

# And it all began with 'Snake', remember? Gaming Mobile all the way



**JOSEPH OLIN**

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International Digital Media & Arts Association, United States of America

[@JosephOlin](#)

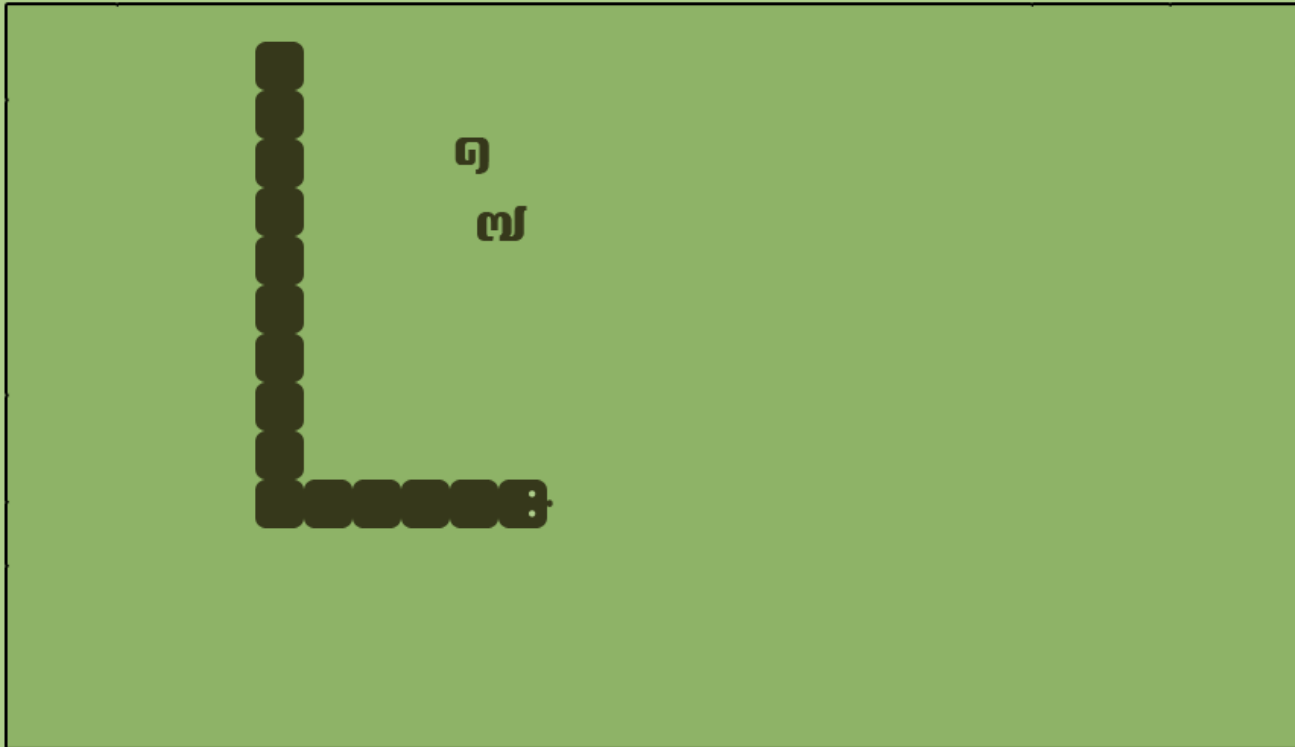


**IV Annual Convention**

Latin America in the Knowledge and Information Economy



Score: 578





# Overview

\$100+  
Billion USD

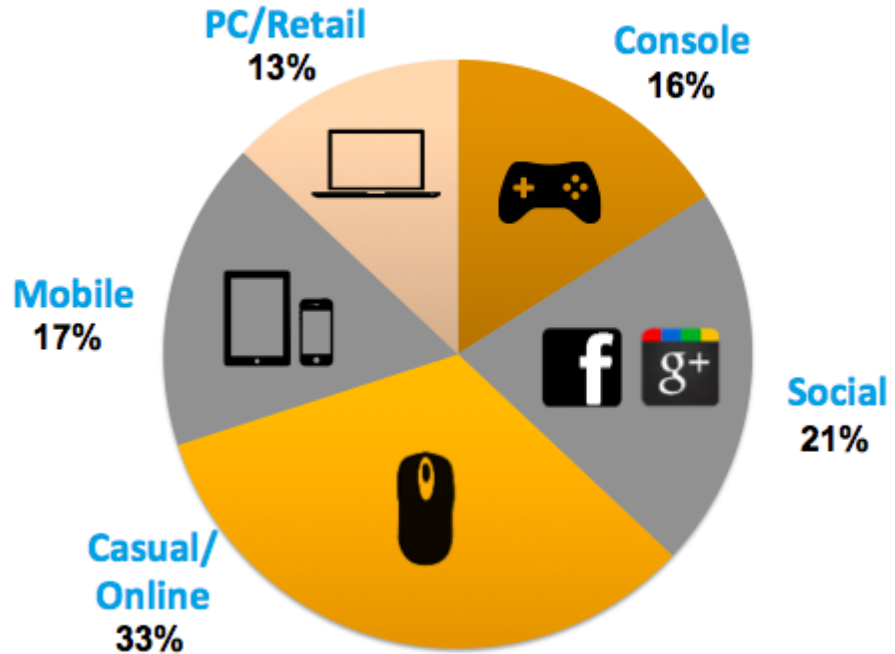
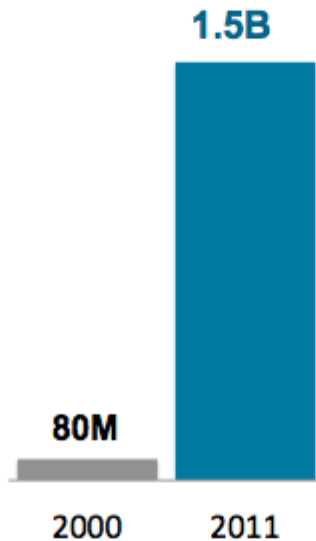


# More People Playing *Even More Games to Play*

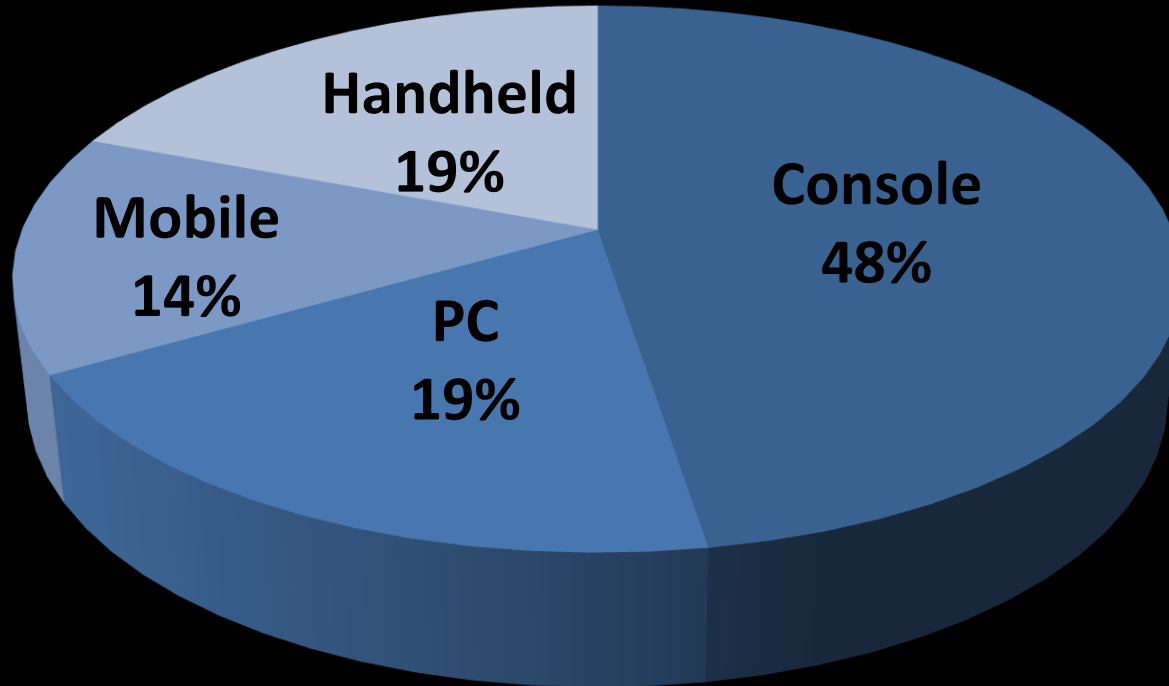


# A Billion New Players!

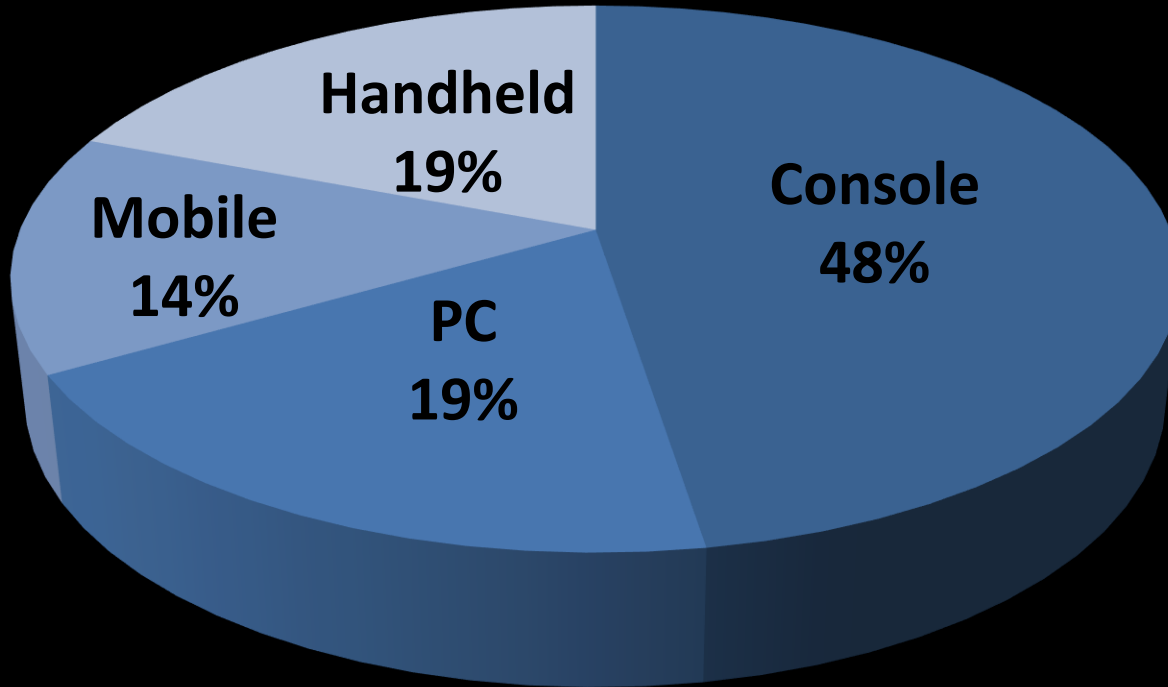
Worldwide Players



# GLOBAL GAME REVENUE



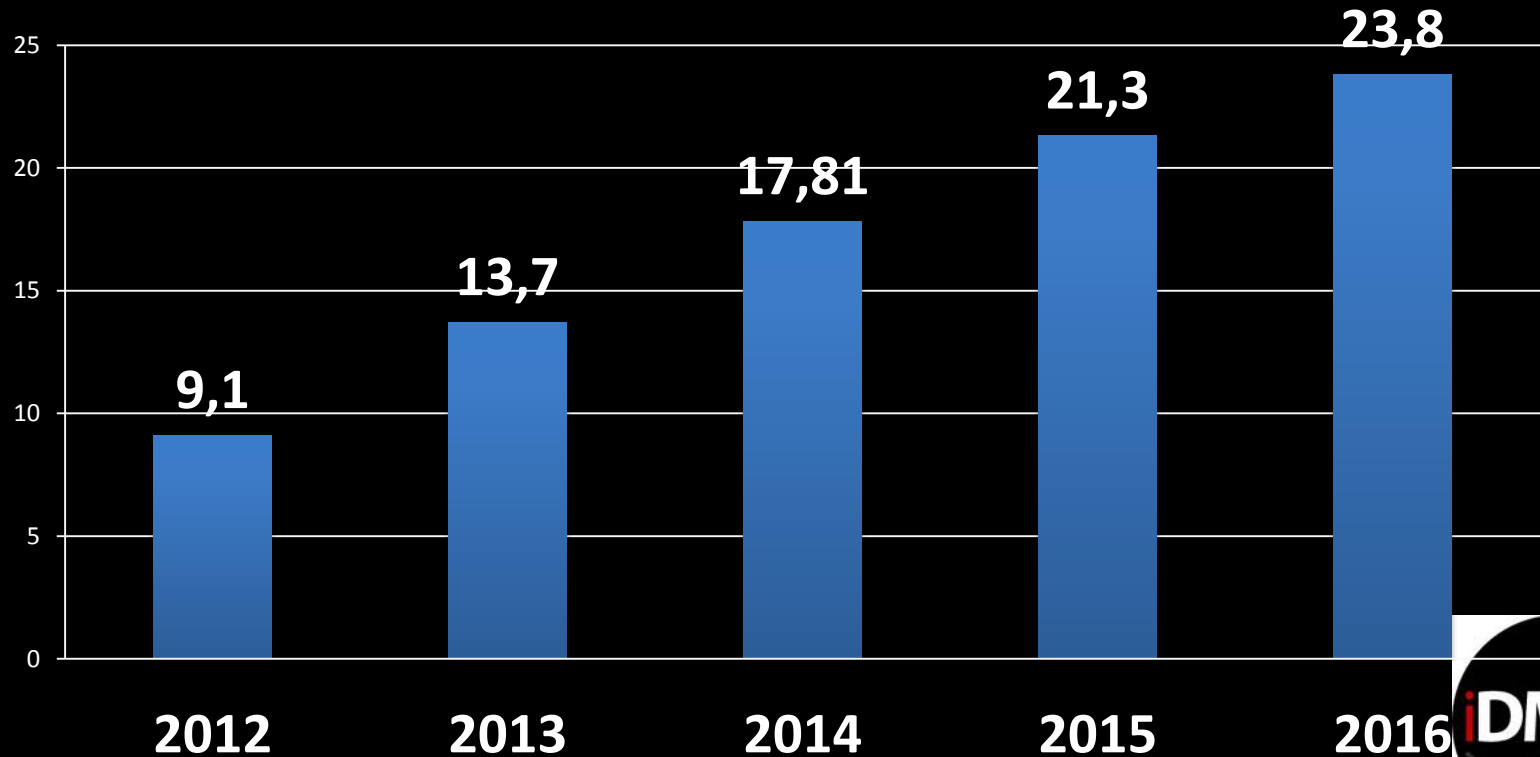
# \$40 Billion Upside





# Global Growth Is Expected!

## *Mobile Games Revenue Forecasts*



# Mobile Rules!

CONNECTED TV **+25%**



PC **+0%**



SMARTPHONES/  
TABLETS **+65%**



**-3%**  
FEATURE  
PHONES



HANDHELDS **-5%**



XBOX360 / PS3  
**+2%**



WII **-33%**



Source: Lectman Research Group

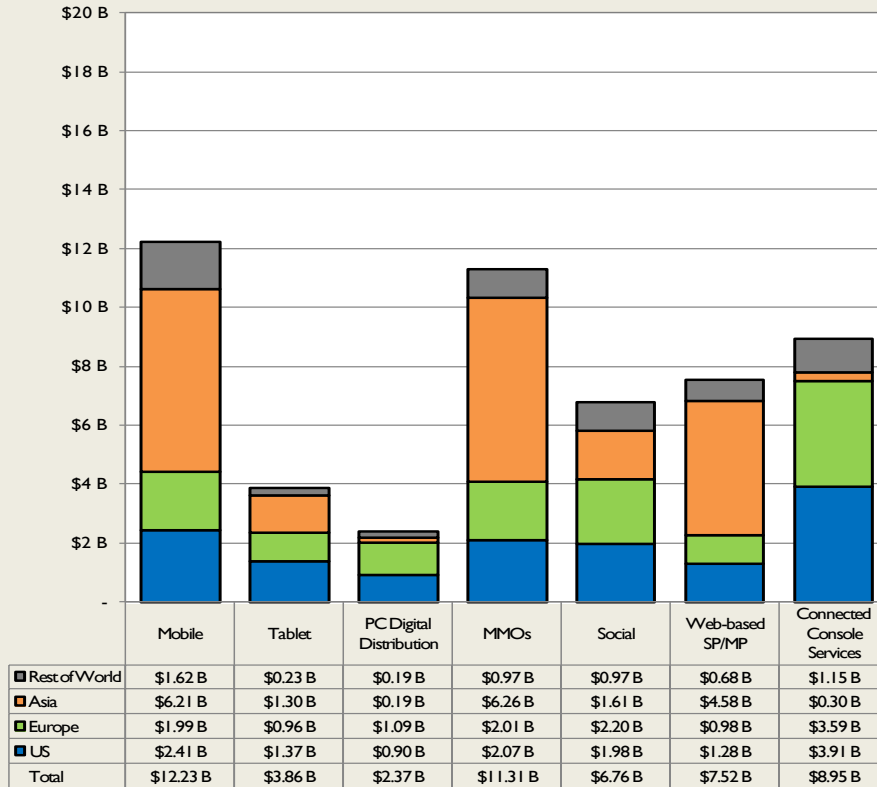




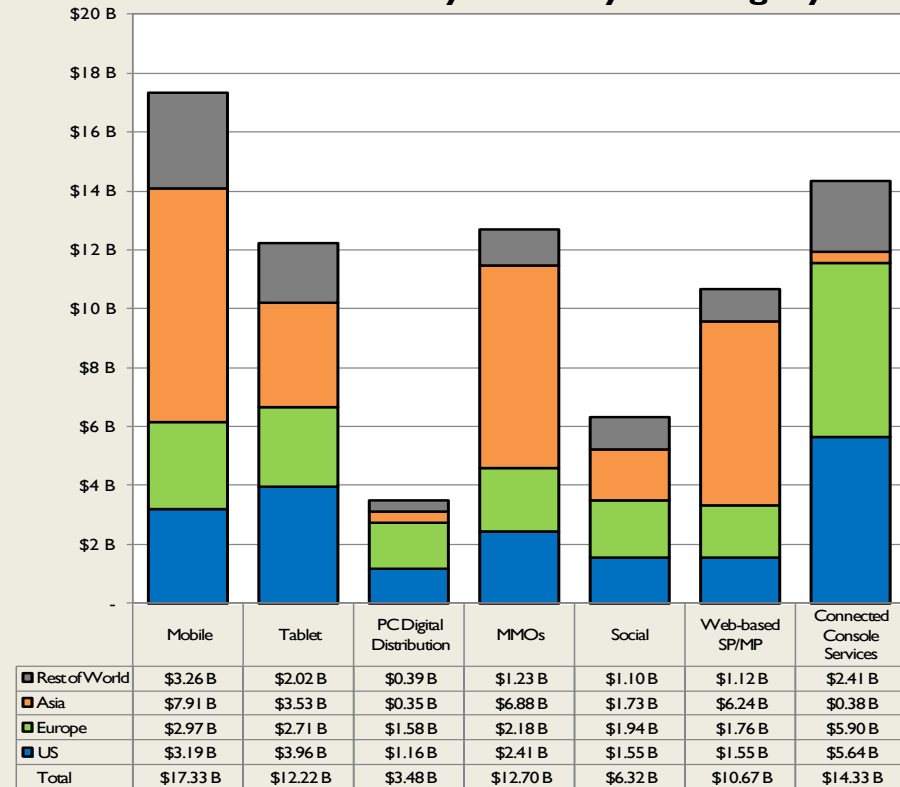


# 2013 – '17E Revenue by Area & Category

## 2013 Revenue by Territory & Category

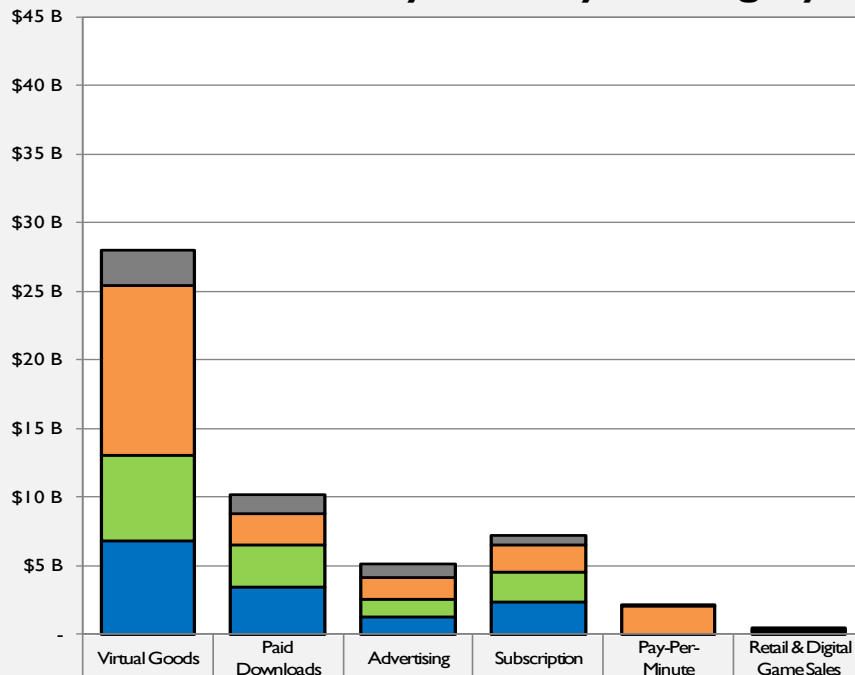


## 2017E Revenue by Territory & Category



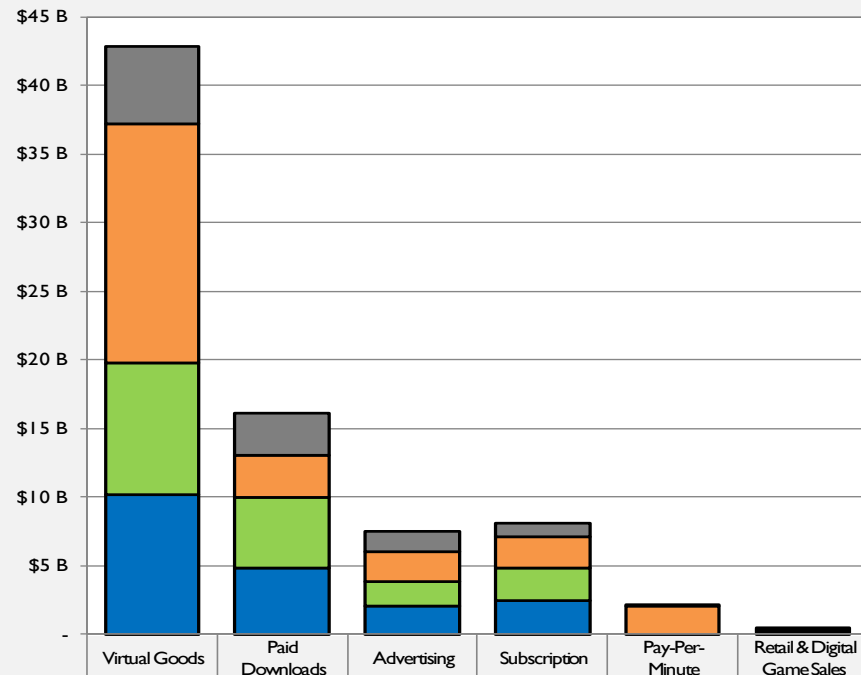
# 2013 – '17E Revenue By Area & Monetization

## 2013 Revenue by Territory & Category



Territory	Virtual Goods	Paid Downloads	Advertising	Subscription	Pay-Per-Minute	Retail & Digital Game Sales
Rest of World	\$2.58 B	\$1.43 B	\$0.96 B	\$0.71 B	\$0.11 B	\$0.03 B
Asia	\$12.40 B	\$2.27 B	\$1.60 B	\$2.00 B	\$2.07 B	\$0.09 B
Europe	\$6.21 B	\$3.08 B	\$1.25 B	\$2.15 B	-	\$0.12 B
US	\$6.81 B	\$3.38 B	\$1.26 B	\$2.35 B	-	\$0.12 B
<b>Total</b>	<b>\$28.0 B</b>	<b>\$10.2 B</b>	<b>\$5.1 B</b>	<b>\$7.2 B</b>	<b>\$2.2 B</b>	<b>\$0.4 B</b>

## 2017E Revenue by Territory & Category



Territory	Virtual Goods	Paid Downloads	Advertising	Subscription	Pay-Per-Minute	Retail & Digital Game Sales
Rest of World	\$5.62 B	\$3.12 B	\$1.55 B	\$1.07 B	\$0.14 B	\$0.02 B
Asia	\$17.45 B	\$3.08 B	\$2.16 B	\$2.19 B	\$2.03 B	\$0.10 B
Europe	\$9.60 B	\$5.17 B	\$1.73 B	\$2.44 B	-	\$0.10 B
US	\$10.12 B	\$4.76 B	\$2.06 B	\$2.41 B	-	\$0.11 B
<b>Total</b>	<b>\$42.8 B</b>	<b>\$16.1 B</b>	<b>\$7.5 B</b>	<b>\$8.1 B</b>	<b>\$2.2 B</b>	<b>\$0.3 B</b>

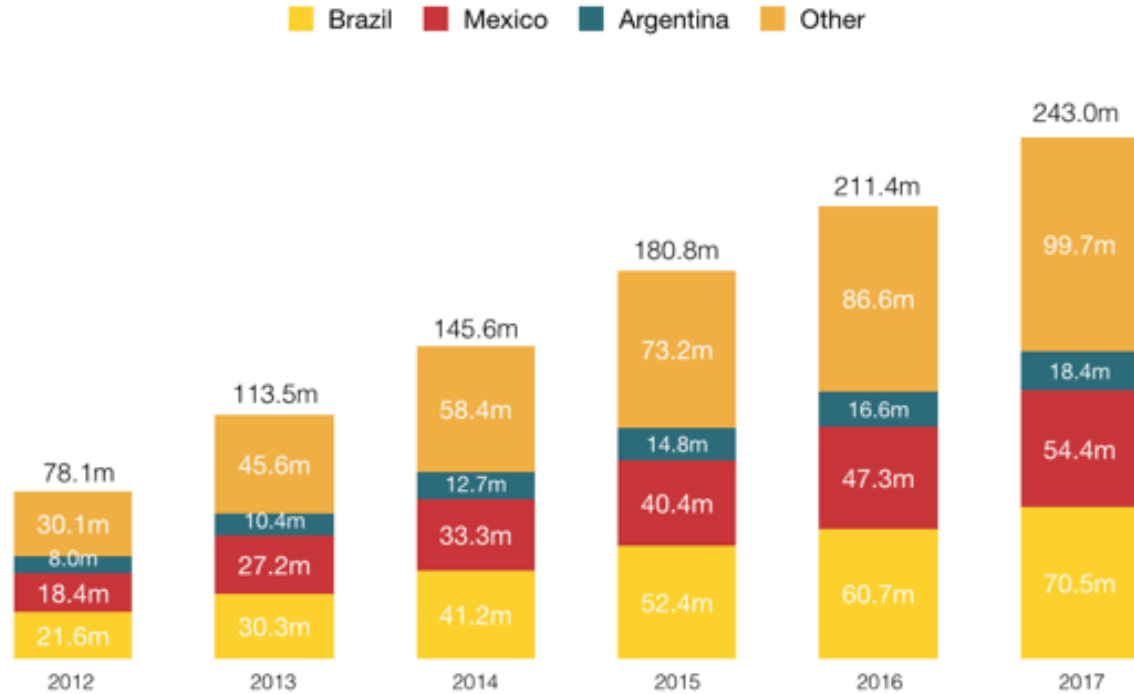


Games are a  
real business  
throughout  
Latin  
America



## Smartphone users in Latin America 2012-2017

number of people who own at least one smartphone & use it at least once a month in millions



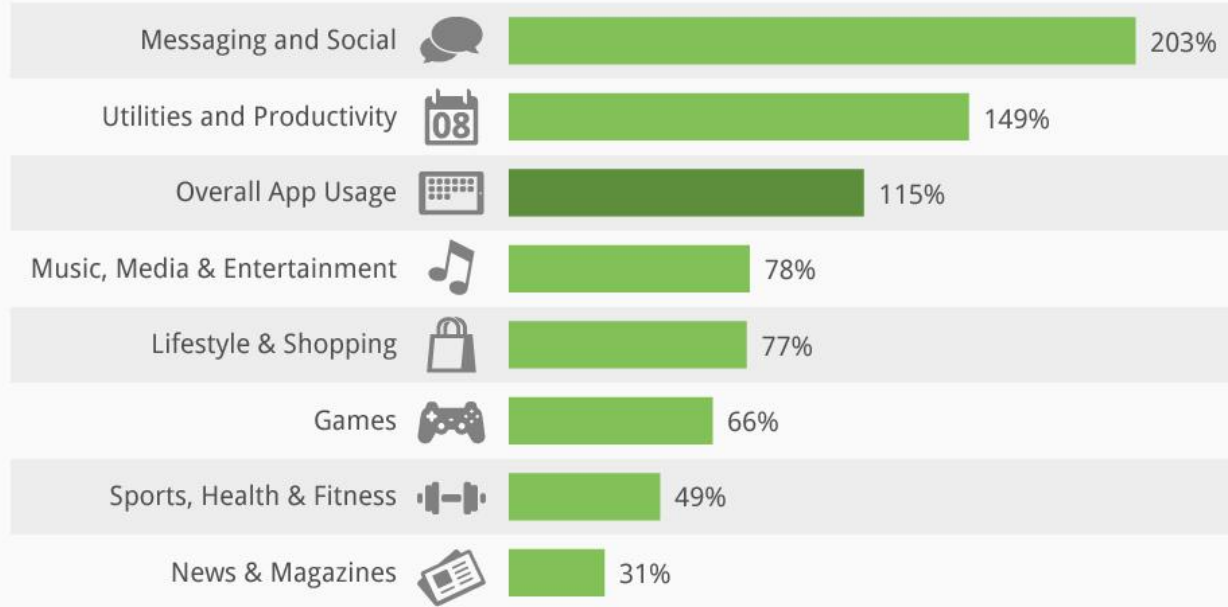
Source: eMarketer, December 2013





## Messaging & Social App Use Triples in 2013

Year-over-year growth of app usage, by category\*



\* app use defined as a consumer launching an app

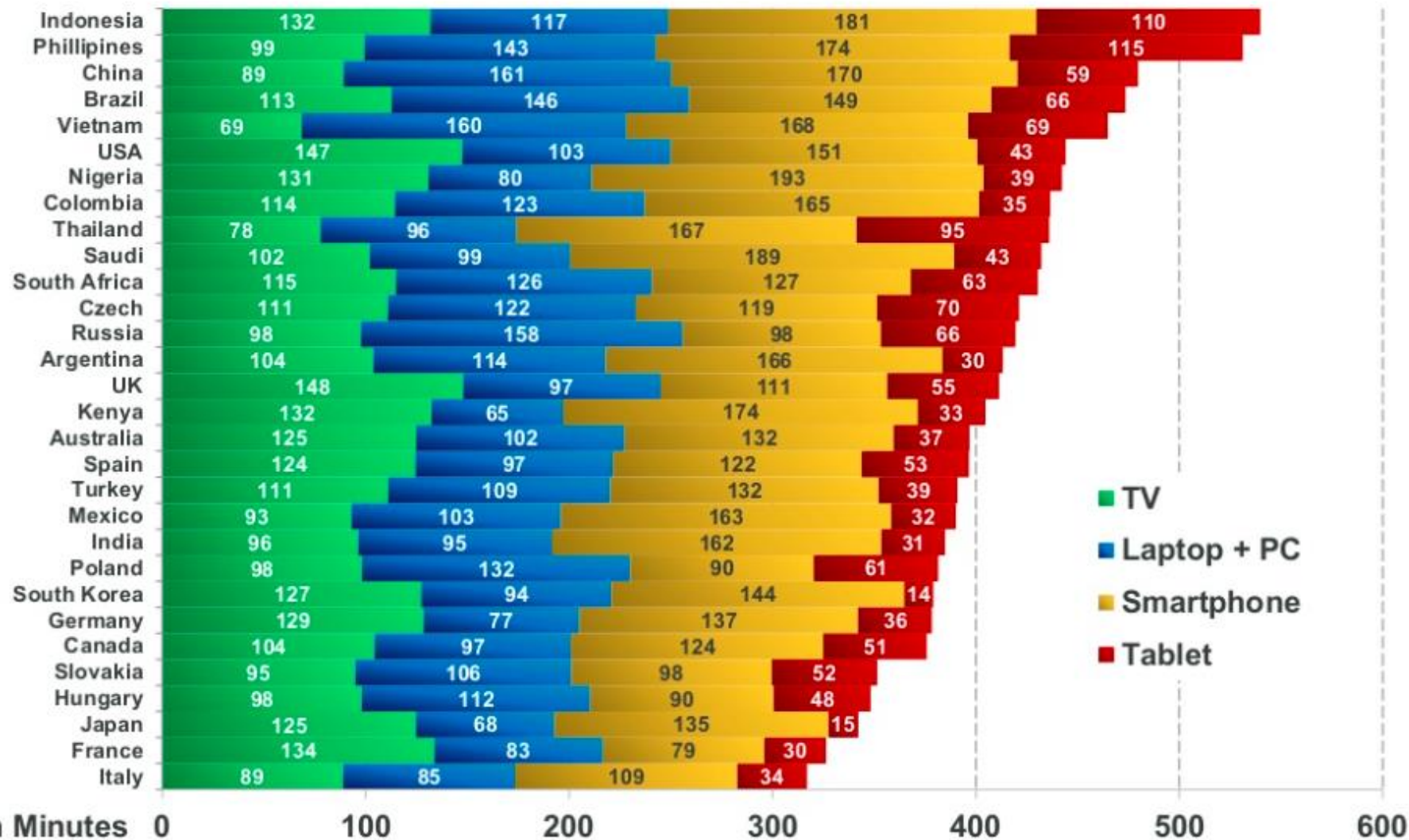
Source: Flurry Analytics

Mashable statista

# Social Apps Drive Usage Trends



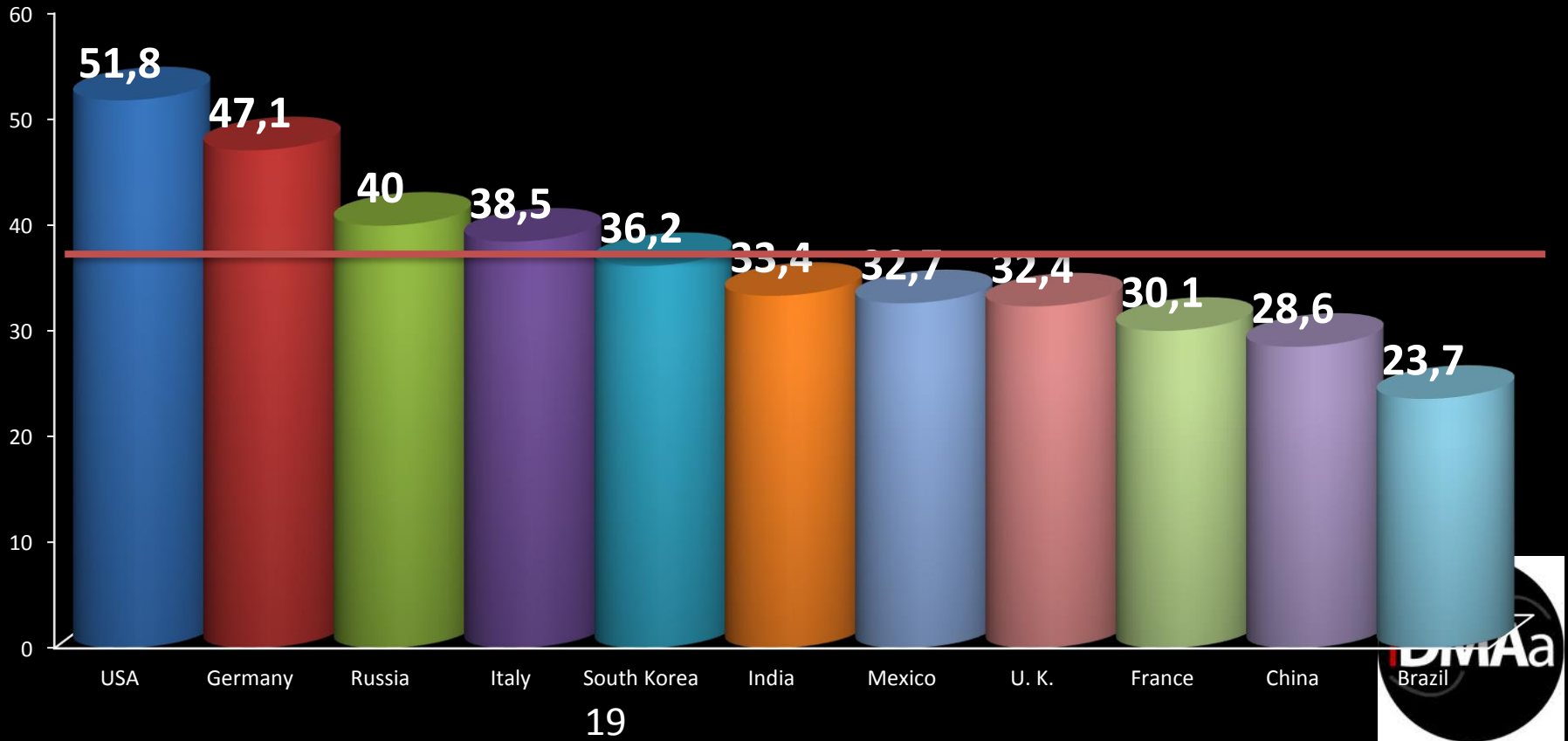
# Daily Distribution of Screen Minutes Across Countries (Mins)



Source: Milward Brown AdReaction, 2014.

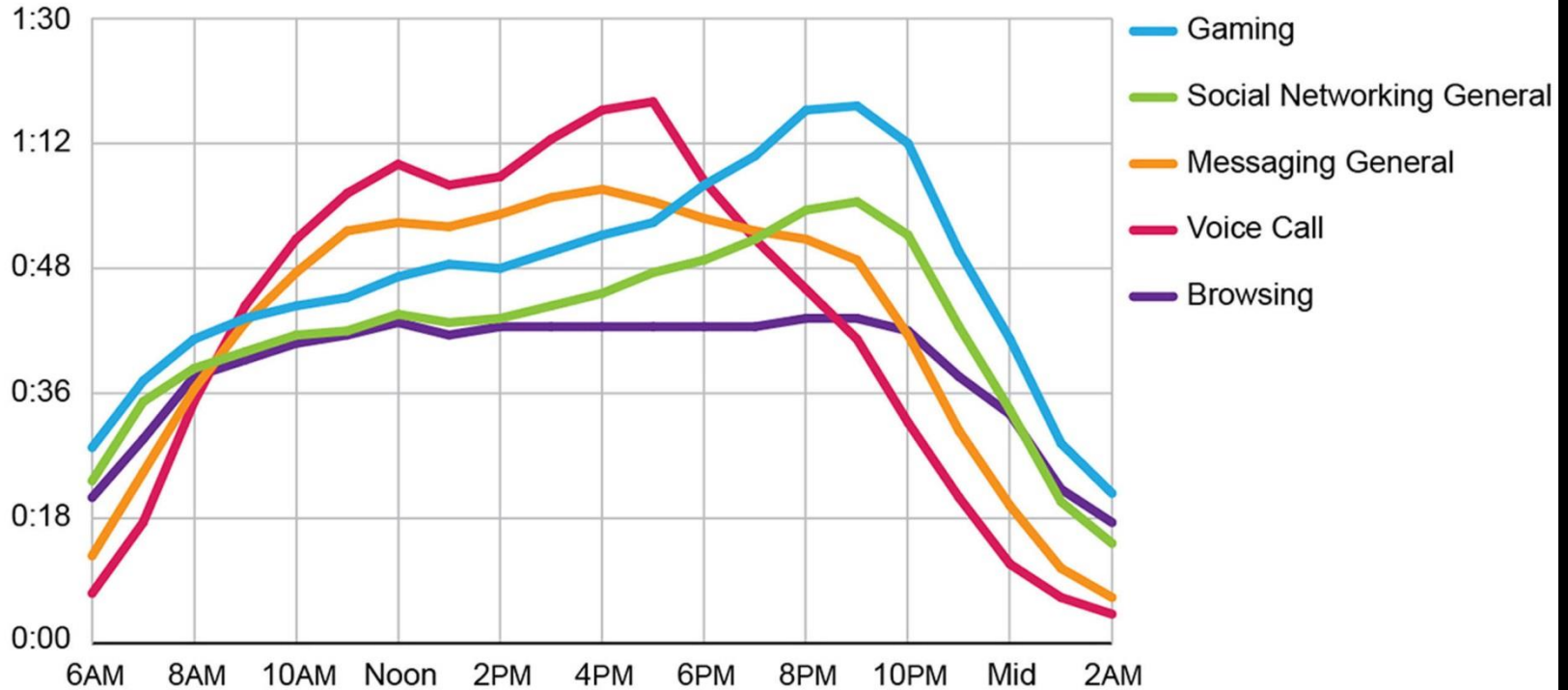
Note: Survey asked respondents "Roughly how long did you spend yesterday watching television (not online) / using the internet on a laptop or PC / on a smartphone / on a tablet?"

# Minutes Per Day of Mobile Play



# Hour-by-Hour/Average Time Spent With Top Smartphone Functions

Monday-Friday, expressed in minutes : seconds per each hour



All Phone	2:19	4:26	5:28	6:02	6:01	6:23	6:14	6:10	5:16	3:13	1:26
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Source: Arbitron Mobile U.S. Mobile Trends Panels™ Service; Fourth Quarter 2012  
 Opt-In sample of mobile consumers; Persons 18+



# Tastes in Games

<b>Arcade &amp; Action</b>	<b>74%</b>	<b>71%</b>	<b>67%</b>	<b>67%</b>	<b>65%</b>	<b>51%</b>
<b>Casual</b>	<b>46%</b>	<b>52%</b>	<b>50%</b>	<b>60%</b>	<b>61%</b>	<b>49%</b>
<b>Brain &amp; Puzzle</b>	<b>13%</b>	<b>35%</b>	<b>12%</b>	<b>12%</b>	<b>21%</b>	<b>53%</b>
<b>Cards &amp; Casino</b>	<b>6%</b>	<b>20%</b>	<b>17%</b>	<b>3%</b>	<b>7%</b>	<b>14%</b>
<b>Sports</b>	<b>3%</b>	<b>10%</b>	<b>14%</b>	<b>10%</b>	<b>11%</b>	<b>9%</b>

*CHINA*

*USA*

*India*

*Brazil*

*Mexico*

*Germany*



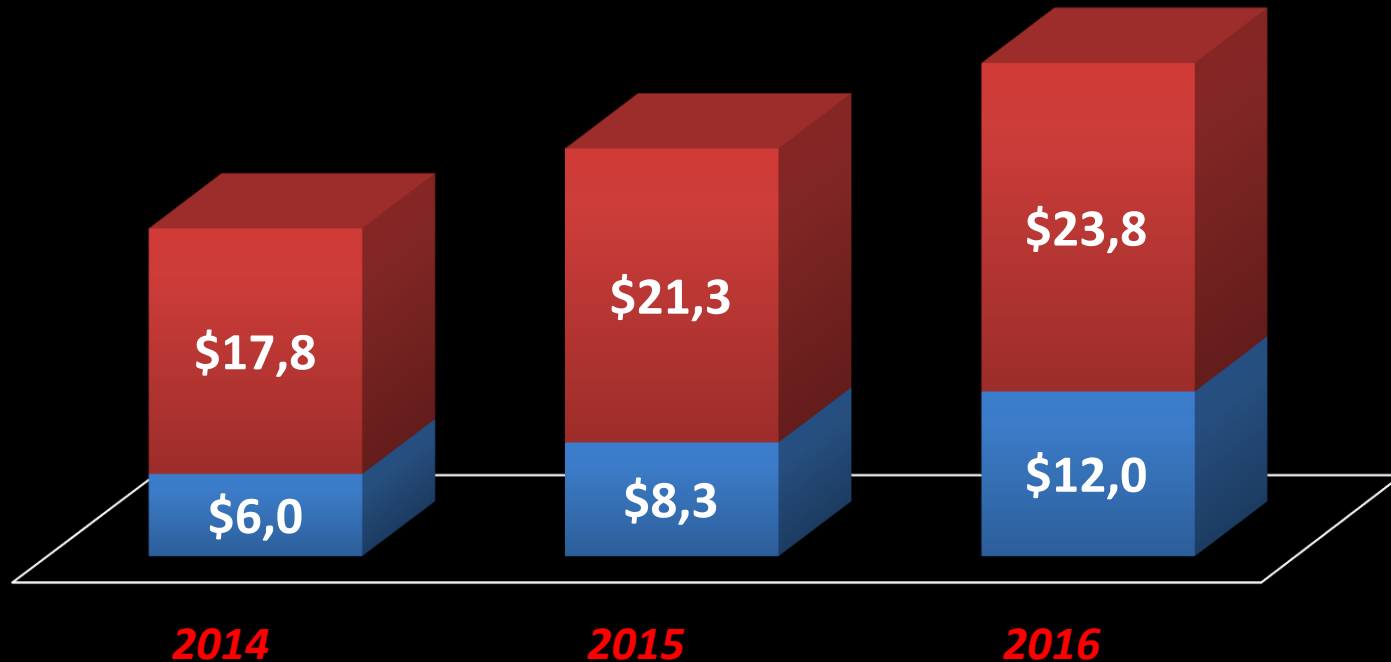
# The Opportunity?



# How Do We Get Paid



# Ads to Outgrow IAP







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\$17.17



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Lucas Bros. Moving C...



Moonshine Myths  
MythBusters, Season ...



All About Eve  
Last Man Standing, S...



The Bogeyman  
Blue Bloods, Season 4



Date Expectations  
The Carrie Diaries, Se...



Fear and Loving in  
New Jersey  
The Neighbors, Seaso...



Hey There Delilah  
Raising Hope, S...



The Furies  
Atlantis, Season 1



A Pox On Your Pox  
Golan the Insatiable, ...



Blowout  
Gold Rush, Season 4



Come to Die  
Dracula, Season 1



Eyes of the Beholder  
Grimm, Season 3



The Ghost in the Killer  
Bones, Season 9



O kela me keia  
manawa  
Hawaii Five-0, Se...


### TV SHOWS

All Categories

#### TV SHOWS QUICK LINKS

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- Get the Latest Episodes
- Networks & Studios
- Shows Just Added
- Kids Highlights
- Complete My Season
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#### TOP TV EPISODES >

-  **The Magical Delights of Stevie Nicks**  
American Horror Stor...
- Episode 1 (Original UK Edition)**  
Downton Abbey, Season 4
- Episode 2 (Original UK Edition)**  
Downton Abbey, Season 4
- Who's in the Box?**  
Pretty Little Liars, Season 4
- The Occupation Recalibration**  
The Big Bang Theory, Season 7
- And One to Grow On**

**WHITECOLLAR**



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## Top Free iPhone Apps

Paid Free Top Grossing

Game: ▾

 <b>1. Cut the Rope</b> Games Free ▾	 <b>2. The Impossible Line</b> Games Free ▾	 <b>3. New Scramble With Friends</b> Free Games Free ▾	 <b>4. Plants vs. Zombies™ 2</b> Games Free ▾	 <b>5. Candy Crush Saga</b> Games Download ▾	 <b>6. Jelly Splash</b> Games Free ▾	 <b>7. Madden NFL 25</b> by EA SPORTS™ Games Free ▾	 <b>8. Despicable Me: Minion Rush</b> Games Free ▾	 <b>9. Racing Rivals</b> Games Free ▾	 <b>10. Family Farm Seaside</b> Games Free ▾
 <b>11. Baby Care &amp; Baby Hospital</b> Games Free ▾	 <b>12. RunBot</b> Games Free ▾	 <b>13. College Chic Makeover - Spa</b> Games Free ▾	 <b>14. Colomania - Guess the Colors</b> Games Free ▾	 <b>15. Sonic Dash</b> Games Free ▾	 <b>16. Subway Surfers</b> Games Free ▾	 <b>17. Minecraft - Pocket Edition</b> Games Free ▾	 <b>18. Monster Doctor Office</b> Games Free ▾	 <b>19. Sniper Shooter by Fun Games</b> Games Free ▾	 <b>20. Smash Bandits</b> Games Free ▾
 <b>21. Temple Run 2</b> Games Free ▾	 <b>22. Zombie Highway</b> Games Free ▾	 <b>23. Escape the Titanic - Deviou...</b> Games Free ▾	 <b>24. Hill Climb Racing</b> Games Download ▾	 <b>25. Coin Dozer</b> Games Download ▾	 <b>26. Dragon Skies</b> Games Free ▾	 <b>27. Clash of Clans</b> Games Free ▾	 <b>28. Pet Shop Story</b> Games Free ▾	 <b>29. The Sims™ FreePlay</b> Games Free ▾	 <b>30. Dumb Ways to Die</b> Games Free ▾

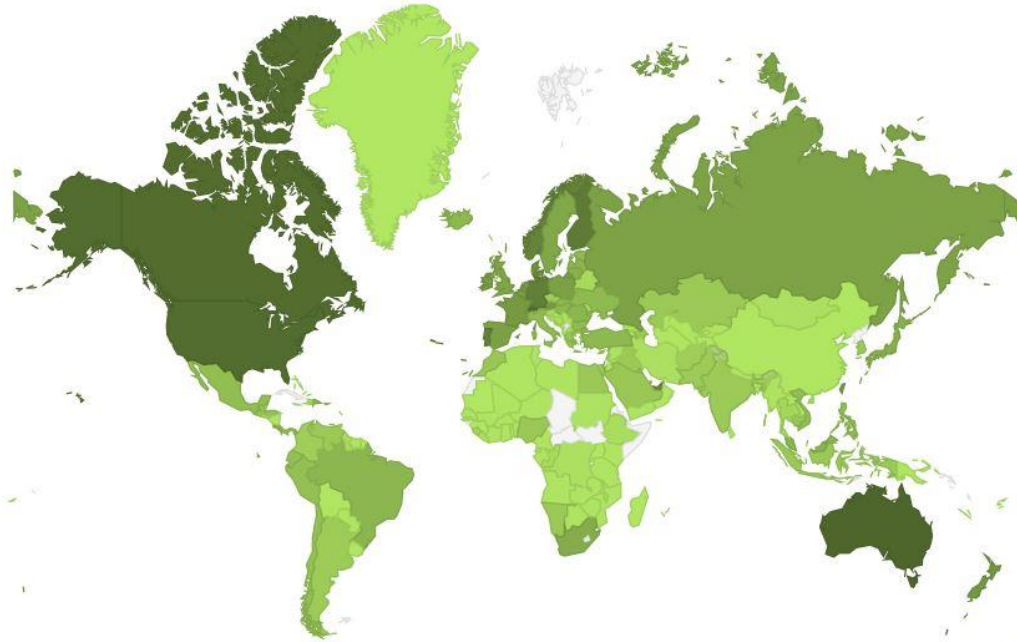


Cost of Discovery still the  
Biggest Barrier to Success



# Android Average CPI

DECEMBER 2013



\$0.5  \$1.48

Chartboost 

## INSIGHTS

[iOS CPI by Country](#)

[iPhone CPI by Country](#)

[iPad CPI by Country](#)

**[Android CPI by Country](#)**

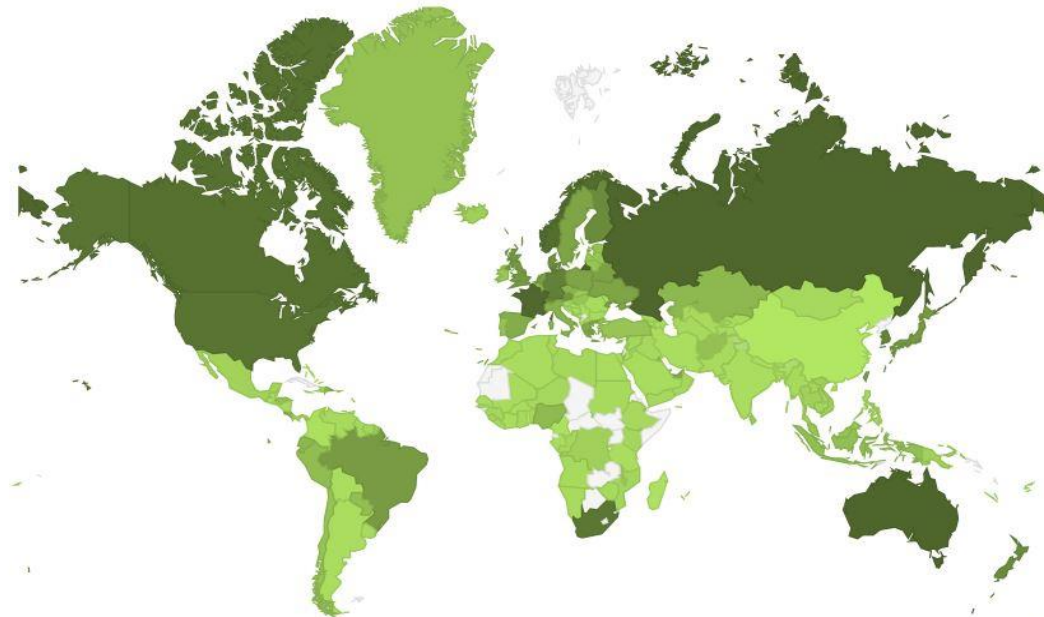
[Network CPI](#)

[About](#)



# iOS Average CPI

DECEMBER 2013



\$0.88  \$2.39

Chartboost

## INSIGHTS

### iOS CPI by Country

[iPhone CPI by Country](#)

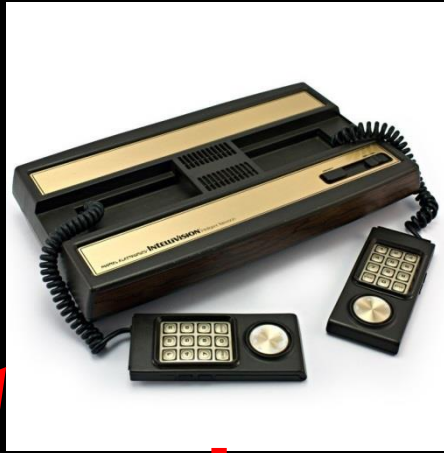
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[Android CPI by Country](#)

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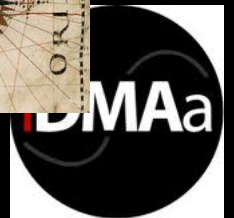


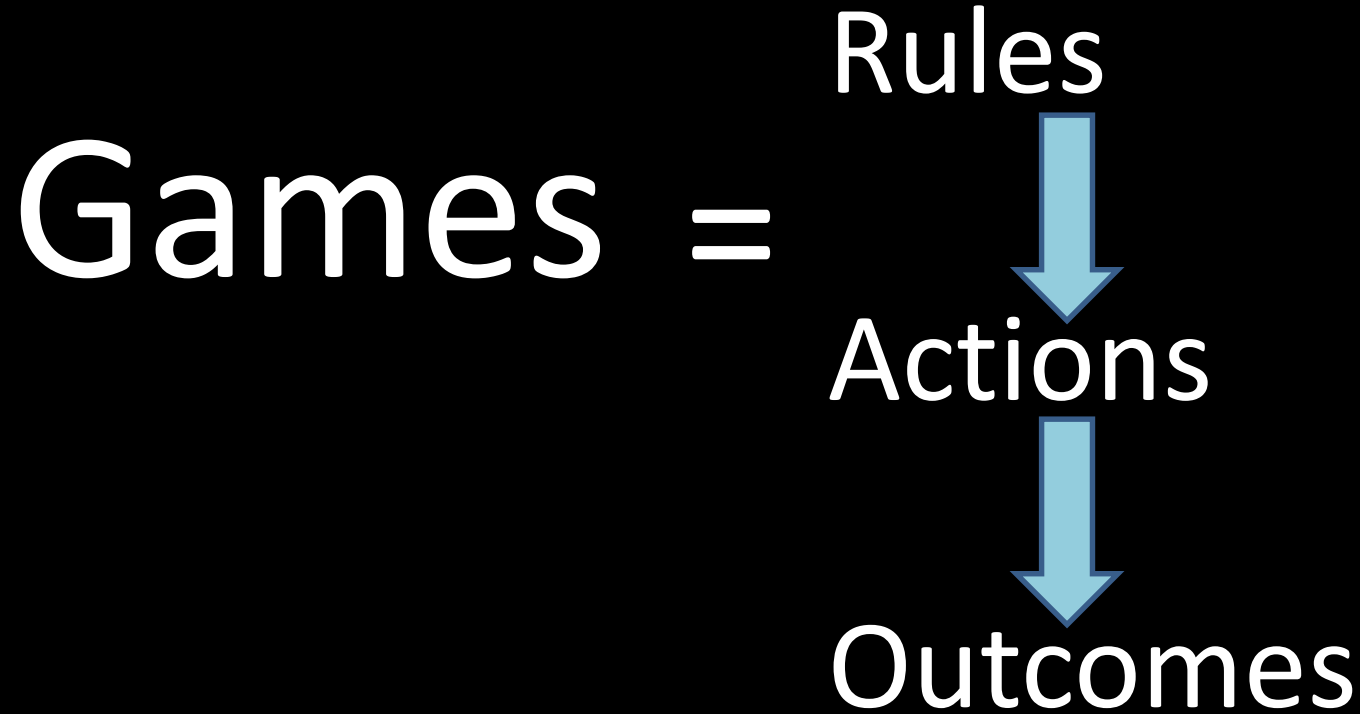
# iPhone 6





# A Brave New World





**SUCCESS IN MOBILE TODAY  
IS ABOUT THE RULES OF  
BUSINESS**



“The way to get started is to quit talking and begin doing.” - **Walt Disney.**



Buena Suerte  
Con Sus Juegos!



