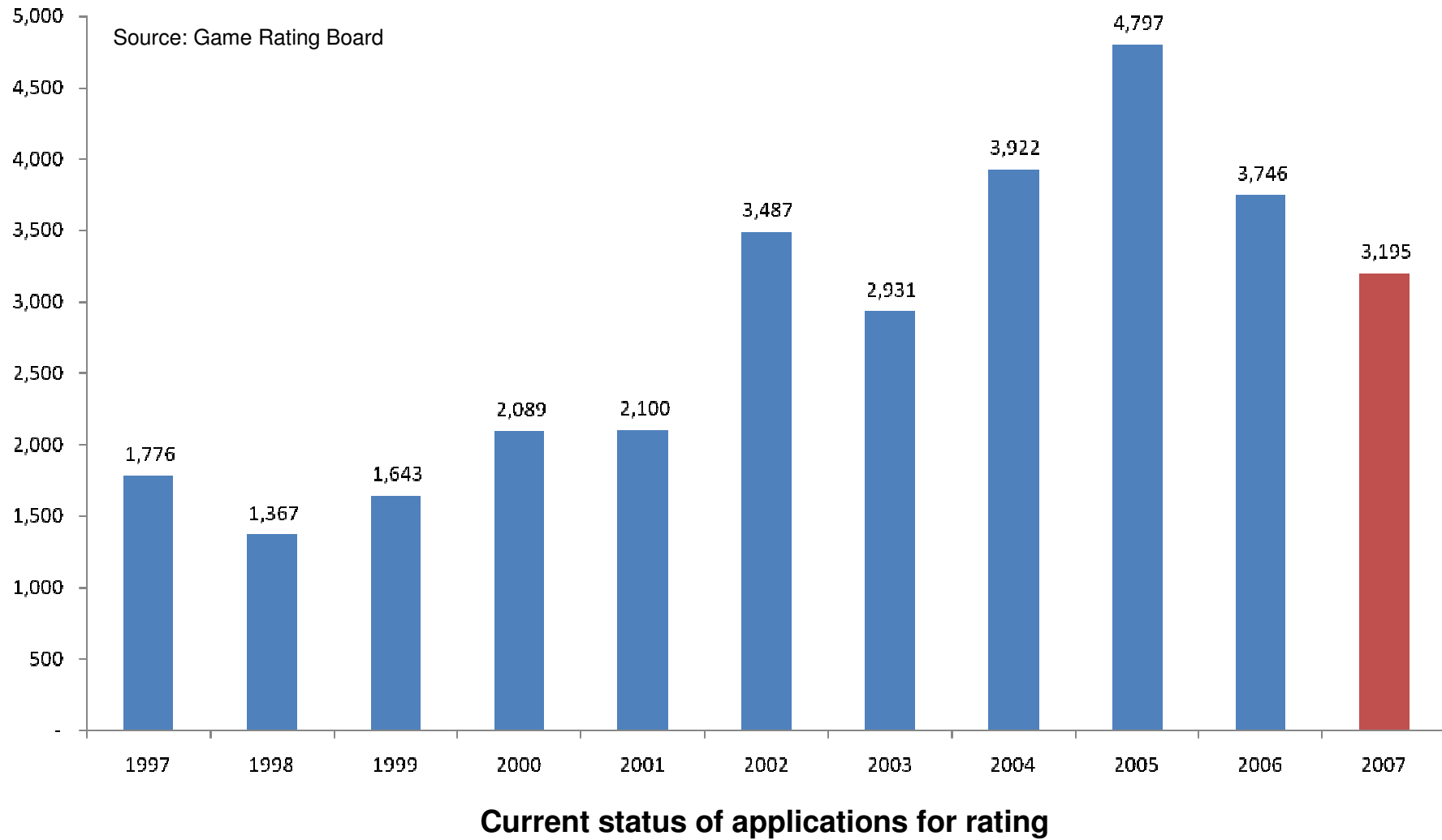
Comparison of avg. price-earnings ratios



Comparison of sales growth rate



Games – Current status of rating applications



Thank You & Questions