

THE PC PERIPHERAL MARKET – 2015



2015 FREE REPORT

This version of the report focuses on the Gaming Mice market
For more, contact Cooper Waddell at solutions@eedar.com



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CONTEXT IS EVERYTHING

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REPORT TERMINOLOGY

GENERAL GAMING TERMS

PC GAMER: User who plays client-based titles on the PC. For this study, EEDAR discounted players who primarily played social, browser-based titles such as *Travian* or *FarmVille*.

CONSOLE: A device with the primary purpose of playing video games. The last generation of consoles included the PS3, Xbox 360, and Wii while the current generation includes the PS4, Xbox One, and Wii U.

GENERAL PC: A PC that is mostly used for purposes outside of gaming.

GAMING PC: A PC with technical specifications aimed at delivering a superior gaming experience.

GENERAL LAPTOP: A laptop PC that is mostly used for purposes outside of gaming.

GAMING LAPTOP: A laptop PC with technical specifications aimed at delivering a superior gaming experience.

PLAYER VS PLAYER (PVP): A mode where the player competes against other players.

PLAYER VS ENVIRONMENT (PVE): A mode where players face off against the computer AI or environment. The player can be by themselves or in a cooperative situation with other users.

RANKED PVP: A mode where the player combats other players and the battle's outcome affects ladders or a player's competitive rank.

FREE-TO-PLAY (F2P): A title that can be played for free and does not require monetization for continued engagement. Microtransactions within F2P titles are common. For this report, PC F2P excludes games that do not require a client download, such as browser-based and Facebook games.

MULTIPLAYER ONLINE BATTLE ARENA (MOBA): A genre of gaming that typically involves players choosing a champion and then playing a team-based, 5v5 match with the ultimate goal of destroying an opponent's base. *League of Legends* and *Dota 2* are examples.

TRADING CARD GAME (TCG): A game where players create a customized deck of cards that battle against an opponent's deck. An example would be *Hearthstone*.

REPORT TERMINOLOGY

THE PC PERIPHERAL MARKET – 2015

PERIPHERAL TERMS

GAMING PERIPHERAL: Peripherals designed for the express purpose of gaming. Often include gaming optimization features, such as programmable buttons or additional precision, to deliver a superior gaming experience.

GENERAL PERIPHERAL: Peripherals designed for everyday use. These peripherals are not marketed as gaming accessories.

GAMEPAD CONTROLLER: A controller that is or mimics a console controller. An alternate control option for those who prefer console controls.

AESTHETICS: A term to describe the visual appeal of a peripheral.

PERFORMANCE: How well a peripheral performs for its overarching goal. For headsets, this involves how they sound while keyboards and mice relate to precision of input control.

VALUE: Describes the balance between the quality of the item and the price.

POINT OF PURCHASE TERMS

ONLINE RETAILER: A website or App that sells items online, such as Amazon.com or Bestbuy.com.

PHYSICAL RETAILER: A retailer that the consumer physically interacts with, such as a Best Buy store.

ONLINE PORTAL: A portal for digital gaming purchases, such as Steam or Origin.

MANUFACTURER'S WEBSITE: The website for the manufacturer or brand's website, such as Logitech.com.

ESPORTS TERMS

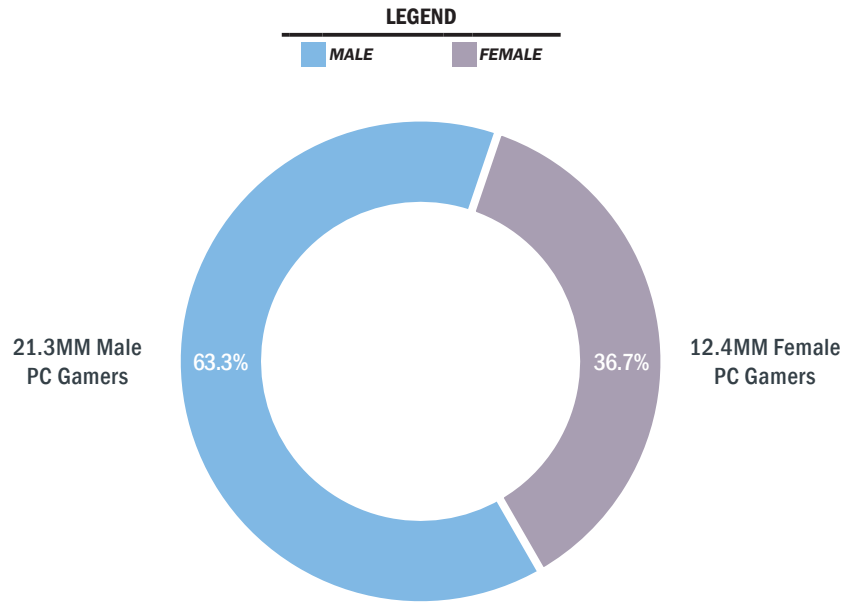
ESPORTS: A term for the competition between players in a video game setting. eSports, much like professional athletic sports, pit players of the highest skill levels against one another. Various organizations have constructed eSports tournaments where fans can either partake or watch professionals compete.

THE PC GAMER - DEMOGRAPHICS

DEMOGRAPHICS

THE PC PERIPHERAL MARKET - 2015

PC GAMER GENDER SPLIT
[NA][2014][CLIENT-BASED GAMERS][18+]

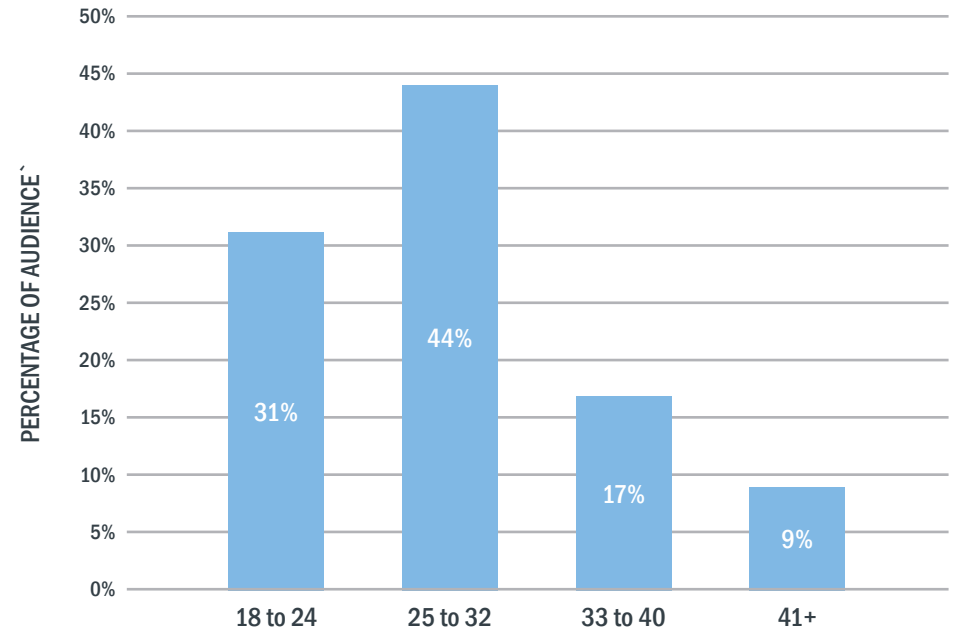


SOURCE: EEDAR

The majority of the PC market is male, though women constitute a significant portion of the user base. In North America, the adult PC gamer population is 63% male and 37% female. With roughly 34MM PC gamers in NA, this translates to 21.3MM men and 12.4MM women.

In comparison, core console owners (Xbox and PlayStation) follow a similar split at 63% male while the mobile market boasts a majority of women, at 56%, and F2P PC titles skew heavily male, at 72% of the audience.

PC GAMER AGE BRACKETS
[NA][2014][CLIENT-BASED GAMERS][18+]

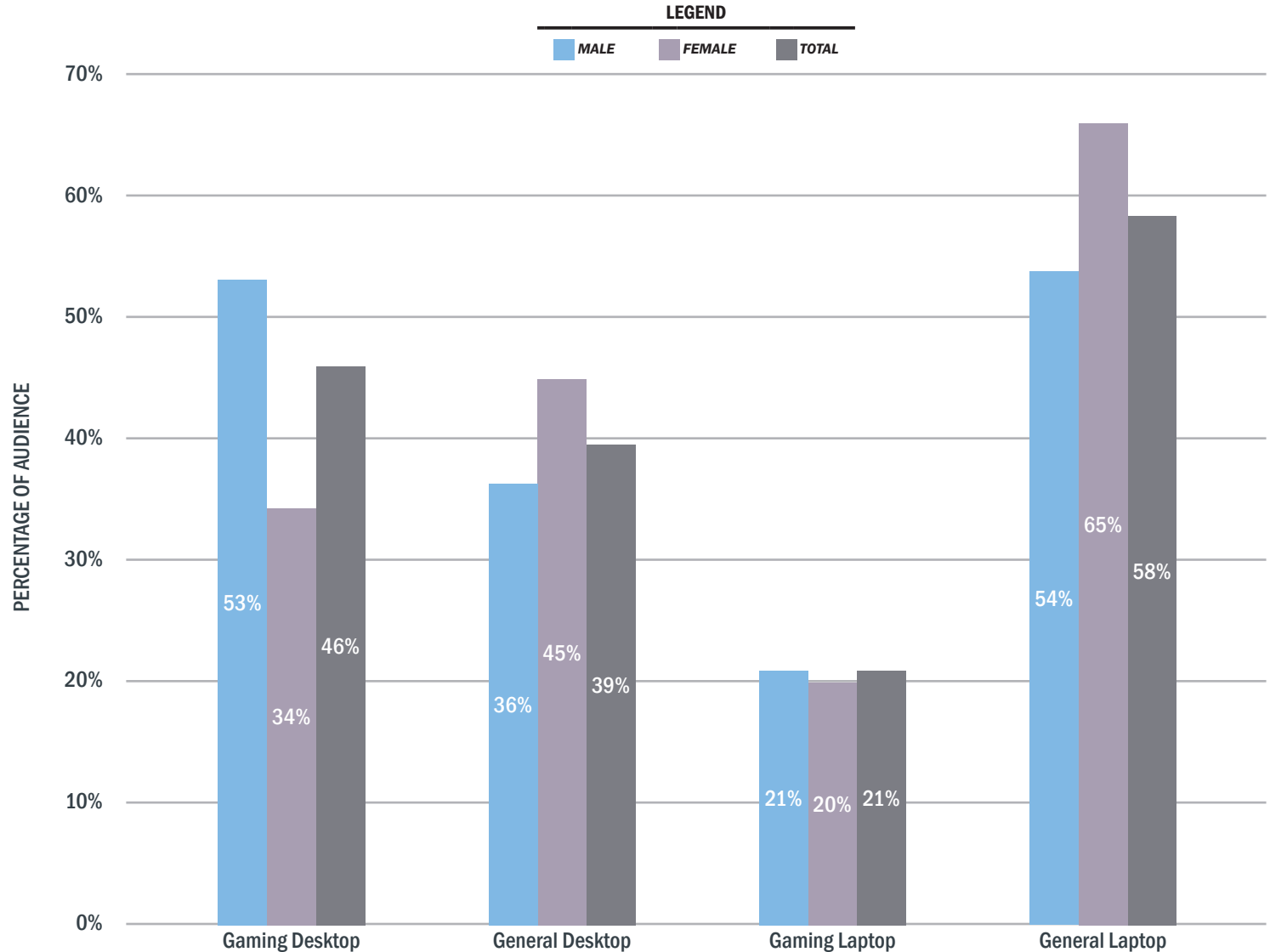


SOURCE: EEDAR

The average age of the adult PC gamer is 29.2. The largest age bracket, at nearly half of the audience with 44%, is between the ages of 25 and 32. The second largest bracket were users aged 18 to 24, which comprised 31% of the population. Combined, 75% of the market is below the age of 33.

PC HARDWARE OWNERSHIP

[NA][2014][CLIENT-BASED GAMERS][18+]



In terms of the type of PC and consumer ownership, the General Laptop was the most ubiquitous computing device. Nearly 60% of the audience, or 19.5MM people, owned an everyday laptop. **The second most popular item was actually a Gaming Desktop, as nearly half of PC gamers have a computer dedicated to gaming.** General Desktops were still fairly popular, at a roughly 40% ownership rate, while Gaming Laptops were rarer; only about 20% of the population, or 7MM people, owns one.

Generally, females were more likely to play PC games on a general computer with multiple functions. Women were roughly 20% more likely to own a General Desktop or Laptop than their male counterparts. Conversely, men over-indexed in terms of owning Gaming Desktops that were dedicated to video games; 11MM men own a Gaming Desktop compared to 4MM women.

SOURCE: EEDAR

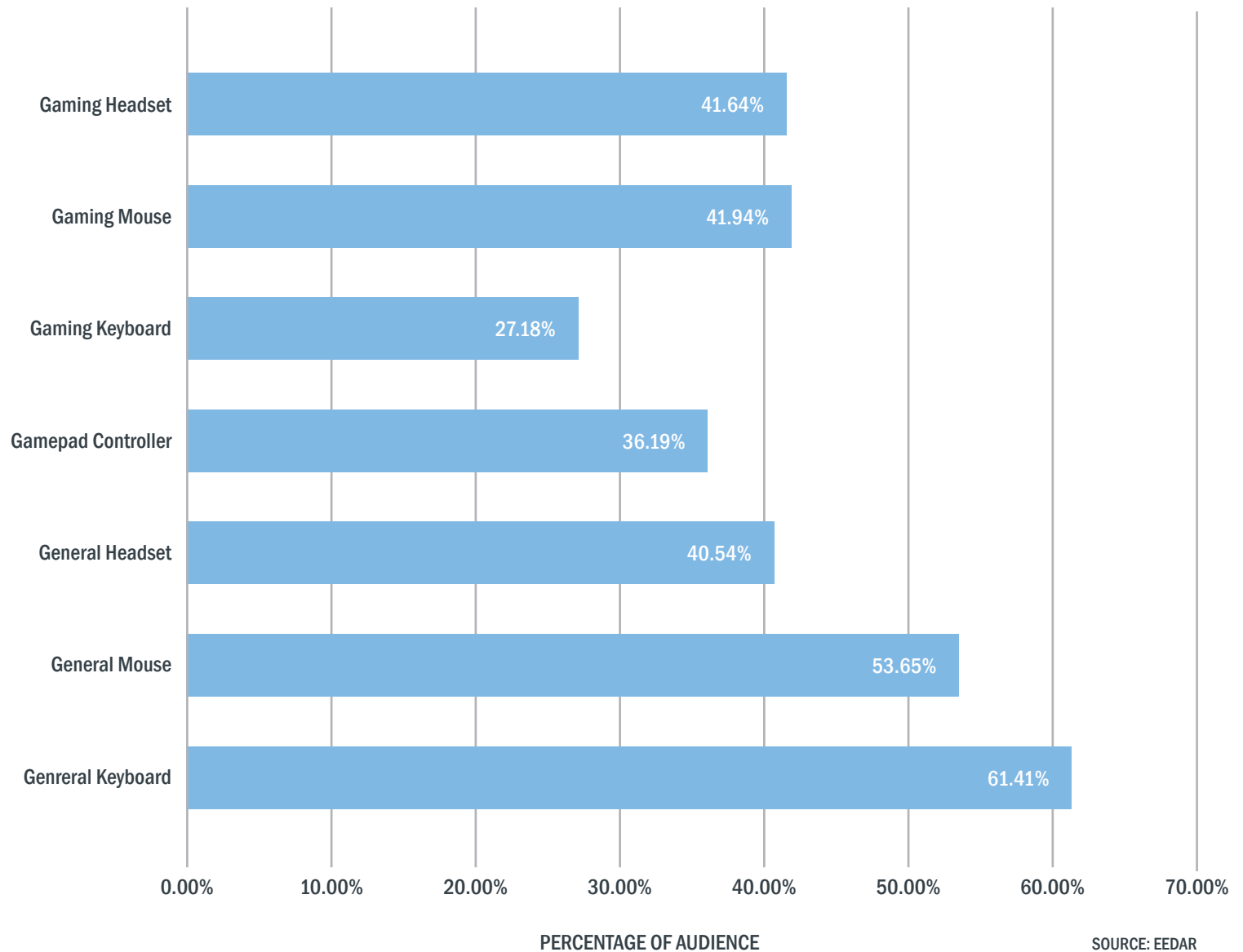
When playing a video game, the most commonly used peripherals are General Keyboards. Some 61% of the audience, or 21MM people, use General Keyboards compared to only 9MM that have Gaming Keyboards. Overall, Gaming Keyboards were the least prevalent peripheral, as even Gamepad Controllers (at 36% of the audience) were used more often.

The second and third most popular peripherals were both mice: 54% of users played with a General Mouse while Gaming Mice were used by 42%. A similar number of people, roughly 14MM, also used Gaming Headsets.

In terms of headsets, the amount of consumers who either used a Gaming Headset or a General Headset were almost at parity with 14MM and 13.7MM people, respectively.

PERIPHERAL USAGE DURING PC GAMING

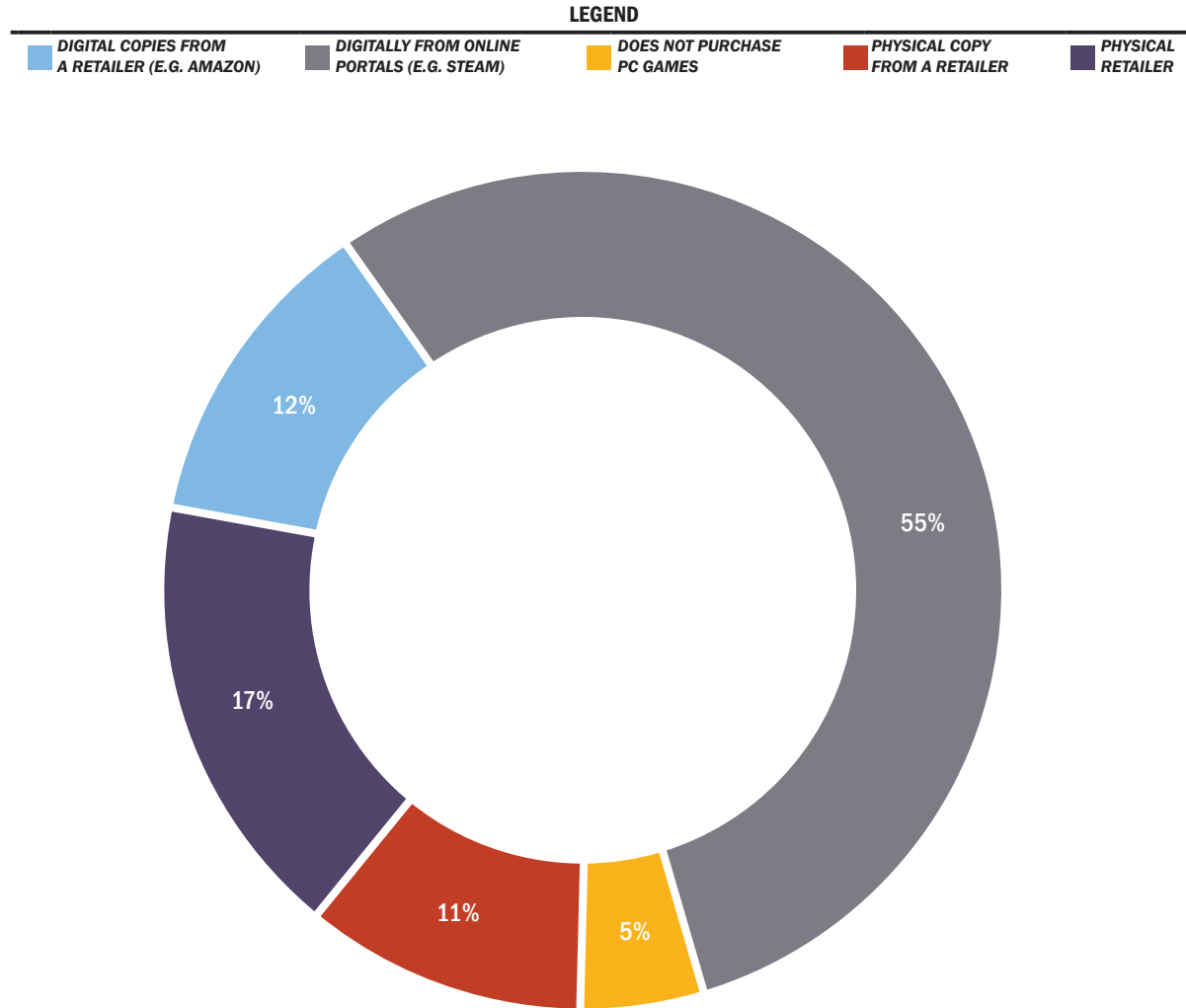
[NA][2014][CLIENT-BASED GAMERS][18+]



SOURCE: EEDAR

MOST FREQUENT CHANNEL FOR PC GAMING PURCHASES

[NA][2014][CLIENT-BASED GAMERS][18+]



PC gamers most frequently use Digital Online Portals (such as Steam, Origin, etc.) as their primary portal for purchasing PC titles. Online merchants were the most used, preferred by 55% of the audience or roughly 18.5MM users. The next most used channels were dramatically smaller as Physical Retailers were only at 17%.

Some 12% primarily bought Digital Copies from an Online Retailer such as Amazon while 11% bought Physical Copies from an Online Retailer.

Only about 5% stated they Did Not Purchase PC games.

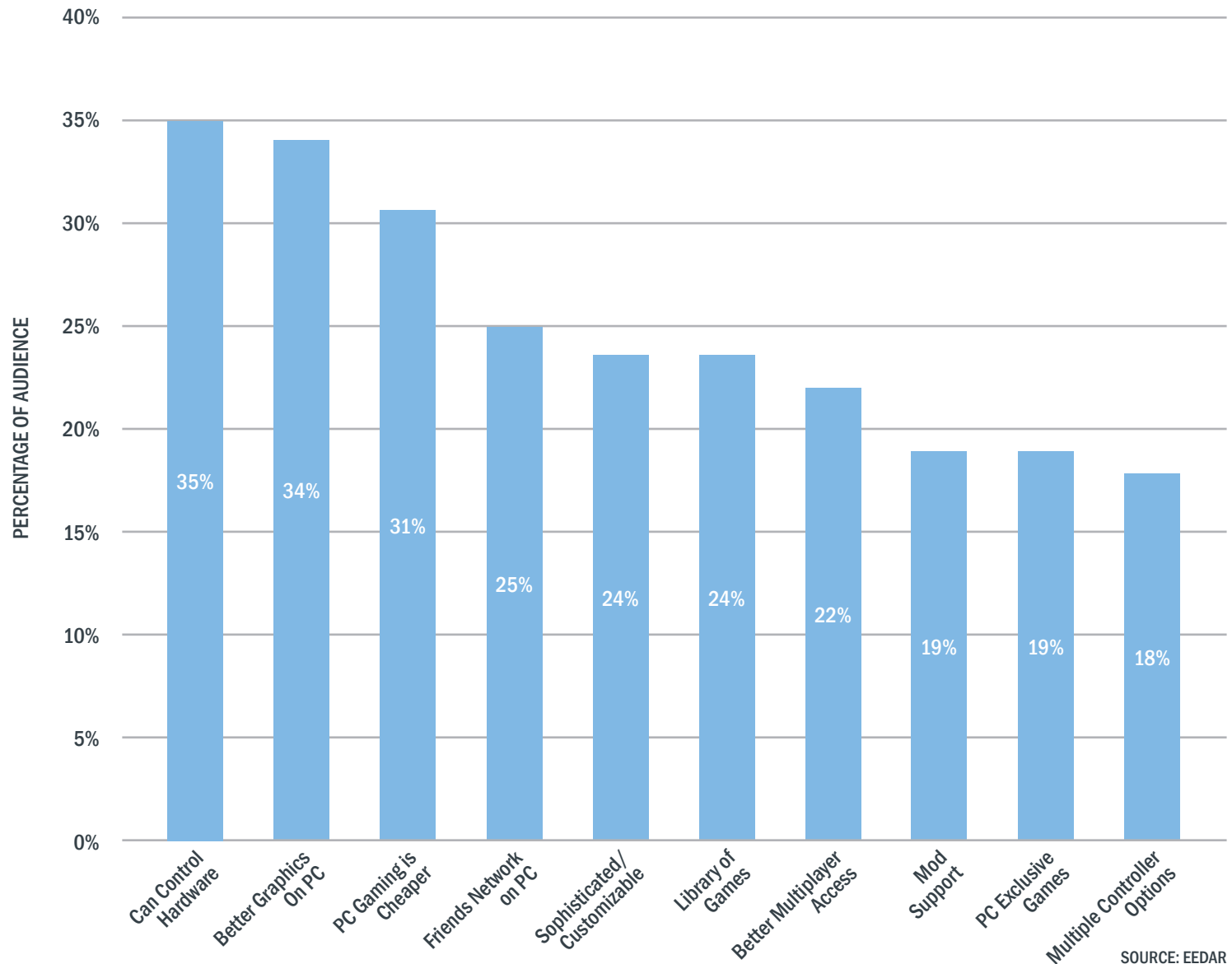
SOURCE: EEDAR

When examining the reasons for a person's preference of PC gaming over consoles, the three most cited were the ability to Control Hardware, PC Graphical Superiority, and PC Gaming is Cheaper. These three reasons all resonated with over 30% of players who preferred PC gaming.

The next most commonly cited reasons were having Friends on the PC Network, more Options for Gameplay Controls, and the extensive Library of Games. PC gamers don't have to worry about backwards compatibility, which is often a point of distress when consoles change generations.

REASONS FOR PREFERRED PLAY ON PC VERSUS CONSOLES

[NA][2014][PC][CLIENT-BASED GAMERS][18+]



SOURCE: EEDAR

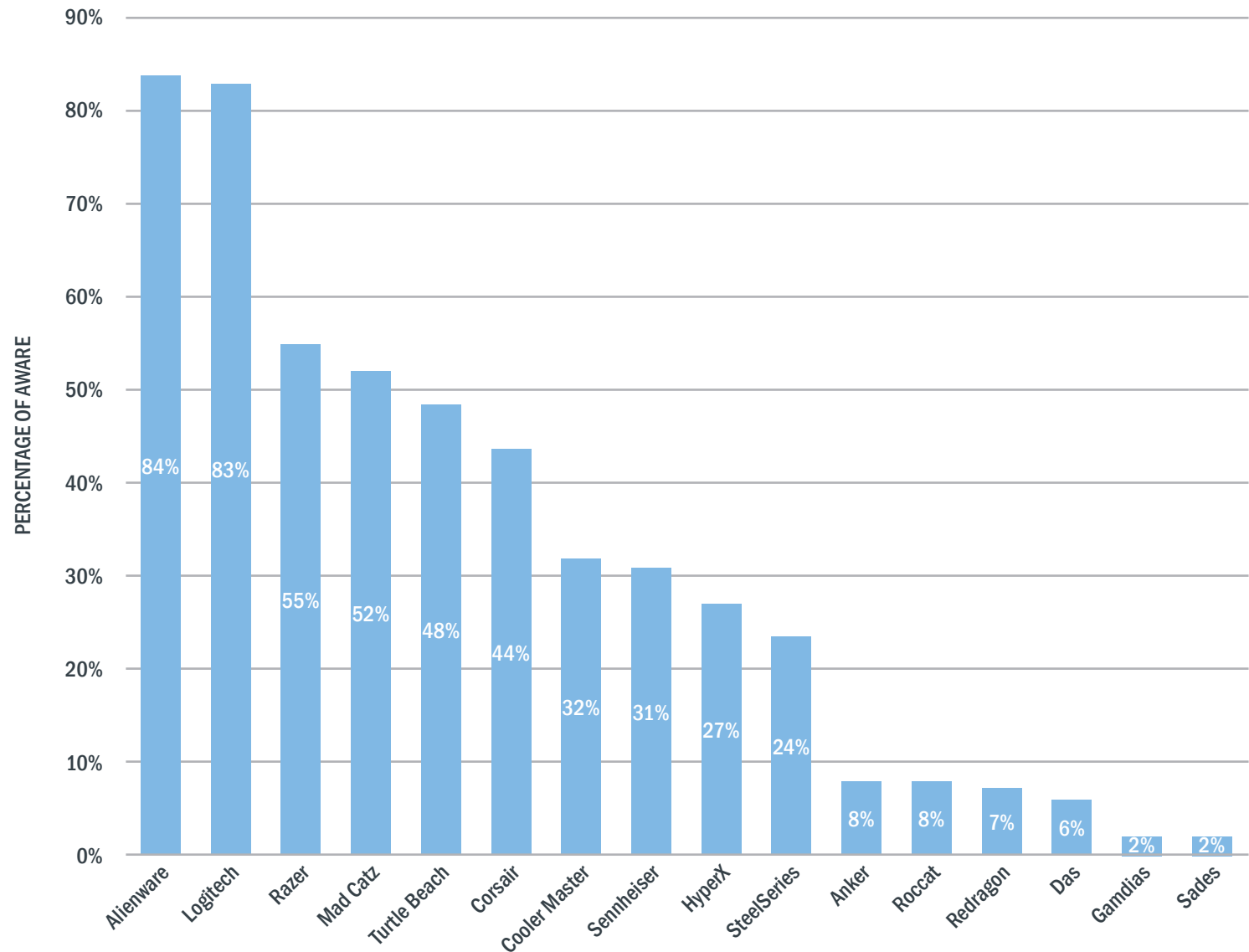
By far, the two most recognizable brands for gaming peripherals are Alienware and Logitech.

More than 80% of the audience are aware of the two brands, while the next closest competitors (Razer and Mad Catz) were recognized by only 50% of the PC gaming audience. After SteelSeries (recognized by 24% of the audience), there is a significant drop off to Anker at only 8% awareness.

Within the top 10, a number of the most recognizable brands are actually known primarily for their hardware. Companies such as Alienware, Corsair, Cooler Master, and HyperX are mostly recognized for laptops and PC components. Meanwhile, Sennheiser and Turtle Beach are ubiquitous within the overall headset market.

PC GAMER AWARENESS OF PERIPHERAL BRANDS

[NA][2014][CLIENT-BASED GAMERS][18+]



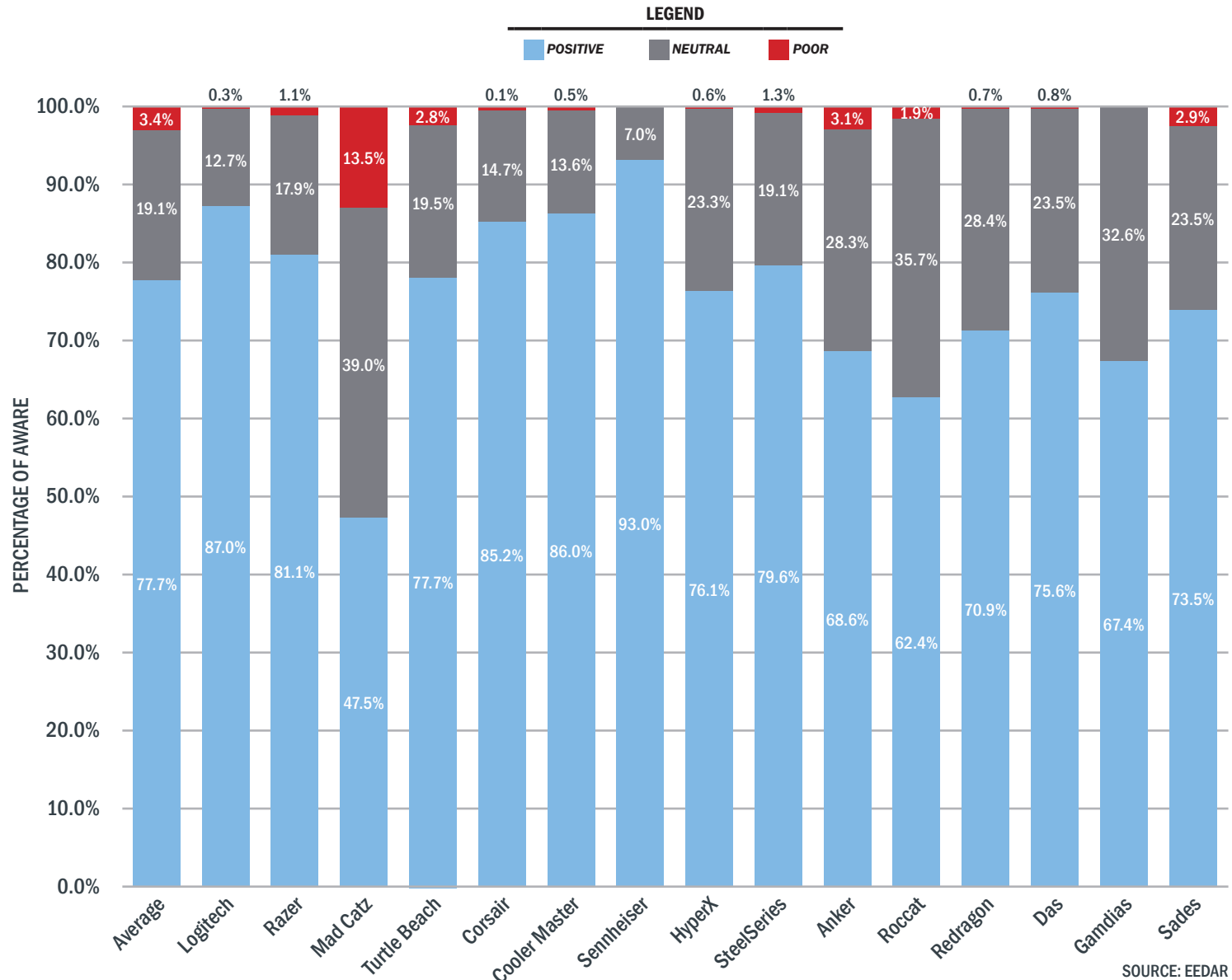
SOURCE: EEDAR

PC gamers were generally positive when rating the quality of peripherals. On average, for peripherals they were familiar with, 78% of PC gamers rated the brand's quality as good or better. Some 19% had neutral opinions while only 3% were negative. EEDAR notes that, generally, the more well-known brands also had higher quality ratings from consumers. Out of the top 8 most recognized brands, only one had a positive quality rating below 75%. Of the 8 least recognized brands, 5 had positive ratings below 75%.

The peripheral brands that significantly over-performed the average rankings were Sennheiser, Logitech, Corsair, and Cooler Master. The brand that was viewed most negatively in terms of quality was Mad Catz, which received positive quality sentiment from only 47% of consumers while no other brand had less than a 60% quality approval.

CONSUMER VIEWS ON PERIPHERAL QUALITY

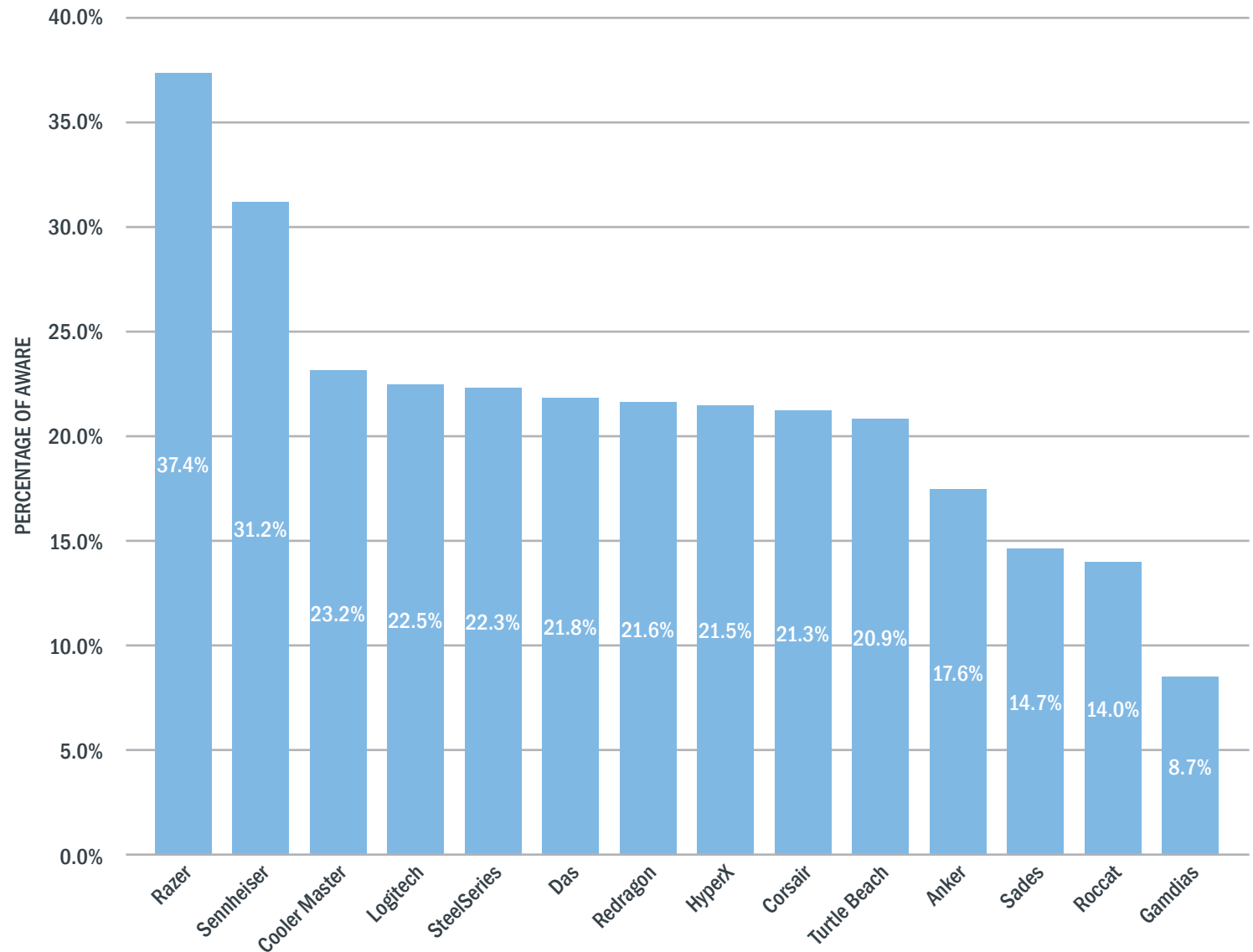
[NA][2014][PC][CLIENT-BASED GAMERS][18+]



SOURCE: EEDAR

MOST INNOVATIVE PERIPHERAL BRANDS

[NA][2014][PC][CLIENT-BASED GAMERS][18+]



Consumers viewed Razer and Sennheiser as the most Innovative brands. When PC gamers who were already familiar with the brand were asked, 37% of users associated Innovation with Razer while 31% said the same of Sennheiser. No other brand was viewed as Innovative by more than 25% of its audience.

The four brands that were viewed as the least Innovative were Anker, Sades, Roccat, and Gamdias. Anker and Sades both target entry-level consumers, which leaves little room for innovative products, while Roccat and Gamdias are relatively new companies that have mostly followed in the steps of more established gaming peripheral makers.

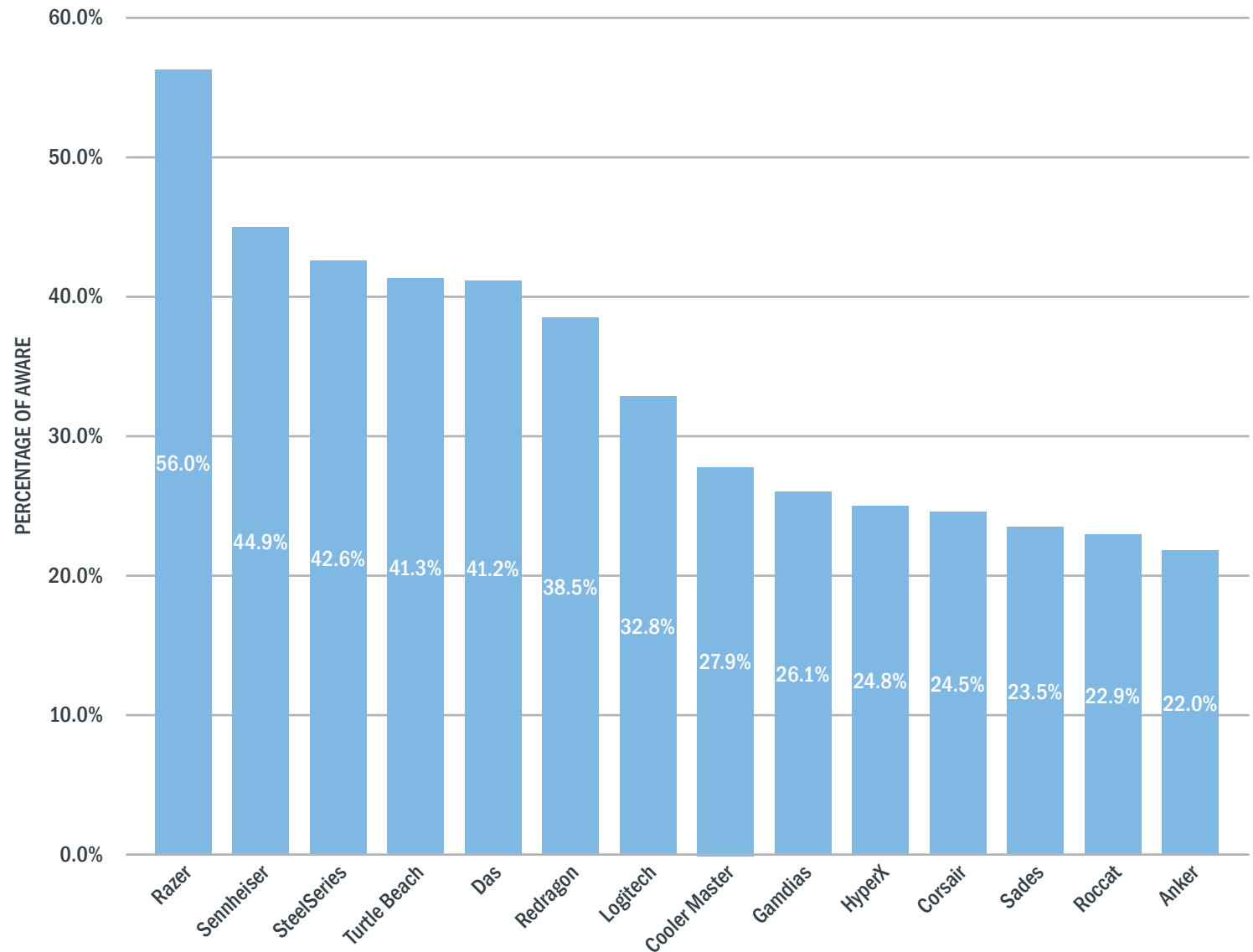
SOURCE: EEDAR

PC gamers most strongly associated Aesthetics, or how a product looks, with the Razer brand, as 56% of users believed that the company created visually arresting peripherals. The next five brands were tied as roughly 40% of their audience associated Aesthetics with Sennheiser, SteelSeries, Turtle Beach, Das, and Redragon.

A drop-off occurred afterwards, as only about a quarter of their respective audiences associated strong Aesthetics with Gamdias, HyperX, Corsair, Sades, Roccat, and Anker.

BEST AESTHETICS PERIPHERAL BRANDS

[NA][2014][PC][CLIENT-BASED GAMERS][18+]



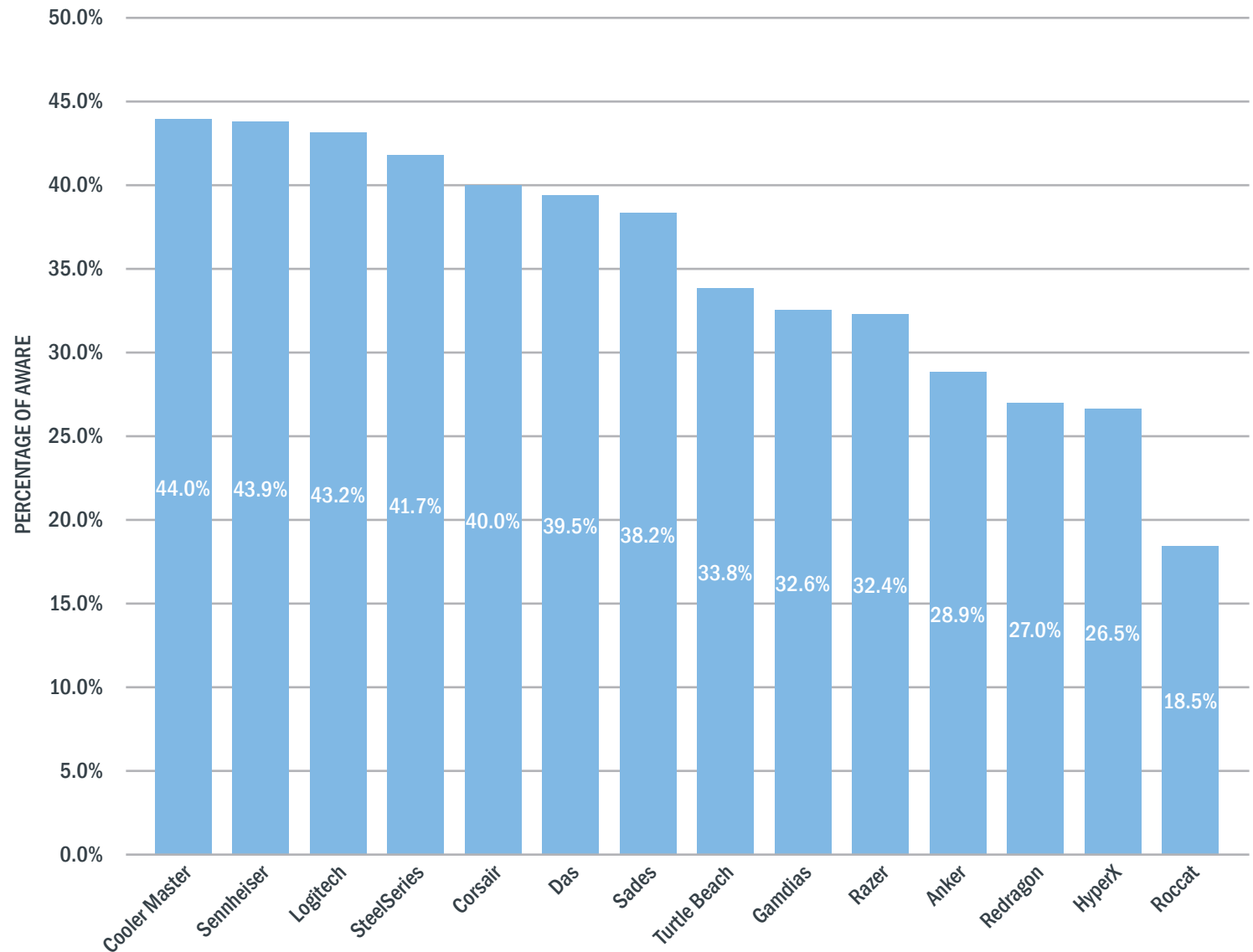
SOURCE: EEDAR

MOST DURABLE PERIPHERAL BRANDS

[NA][2014][PC][CLIENT-BASED GAMERS][18+]

Consumers believed the most Durable brand was Cooler Master. Overall though, there was parity concerning the top brands. The top seven brands all had roughly 40% of their audiences consider them Durable.

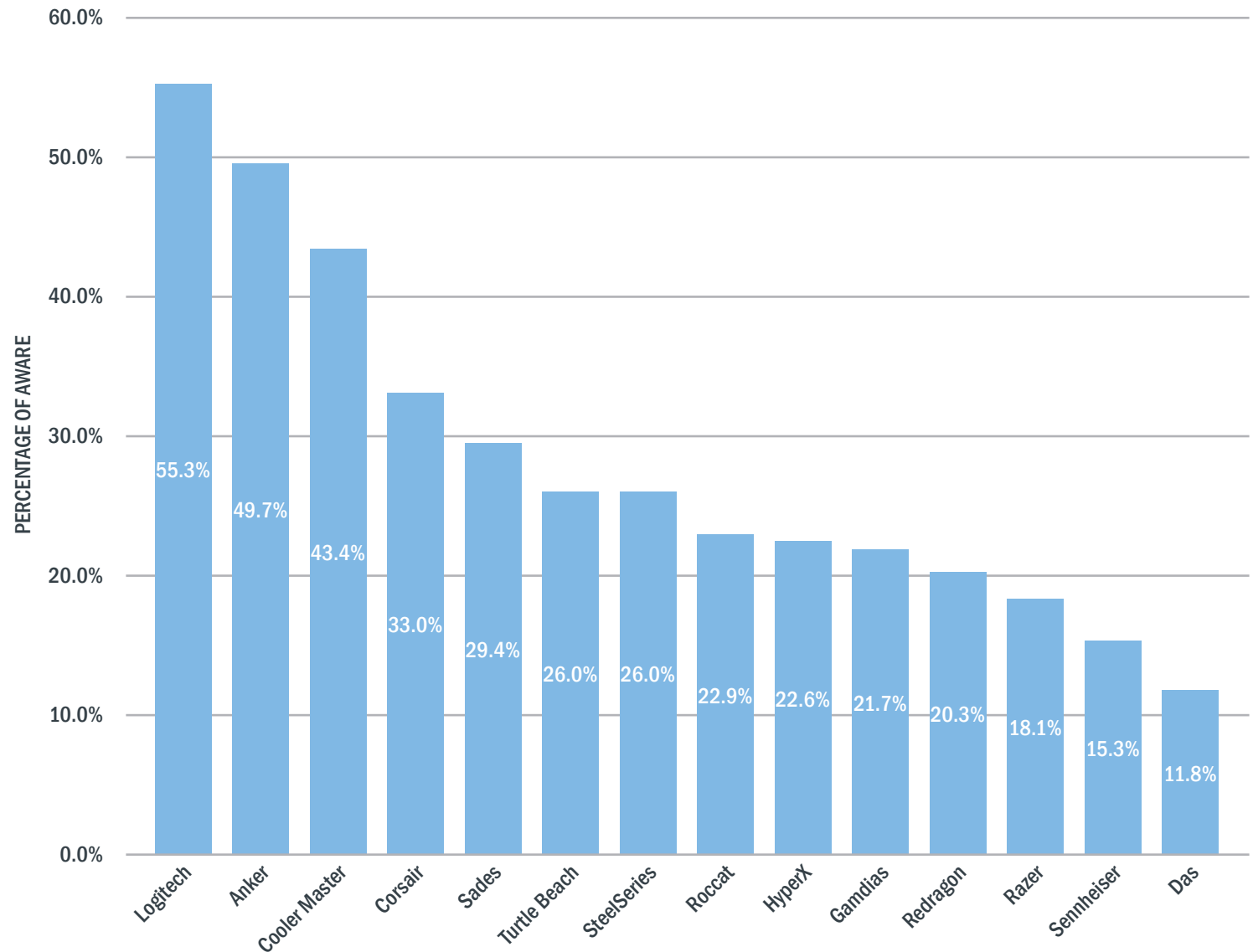
Roccat, by a significant margin, was considered the least Durable while HyperX, Redragon, and Anker were also in the bottom 4.



SOURCE: EEDAR

MOST AFFORDABLE PERIPHERAL BRANDS

[NA][2014][PC][CLIENT-BASED GAMERS][18+]



Consumers, at roughly 55% of the audience, considered Logitech to the most Affordable brand followed by Anker, Cooler Master, and Corsair. All four brands offer entry-level peripherals that are inexpensive, though Logitech, Cooler Master, and Corsair also have a wide array of items that target heavier spenders.

In comparison, the three brands that were viewed as least Affordable were Razer, Sennheiser, and Das. All three generally target the mid to high-end consumer and also pride themselves on quality.

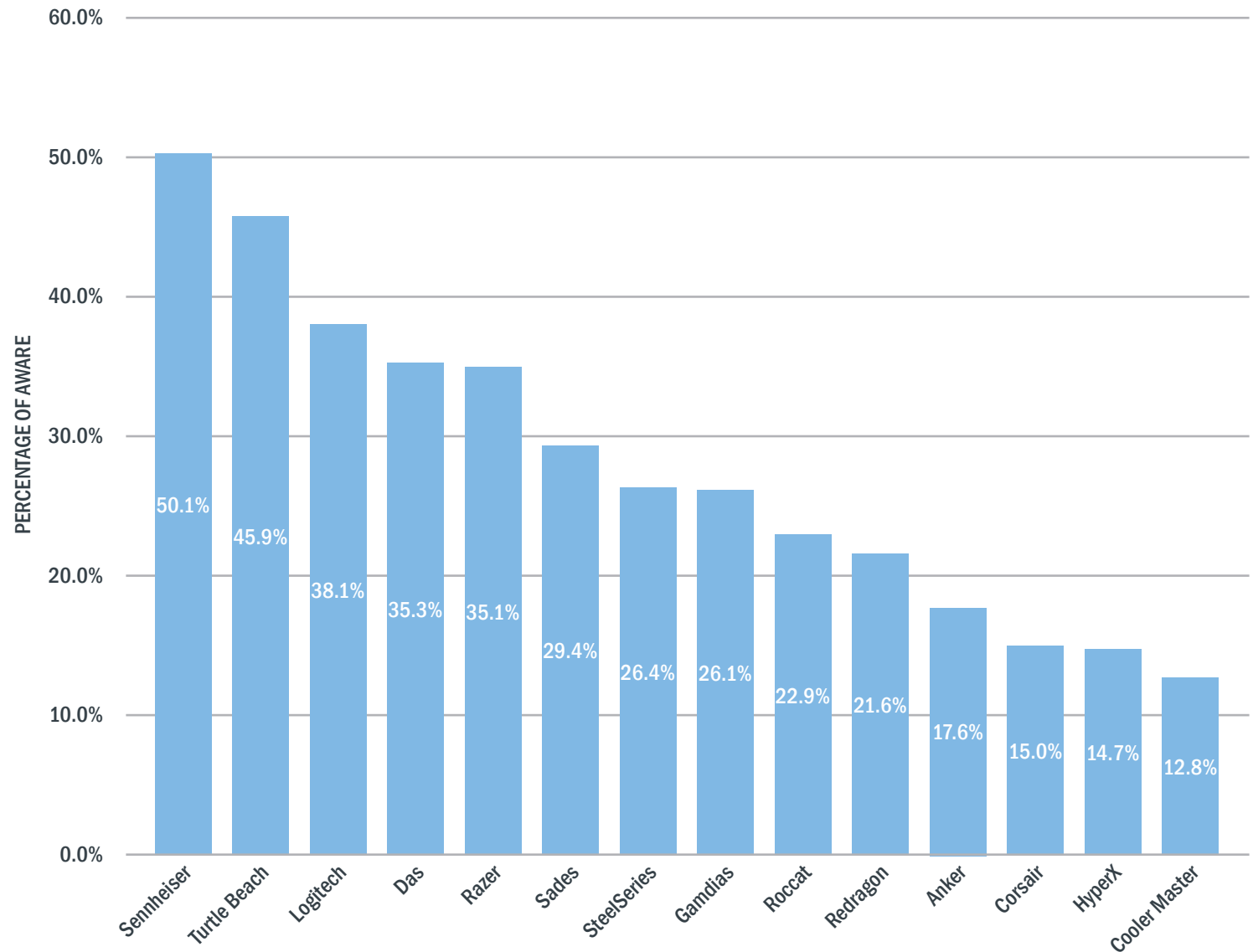
SOURCE: EEDAR

MOST COMFORTABLE PERIPHERAL BRANDS

[NA][2014][PC][CLIENT-BASED GAMERS][18+]

The two top brands for Comfort were Sennheiser and Turtle Beach. Both are primarily companies that manufacture audio peripherals, which makes Comfort a key attribute. Logitech, Das, and Razer were the next three brands most commonly associated with Comfort.

Conversely, the bottom four brands were Anker, Corsair, HyperX, and Cooler Master. All four are better known for their PC hardware or accessories in other areas, which may explain their low Comfort rankings in relation to PC gaming peripherals.



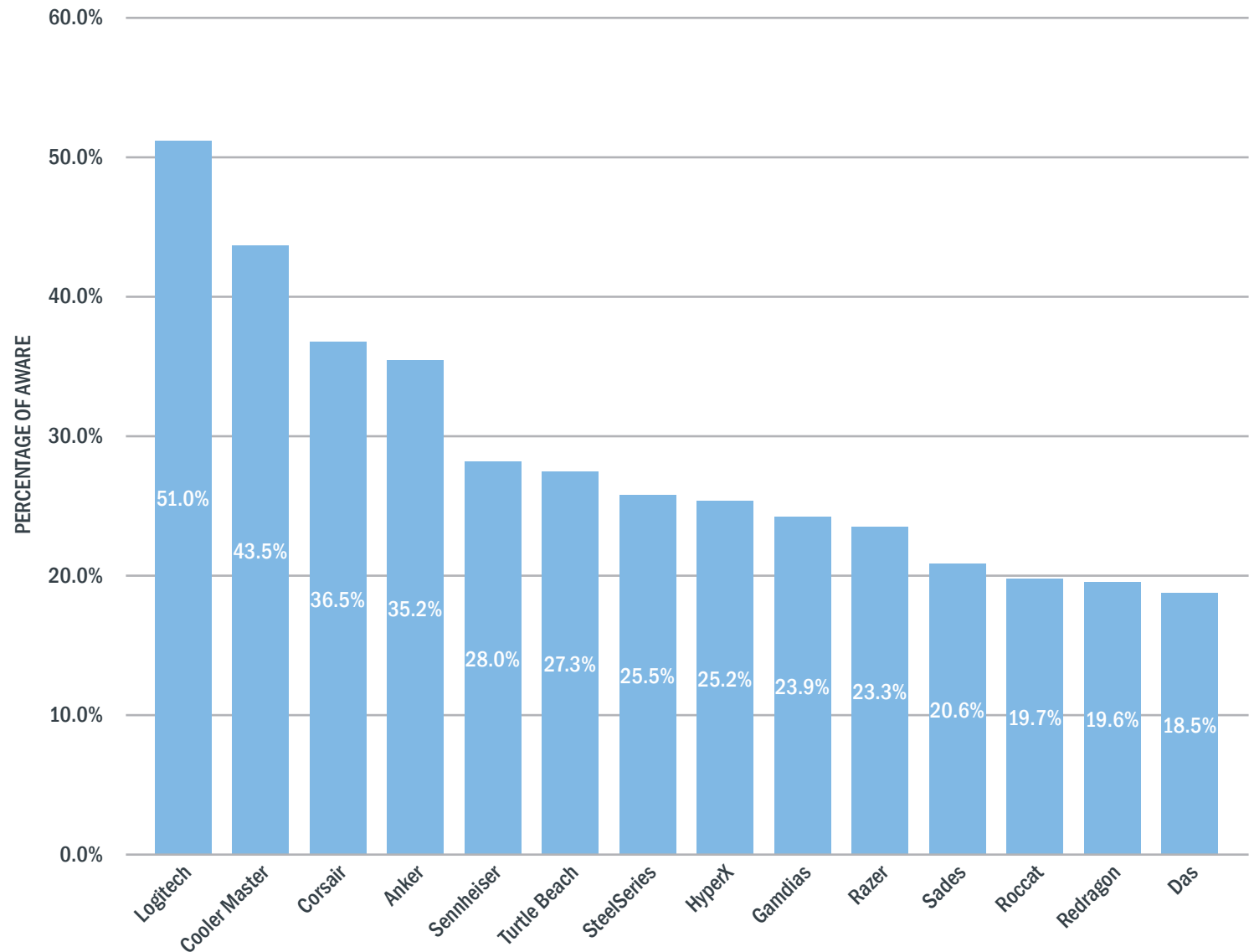
SOURCE: EEDAR

BEST VALUE PERIPHERAL BRANDS

[NA][2014][PC][CLIENT-BASED GAMERS][18+]

Value is defined as providing significant returns for the paid price. Logitech, with its wide selection of entry-level peripherals and strong quality, was the brand most associated with Value. More than half of the PC gamers who are familiar with Logitech also believed the peripheral manufacturer provided good Value while the next two closest, Cooler Master and Corsair, were at 44% and 37%, respectively.

In comparison, the brand least associated with Value was Das Keyboards. The company specializes in creating high-quality mechanical keyboards that are often fairly pricey. Yet consumer sentiment generally believed that the high cost wasn't worth the price, thus leading to a low Value rating.



SOURCE: EEDAR

PRIMARY PRODUCT LINE:

Headsets, Mice, & Keyboards

TARGET AUDIENCE:

Mid to High-End

BEST KNOWN PRODUCTS:

Razer DeathAdder & Naga Mouse, BlackWidow Keyboard

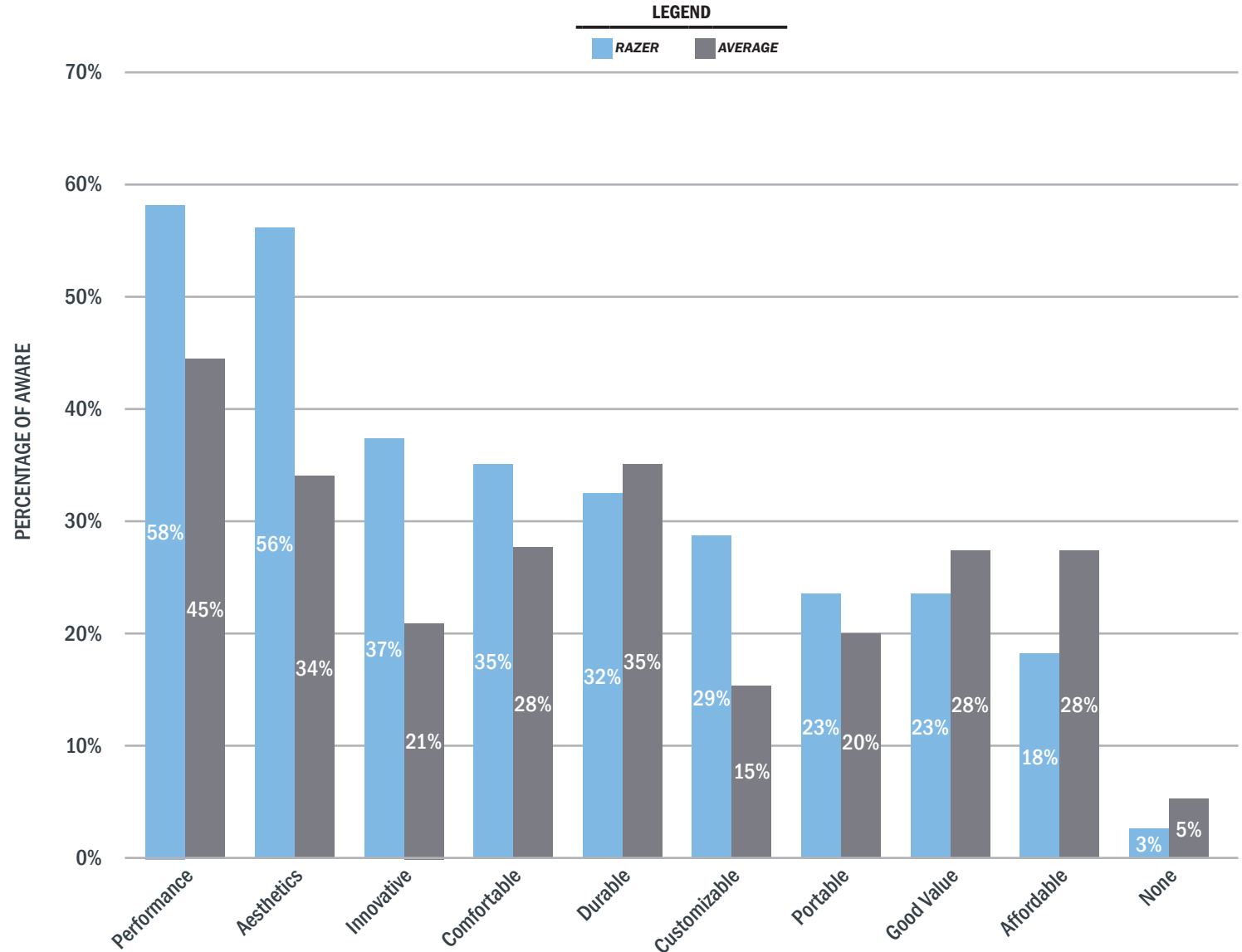
Razer is one of the best-known gaming peripheral brands, and is responsible for perhaps the most popular gaming mouse in the Razer DeathAdder. The stylish brand sports a wide variety of products for all three peripheral types.

Consumers were generally highly complimentary of Razer products, with the three top descriptors being Performance, Aesthetics, and Innovation. In nearly every category, Razer outperformed the competition and the brand was particularly noted for its strong Customization options.

Yet Razer products generally trend towards the more expensive end of the spectrum, and consumers felt that competitors were generally more Affordable.

TOP DESCRIPTORS FOR RAZER PRODUCTS

[NA][2014][PC][CLIENT-BASED GAMERS][18+]



SOURCE: EEDAR

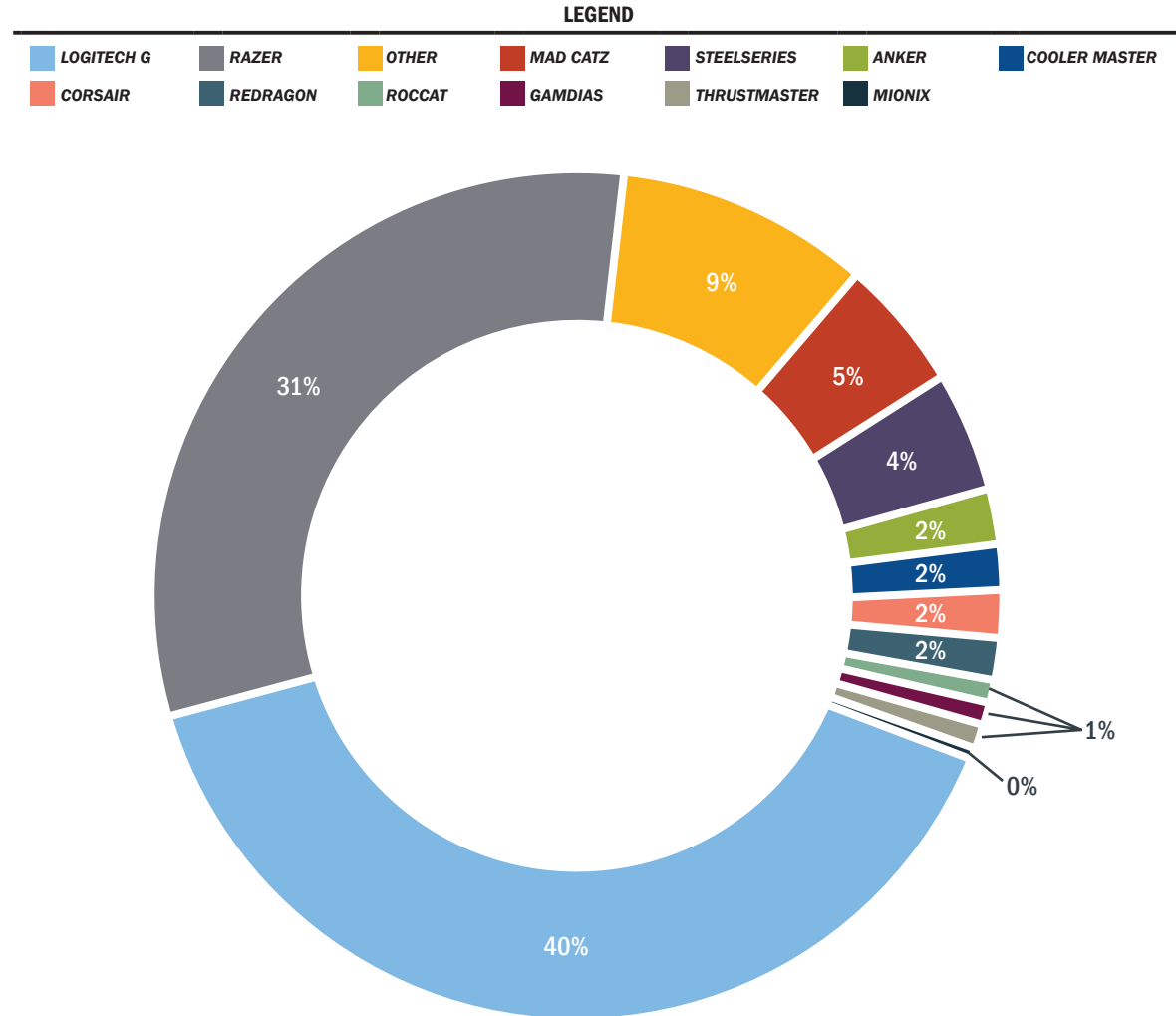


GAMING MICE

PC GAMERS AND PRIMARY MOUSE OWNERSHIP
[NA][2014][PC][CLIENT-BASED GAMERS][18+][GAMING MOUSE OWNER]

Logitech was the most prevalent brand for gaming mouse owners, being owned by 5.6MM users or 40% of users who had a gaming mouse. Razer was the next most popular brand, with 31% of the market. Combined, the top two brands accounted for 71% of the market.

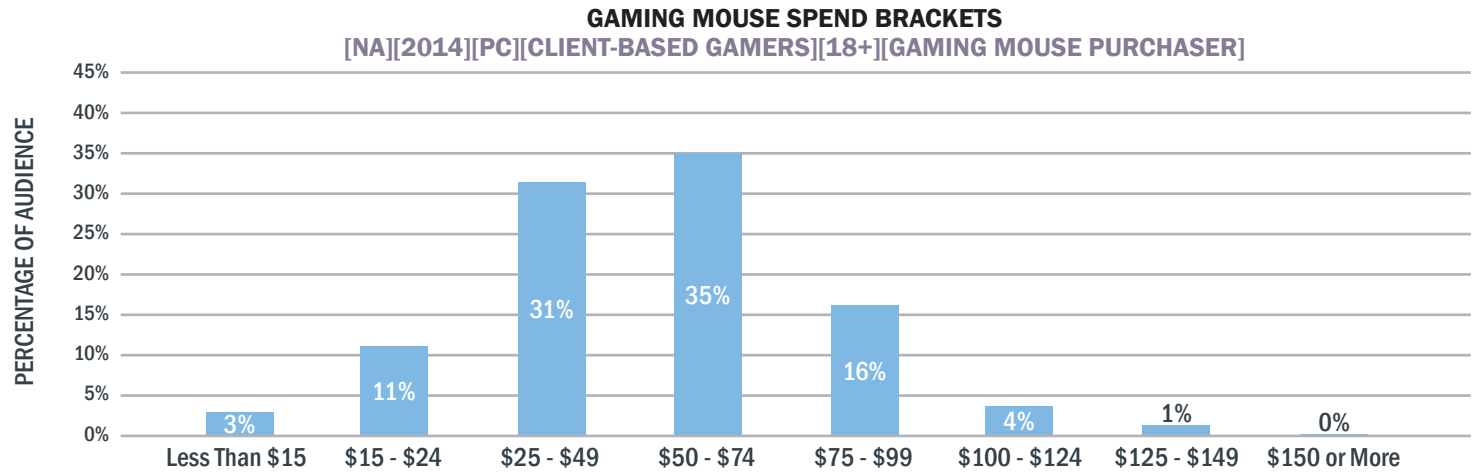
No other peripheral brand accounted for more than 5%.



SOURCE: EEDAR

The most common cost of a gaming mouse was between \$50 and \$74 while the second most prevalent bracket was \$25 to \$49. Combined, the two brackets represented 66% of current gaming mouse ownership. Some 16% cost between \$75 and \$99 while only 5% cost more than \$100.

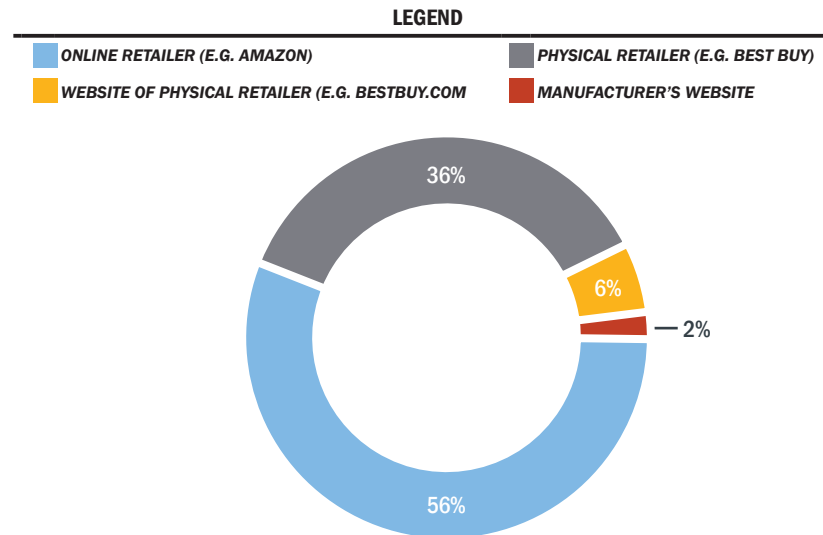
For mice, it was less important for users to see the peripheral physically when compared to headsets. More than half of gaming mice purchases occurred on Online Retailers such as Amazon while 36% occurred at the Physical Retailer. The split was even for gaming headsets.



SOURCE: EEDAR

GAMING MOUSE PURCHASE PORTALS

[NA][2014][PC][CLIENT-BASED GAMERS][18+][GAMING MOUSE PURCHASER]



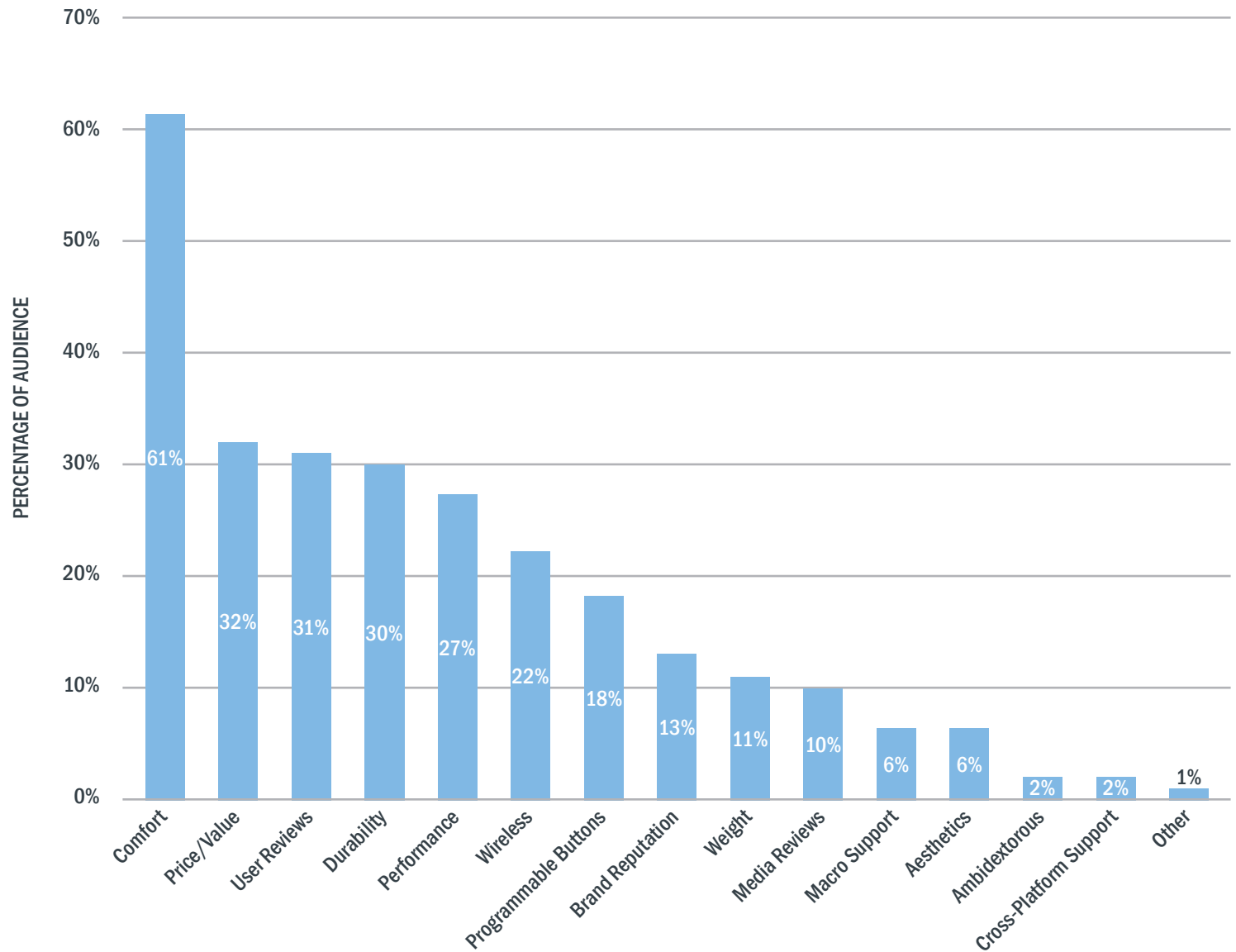
SOURCE: EEDAR

By far, the most important factor for a mouse purchase is Comfort; 61% of gaming mouse purchasers stated that Comfort was vital. The next three most cited factors were only chosen by half as many people, or about 30%. These were Price/Value, User Reviews, and Durability. Performance was actually only the 5th most important factor with 27%.

A sizable percentage of users were also concerned with high-end customization features such as Programmable Buttons (18%) and Macro Support (6%).

MOST IMPORTANT FEATURES OF MICE

[NA][2014][PC][CLIENT-BASED GAMERS][18+][GAMING MOUSE PURCHASER][TOP 3 CHOICES]



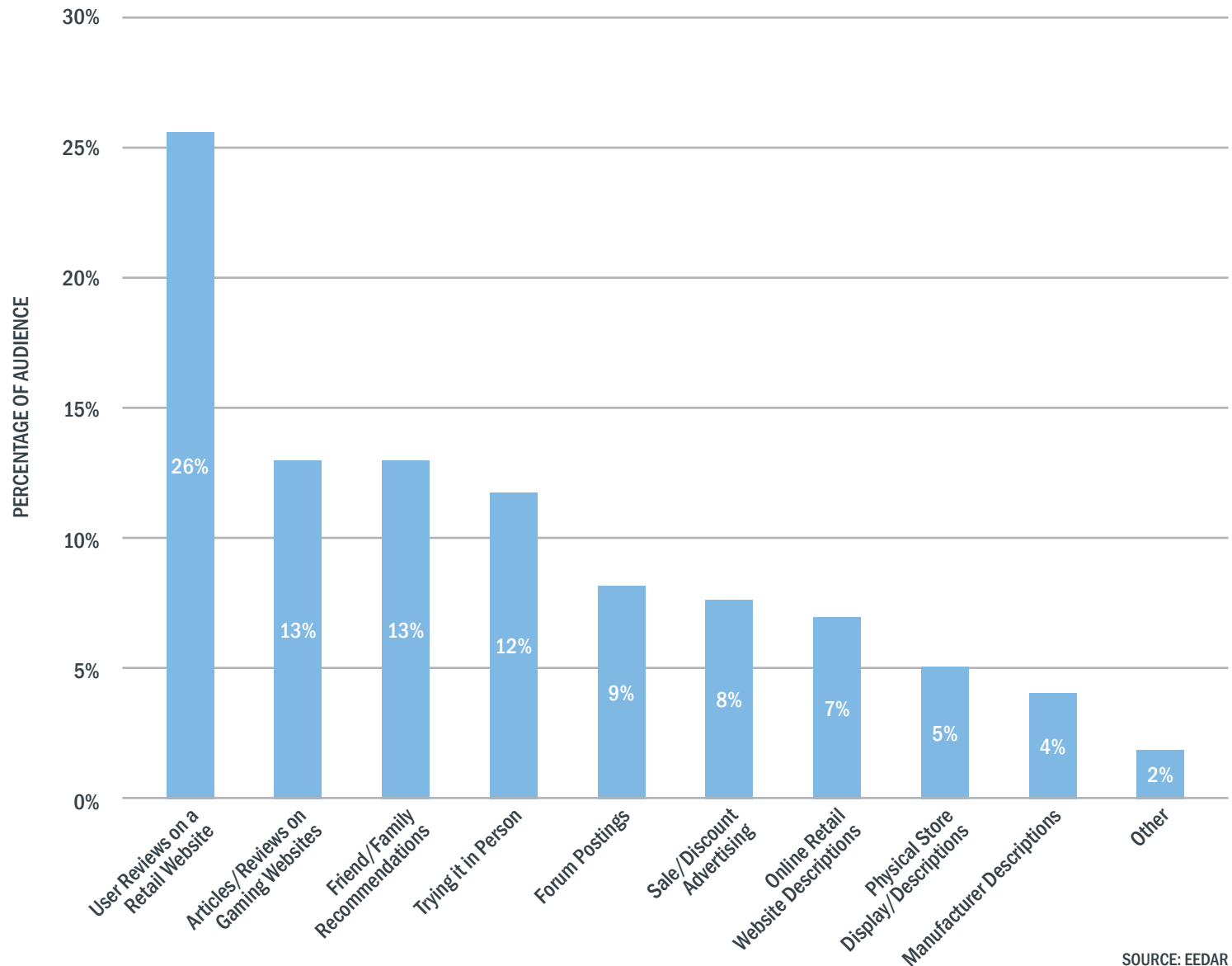
SOURCE: EEDAR

MOST INFLUENTIAL DISCOVERY SOURCE TO MOUSE PURCHASE

[NA][2014][PC][CLIENT-BASED GAMERS][18+][GAMING MOUSE PURCHASER]

Much like with headsets, the most influential sources of discovery for mice were firstly the opinions of other consumers and the media. Some 26% of users stated that User Reviews were the most important while 13% chose Media Articles/Reviews and another 13% pointed to Family Recommendations.

The least effective discovery sources involved Manufacturer Descriptions. Online Retail Descriptions were chosen by 7%, Store Displays by 5%, and Manufacturer Descriptions by only 4%.



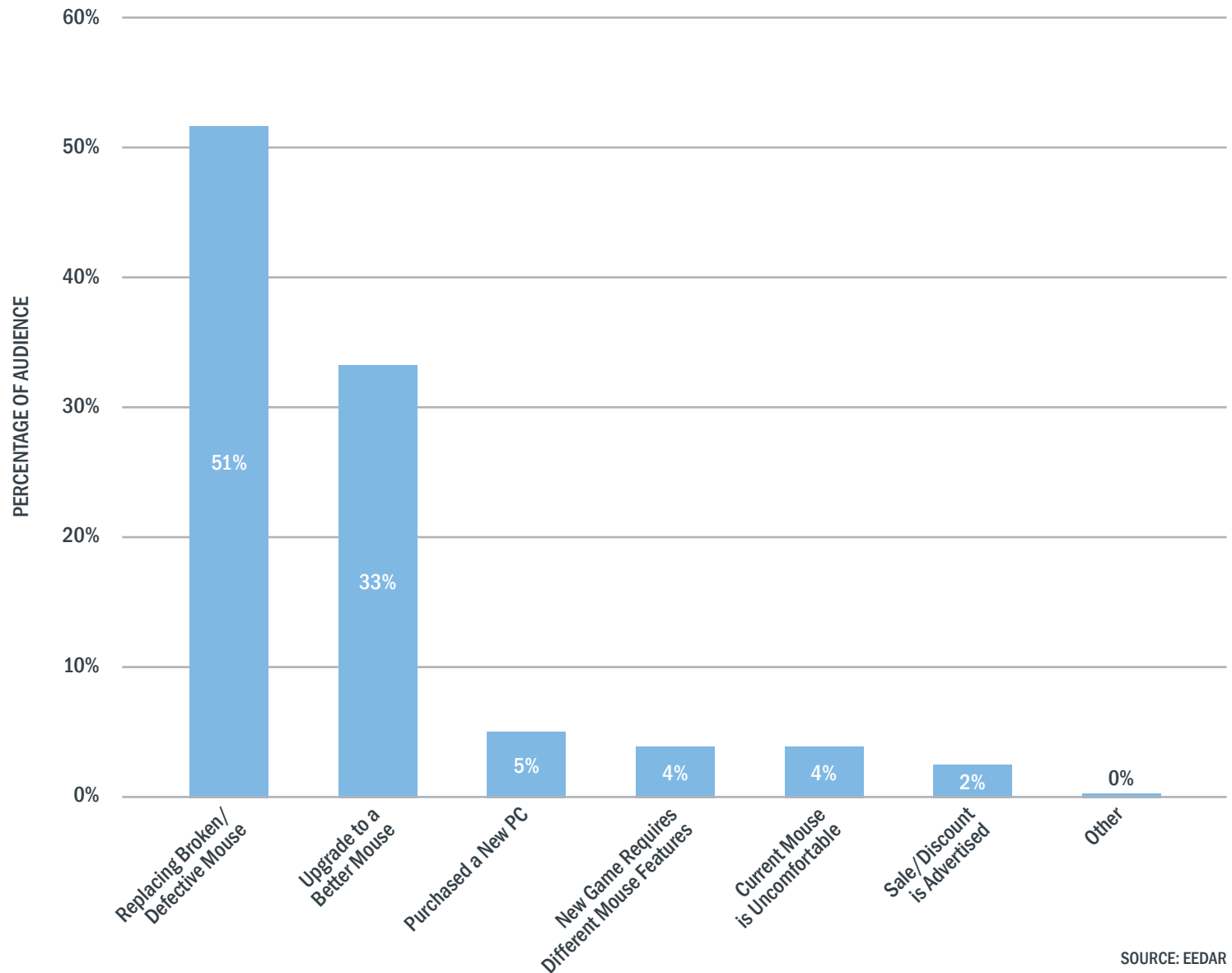
SOURCE: EEDAR

The top overall reason for purchasing a new mouse, responsible for 51% of purchases, was to replace a Broken or Defective peripheral. Some 33% of the audience Upgraded to buy a better mouse while no other reason garnered more than 5% of respondents.

Some 4% of users did state that they would buy a new mouse to Accommodate a Video Game. Only 2% stated that they bought a mouse since it was on Sale.

TOP REASONS FOR LAST MOUSE PURCHASE

[NA][2014][PC][CLIENT-BASED GAMERS][18+][GAMING MOUSE PURCHASER]



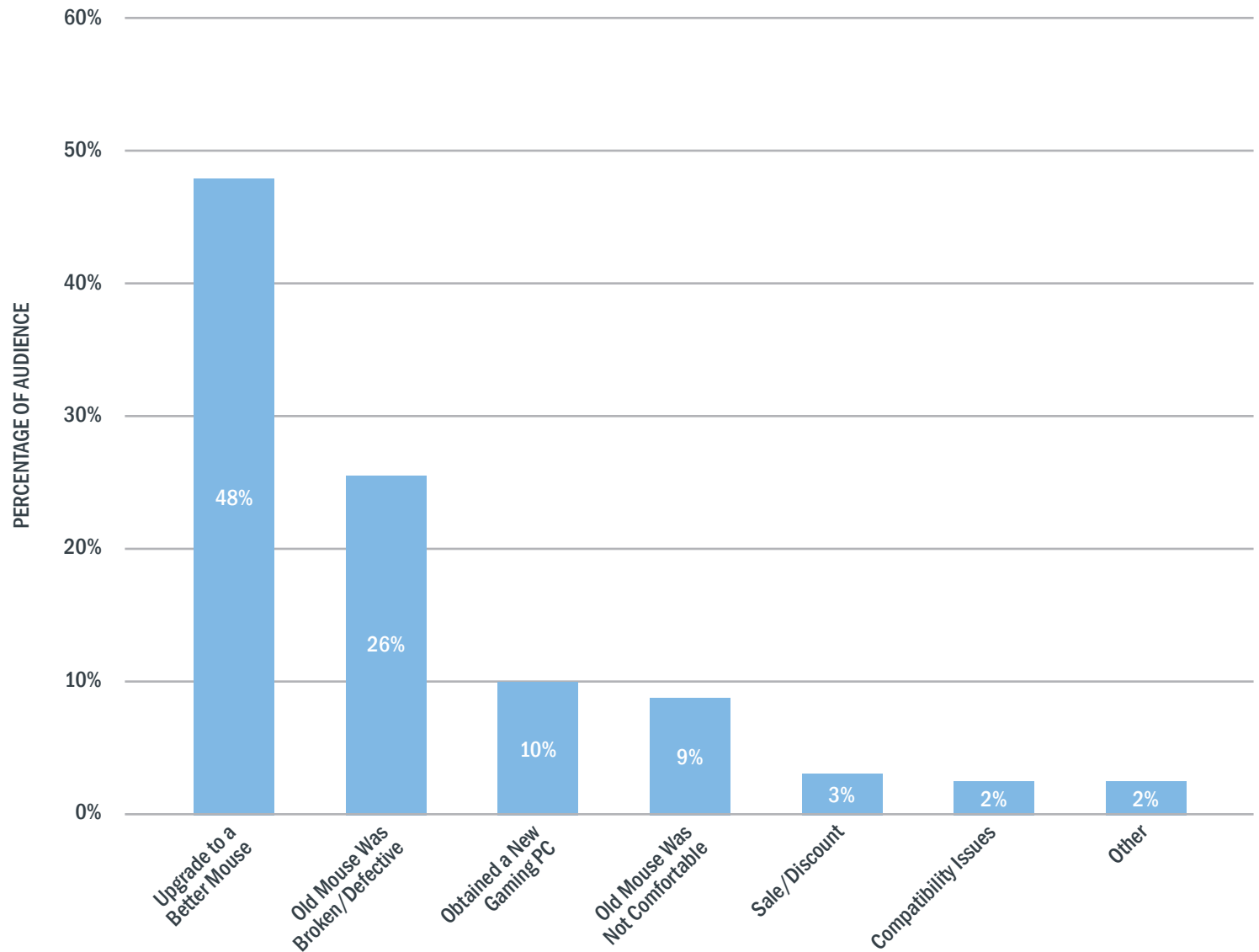
SOURCE: EEDAR

Gaming mouse purchasers believe that they are much more likely to buy their next mouse to Upgrade rather than to Replace a Broken Peripheral. Nearly half of gaming mouse purchasers, at 48%, said their next mouse would be an Upgrade compared to only 26% forseeing a purchase due to a Broken Mouse.

These two reasons accounted for 74% of respondents. Some 10% believe they would also buy a new mouse when they Obtain a New Gaming PC while 9% would buy a new mouse if their current one becomes Uncomfortable. Again, few (3%) saw a Sale as significant motivation to buy a mouse.

TOP REASONS FOR NEXT MOUSE PURCHASE

[NA][2014][PC][CLIENT-BASED GAMERS][18+][GAMING MOUSE PURCHASER]



SOURCE: EEDAR

RESEARCH METHODOLOGY

Electronic Entertainment Design and Research (EEDAR) gathers its information from a variety of sources. EEDAR goes to great lengths to verify the accuracy of its information, as detailed below.

Where information is publicly available from an authoritative source, such as the issuer or the responsible industry agency, that data is used as authoritative. All authoritative information is then double checked by an EEDAR researcher through direct observation or by cross referencing the data with other authoritative sources. Where possible, the data that is visible to the consumer is used: this includes information printed on the retail boxed product or displayed on the manufacturer website. When discrepancies arise between authoritative sources, additional sources are checked until a clear consensus emerges.

Where information is not publicly available, EEDAR's internal staff performs directed studies to gather the appropriate data. Our researchers work using custom-built data collection and analysis applications. Each researched fact has an objective observation system which ensures that researcher bias is eliminated. Our data research is performed by multiple researchers simultaneously to ensure that individual facts are cross-checked before being input into the classification system established for that fact. Once information has been entered in the EEDAR Games Database, quality assurance staff reviews the data using boundary analysis tools to identify errors and pinpoint difficulties in the classification systems. Our quality assurance team maintains rigorous performance metrics and ensures that each report is validated to the highest quality standards.

EEDAR attempts to use standard industry vernacular and information classification whenever possible. Where industry standard vernacular or classification structures are not available, EEDAR uses its own vernacular and/or classification systems. This would occur in areas where no industry recognized authoritative body exists, or in areas where multiple authoritative sources use different classification systems. All of the classifications systems created for these reports by EEDAR researchers are detailed in the appendix sections of EEDAR documents. All data from sources other than the EEDAR Games Database are clearly cited.

ABOUT EEDAR

Founded in 2006 by video game industry veterans, EEDAR is the largest specialty video game research firm in the world.

Leveraging a proprietary database of over 160 million internally researched data points from more than 120,000 physical and digital video game products, EEDAR is the sole provider of end-to-end integrated data analysis solutions that allow for the examination of every factor influencing the success of past, present, and future video game titles.

EEDAR's well-known services include GamePulse® (a continuously updated application converging data for physical and digital game industry research), sales forecasting, data feeds, discovery and recommendation technologies, and custom research services.

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