Game, it’s so energetic!

OFFICIAL REPORT

Organizer : Computer Entertainment Supplier’s Association (CESA)
Co-Organizer : Nikkei Business Publications, Inc. (Nikkei BP)
Supporter : Ministry of Economy, Trade and Industry
Period : Sep.24(Thursday) - 27(Sunday), 2009
Venue : Makuhari Messe

Nikkei Business Publications, Inc.
Outline of the Show

Name: TOKYO GAME SHOW 2009
Theme: Game, it's so energetic!
Organizer: Computer Entertainment Supplier's Association (CESA)
Co-Organizer: Nikkei Business Publications, Inc. (Nikkei BP)
Supporter: Ministry of Economy, Trade and Industry
Period: Business Day Sep. 24(Thursday) - Sep. 25(Friday)
Open to the Public Sep. 26(Saturday) - Sep. 27(Sunday)
From 10:00 a.m. to 5:00 p.m.
Venue: Makuhari Messe (Mihama-ku, Chiba-shi, Chiba)
Exhibition Halls 1-8 (exhibition area : about 54,000 square meters)
International Conference Hall
Number of exhibitors: 180
Number of booths: 1,367 booths
Displayed titles: 758 titles (number of advance registrations)

<table>
<thead>
<tr>
<th>By platform(%)</th>
<th>By genre(%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC 24.1</td>
<td>Action 21.4</td>
</tr>
<tr>
<td>Mobile phone 18.6</td>
<td>RPG 10.6</td>
</tr>
<tr>
<td>Nintendo DS 13.9</td>
<td>Puzzle 9.3</td>
</tr>
<tr>
<td>Xbox360 5.7</td>
<td>Simulation 6.2</td>
</tr>
<tr>
<td>PSP 3.4</td>
<td>Adventure 4.3</td>
</tr>
<tr>
<td>Playstation3 3.0</td>
<td>Shooter 2.9</td>
</tr>
<tr>
<td>Wii 2.9</td>
<td>Sports 2.4</td>
</tr>
<tr>
<td>Playstation2 0.4</td>
<td>Racing 1.9</td>
</tr>
<tr>
<td>Others 28.0</td>
<td>Others 41.0</td>
</tr>
</tbody>
</table>

Admission fees:
General visitor Ticket valid only for day of issue ¥1,200 (incl. tax)
Ticket sold in advance ¥1,000 (incl. tax)
2 Visitors Report

2-1 Number of Visitors on Each Day

<table>
<thead>
<tr>
<th>TOKYO GAME SHOW 2009</th>
<th>TOKYO GAME SHOW 2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sep. 24 (Thu) - Business Day</td>
<td>Oct. 9 (Thu) - Business Day</td>
</tr>
<tr>
<td>27,435</td>
<td>27,305</td>
</tr>
<tr>
<td>Sep. 25 (Fri) - Business Day</td>
<td>Oct. 10 (Fri) - Business Day</td>
</tr>
<tr>
<td>24,605</td>
<td>24,178</td>
</tr>
<tr>
<td>Sep. 26 (Sat) - Open to the Public</td>
<td>Oct. 11 (Sat) - Open to the Public</td>
</tr>
<tr>
<td>61,138</td>
<td>71,639</td>
</tr>
<tr>
<td>Sep. 27 (Sun) - Open to the Public</td>
<td>Oct. 12 (Sun) - Open to the Public</td>
</tr>
<tr>
<td>71,852</td>
<td>71,166</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>Total</strong></td>
</tr>
<tr>
<td>185,030</td>
<td>194,288</td>
</tr>
</tbody>
</table>

2-2 Results of Business-Day Visitors Survey

Outline of Survey

[Survey Method]
A survey request was e-mailed to 4,585 preregistered visitors in Japan on the Business Days. Replies were received at the Internet Research System "AIDA" operated by Nikkei BP Consulting.

[Number of Responses]
835 (response rate : 18.2%)

[Survey Schedule]
Oct. 20, 2009 / Survey started (By e-mails and website opened)
Nov. 3, 2009 / Survey finished (website closed)

[Survey Organizations]
Nikkei BP Consulting, Inc.

● Age

![Age Chart]

● Business Category

![Business Category Chart]

● Job Category

![Job Category Chart]
Visitors’ Relationship to Game and Entertainment Content

- Development and making of game-related software and content: 51.4%
- Distribution and sales of game consoles and game software: 13.6%
- Related to entertainment other than game: 5.2%
- No response: 0.3%

Degree of Satisfaction

- Very satisfied: 5.8%
- Satisfied: 44.7%
- Not particularly satisfied or dissatisfied: 32.1%
- Dissatisfied: 15.4%
- Very dissatisfied: 2.0%
- No response: 0.1%

Intention to Attend the Next Show

- Intend to attend: 87.5%
- Not sure: 11.1%
- Does not intend to attend: 1.4%
- No response: 0.1%

Information You Wanted to Get at TGS 2009 (multiple answers)

- Overall grasp of game industry including such items as hot and talk-about game software: 92.6%
- Information on products and companies, with the focus on business: 47.6%
- Information from the viewpoint of end-users: 46.2%
- Information on exhibition status or products of competitors and related companies: 46.0%
- Information on overseas products and companies: 22.9%
- Others and no response: 8.6%

Business-Day Visitors Breakdown by Country and Region

<table>
<thead>
<tr>
<th>Country &amp; Region</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Korea</td>
<td>28.2</td>
</tr>
<tr>
<td>Taiwan</td>
<td>16.9</td>
</tr>
<tr>
<td>China</td>
<td>9.2</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>6.4</td>
</tr>
<tr>
<td>Singapore</td>
<td>3.1</td>
</tr>
<tr>
<td>Thailand</td>
<td>2.4</td>
</tr>
<tr>
<td>Malaysia</td>
<td>0.8</td>
</tr>
<tr>
<td>Vietnam</td>
<td>0.5</td>
</tr>
<tr>
<td>India</td>
<td>0.3</td>
</tr>
<tr>
<td>Indonesia</td>
<td>0.3</td>
</tr>
<tr>
<td>Philippines</td>
<td>0.3</td>
</tr>
<tr>
<td>U.S.A.</td>
<td>16.1</td>
</tr>
<tr>
<td>Canada</td>
<td>0.9</td>
</tr>
<tr>
<td>Mexico</td>
<td>0.3</td>
</tr>
<tr>
<td>Brazil</td>
<td>0.2</td>
</tr>
<tr>
<td>Argentina</td>
<td>0.1</td>
</tr>
<tr>
<td>France</td>
<td>2.9</td>
</tr>
<tr>
<td>U.K.</td>
<td>2.4</td>
</tr>
<tr>
<td>Germany</td>
<td>1.9</td>
</tr>
</tbody>
</table>

Europe

- Netherlands            | 1.6 |
- Spain                  | 0.4 |
- Finland                | 0.3 |
- Russia                 | 0.3 |
- Italy                  | 0.3 |
- Poland                 | 0.3 |
- Hungary                | 0.2 |
- Ireland                | 0.2 |
- Switzerland            | 0.2 |
- Belgium                | 0.1 |
- Portugal               | 0.1 |
- Denmark                | 0.1 |
- Australia              | 1.8 |
- New Zealand            | 0.2 |
- Middle East            | 0.4 |

*A total of 1,206 overseas visitors registered with the overseas receptionist. Of these the working countries of 1,189 visitors are known as broke down above.
*The following are not included in the overseas visitors total.
/ Registered / Visitors with a guest pass / Overseas press / Visitors with exhibitor Pass
Results of Exhibitors Survey

Outline of Survey

[Survey Method]
A survey request was e-mailed to all exhibitors. Replies were received at the Internet Research System “AIDA” operated by Nikkei BP Consulting.

[Number of Responses]
60 (response rate: 49.2%)

[Survey Schedule]
Oct. 8, 2009 / Survey started (By e-mails and website opened)
Oct. 19, 2009 / Survey finished (website closed)

[Survey Organizations]
Nikkei BP Consulting, Inc.

Degree of Satisfaction

- Very satisfied: 13.3%
- Satisfied: 60.0%
- Not particularly satisfied or dissatisfied: 20.0%
- Dissatisfied: 1.7%
- Very dissatisfied: 0.0%
- No response: 5.0%

TGS 2010 Exhibit Plans

- Planned; exhibit size undecided: 38.3%
- Under consideration: 33.3%
- Undecided now: 15.0%
- Planned; with larger exhibit: 11.7%
- Planned; with smaller exhibit: 1.7%
- No plan: 0.0%

Activities on Business Days (multiple answers)

- Business meetings at Booths and Meeting Rooms: 30.0%
- Business meetings at Conference Room and Hotels: 8.3%
- Information Sessions on New products, etc. for Distributors: 8.3%
- Press Releases: 6.7%
- Others: 15.0%
- No response: 45.0%
TGS Forum 2009

“TGS Forum 2009”, conference for business people in the game industry, was held on the two Business Days.

Keynote addresses were delivered on Thursday, September 24, the first day of the Tokyo Game Show 2009, and consisted of two parts. The first part was a speech titled “Sony Computer Entertainment New Strategy for 2009”, delivered by Mr. Kazuo Hirai, President and Group CEO of Sony Computer Entertainment Inc. (SCEI). In his speech, Mr. Hirai looked back at the history of SCEI and unveiled their movements toward year 2010 by introducing new controller.

The second part was formed by a panel discussion by top managers of five major game manufacturers, titled “Strategies and Visions of Top Makers in the Global Era”. Mr. Haruhiro Tsujimoto, President and COO of Capcom Co., Ltd., Mr. Kazumi Kitaue, Chairman and CEO of Konami Digital Entertainment Co., Ltd., Mr. Shin Unozaawa, President and CEO of NAMCO BANDAI Games Inc., Mr. Shuhei Yoshida, President of Sony Computer Entertainment Worldwide Studios, and Mr. Yoichi Wada, President and Representative Director of SQUARE ENIX CO., LTD. exchanged views on challenges and solutions observed in the current game industry in a globalization era.

After that, four specialized, paid sessions were held. In the category of four paid sessions, there was no change since the previous year. “Casual Game Session” was to learn about the origin of casual games which are rapidly growing on cell phones, internet and portable game machines; “Character Session” to search for secrets of popularity of warlords in the provincial war period from the perspective of games and TVs; “Cellular Phone Game Session” to study about trends of the cell phone industry where smart phones such as iPhone and Android devices rapidly progress; and “Management Session” to lecture on management of human resources development particularly for the game industry. Attendees were listening the two-hour sessions enthusiastically.

September 25, the second Business Day, Special Invitation Session was held featuring a lecture by a key person from abroad.

The speaker invited in 2009 was Mr. Michael Capps, President of Epic Games, Inc., who delivered a speech titled “Adapting the ‘Gears of War’ Franchise for Global Consumption”. In addition, two more sessions were held as “Sponsorship Sessions”. One was a lecture titled “The Latest Trend in the Game Industry and Scientific Approach to Sales Demand Forecast” by Mr. Ricky Tanimoto of Enterbrain Inc. and Mr. Seijiro Sannabe of GAMEAGE RESEARCH & INSTITUTE Inc. The other was a set of lectures titled “Taiwanese Manufacturers’ Creative Games!” delivered by Mr. Hsu King Long and Mr. Yang Zhen Hua of XPEC Entertainment Inc., and Mr. Norifumi Sugita of Thermaltake Japan Inc.
### September 24 (Thursday)

#### Keynote 1
10:30 - 11:30

**Sony Computer Entertainment New Strategy for 2009**

Kazuo Hirai, President and Group CEO, Sony Computer Entertainment Inc.

#### Keynote 2 / Panel Discussion
11:30 - 12:30

**Strategies and Visions of Top Makers in the Global Era**

Haruhiro Tsujimoto, President & COO, Capcom Co., Ltd.
Kazumi Kitase, Chairman & CEO, Konami Digital Entertainment Co., Ltd.
Shin Unoza, President & CEO, NAMCO BANDAI Games Inc.
Shuhei Yoshida, President, Sony Computer Entertainment Worldwide Studios
Yoichi Wada, President & Representative Director, SQUARE ENIX CO., LTD.

#### Casual Game Session
13:00 - 15:00

**Casual Game - Development Capability is Tested**

Ryo Morikawa, NHN Japan
Daikaku Ikejiri, SCE Japan Studio
Shigeya Kawagishi, mixi

**Why Historical Characters Are So Popular Across the Generations**

Shinsuke Naitou, NHK
Hiroyuki Kobayashi, Capcom
Ken Kitami, KOEI

**The Era of Provincial Wars Definitely Attracts Both Women And Men**

Moderator: Taku Agatsuma, Nikkei TRENDY net

Moderator: Kenji Toda, Nikkei Business Online

#### Cellular Phone Game Session
15:15 - 17:15

**The Next Step Cell Phone Games Should Take in a Time of “Open Environment”**

Chris Pruett, Google
Yoshikazu Tanaka, GREE
Masato Shibata, HUDSON SOFT

**What Strategy for Human Resources Management a Game Company Should Adopt to Overcome Increasingly Intense Competitions**

Akihide Miyawaki, SQUARE ENIX
Joji Sakaguchi, Microsoft Japan
Keizou Tannawa, Watson Wyatt

Moderator: Hirozumi Yoshioka, Nikkei Entertainment

Moderator: Junpei Furuhata, Nikkei Business Associates

### September 25 (Friday)

#### Special Session
11:00 - 12:00

**Adapting the 'Gear of War' Franchise for Global Consumption**

Micheal Capps, President, Epic Games, Inc.

#### Sponsorships Session
10:30 - 11:00

**The Latest Trend in the Game Industry and Scientific Approach to Sales Demand Forecast**

Seijiro Sannabe, GAMEAGE R&I

Moderator: Ricky Tanimoto, Enterbrain

**Taiwanese Manufacturers’ Creative Games!**

“A Taiwanese Game Developer, Who Has Developed Successful Products Both in Console Platforms And in PC Dimension, Now Expands into the Global Market”

Hsu King Long, XPEC Entertainment

“Never-ending Challenges - New Technologies and Future Prospect of XPEC Web Browser Games”

Yang Zhen Hua, XPEC Entertainment

“Thermaltake recommends PCs for games to be home-built”

Norifumi Sugita, Thermaltake Japan
6 Business Solution Area

Business Solution Area was first set up in the Tokyo Game Show 2007. In 2009, the Area featured 24 domestic and foreign exhibitors who displayed products and services to support game development and game-related business. Also, Sponsorship Sessions of TGS Forum were held in the Conference Room #301 of the International Conference Hall, for increased coordination with the Business Solution Area.

7 Sense of Wonder Night 2009

[Time and Date] : 17:00-19:30 on Friday, September 25
[Location] : Conference Room #201, International Conference Hall 2F
[Organizer] : Computer Entertainment Supplier’s Association (CESA)/Nikkei Business Publications, Inc. (Nikkei BP)
[Cooperator] : International Game Developers Association Japan Chapter (IGDA Japan)
[Supporter] : CRI Middleware Co., Ltd./ Microsoft Corporation/ Nintendo Co.,Ltd./ Sony Computer Entertainment Inc.

“Sense of Wonder Night (SOWN)” was started in 2008, in order to spotlight game developers who seek new possibilities by providing them with an opportunity to present their ideas. For the second SOWN, 65 entries from 18 countries were received. After strict and fair screening, 10 titles (6 from Japan, 4 from abroad) were selected for presentation to people in the game industry and journalists. The presentations can be viewed on the official website of SOWN (http://tgs.cesa.or.jp/sown/).
### 8. Public Relationship

8-1. Newspaper and Magazine Articles Printed, and TV and Radio Reports Broadcast

<table>
<thead>
<tr>
<th></th>
<th>TV</th>
<th>Radio</th>
<th>Newspaper (general, sports)</th>
<th>General Magazine</th>
<th>Specialized paper/magazine/web</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before the Show</td>
<td>0 (0)</td>
<td>0 (0)</td>
<td>56 (158)</td>
<td>86 (70)</td>
<td>461 (201)</td>
<td>603 (429)</td>
</tr>
<tr>
<td>During the Show</td>
<td>27 (73)</td>
<td>2 (8)</td>
<td>146 (178)</td>
<td>3 (0)</td>
<td>532 (705)</td>
<td>710 (964)</td>
</tr>
<tr>
<td>After the Show</td>
<td>12 (12)</td>
<td>0 (2)</td>
<td>37 (61)</td>
<td>27 (30)</td>
<td>139 (138)</td>
<td>215 (243)</td>
</tr>
<tr>
<td>Total</td>
<td>39 (85)</td>
<td>2 (10)</td>
<td>239 (397)</td>
<td>116 (100)</td>
<td>1132 (1044)</td>
<td>1528 (1636)</td>
</tr>
</tbody>
</table>

Notes: Figures in parentheses are numbers in 2008.

8-2. Number of Media During the Show Period, and Number of Reporters

#### Sep.24 (Thu)
- Web News / Web Magazine: 122
- Newspapers: 29
- News Agency: 12
- TV (Satellite TV / CATV): 11
- TV (Terrestrial): 38
- Editor / Freelance Writer / Others: 48
- Radio: 4
- Magazine: 158
- Overseas Media: 254

#### Sep.25 (Fri)
- Web News / Web Magazine: 471
- Newspapers: 73
- News Agency: 33
- TV (Satellite TV / CATV): 24
- TV (Terrestrial): 191
- Editor / Freelance Writer / Others: 121
- Radio: 6
- Magazine: 492
- Overseas Media: 507

#### Sep.26 (Sat)
- Web News / Web Magazine: 97
- Newspapers: 18
- News Agency: 3
- TV (Satellite TV / CATV): 6
- TV (Terrestrial): 24
- Editor / Freelance Writer / Others: 14
- Radio: 12
- Magazine: 152
- Overseas Media: 223

#### Sep.27 (Sun)
- Web News / Web Magazine: 33
- Newspapers: 10
- News Agency: 3
- TV (Satellite TV / CATV): 13
- TV (Terrestrial): 68
- Editor / Freelance Writer / Others: 21
- Radio: 7
- Magazine: 43
- Overseas Media: 388

#### Total
- Web News / Web Magazine: 676
- Newspapers: 1918
- News Agency: 593
- TV (Satellite TV / CATV): 519
- TV (Terrestrial): 1319
- Editor / Freelance Writer / Others: 245
- Radio: 189
- Magazine: 1727
- Overseas Media: 4339

8-3. Breakdown of Overseas Media

<table>
<thead>
<tr>
<th>Reported-to region</th>
<th>Number of Reporters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>23 46 24 14 107 84</td>
</tr>
<tr>
<td>Taiwan</td>
<td>29 16 16 2 63 35</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>22 14 5 0 41 29</td>
</tr>
<tr>
<td>South Korea</td>
<td>13 11 10 7 41 22</td>
</tr>
<tr>
<td>Singapore</td>
<td>4 1 1 0 6 5</td>
</tr>
<tr>
<td>Thailand</td>
<td>5 3 1 4 13 7</td>
</tr>
<tr>
<td>China</td>
<td>12 5 4 4 25 10</td>
</tr>
<tr>
<td>Philippines</td>
<td>2 0 0 0 2 1</td>
</tr>
<tr>
<td>France</td>
<td>50 33 28 5 116 63</td>
</tr>
<tr>
<td>U.K.</td>
<td>23 13 7 4 47 30</td>
</tr>
<tr>
<td>Italy</td>
<td>16 17 4 10 47 22</td>
</tr>
<tr>
<td>Netherlands</td>
<td>16 8 5 0 29 12</td>
</tr>
<tr>
<td>Germany</td>
<td>13 0 5 0 18 16</td>
</tr>
<tr>
<td>Spain</td>
<td>23 15 5 1 44 27</td>
</tr>
<tr>
<td>Belgium</td>
<td>3 1 0 0 4 3</td>
</tr>
<tr>
<td>Russia</td>
<td>5 5 4 3 17 5</td>
</tr>
<tr>
<td>Austria</td>
<td>2 1 2 0 5 5</td>
</tr>
<tr>
<td>Denmark</td>
<td>0 11 1 0 12 9</td>
</tr>
<tr>
<td>Norway</td>
<td>7 6 6 3 22 8</td>
</tr>
</tbody>
</table>

Notes: Figures in parentheses are numbers in 2008.
Outline of TOKYO GAME SHOW 2010

Period  Business Day* / Sep.16 (Thursday) - Sep.17 (Friday), 2010
*Admission is limited to the press, industry participants and those with invitations.

Open to the Public / Sep.18 (Saturday) - Sep.19 (Sunday), 2010
From 10:00 a.m. to 5:00 p.m.

Venue  Makuhari Messe
2-1 Nakase, Mihama-ku, Chiba-city, Chiba Prefecture  JAPAN

Organizer  Computer Entertainment Supplier's Association (CESA)
http://www.cesa.or.jp/english/

Co-Organizer  Nikkei Business Publications, Inc. (Nikkei BP)
http://www.nikkeibp.com/

Expected number of exhibitors  180
Expected booth units  1,500
Expected visitors  180,000

More Information..... http://tgs.cesa.or.jp/english/