



PAUL JACKSON ESQ., OBE DOVETAIL GAMES

100% STEAM.
HOW DOVETAIL GAMES STEAM-ONLY
POLICY HAS BUILT THE FOUNDATION FOR
A NEW TYPE OF VIDEOGAME BUSINESS



- Formed as *Railsimulator.com* in 2009
- Developer and publisher of the World's **#1** Train Simulator
- **+60** employees across three UK sites





EXECUTIVE SUMMARY

- Steam provides key technology for all our users
- It allows us to focus on what we do best
- Our relationship is founded on mutual trust
- A service that gives our customers confidence



OUR MODEL

It's all about **DLC**

...all 147 pieces of it

OUR MODEL

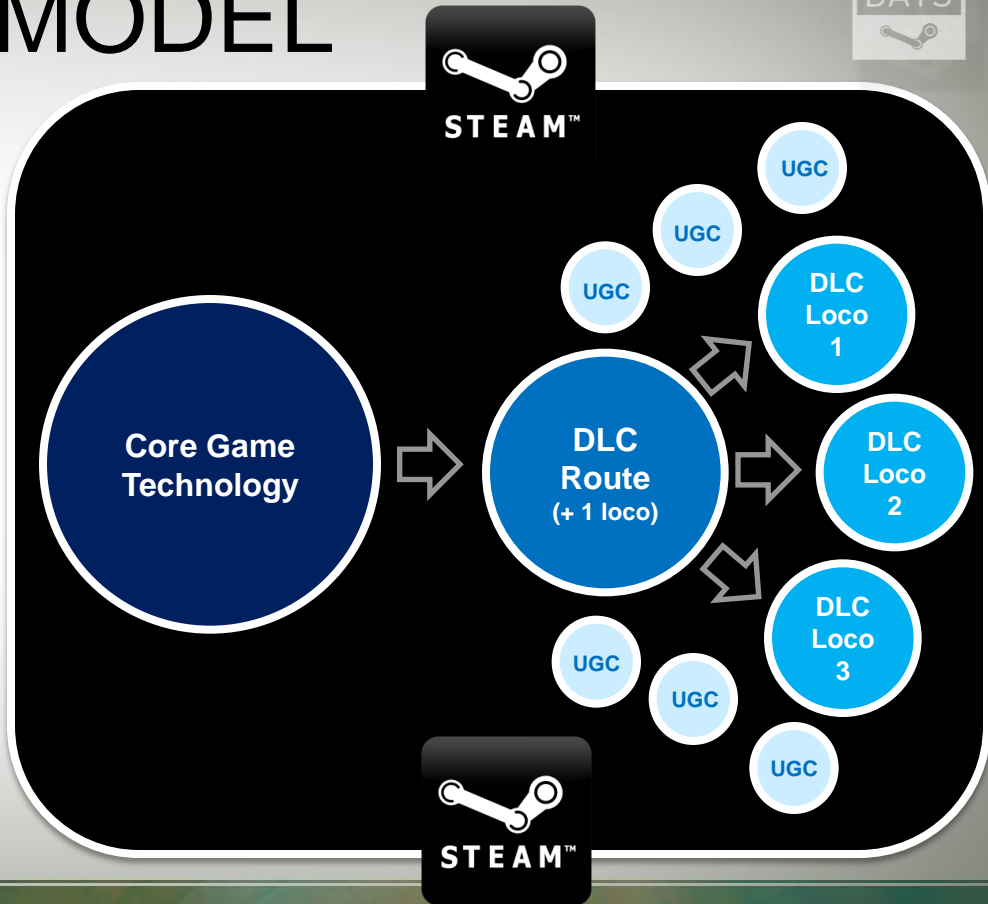
To buy everything we sell will cost

\$3,285

...but that's not how we run our business

OUR MODEL

- 'Core' provides the fundamental technology and initial gameplay experience. It is upgrade to *existing players for free*, via a major annual upgrade
- This experience is greatly expanded via the purchase of additional routes and locomotives
- Our players can then create - and even sell - their own content within a managed environment
- Everything we sell comes with a Steam 'wrapper'



CRAFTING HOBBY ENTERTAINMENT

- Our product is more than a game – it's a **Hobby**
- Our customers are frequent players, have specialized interests and many have an extensive knowledge of railways and trains
- As a result, our offering needs to be comprehensive, which leads to complexity
- Steam provides the powerful technology that allows us to manage this complexity safely



WHY STEAM IS OUR SOLUTION

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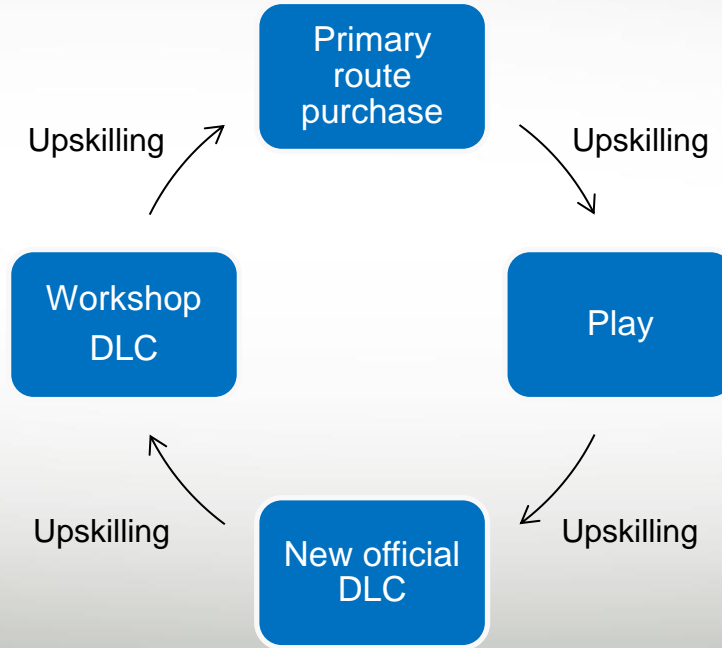
1. It provides key technology for all our users

- It enables us to deliver a common platform through regular upgrading
- Customer ownership of a network of DLC
- Sharing and uploading tools that always work
- Anti-piracy measures
- World-class retailing platform



THE LONG TAIL

THE PLAYER EXPERIENCE LOOP



THE LONG TAIL

Case Study: Isle Of Wight Route

Cumulative Sales Since Launch
2009-2013

CUMULATIVE SALES

Q1 Q2 Q3 Q4 Q5 Q6 Q7 Q8 Q9 Q10 Q11 Q12 Q13 Q14 Q15 Q16 Q17 Q18

- Content that sells year after year
- Workshop content keeps the core offering fresh
- Regular re-promotion keeps it in the spotlight

THE POWER OF CREATIVITY

THE POWER OF WORKSHOP



3,700

Workshop
scenarios

4,000

hours of
'free'
Workshop
play

1.5

MILLION

Workshop
downloads



STEAM
WORKSHOP

WHY STEAM IS OUR SOLUTION

2. It allows us to focus on what we do best



- ✓ Processing customer payments
- ✓ Compliance with local legislation
- ✓ Stock issues
- ✓ Hosting servers
- ✓ Managing large amounts of customer data



- ✓ Funding our own development
- ✓ Catering to the diverse needs of our customers – the right content, at the right time, at the right price
- ✓ Executing our marketing

WHY STEAM IS OUR SOLUTION

3. Mutual trust

- A strong relationship built over time
- Timely payments
- Regular communication
- Welcome and honest advice



WHY STEAM IS OUR SOLUTION

4. Customer Confidence

- Our offering is complex, but with Steam as our back-end we can offer the breadth and range our customers require
- It also offers a reliable and sustainable service that our customers can depend on
- It is essential to the on-going development and delivery of our hobby



WHY STEAM IS OUR SOLUTION

TECHNOLOGY

FOCUS

TRUST

CONFIDENCE





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QUESTIONS?