



Associação Comercial, Industrial e Cultural de Games

Audiência Pública

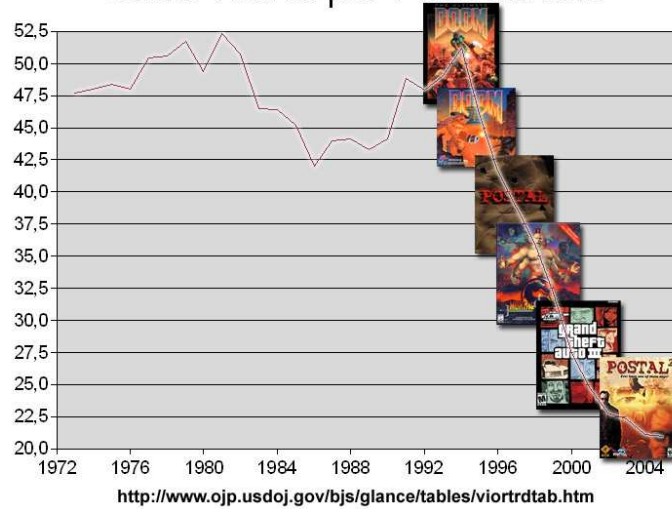


Breaking Point

- *Music: 01 to 500 years*
- *Movies: 01 to 20 years*
- *Game: 01 to 03 years*



Crime victims per 1 000 citizens



Forbes | New Posts | Most Popular | Lists

TECH | 4/19/2012 @ 4:12PM | 15,929 views

As Video Game Sales Climb Year Over Year, Violent Crime Continues To Fall

451 | 122 | 26 | 1 | 42 | 1 | 1

Paul Tassi has a [great post](#) up on the "idiocy" of blaming the Norway massacre on violent video games.

It turns out the shooter in that tragedy says he "trained" by playing *Call of Duty*. Setting aside how ludicrous that notion is, it is even more ludicrous to suggest that *Call of Duty* was any sort of inspiration for the shooting spree itself.

As Paul notes, correlation is not causation. That a person prone to violent acts would be drawn to violent video games is a truism, not a revelation.

What link?
US:
Total violent crime offenses, m
Computer and video-game sales, \$bn

Year	Total violent crime offenses (m)	Computer and video-game sales (\$bn)
1996	6.5	0.5
1997	6.0	0.8
1998	5.5	1.2
1999	5.0	1.8
2000	4.5	2.5
2001	4.0	3.5
2002	3.5	4.5
2003	3.0	5.5
2004	2.5	6.5

If violence and video games are linked, it may be because we're less violent now than ever (via The Economist)



Associação Comercial, Industrial e Cultural de Games



powered by **DISTIMO**  **SUPERDATA RESEARCH**
digital goods measurement

Research on and promotion of

The Brazilian Games Market & Industry



Peter Warman
CEO Newzoo
Moacyr Alves
Acigames
November 2012
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US EU* UK GER FR IT ES BE NL RU BR PL TR AUS JP CN

www.newzoo.com
www.acigames.com.br

Brazilian Games Market 2012

Preliminary results on year-on-year trends and market size

2012 vs 2011
YoY Growth



2011-2012
+8%

2011-2012
+26%

2011-2012
+36%

2011-2012
+1%



2011-2012
+8%

2011-2012
+18%

2011-2012
+17%

2011-2012
+3%



2011-2012
+15%

2011-2012
+14%

2011-2012
+32%

2011-2012
+32%

40,200,000 2012

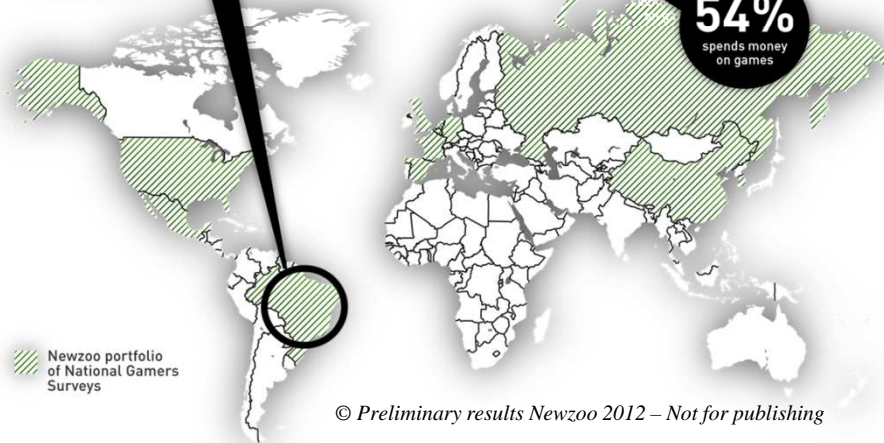
Active gamers in Brazil

+15%
Year-on-Year
Growth



Total population:	203.400.000
Active internet population aged 10-65:	60.200.000
Active gamers:	40.200.000
Paying gamers:	21.700.000

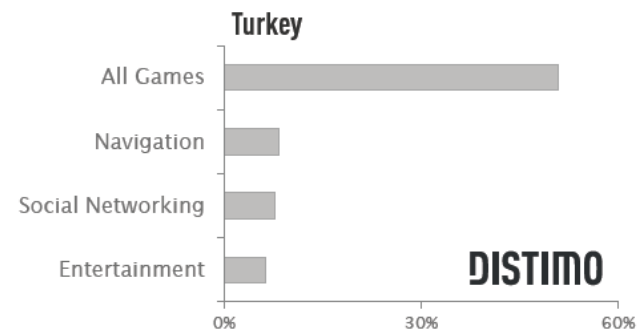
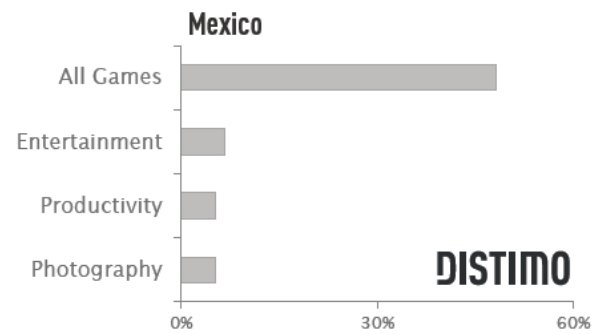
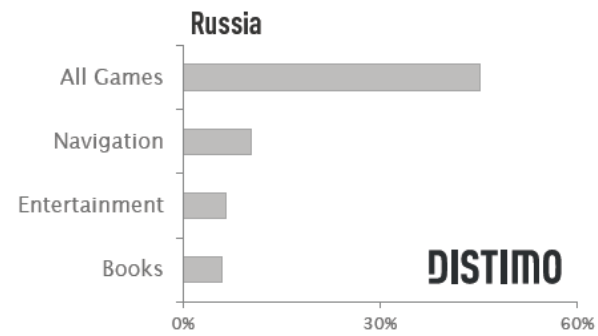
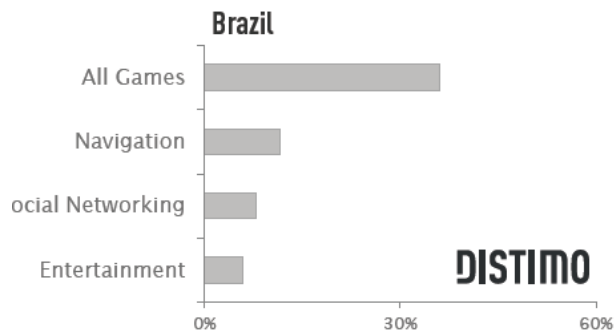
54%
spends money
on games



© Preliminary results Newzoo 2012 – Not for publishing

Top Categories Per Country In The Apple App Store For iPhone, May 2012

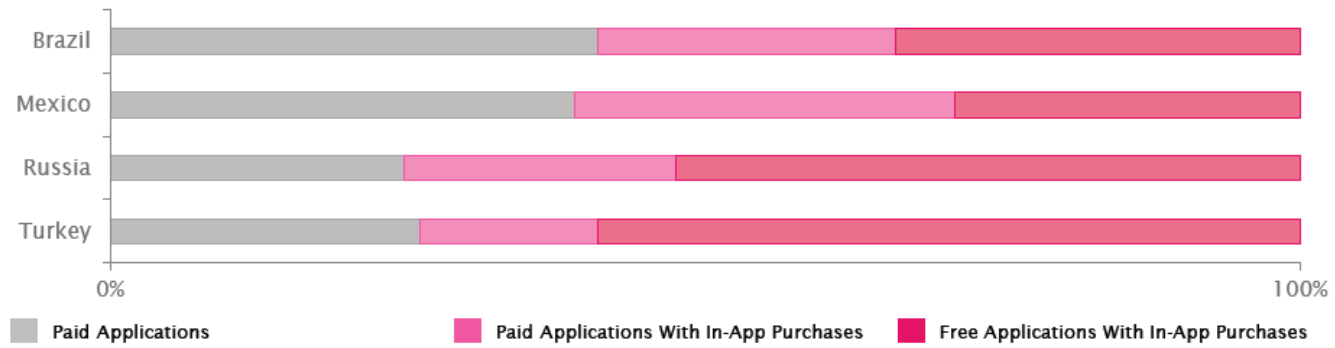
Revenue generated by the top 100 highest grossing apps per category as a proportion of the sum of the revenue generated by the top 100 highest grossing apps per category



Revenue Share Per Business Model In The Apple App Store For iPhone

Top 200 highest grossing applications, May 2012

DISTIMO





RESEARCH

GAME

MOBILE

BRASIL



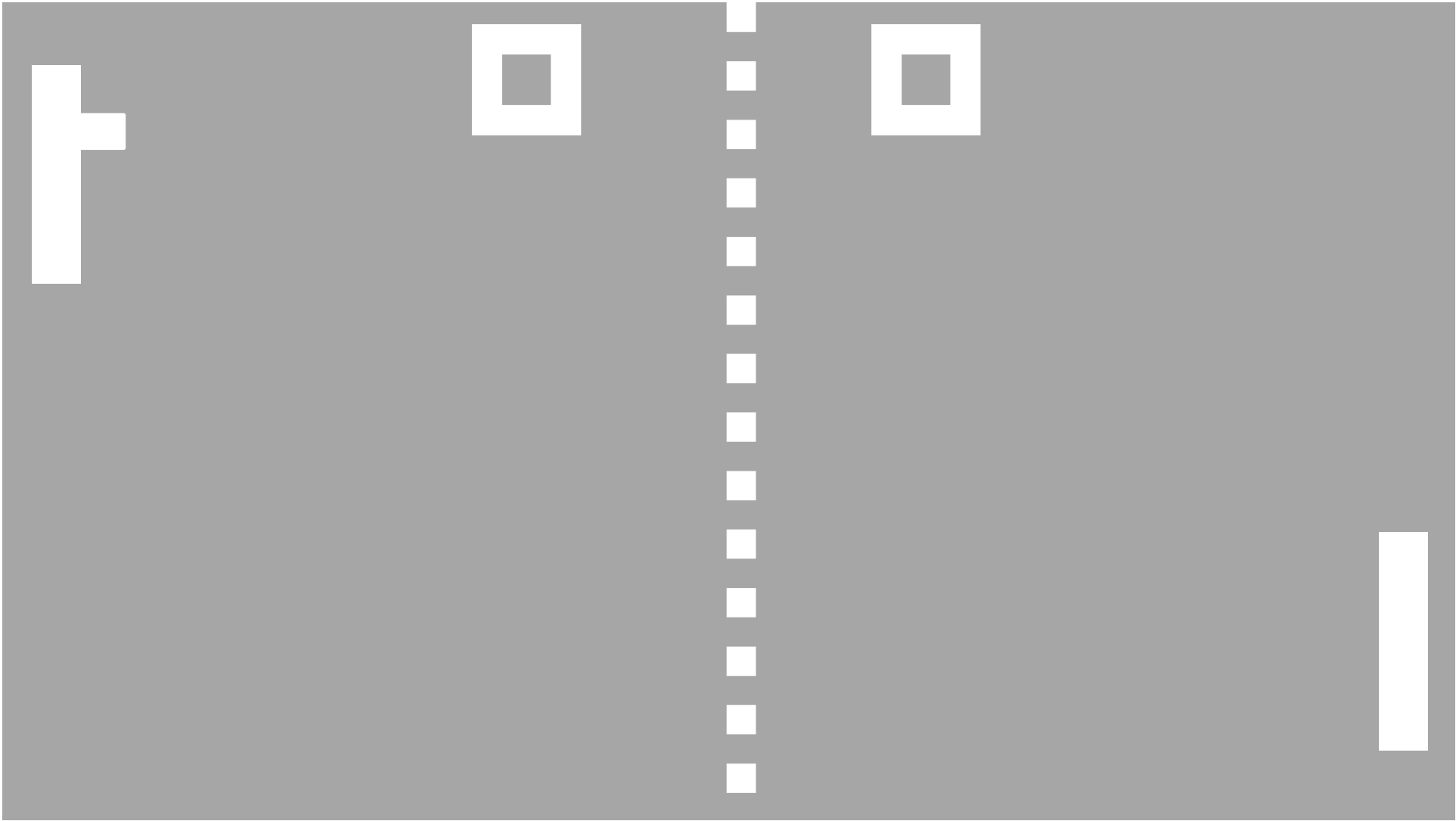
RESEARCH DEVELOPERS



PARTNERSHIP



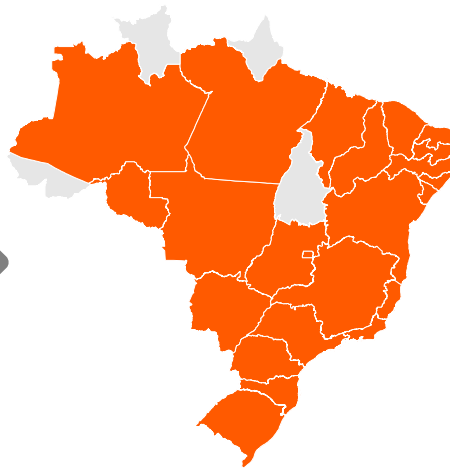
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METHODOLOGY



STRUCTURE
D
QUANTITATIV
E
QUIZ



ONLINE
PANEL

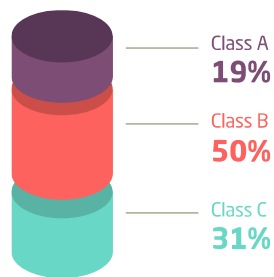
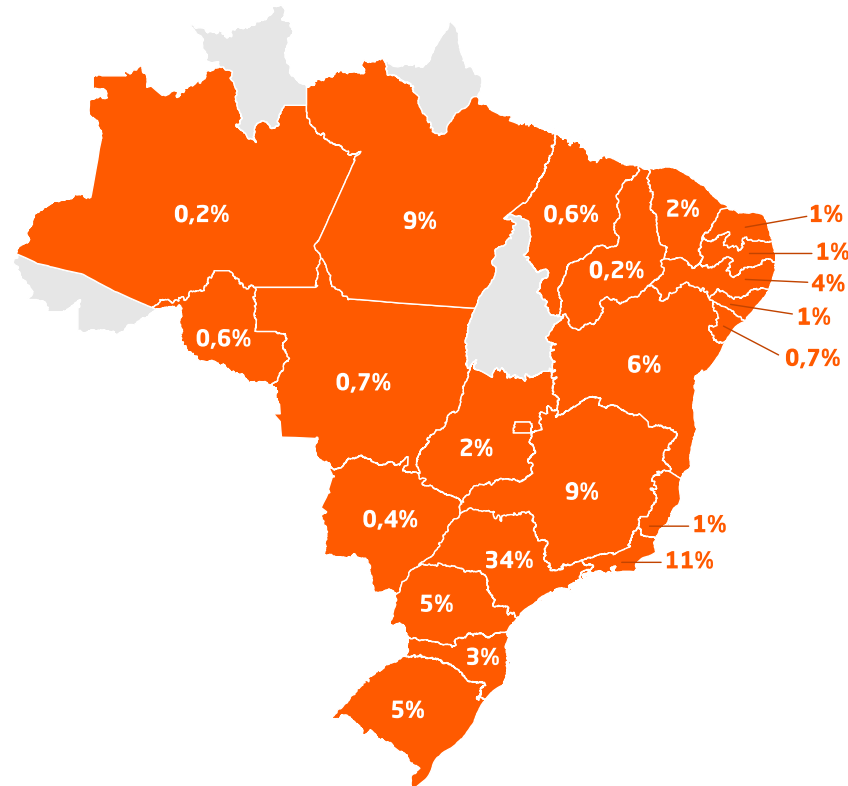
The methodology aims to achieve higher quality of information and depth of responses.

The panel also allows project partners to interact again, anytime, with the respondents, in order to gain deeper analysis.

Among the panelists, representative of the online population in Brazil, the study got participation of **823 respondents, 14-84 years**, been held from **2 to September 16**.

RESEARCH TARGET

The study was conducted within **online population from all around Brazil**, according to the map, and proportional to the regional online stage from each state.



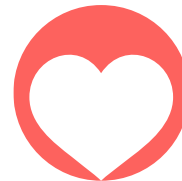
RESEARCH LEVELS



The Gamer



Monetize



Brands Connected



So what?

RESEARCH LEVELS

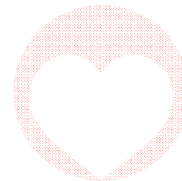
LEVEL 1



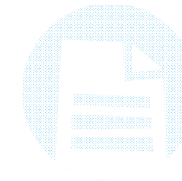
The Gamer



Monetize



Brands Connected



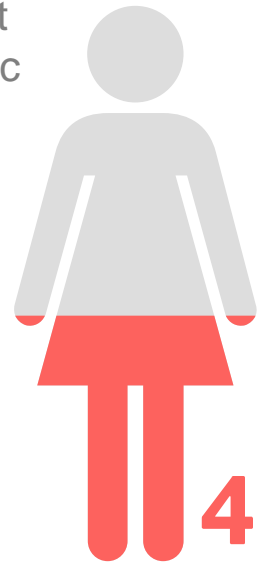
So what?



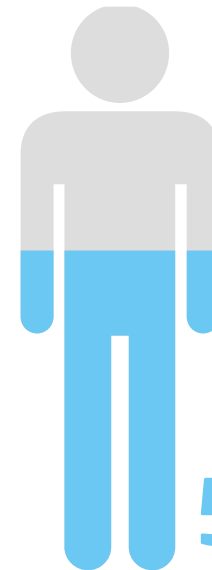
The Gamer - Universalization

DO YOU STILL THINK IT IS “BOYS ONLY”?

Declared to play at least one electronic game



average: 32 years old



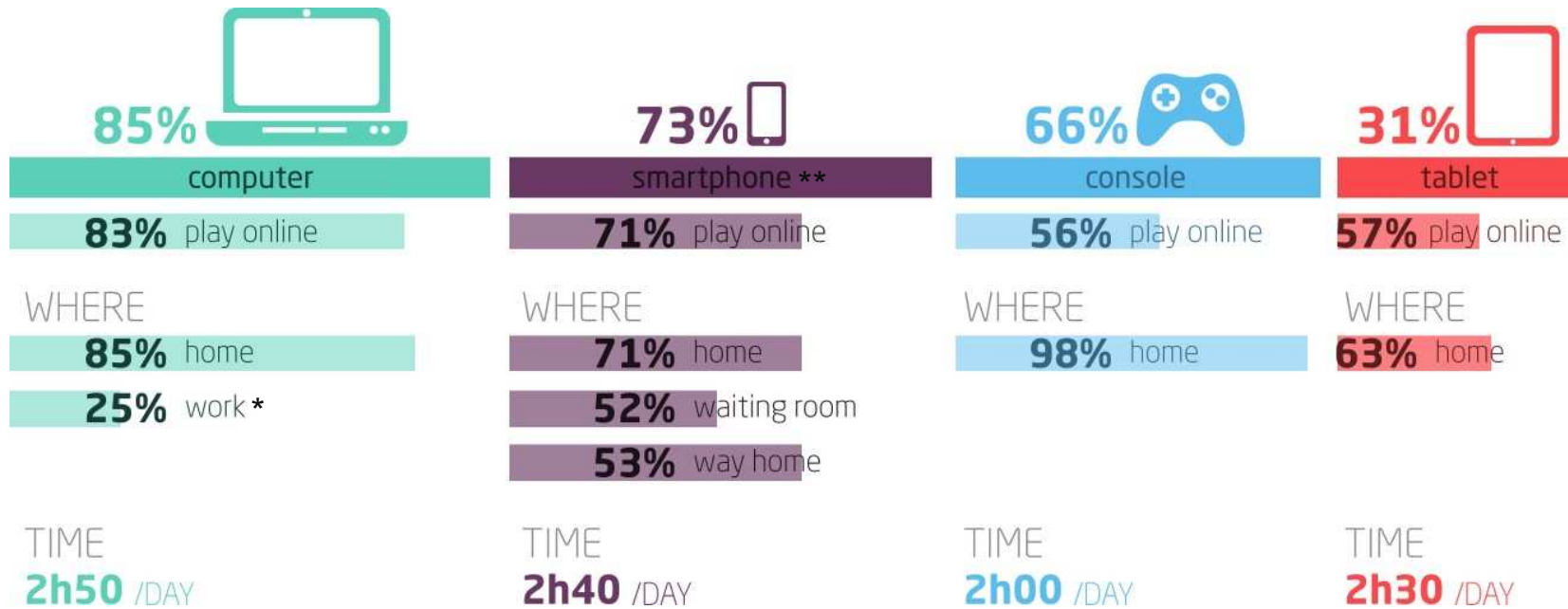
average: 35 years old



The Gamer – How they play

WE ARE “MULTI-PLATAFORM” PLAYERS

With lower penetration, they play with Portable Video Game (21%) and the iPod (14%).

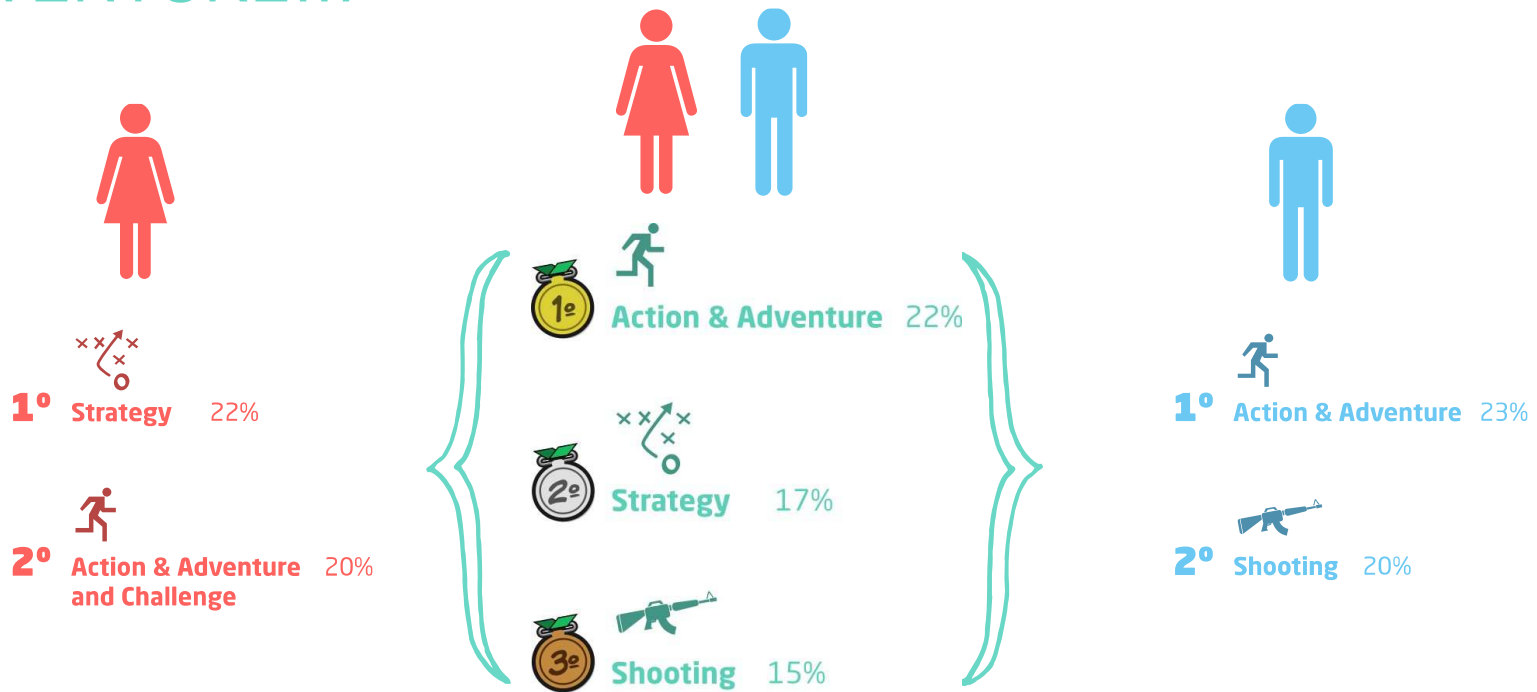


* There are games played all along the day, as the strategy ones. ** When aided 'do you use you mobile for gaming?' it raises to 81%



The Gamer – Preferred Styles

AND OUR PREFERENCE IS FOR ACTION AND ADVENTURE...

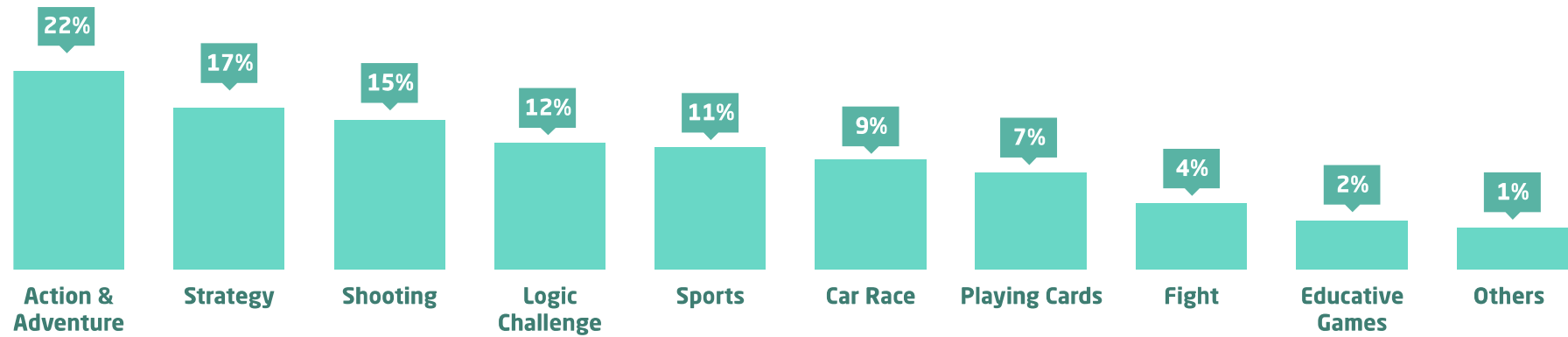


* STRATEGY is extended not only for the complex ones, but also the ones we call 'social', and 'lighers'.



The Gamer – Preferred Styles

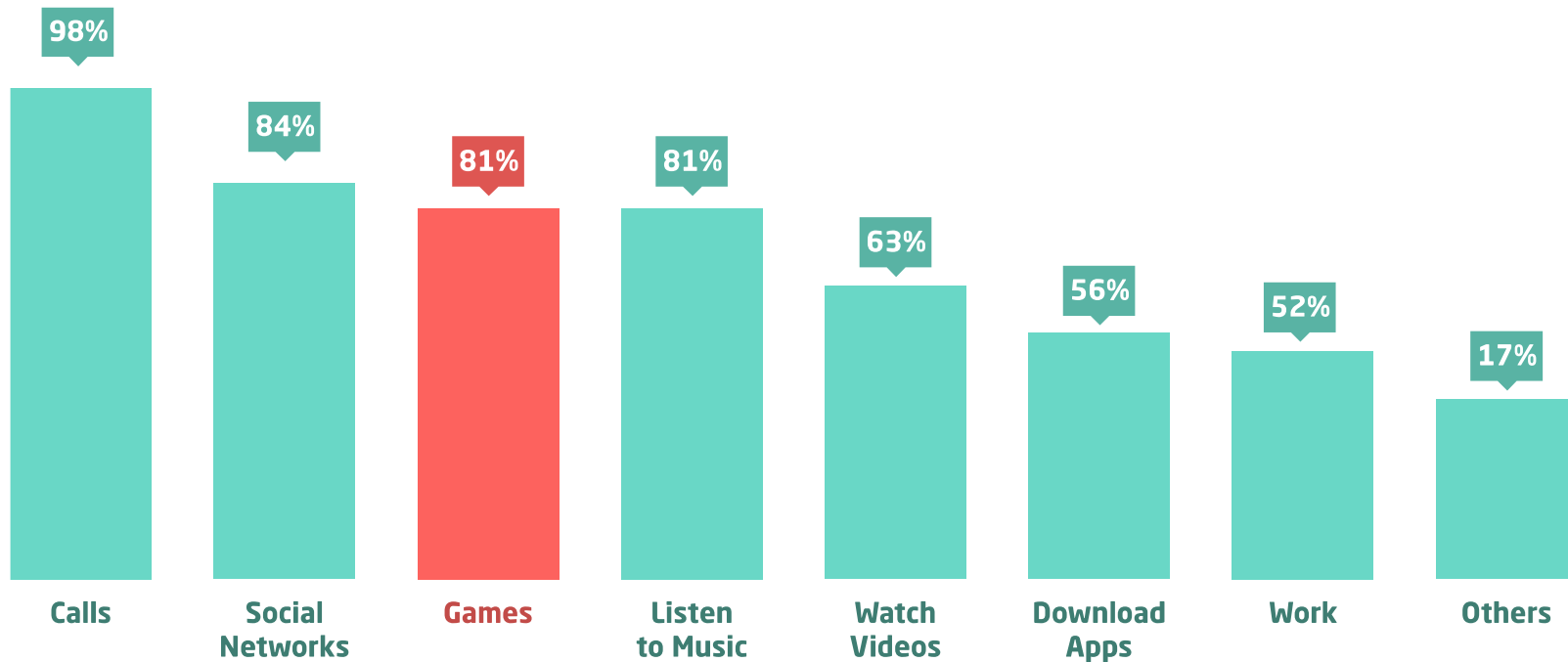
BUT THE FACT IS: WE PLAY IT ALL





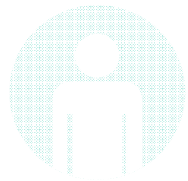
The Gamer – What do you do on your mobile?

SOCIAL NETWORK, MUSIC AND GAMES.
THE MOBILE IS OUR BUDDY.



RESEARCH LEVELS

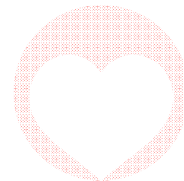
LEVEL 2



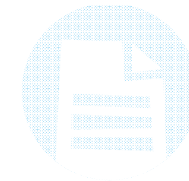
The Gamer



Monetize

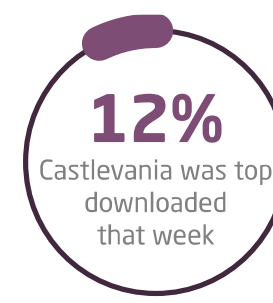
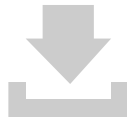


Brands Connected



So what?

 Monetize – How they consume Apps





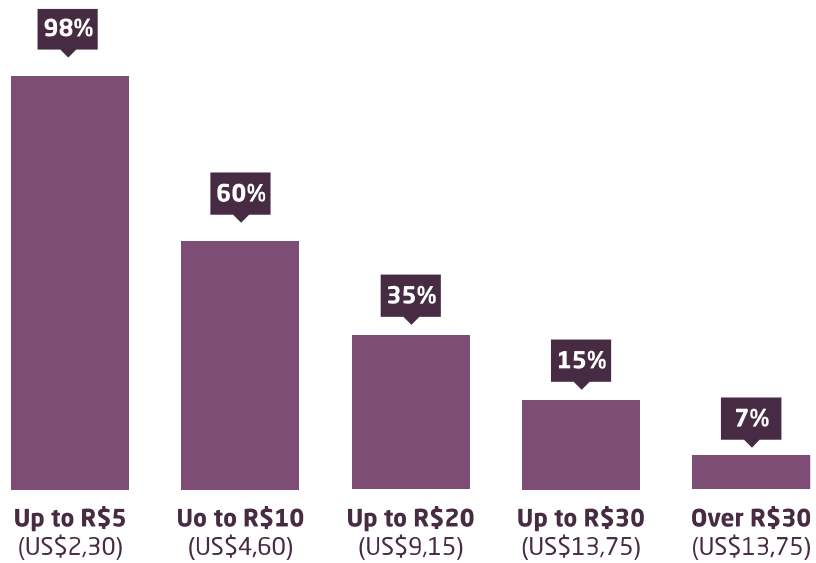


FREE

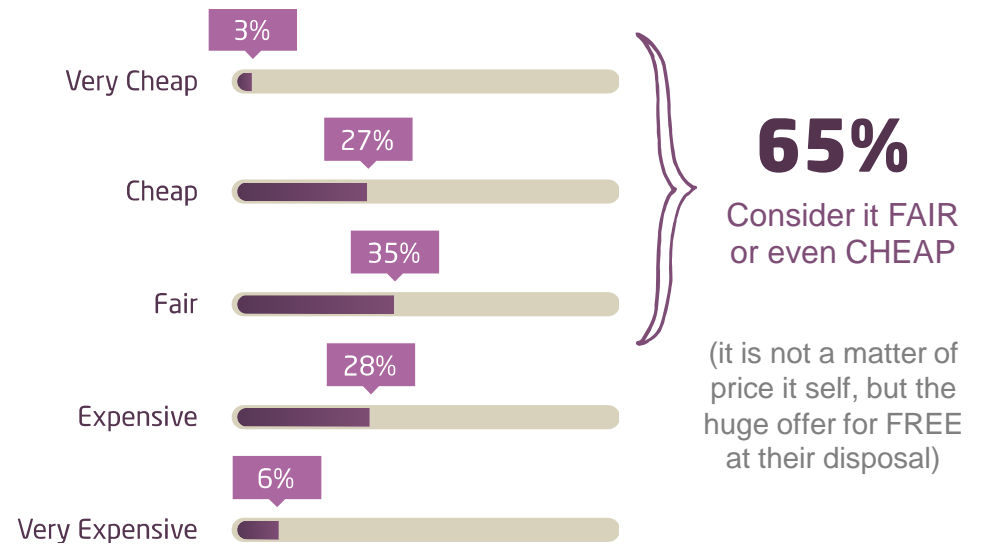


 Monetize – Price experience

Higher price paid for:

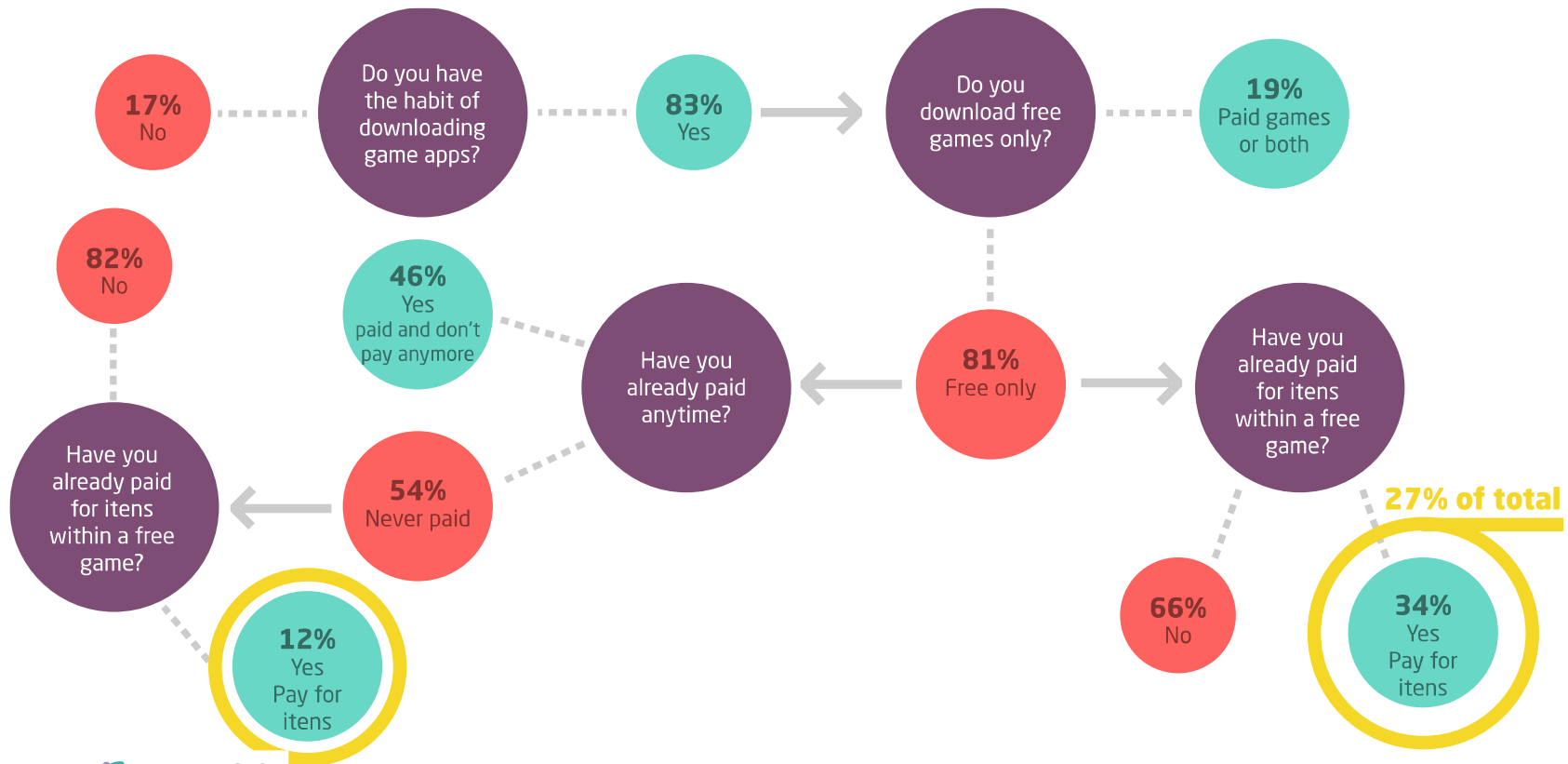


* Exchange rate: US\$1 \cong R\$2,183



\$ Monetization – The track to monetization

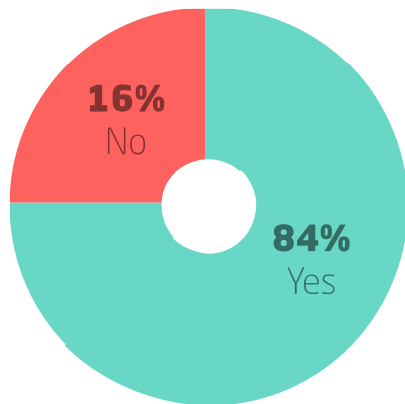
To get in for free, and get money in the engagement has being a successful track.



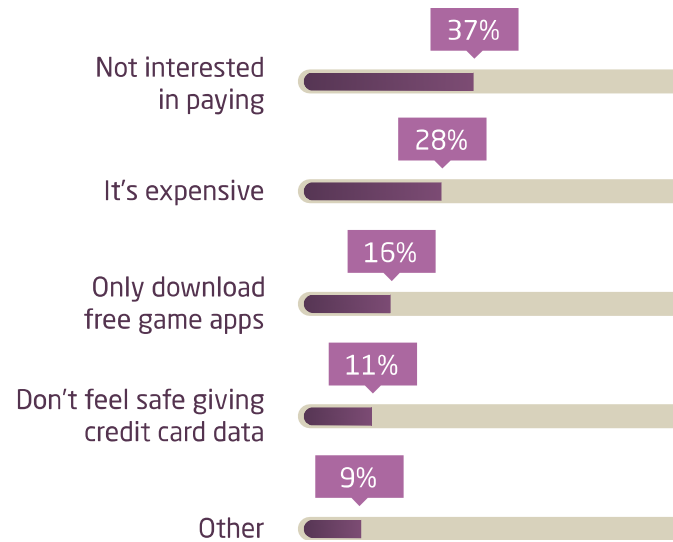
 Monetize – Purchase behavior

WHO HAS ALREADY BROUGHTH...

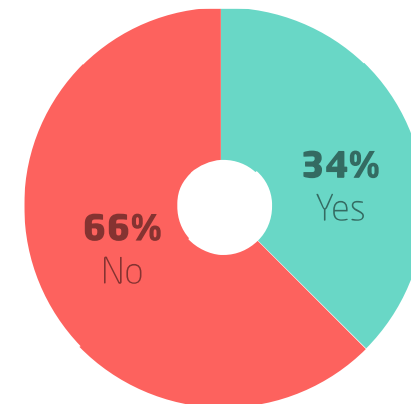
Would pay for, again?



Reasons to not pay again



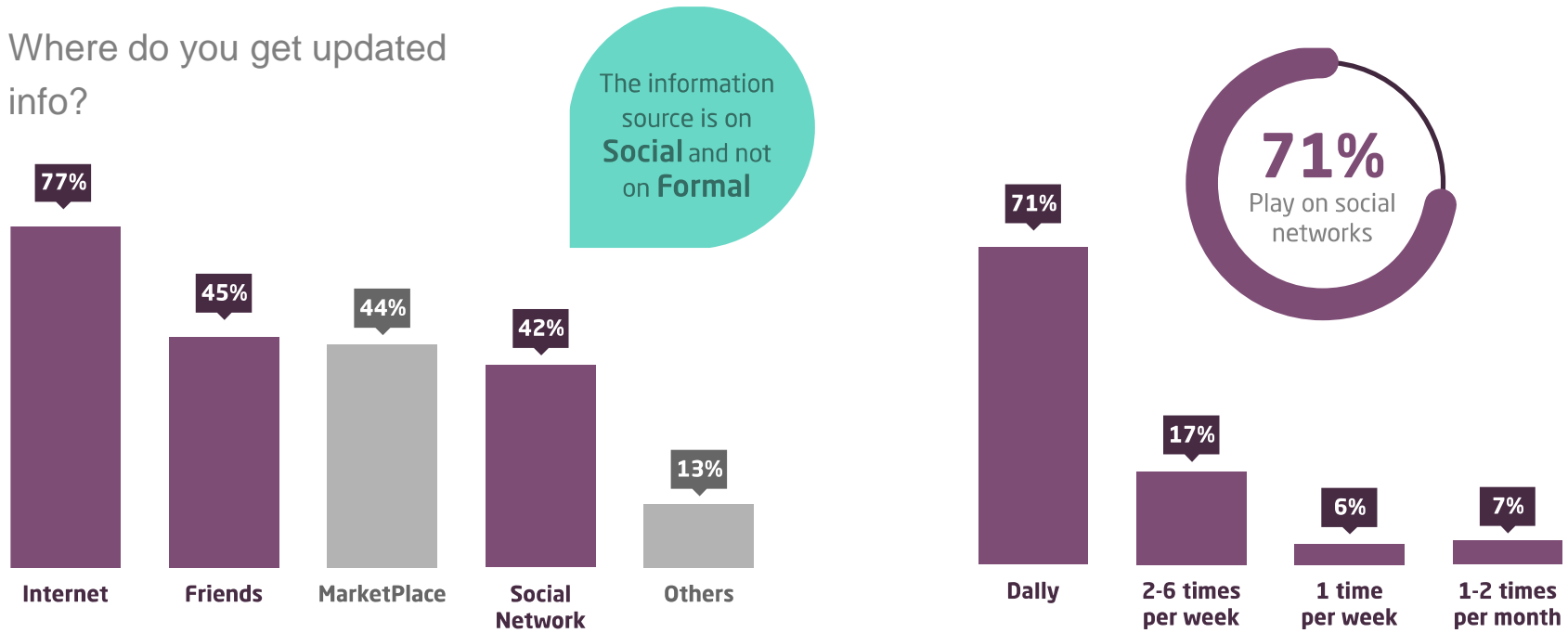
Have already paid for items within a free game?



Monetize - Advertisement

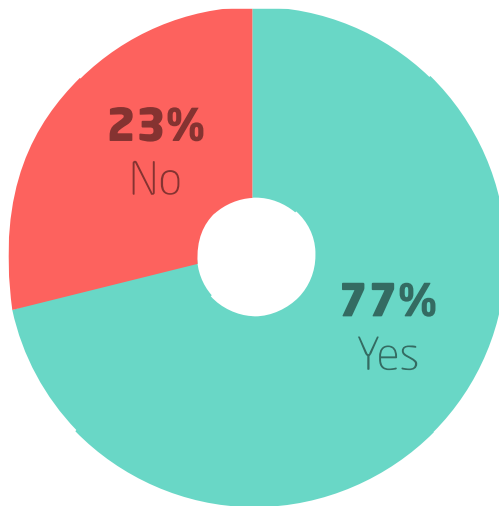
IS IT POSSIBLE ADVERTISE WITHOUT BEING INVASIVE?

Where do you get updated info?

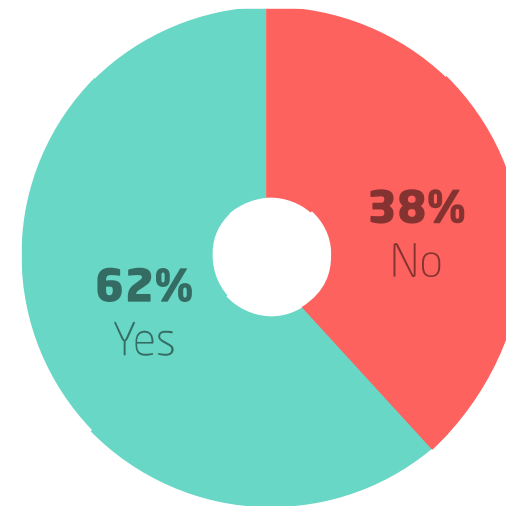


OPINION ABOUT ADVERTISEMENT

Do you accept to download a FREE game with advertising within?

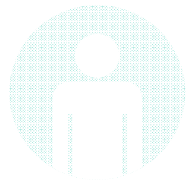


Do the ads DISTURB the game?



RESEARCH LEVELS

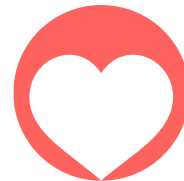
LEVEL 3



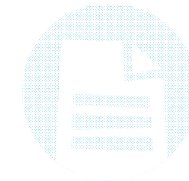
The Gamer



Monetize



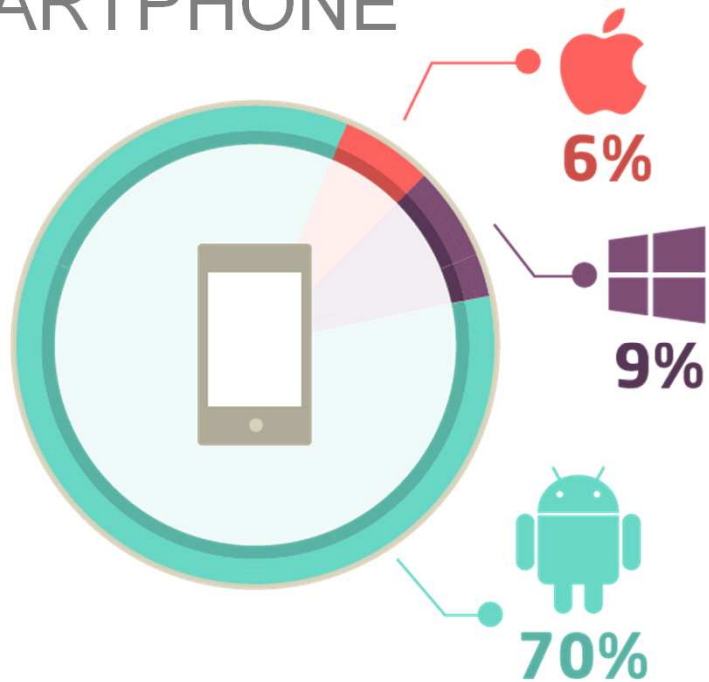
Brands Connected



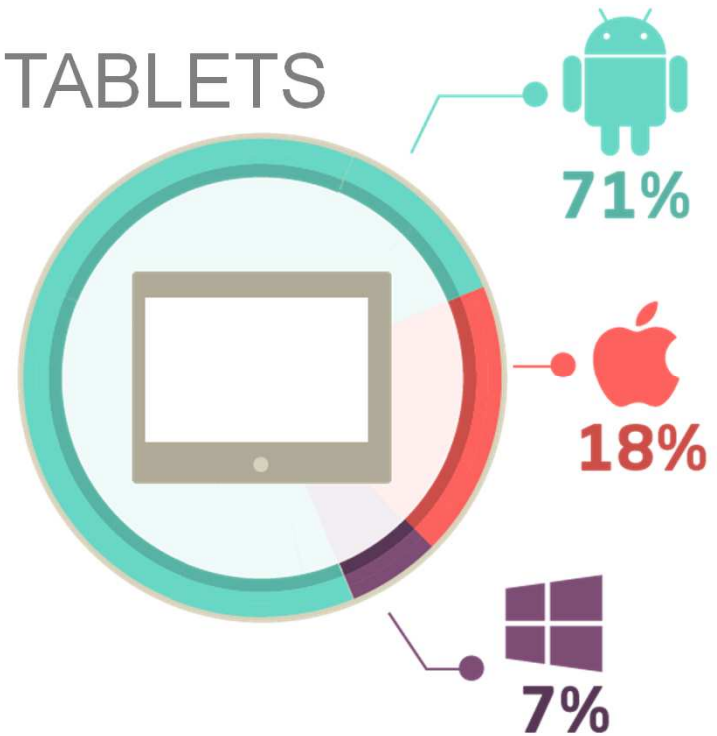
So what?

Brands Connected – Operational System they have now

SMARTPHONE S



TABLETS

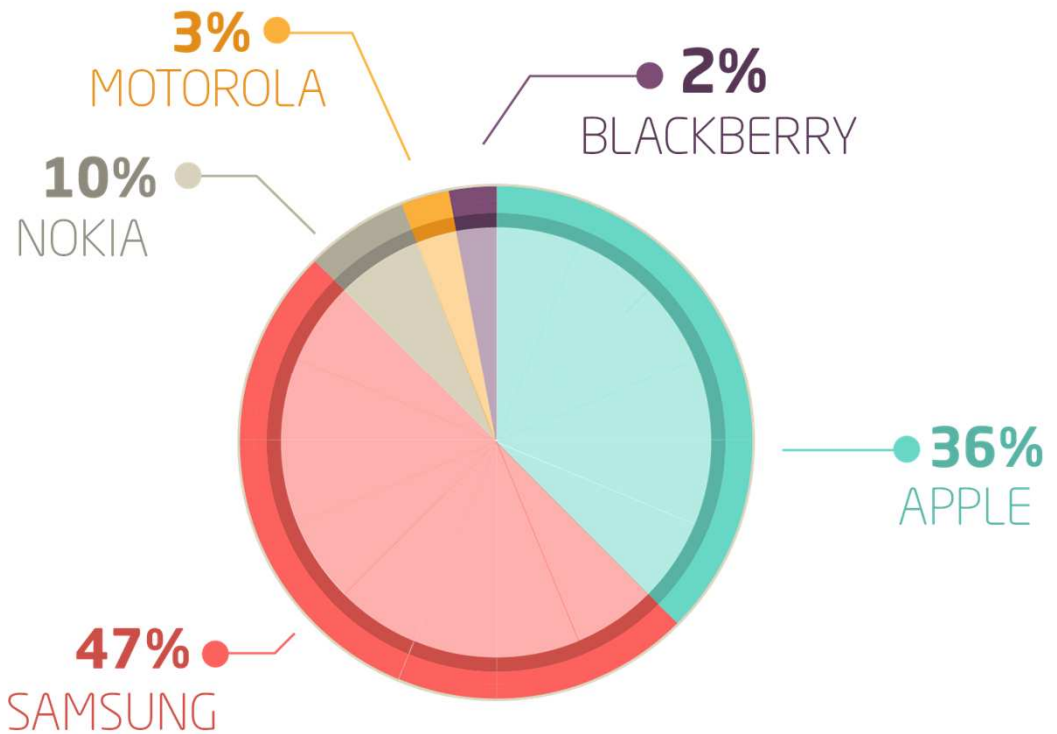


77% use phone's 3G



Brands Connected – Operational System they have now

WHAT IS THE BEST SMARTPHONE BRAND IN THE MARKET?

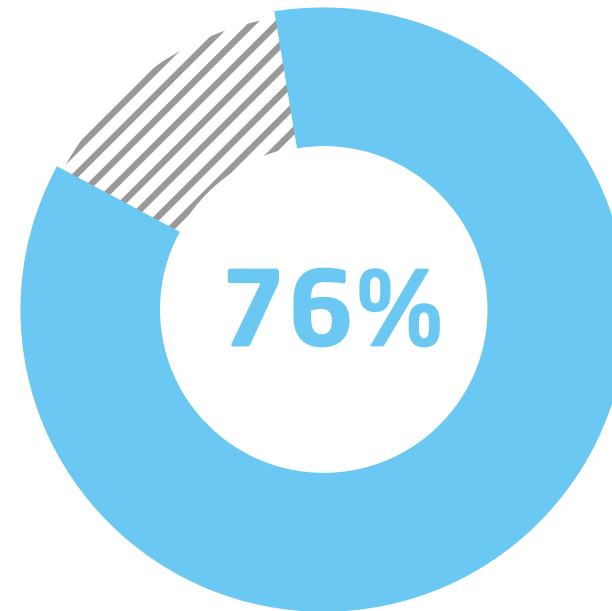


SAMSUNG WAS CONSIDERED THE BEST IN 47% OF RESPONDENTS

 Conclusions – Game Mobile shows off its strength

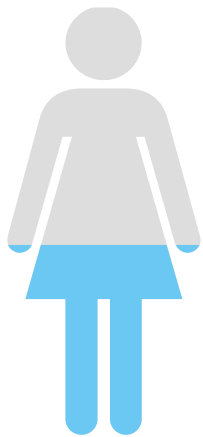
The mobile market has huge impact on games massification.

It's the 2^a largest platform, beaten only by PC.

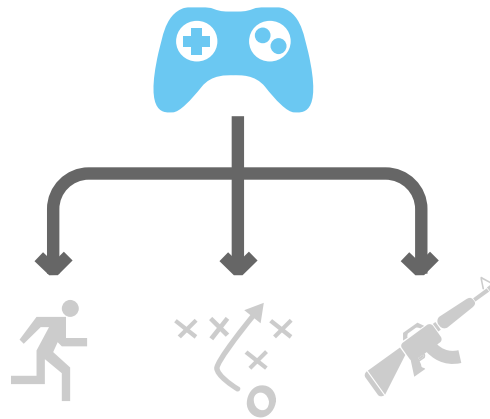


Conclusions – Trend to Universalization

WHO BELIEVES IT AS A NICHE THING, WILL TAKE THE RISK TO MISS THIS OPPORTUNITY.



Women are already
41% of Brazilian
gamers



Games vary from an extended range of styles (action and adventure are main ones, but there are many. As strategy, preferred by women. Or 'Shooting', preferred by hardcore gamers)



They (should say 'we') play it even on workplace. But we don't need to get worried, because that doesn't necessarily mean less productivity.

Conclusions – To monetize



- To buy game Apps is increasingly **hard to accept** - the excess of high quality free options contribute to this **inertia**. Even those who already bought, aren't interested on buying again.
- But when it comes to buying items 'within' a game, we are **more susceptible** to do so.
- Ads are 'accepted', but **strongly criticized** for disturbing the game. To combine them within the game environment, avoiding the disrupt in user experience (preferably improving it), means finding **the 'Holy Grail' of advertising in Games**.

Conclusions – Operational System and Brands



- The **Android** operational system has absolute leadership and is who dictates the consumer's buying behavior. The users are more likely to consume “free” apps than paid ones, reflecting to the research's result.
- Even with a relatively low market share, the strength of **Apple's** brand is great, just behind of **Samsung**.
- **Nokia**, in its turn, brought relevance to the **Windows Phone** operational system focused on the “first smartphone” that has shelf price below R\$ 500.







Price



Service



CONTACTS



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O B R I G A D O



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