Mobile Gamesanalyst

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industry trends

Developers, publishers move toward raising their profile among consumers

Games companies are creating consumer-facing brands, increasing their marketing and advertising budgets, and developing an online presence, which may also include a direct-to-consumer sales capability.

The mobile games market has also reached a stage in which games companies can't afford not to invest in developing greater brand awareness, for a number of commercial reasons. Fortunately, revenues from mobile games are increasing, which means companies can also now afford to allocate resources to such activities.

Mobile operators are increasingly disinclined to underwrite all of the marketing costs for games, says Giles Corbett, co-CEO of France-based mobile games outfit In-Fusio. Jan Andresen, CEO at Germany-based publisher Elkware, agrees, saying cellcos are no longer marketing mobile games in Germany at all (see "Germany," pp. 5-6).

In such an environment, games companies will be forced to do their own promotion, says Corbett. In-Fusio has been preparing to do this and has been conducting trial marketing campaigns in recent months.

Further, some cellcos and content portals are encouraging games companies in this direction by changing the way they present content to the consumer, in that they are starting to list titles by the name of the developer or publisher, says Christopher Kassulke, CEO of Germany-headquartered publisher HandyGames.

Paul Maglione, vice president of publishing and marketing at UK publisher Digital Bridges, says the company believes pushing out to the consumer will be very important in 2005. "2004 was the year that everyone got their portfolio lineup and got games on decks," he says. "2005 has to be the year that we achieve breakthrough of the awareness of mobile games in general."

The penetration of games-capable handsets is also increasing toward mass-market levels, a move that should help encourage the take-up of mobile games by the all-important casual gamer.

Given estimates that four-fifths of handset replacements in some markets are Java-enabled, and therefore games-capable, it's wholly possible that the penetration rate of such handsets could exceed 50% in 2005, as Maglione

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research

Gameloft holds off local companies in Germany

France-based games publisher Gameloft remained atop the list of most-deployed mobile games providers in Germany in January. But three Germany-headquartered mobile games companies also rank in the top six – up from two a year ago – including new entrants Living Mobile and Mobile Scope (see "Germany," pp. 5-6; see also *MGA*, 11 Dec, 2003).

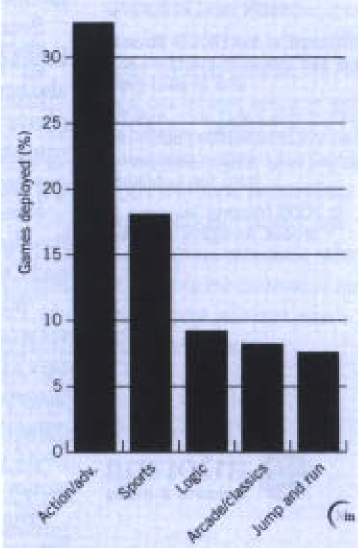
Germany's 68.23 million subscribers could access more than 900 games from the four German cellcos in January, according to *MGA* research (see pp. 7-14), representing an increase of almost 111% over the number of games available to them in December 2003.

The two smallest cellcos – E-Plus, with 8.6 million subs, and O_2, with 7 million subs – reported the biggest increases in the number of titles in their catalogs, up 370% and 218% to 207 and 188 titles, respectively. But second-ranked Vodafone D2 still has the largest library of downloadable games, increasing its portfolio size 52.1% so that it offered 292 titles to its 24.7 million subs in January, while market leader T-Mobile offered 225 games to its 27.7 million subs, a rise of 63%.

With 298 games, the "action/adventure" genre accounted for almost a third of all games available from the four German operators (see fig.). The cellcos also offered 165 sports games and 84 logic titles.

Mobile games in Germany have become slightly more expensive, with prices in January ranging from €1.99 (US$2.59) to €4.99, as opposed to a range of €0.99-4.99 in December 2003.

Downloadable games by genre, Germany



Sources: Operator data, Mobile Games Analyst