

# Fields Corporation Business Strategy Conference

May 7, 2014



## **1 Pachinko/Pachislot Field Growth Strategy**

**» Business alliances and customer acquisition**

**» 3-year lineup**

## **2 Current status of Tsuburaya Productions**

# **1 Pachinko/Pachislot Field Growth Strategy**

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**Business alliances and customer acquisition**

# 1) Status of Fields's alliances with manufacturers

## NOW

Year ended March 31, 2014

- Pachinko 2 brands
- Pachislot 4 brands



## In 3 years

Year ending March 31, 2017

- Pachinko 1 brand
- Pachislot 3 brands

### Pachinko

Bisty Co., Ltd.

OK Co., Ltd.

### Pachislot

RODEO Co., Ltd.

Bisty Co., Ltd.

Enterrise Co., Ltd.

Mizuho Corp.

# 1) Status of Fields's alliances with manufacturers

NOW

Year ended March 31, 2014

- Pachinko 2 brands
- Pachislot 4 brands



In 3 years

Year ending March 31, 2017

- Pachinko 5 brands
- Pachislot 6 brands

## Pachinko

Bisty Co., Ltd.

OK Co., Ltd.

D-light Co., Ltd.

Mizuho Corp.

NANASHOW Corporation

## Pachislot

Bisty Co., Ltd.

Enterrise Co., Ltd.

Mizuho Corp.

NANASHOW Corporation

D-light Co., Ltd.

OK Co., Ltd.

# **1 Pachinko/Pachislot Field Growth Strategy**

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**3-year lineup**

# 1) RODEO

## RODEO Co., Ltd.

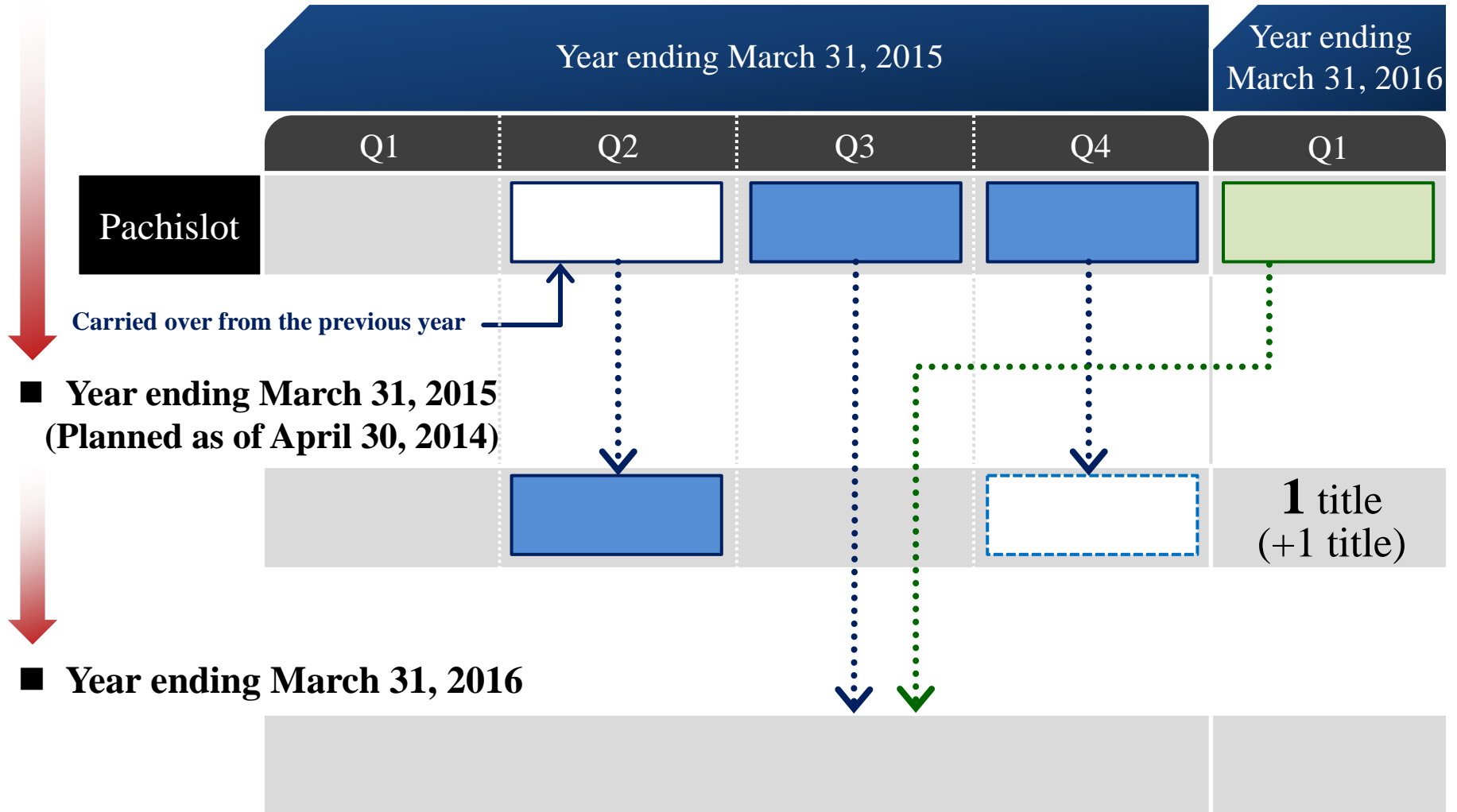


- |               |                                                                                                                                                     |
|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| June 1995     | Fields begins a business alliance with Sammy Corporation                                                                                            |
| October 2000  | Fields starts selling RODEO-brand pachislot machines as the general sales agency of RODEO Co., Ltd.                                                 |
| November 2001 | Fields concludes the Basic Agreement on Exclusive Sales Agency Transactions Regarding Sales and Purchase of Pachislot Machines with RODEO Co., Ltd. |
| March 2002    | Fields takes a stake in RODEO Co., Ltd.                                                                                                             |

# 1) RODEO

## Now negotiating individual products in preparation for dissolution of joint venture

### ■ Year ending March 31, 2015 (Initial plan)





# Bisty Co., Ltd. **Bisty**

March 1996	SANKYO CO., LTD. converts Daido Co., Ltd. into a subsidiary
November 2003	Fields announces business alliance with Daido Co., Ltd.
January 2004	Daido Co., Ltd. changes its name to Bisty Co., Ltd.
February 2004	Fields starts selling pachinko machines made by Bisty Co., Ltd.
March 2005	Fields starts selling pachislot machines made by Bisty Co., Ltd.

	3.2015	3.2016	3.2017
Pachislot	1title	2titles	2titles
Pachinko	2titles	2titles	2titles

### 3) OK!!

# OK Co., Ltd.



- April 1983 Established as MASAMURA.
- February 2008 Fields announces business alliance with KYORAKU SANGYO for joint projects
- October 2011 MASAMURA changes its name to OK Co., Ltd.
- August 2012 Fields releases a pachinko machine as the first step in the alliance

	3.2015	3.2016	3.2017
Pachislot	-	-	2titles
Pachinko	1title	2titles	2titles

# Enterrise Co., Ltd.



- April 2002 Enterrise Co., Ltd. is established as the pachislot machine division of CAPCOM CO., LTD.
- February 2010 Fields starts selling Enterrise-brand machines as the general sales agency of Enterrise Co., Ltd.
- July 2012 Enterrise Co., Ltd. joins Nichidenkyo (Japan Electric Amusement Machine Association)

	3.2015	3.2016	3.2017
Pachislot	3titles	3titles	4titles

# Mizuho Corp.



December 2011 Fields and Universal Entertainment Corporation conclude a memorandum of understanding for joint projects through Mizuho Corp.

January 2012 Fields acquires 198 shares of stock (ownership percentage of 49.8%) in Mizuho Corp.

... Approx. ¥1.0 billion

February 2014 Fields sells “ANOTHER GOD HADES,” a pachislot machine made by Mizuho Corp.

	3.2015	3.2016	3.2017
Pachislot	1title	2titles	3titles
Pachinko	-	2titles	2titles

## 6) D-light

# D-light Co., Ltd.



- June 2000 D-light Co., Ltd. is established as the second brand of Daiichi Shokai CO., LTD.
- May 2008 D-light Co., Ltd. joins Nikkoso (Japan Pachinko Manufacturers' Association)
- April 2014 Fields and D-light Co., Ltd. begin business alliance for joint projects

	3.2015	3.2016	3.2017
Pachislot	1title	2titles	2titles
Pachinko	-	2titles	2titles

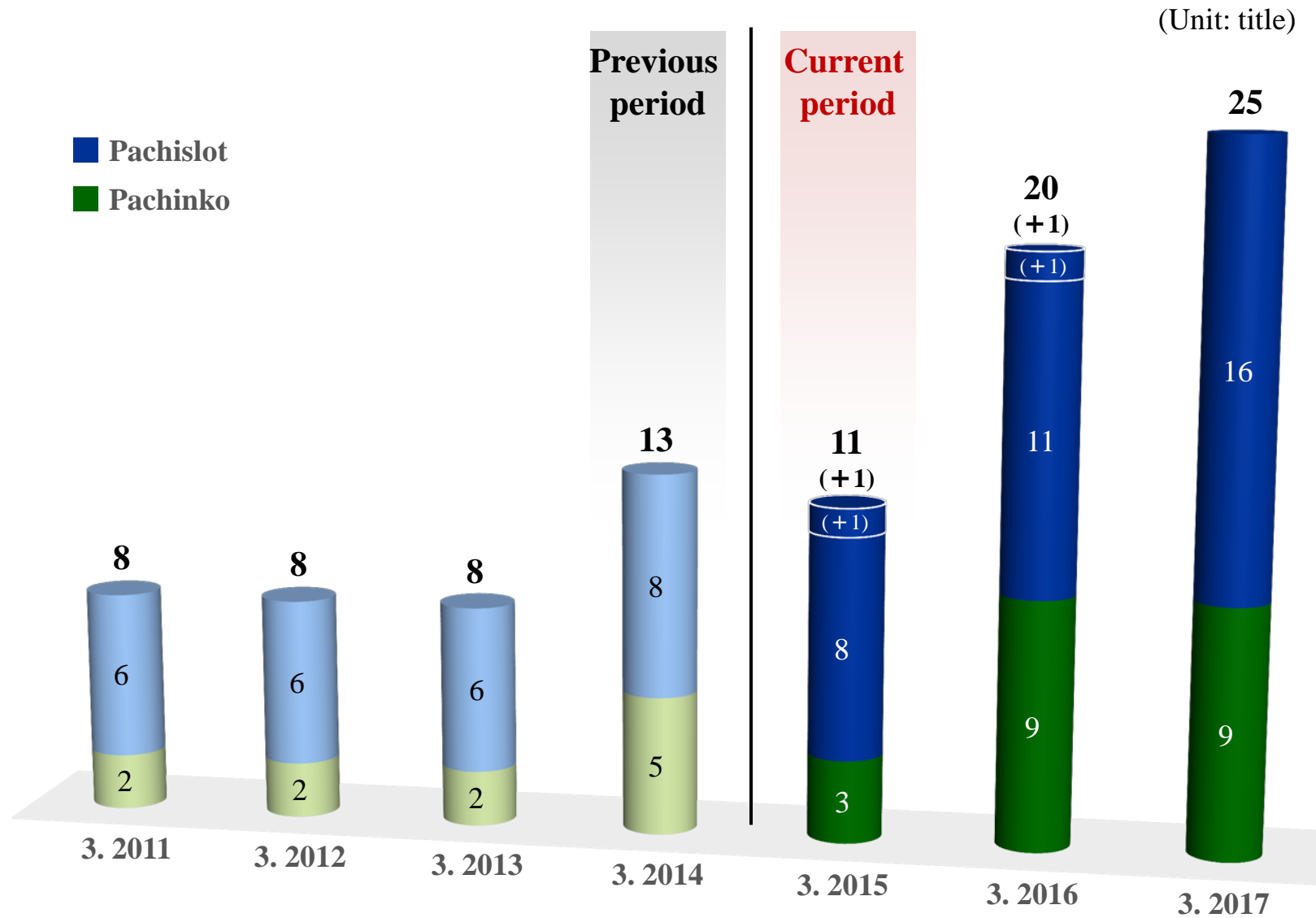
## NANASHOW Corporation



- August 2009      NANASHOW Corporation is established
- May 2013        NANASHOW Corporation joins Nikkoso (Japan Pachinko Manufacturers' Association)
- January 2014    Fields takes a stake (38.9%) in NANASHOW Corporation
- April 2014      Fields and NANASHOW Corporation begin a business alliance for joint projects

	3.2015	3.2016	3.2017
Pachislot	1title	1title	3titles
Pachinko	-	1title	1title

# 8) Number of pachinko/pachislot titles sold/ 3-year lineup



\*Except reuse machines and specifications changed machines

## 9) Product appeal that aims to sale for an average of more than 30,000 machines per title

The development of the industry has been achieved by means of the equation **“originality” = “customer acquisition.”**

We, too, take as our mission **the challenge of creating originality** that drives the healthy growth of the industry even more.

### ■ 1980 : SANKYO “FEVER”

With its innovative game features that left fans astounded, SANKYO’s “FEVER,” introduced in 1980, changed everything about pachinko—from hall management and distribution forms to the scale and state of manufacturers—and thus established pachinko as a true industry.

### ■ 1985 : Pachislot was officially approved

In 1985, when the Law on Control and Improvement of Amusement and Entertainment Business was put into force, pachislot was officially approved. “CRANKY CONDOR,” which made its debut later, became the driving force that increased the number of installed pachislot machines, which had not exceeded 700,000 at the time, to 1 million and then 2 million

### ■ 2000 : The character approach advocated by us became completely established

In the 2000’s, the character approach advocated by us became completely established, and it is now trying to grow into the core of the originality of the next generation. Originality is the very life force of products.



## 10) Sales system

Increase the number of branch offices from **26 branches** to **37 branches** and the number of sales staff members from **300 members** to **400 members**.

\*Architect's image of the new branch building design



The new branch building design has been achieved through collaboration among 3 of the world's top creators: Yasumichi Morita, Toshiyuki Inoko, and Katsunori Aoki.

# **2** **Current status of Tsuburaya Productions**

# 1) Recent business development

For kids

40s onward

Business development

TV (terrestrial), movies, goods, etc.



Comics, games, etc.



Pachinko/pachislot, TV (satellite), etc.



ネオ・ウルトラQ

Events

ULTRAMAN FESTIVAL



Ultra Seven Exhibition for the 45th anniversary of birth



Eiji Tsuburaya Special Effects Trajectory Exhibition



It's New Year's!  
All the Ultraman Gather!!



# 2) History of Tsuburaya Productions (from establishment to TYO subsidiary)

Established in 1963

Conversion into a consolidated subsidiary of Toho Group

Conversion into a consolidated subsidiary of TSUBURAYA ENTERPRISES Group

Conversion into a consolidated subsidiary of TYO Group

Major masterpieces

## Ultraman from the Showa years

Ultraman  
1966



Ultra Seven  
1967



Ultraman Taro  
1973



...

## Ultraman from the Heisei years

Ultraman Tiga  
1996



Ultraman Cosmos  
2001



Ultraman Zero  
2009

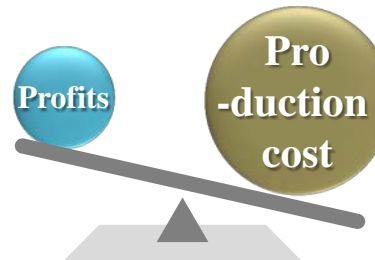
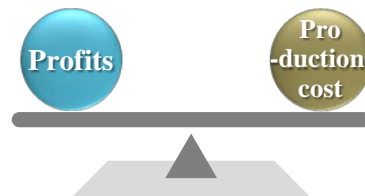
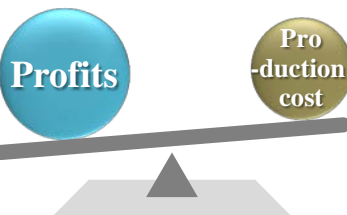


Success of Ultraman

Deterioration after Ultra Seven

Deterioration of financial standing due to investment in new releases

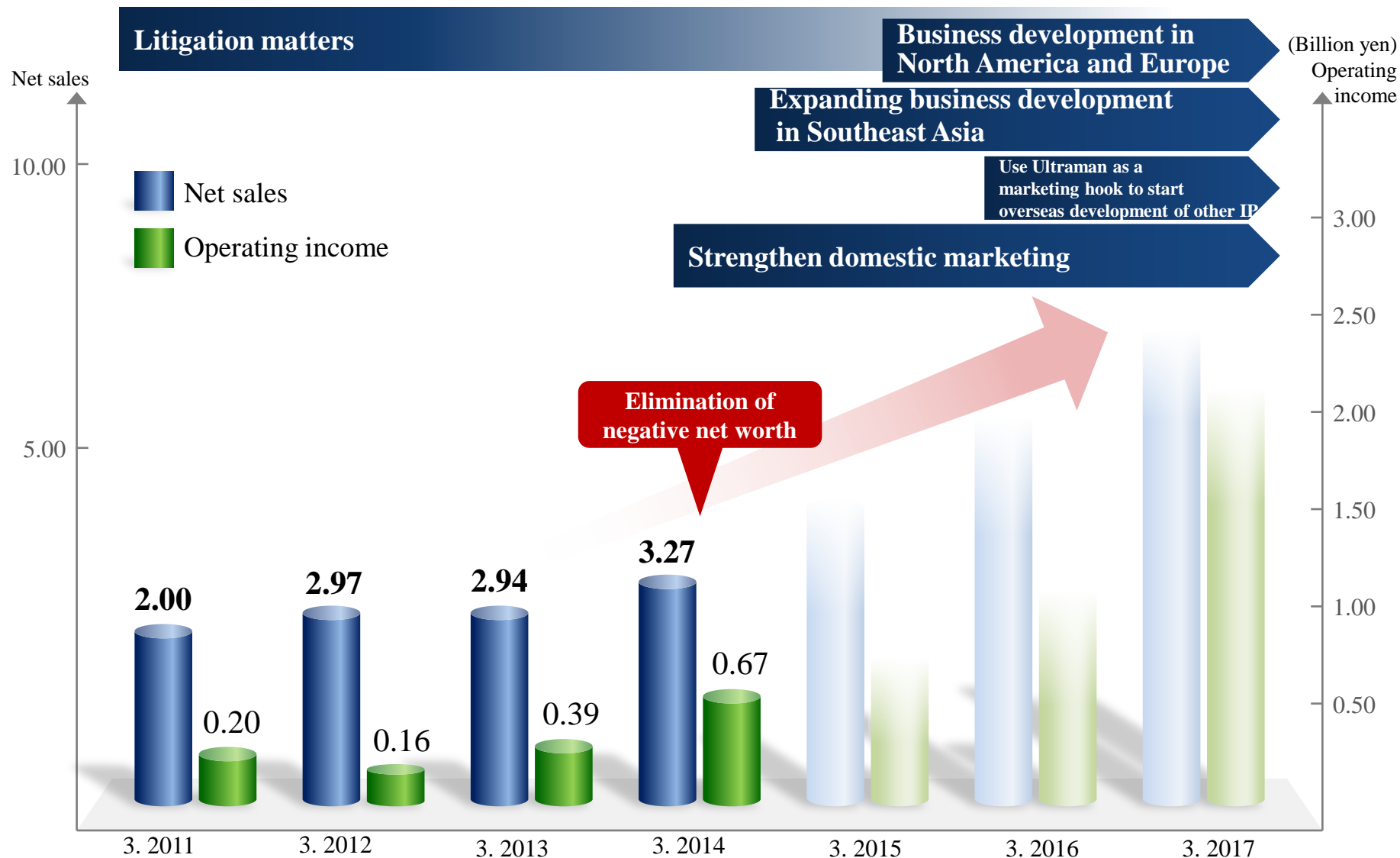
Financial restructuring conducted by TYO



- Closure of studios
- Personnel reductions, etc.

Wasting of past assets

# 3) Image of future revenue



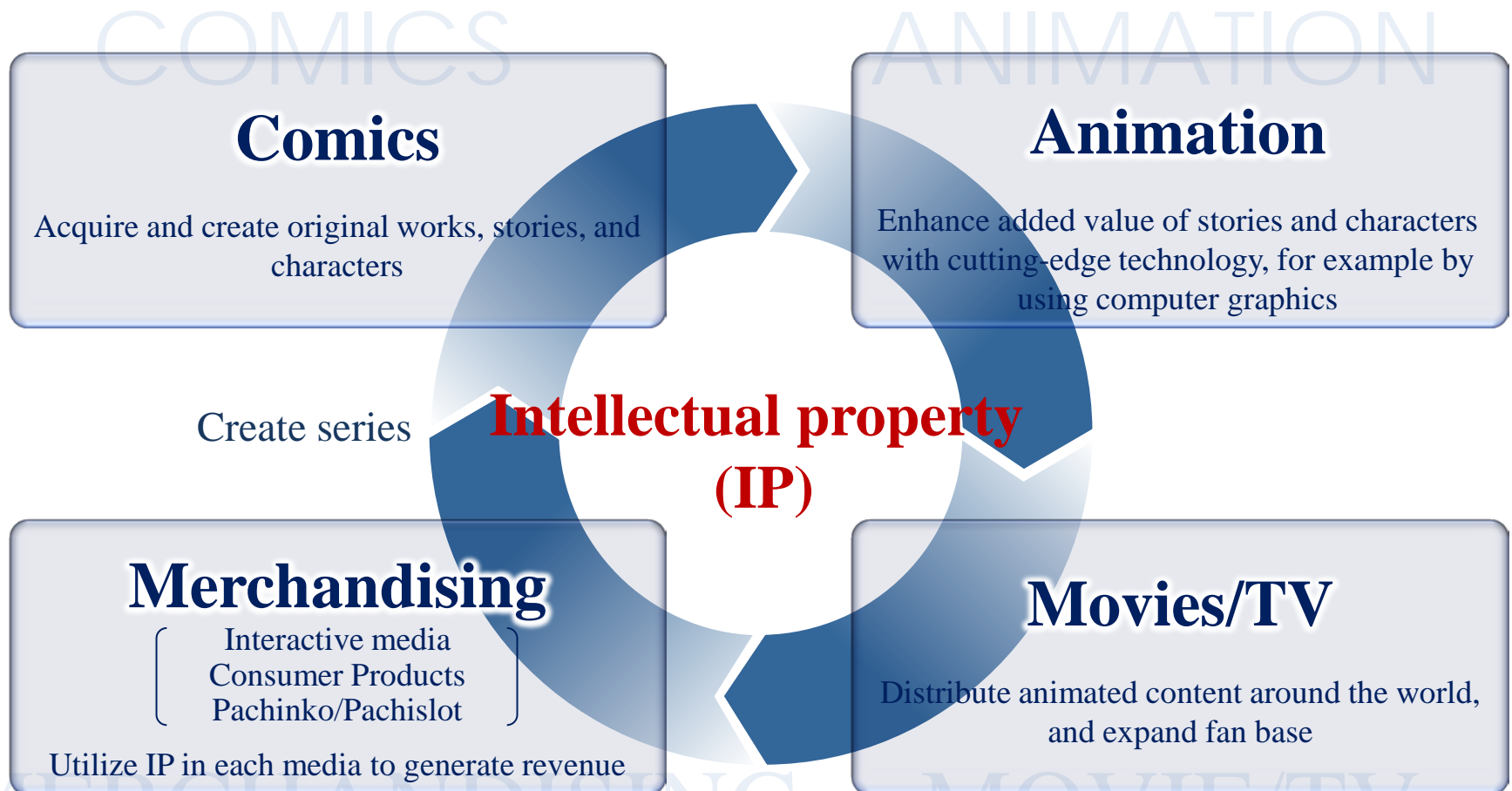
\*Due to an alteration of the accounting term, the fiscal year ended March 2011 comprises only 8 months.

# **Cross-media development of IP created by Fields**

# 1) Developing Business Model

In May 2012,

**Fields announced its IP-centered “Developing Business Model”**



## 2) IP cultivation concept of Majestic Prince

With Fields and its leading partner companies collaborating closely, this **is an original robot animation IP project** that bears in mind cross-media development.

Before the broadcasting of the animated show started, in HERO'S Monthly we began the serialization of stories following the original story, and by incorporating innovative techniques such as events, we have steadily increased the number of fans and monetized through the merchandising.

Animation



April 2013 ~

Comics



November 2011 ~

Social games

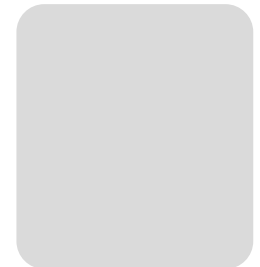


February 2014 ~

Goods

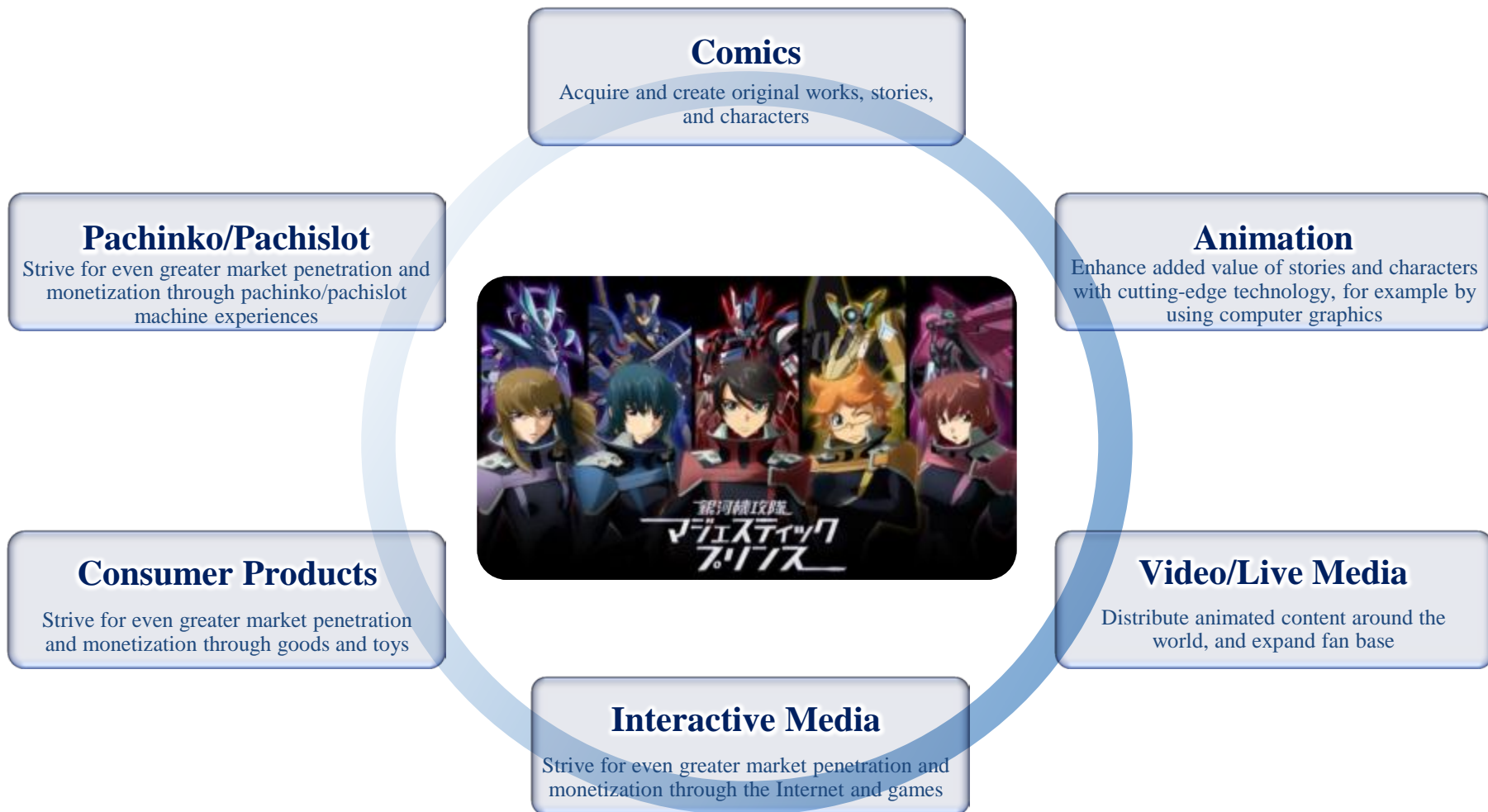
- Case for iPhone5
- Miniature Japanese fan strap
- Various figure, etc.

Pachinko/  
Pachislot





### 3) IP cultivation cycle of Majestic Prince





Gaming and Entertainment

**The plans, strategies and estimates of the Company indicated in these documents, other than actual results and established facts, include potential risks and uncertainties and cannot be guaranteed.**

**Potential risks and uncertainties include, but are not limited to, the economic environment of the pachinko/pachislot market in which the Company mainly operates, market competition and the products handled by the Company.**

**IR and PR Section, Corporate Communications Office  
TEL : +81-3-5784-2109 E-mail : [ir@fields.biz](mailto:ir@fields.biz)**