

L'évolution de l'industrie du jeu numérique

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Origines de l'industrie, Amérique du Nord



PAUSE INIT DONE statement executed
To resume execution, type go. Other input will terminate
go

Execution resumes after PAUSE.

WELCOME TO ADVENTURE!! WOULD YOU LIKE INSTRUCTIONS?

y
SOMEWHERE NEARBY IS COLOSSAL CAVE, WHERE OTHERS HAVE FOUND
FORTUNES IN TREASURE AND GOLD, THOUGH IT IS RUMORED
THAT SOME WHO ENTER ARE NEVER SEEN AGAIN. MAGIC IS SAID
TO WORK IN THE CAVE. I WILL BE YOUR EYES AND HANDS. DIRECT
ME WITH COMMANDS OF 1 OR 2 WORDS.
(ERRORS, SUGGESTIONS, COMPLAINTS TO CROWTHER)
(IF STUCK TYPE HELP FOR SOME HINTS)

YOU ARE STANDING AT THE END OF A ROAD BEFORE A SMALL BRICK
BUILDING . AROUND YOU IS A FOREST. A SMALL
STREAM FLOWS OUT OF THE BUILDING AND DOWN A GULLY.





Des arcades au jeu à domicile



Des arcades au jeu à domicile + Japon



The logo is a circular seal with a brown, serrated outer edge. Inside the seal, the word "Official" is at the top, "Nintendo" is in the center within a rounded rectangle, and "Seal" is at the bottom. All text is brown.

Official

Nintendo[®]

Seal

GENESIS DOES WHAT NINTENDON'T.

ARCADE GAMES:



Super Monaco GP™



Michael Jackson's Moonwalker™



E-SWAT™

SPORTS GAMES:



Joe Montana Football™



Pat Riley Basketball™



James "Buster" Douglas Knockout Boxing™

ADVENTURE GAMES:



The Sword of Vermilion™

STRATEGY GAMES:



Columns™

ACTION GAMES:



Dynamite Duke™

Get the hottest new video games going. Arcade, sports, adventure, strategy and action hits available only on the 16-bit Genesis System by Sega.®

Today's latest blockbuster arcade hits like Super Monaco GP.™ Climb into the cockpit of the world's fastest Grand Prix machines as you race wheel to wheel through the streets at over two-hundred miles per hour. Or take on the evil villain Mr. Big in Michael Jackson's Moonwalker™ as you use dance-kicks, hat-tricks and finally transform into a powerful robot that does it all. Or become a Cybercop in E-SWAT™ and clean up the city besieged by mad terrorists.

Get ready for the most action-packed sports games ever. In Joe Montana Football,™ check out the defense, make the call, fake a pass and scramble for a touchdown. Or force your opponent to move inside your left hook and nail him with an uppercut that puts him on the mat in James "Buster" Douglas Knockout Boxing.™ Or in Pat Riley Basketball,™ get the ball with seven seconds left in the game, drive the length of the court, slam-dunk and draw the foul which you make to break the tie.

In The Sword of Vermilion,™ make your way through 14 towns and 14 mazes in this adventure thriller where encounters with the evil demons are played in real time on the hand controller. And dazzle your friends with your skills on the puzzle game Columns.™ Or become the ultimate commando warrior in Dynamite Duke™ as you blast the enemy from an over-your-shoulder first person view.

There's only one true 16-bit system and it's got the hottest video game hits going. You can only play these on Genesis by Sega. Genesis does what Nintendo doesn't.



Sega and Genesis are registered trademarks of Sega of America, Inc. Michael Jackson's Moonwalker is a trademark of Universal Productions. Dynamite Duke is a trademark of Seto & Kato, Inc. All other game titles are trademarks of Sega of America, Inc. © 1990 Sega of America, Inc. P.O. Box 1467 South San Francisco, CA 94080 Nintendo is a registered trademark of Nintendo of America, Inc.



Qui joue aux jeux aujourd'hui?



CANADIAN GAMERS

54% OF CANADIANS ARE GAMERS - AS DEFINED BY SOMEONE WHO HAS PLAYED A COMPUTER OR VIDEO GAME IN THE PAST 4 WEEKS.

 **52%**
male

 **48%**
female

33 YEARS OLD

average age of a Canadian gamer



CHILDREN (8-12 YEARS)

45%

PLAY KID ROLE-PLAYING GAMES

56%

PLAY ACTION AND ADVENTURE GAMES

TEENS (13-17 YEARS)

27%

PLAY ARCADE GAMES

53%

PLAY SHOOTER GAMES

ADULTS (18-34 YEARS)

40%

PLAY EDUCATION GAMES, PUZZLE
OR WORD GAMES AND GAMES THAT
CHALLENGE MENTAL ABILITY

42%

PLAY ROLE-PLAYING GAMES (RPG)

ADULTS (35-54)

56%

PLAY EDUCATIONAL GAMES, PUZZLES
OR WORD GAMES AND GAMES THAT
CHALLENGE MENTAL ABILITY

26%

PLAY SHOOTER GAMES

MATURE GAMERS (55+)

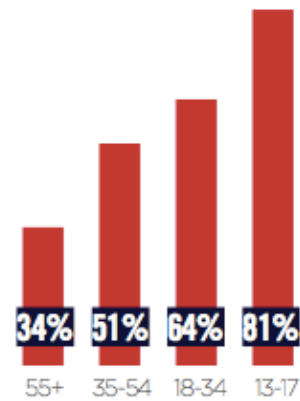
56%

PLAY CARD GAMES

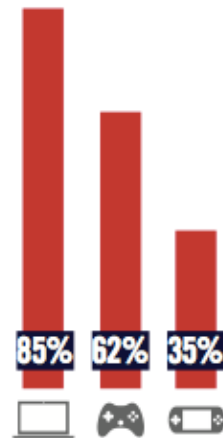
41%

PLAY CARD GAMES

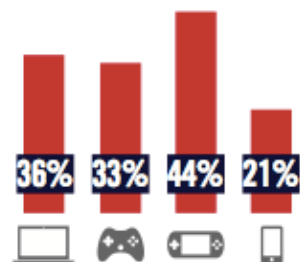
**CANADIANS, BY AGE, WHO HAVE
PLAYED A VIDEO GAME
IN THE PAST 4 WEEKS**

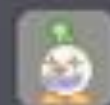


**DEVICE
OWNERSHIP**



**PLATFORM
ON WHICH CANADIANS
PLAY VIDEO GAMES MOST
FREQUENTLY**





Pos	Platform	North America	Europe	Japan	Rest of World	Global
1	PlayStation 2 (PS2)	53.65	55.28	23.18	25.57	157.68
2	Nintendo DS (DS)	57.37	52.07	33.01	12.43	154.88
3	Game Boy (GB)	43.18	40.05	32.47	2.99	118.69
4	PlayStation (PS)	38.94	36.91	19.36	9.04	104.25
5	Wii (Wii)	45.37	33.75	12.77	9.28	101.17
6	PlayStation 3 (PS3)	29.16	34.01	10.31	12.19	85.67
7	Xbox 360 (X360)	48.46	25.67	1.66	9.05	84.84
8	Game Boy Advance (GBA)	40.39	21.31	16.96	2.85	81.51
9	PlayStation Portable (PSP)	21.41	24.14	20.01	15.26	80.82
10	Nintendo Entertainment System (NES)	33.49	8.30	19.35	0.77	61.91
11	Nintendo 3DS (3DS)	16.66	14.25	18.68	3.29	52.88
12	Super Nintendo Entertainment System (SNES)	22.88	8.15	17.17	0.90	49.10
13	Nintendo 64 (N64)	20.11	6.35	5.54	0.93	32.93
14	Sega Genesis (GEN)	16.98	8.39	3.58	0.59	29.54
15	Atari 2600 (2600)	23.54	3.35	0.00	0.75	27.64

Compagnies de jeux selon leurs revenus - 2009

Rank	Name	Revenues, 2009	Country of Origin
1	Nintendo	6,799	Japan
2	Activision Blizzard	4,279	USA
3	Electronic Arts	3,728	USA
4	Sony	1,914	Japan
5	Microsoft	1,741	USA
6	Konami	1,594	Japan
7	Ubisoft	1,249	France
8	Take-Two Interactive	916	USA
9	Square Enix	916	Japan
10	THQ	909	USA

Coûts de développement des jeux au Canada

Platform	Average Cost	Minimum Cost	Maximum Cost	Dev. Days
Traditional Console	\$10 million	\$150,000	\$30 million	380
MMO	\$1.1 million	\$50,000	\$3 million	438
PC	\$1 million	\$15,000	\$15 million	368
Downloadable Console	\$604,000	\$20,000	\$3 million	261
Casual	\$462,000	\$2,000	\$8 million	152
Handheld	\$398,000	\$32,000	\$2.3 million	151
Social	\$238,000	\$6,000	\$1.4 million	197
Mobile	\$166,000	\$2,000	\$3.2 million	96

Taille des équipes, temps de production

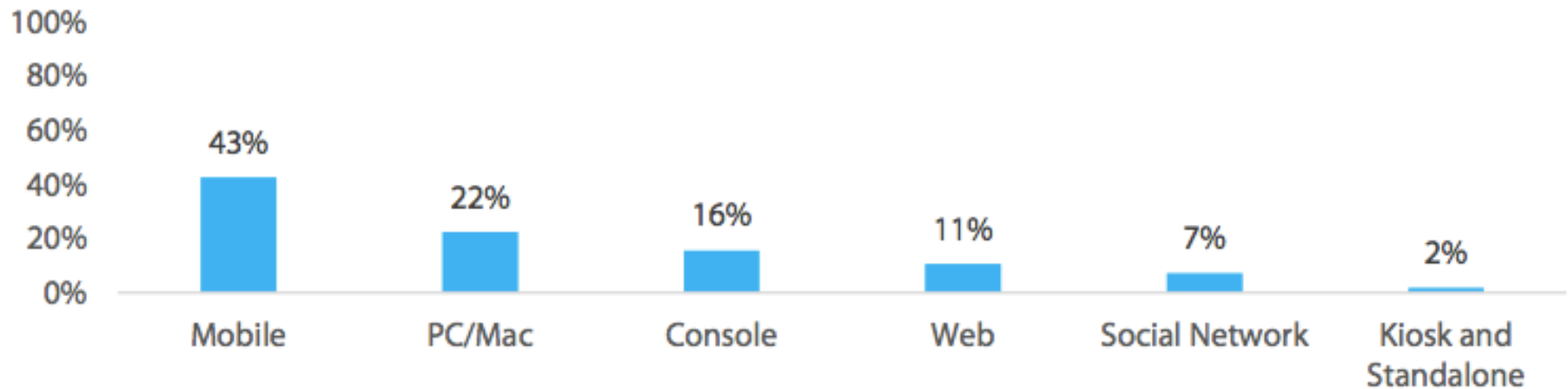
Table 3 – Average project budget, team size and # of days by platform

Platform	Budget	Team Size	# of days
Console	\$ 8,728,125	65	583
PC/Mac	\$ 995,675	10	268
MMO	\$ 834,000	9	259
Web	\$ 651,625	7	172
Mobile	\$ 303,500	7	156
Social Network	\$ 295,000	5	69
Kiosk and Standalone	\$ 30,000	5	65

Source: ESAC Industry Survey 2013
N = 43

Quel type de jeu est en train d'être créé ?

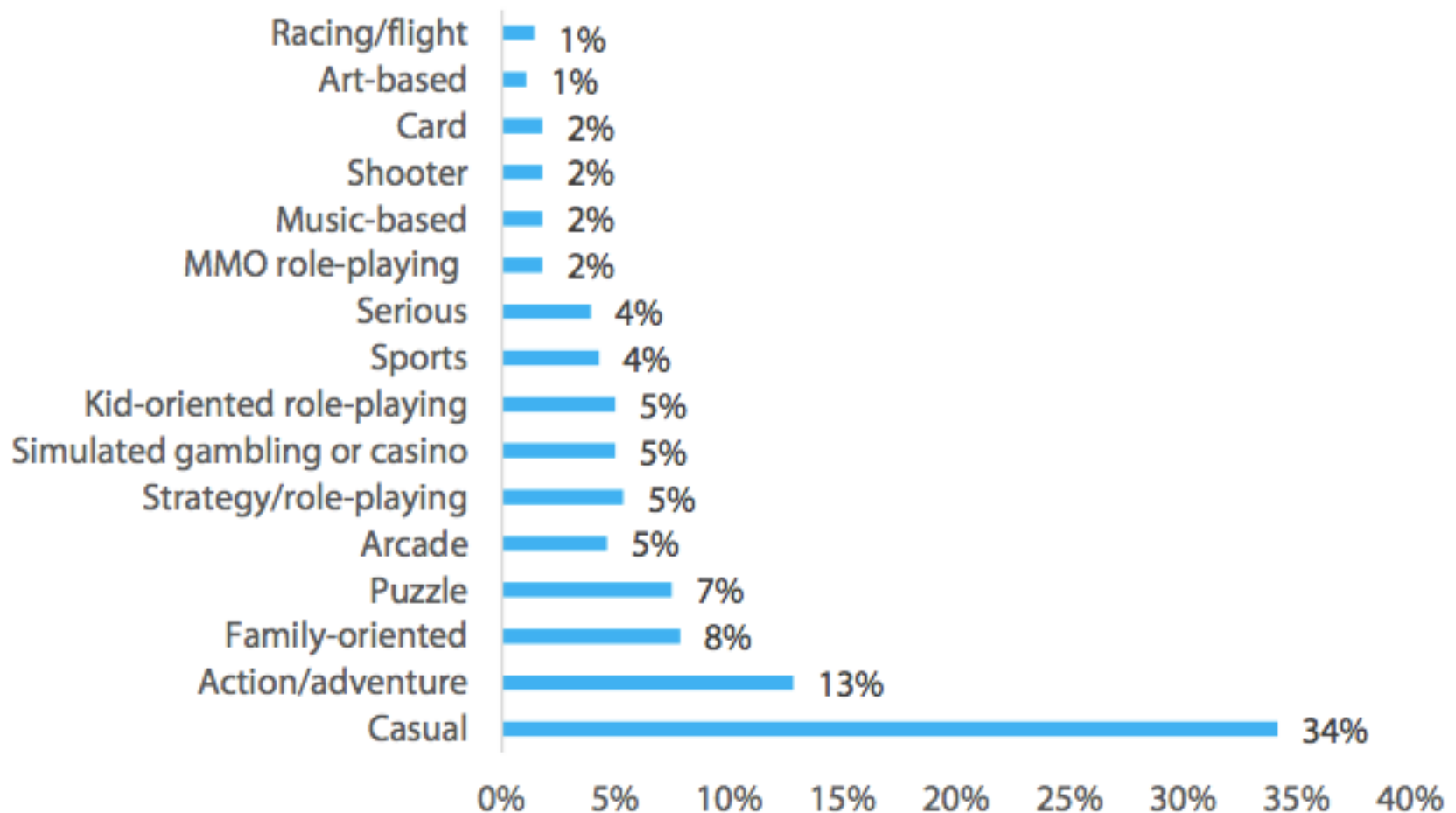
Figure 13 – Number of projects completed in 2012 by platform



Source: ESAC Industry Survey 2013
N = 46

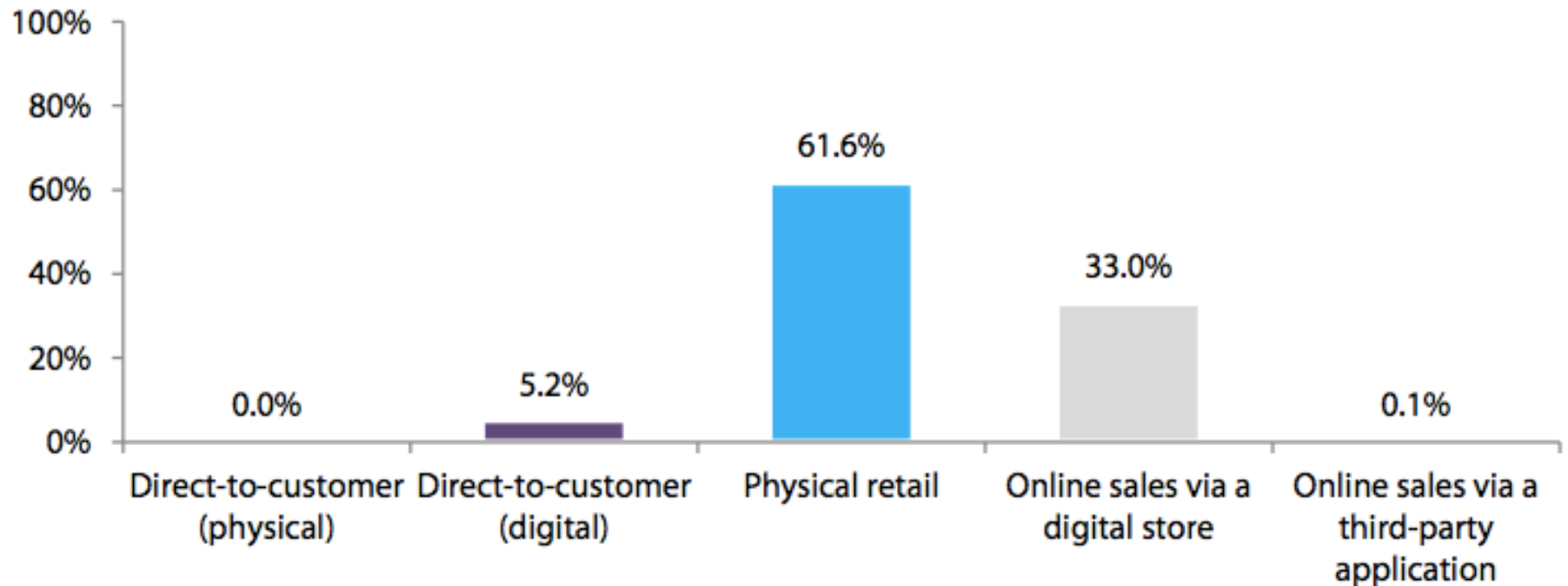
Fréquence des catégories de jeux créés

Figure 14 – Number of projects completed by genre



Lieux de vente des jeux

Figure 35 – Video game revenue by sales channel, 2012



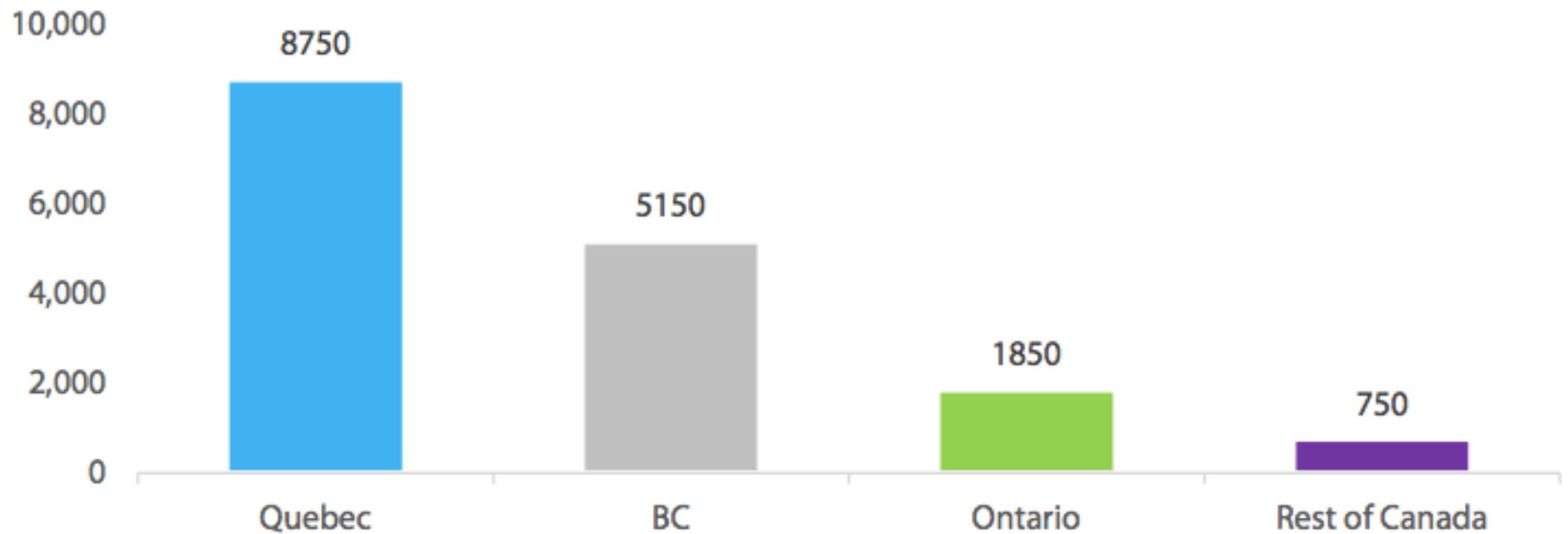
Source: ESAC Industry Survey 2013
N = 24

Compagnies de jeux par province

Province	No. of Game-Related Companies	Major Companies
British Columbia	94	EA Games, Koei, Take Two, Radical, Relic
Prairie Provinces	22	BioWare, GamesCafe
Ontario	106	Capcom, Disney, EA, Rockstar, Ubisoft
Quebec	65	EA, Gameloft, Eidos, Funcom, Ubisoft, THQ, Behaviour, WB
Atlantic Provinces	18*	HB Studios, Long Tails, Other Ocean

Emploi total lié au jeu

Figure 25 – Employment (FTEs) by province



Source: ESAC Industry Survey 2013
N = 80

Taille des compagnies

Table 5 – Employment, by province and size of firm

	Micro	Small	Medium	Large
Ontario	1.1%	25.6%	73.3%	0%
Quebec	0.2%	2.0%	10.4%	83.2%
BC	0.1%	8.9%	11.9%	77.9%

Source: ESAC Industry Survey 2013

N = 57

Emplacement des studios et déplacement à travers le temps

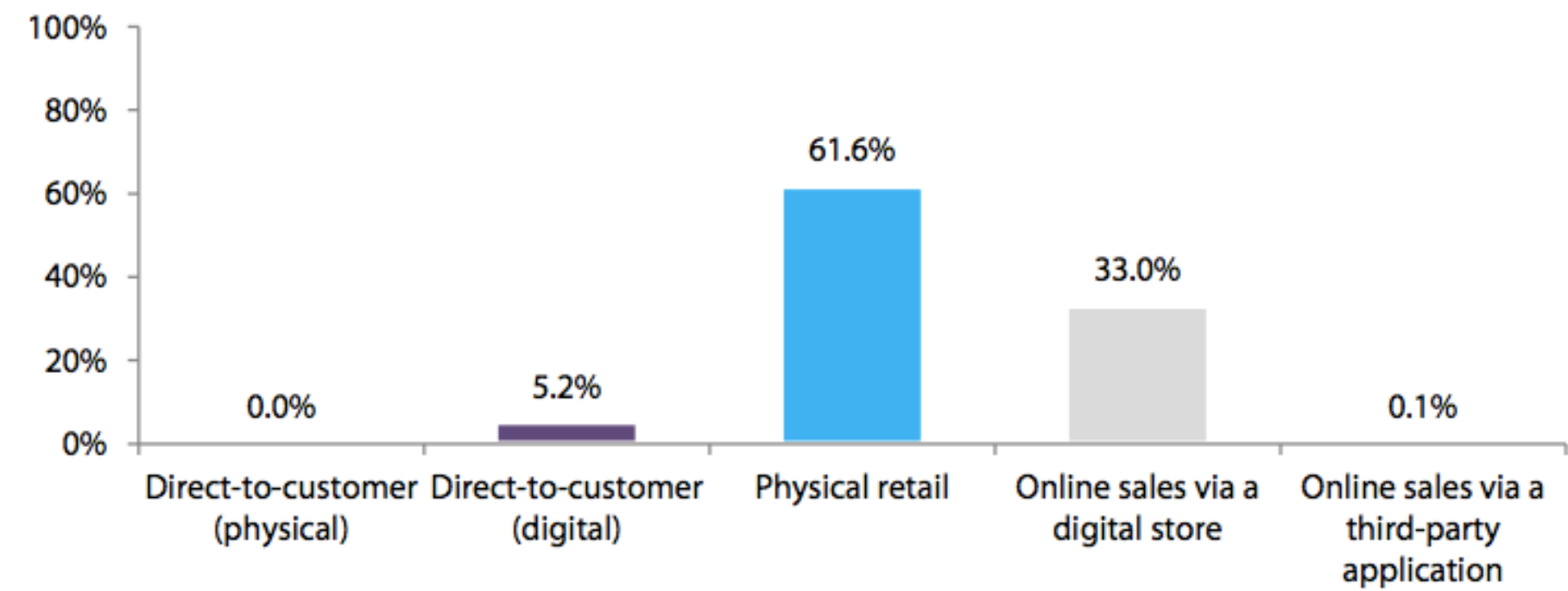
Table 4 – Geographic location of studios

Province	Studio Count 2013	Studio Count 2011
Quebec	97	87
Ontario	96	96
British Columbia	67	83
Alberta	20	30
Manitoba	20	19
Nova Scotia	18	12
PEI	5	10
New Brunswick	3	3
Newfoundland	2	8
Saskatchewan	1	-
Total	329	348

Source: List compiled by ESAC and Nordicity

Revenue

Figure 35 – Video game revenue by sales channel, 2012



Source: ESAC Industry Survey 2013
N = 24

Le projet: qu'est-ce qui est social
à propos des jeux sociaux?

80+ jeux/50 FB for Charts

	Sports City	
	PetVille	
	Warstorm	
	Kingdoms of Camelot	3
	Mafia Wars Game	1
	City of Wonder	3
	EA SPORTS FIFA Superstars: Real football & soccer!	
	Carmen Sandiego	
	FrontierVille	17
	Cupcake Corner	
	MyClub	
	Catch A Killer	
	Knights of the Crystals	
	Legacy of a Thousand Suns	
	Party Resort	

	Fish World	
	The Oregon Trail	
	Wordscraper	
	Zombie Party	
	EA SPORTS™ PGA TOUR® Golf Challenge	
	Geo Challenge	
	Beachtown	
	Zoo Kingdom	
	HealthSeeker	
	ESPN College Town	
	CSI: Crime City	
	Pickomino by Reiner Knizia	
	Treasure Isle: The Adventure Game	

	CityVille	14
	Dragon Age Legends	
	Bejeweled Blitz	
	Game Requests	100
	App Requests	1
	Café World	16
	Horse Saga	
	Coffee Bar	
	Chocolatier: Sweet Society	
	Ravenwood Fair	4
	Office Daze	
	Happy Island	
	Island God	
	Miscrits: World of Adventure	
	NBA Legend: Official NBA Game	
	Fantasy Kingdoms	

	Lost Cities Solo by Reiner Knizia	
	Dungeon Overlord	
	Cooking Mama	
	Simply Hospital	
	My Vineyard	
	My Mad Millions	
	Writer's Blox	
	YoVille	
	Monster Galaxy	
	Cow Clicker	
	IncrediLand	
	FameTown	
	Texas HoldEm Poker	1
	Pet Society	
	Superhero City	
	Robot Unicorn Attack	
	It Girl	
	Crazy Caravans	2
	Country Story	

Types d'interactions retrouvées

- La bande déroulante accorde une présence silencieuse aux amis ou à la famille
- Accorder des rôles différents
- Visites
- Défi et compétition
- Communication

Entourés par des amis

- La majorité des jeux intègrent les amis dans l'interface, habituellement dans le bas de l'écran
 - Les photos des amis/voisins accueillent le joueur lorsqu'il commence son jeu
 - Il y a toujours un espace pour inviter de nouveaux amis à se joindre au jeu
 - Plusieurs jeux remplissent maintenant l'interface avec des amis qui jouent déjà au jeu
 - Moins ennuyeux que d'avoir à inviter des amis, à attendre qu'ils acceptent, qu'ils installent le jeu et qu'ils progressent

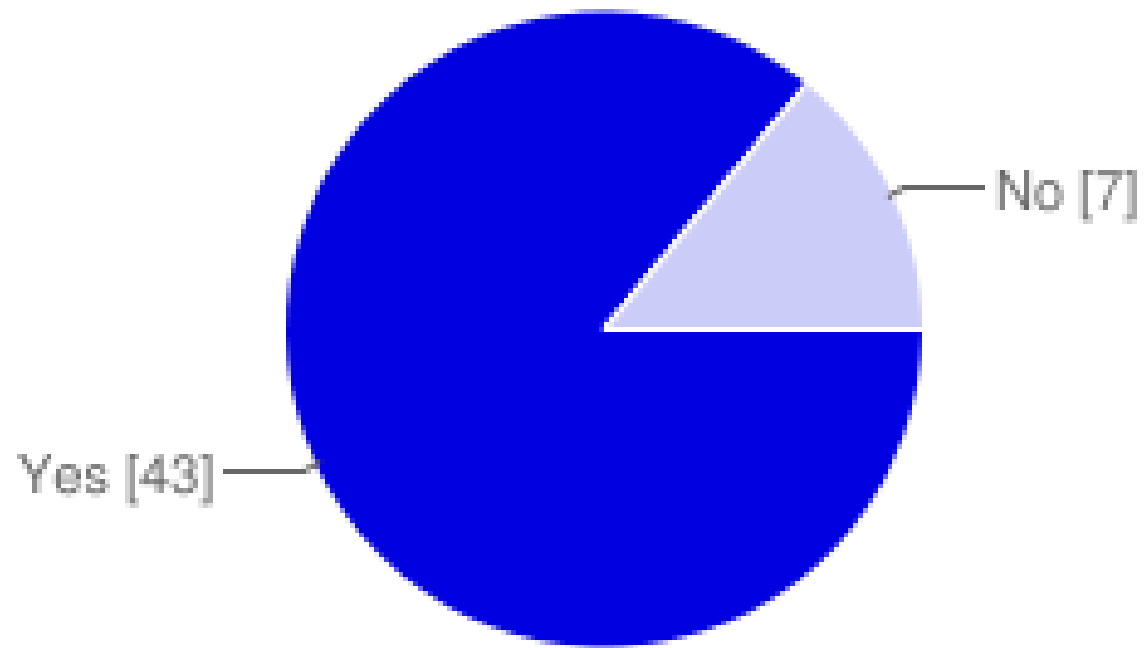


Entourés par des amis

- Les amis sont classés et le joueur est classé parmi ses amis
 - Il est possible de voir comment les amis progressent (ou pas)
 - Il est possible de voir le progrès relativement aux amis
 - Laisse place à de la compétitivité informelle, mais aussi intense/exagérée, particulièrement lorsque les amis débutent ou que les niveaux se complexifient (le « TL Effect »)
 - Raffiner l'accès aux amis/don entre amis



Cadeaux



Cadeaux en tant que potlatch

- Impressionner ses amis
 - Les jeux permettent aux joueurs d'exposer leur statut, leur (gros) comptes en banque et leur niveau avancé à travers les cadeaux offerts



Just Me and My Hammer

Tamir is upgrading the Forge in order to craft exciting furniture! If you can help out, you can probably get some gold for your time!



7 hours ago via Dungeon Overlord · [Like](#) · [Comment](#) · [Get Gold](#)

Cadeaux en tant que potlatch

- Ceux qui offrent fréquemment des cadeaux ou qui répondent immédiatement aux demandes peuvent devenir des amis plus valorisés



Cadeaux dans une perspective de réciprocité/troc

- Si je t'envoie un Ruban, m'en enverras-tu un en échange??
 - Zynga a automatisé avec leur bar d'outils, rendant le processus plus raffiné



Cadeaux critiques

- Les cadeaux peuvent être essentiels pour compléter les épreuves dans les jeux



L'amitié est-il uniquement à propos des échanges d'items?

- Moins il y a d'importance mise sur l'acquisition de cadeaux d'amis dans le jeu, plus le jeu fonctionne comme une expérience individuelle (mis à part les jeux compétitifs)

Visites

- Presque aussi répandu que les cadeaux
- Plus de variations émergentes
- Balance entre l'action de laisser les amis interagir avec d'autres espaces et le contrôle de l'accès
- La plupart des visites supposent une non-simultanéité

Veux-tu être mon voisin?

- Trope la plus courante: Se pointer, recevoir des items



Améliorer le monde existant

- L'irrigation des cultures de Cityville les fait murir plus vite, ou peut raviver les cultures fanées



Facebook Beats In Q2 With \$2.91 Billion In Revenue, 62% Of Ad Revenue From Mobile, 1.32B Users

Posted Jul 23, 2014 by [Josh Constine \(@joshconstine\)](#)

2,458
SHARES



Next Story



CrunchBase

Facebook

FOUNDED
2015

OVERVIEW

Facebook is an online social networking service that allows its users to connect with friends and family as well as make new connections. It provides its users with the ability to create a profile, update information, add images, send friend requests, and accept requests from other users. Its features include status update, photo tagging and sharing, and more. Facebook's profile structure includes ...

LOCATION

Menlo Park, California

CATEGORIES

Revenue by User Geography

In Millions

- Rest of World
- Asia
- Europe
- US & Canada



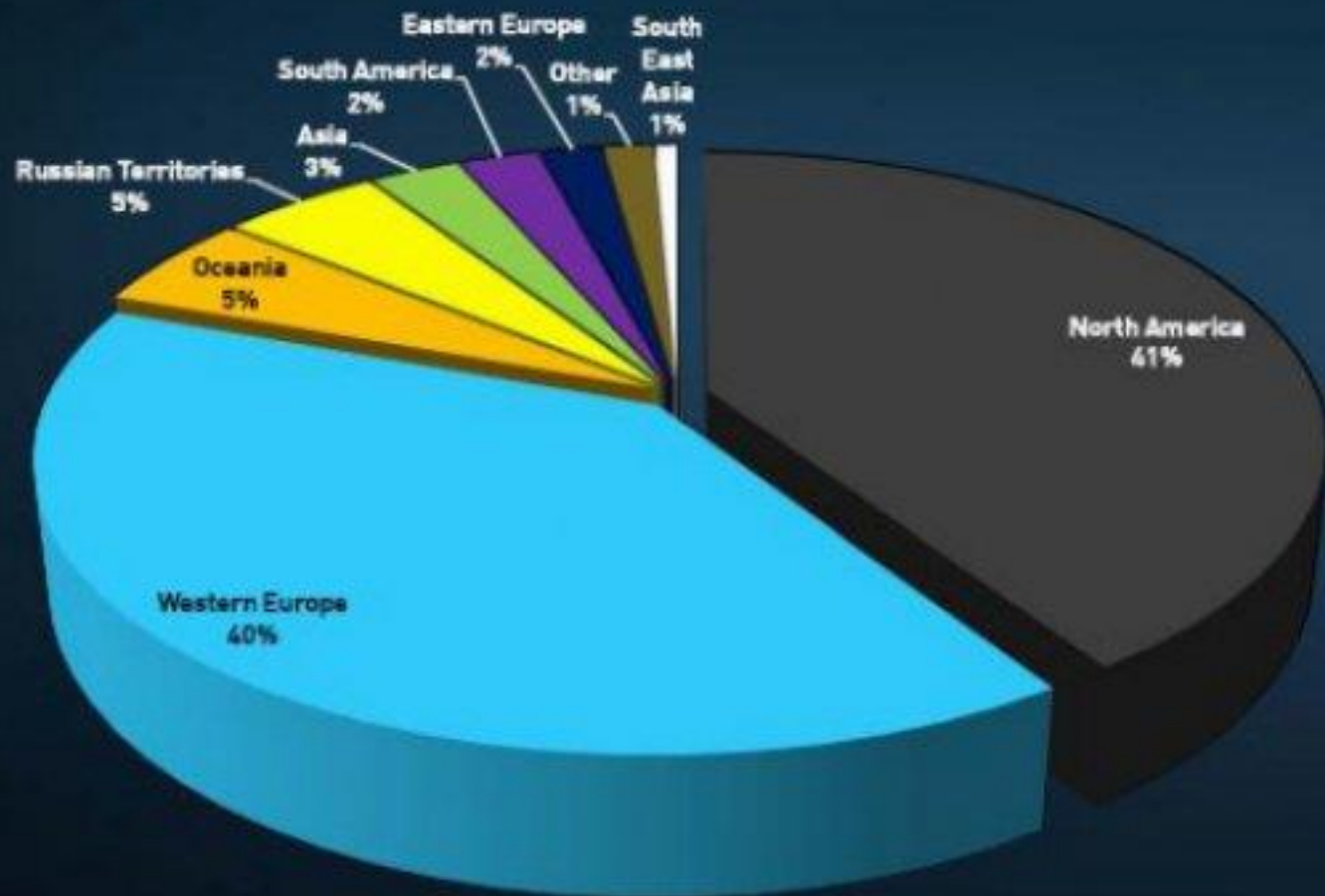
Qui joue?



Vapeur

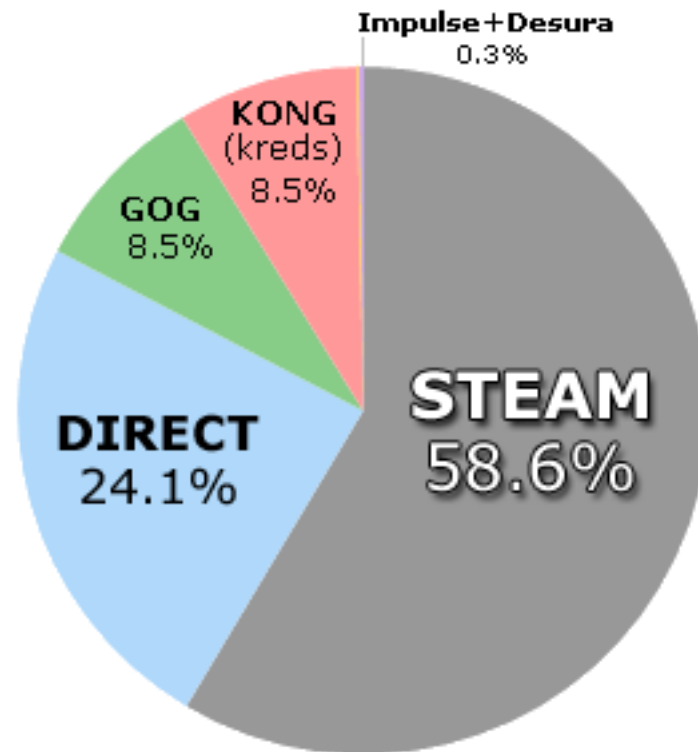


WORLDWIDE STEAM SALES BY REGION 2013

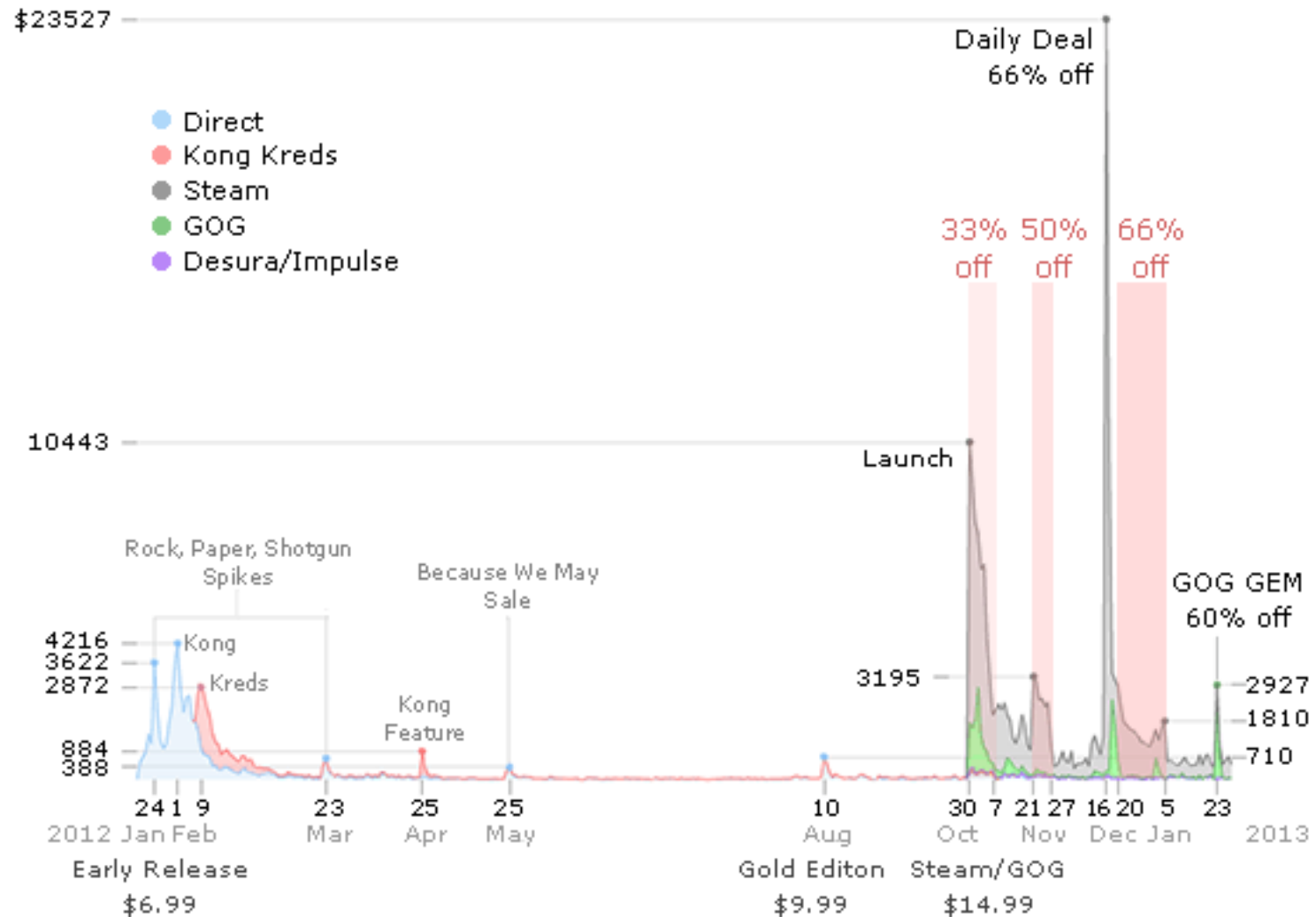


Defender's Quest

Source	\$Gross	Sales
Steam	167,916	20,200
Direct	69,058	12,004
GOG	24,428	3,180
Kong	24,364	4,975
Impulse	445	37
Desura	405	53



Defender's Quest



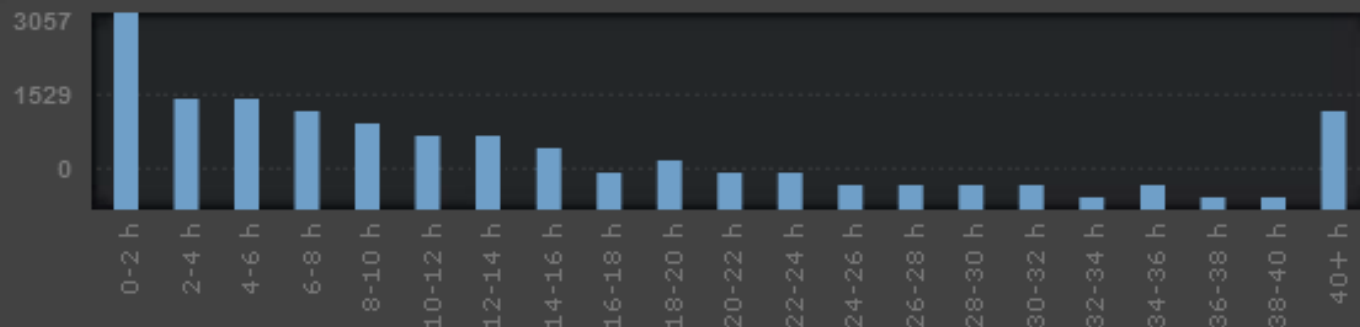
Play time stats: Defender's Quest: Valley of the Forgotten

Users measured	19,096	(users who tried the game at least 2 days ago, have played at least one minute, and we've recorded data for)
Average play session length	69 minutes	
Average time played	16 hours 23 minutes	
Median time played	10 hours 5 minutes	
Time played range	1 hour 59 minutes - 28 hours 2 minutes	(one standard deviation of playing time)

Minimum time played Percentage of users

10 minutes	97%
30 minutes	93%
1 hour	89% (<u>well above average</u> as compared to other Steam games)
2 hours	83%
5 hours	70%
10 hours	50%
20 hours	26%
50 hours	4%
100 hours	0%

Users bucketed by time played



Offre de compétition en temps réel

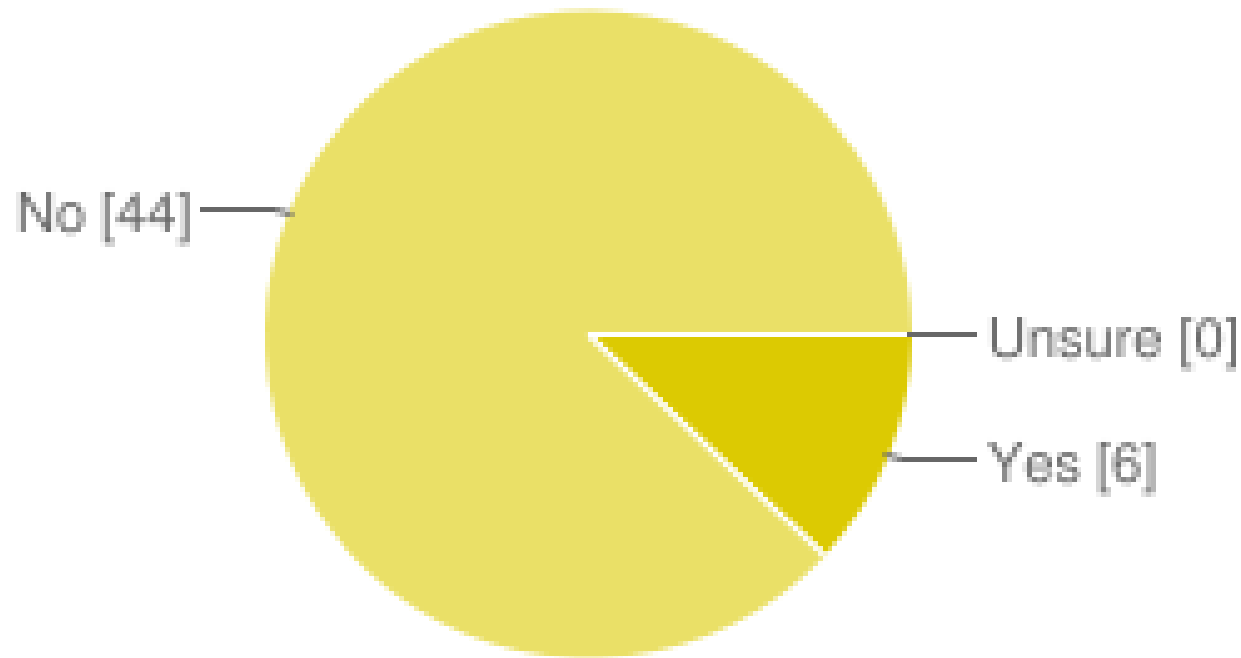


Tableau des scores

- Global, Amis seulement, Hebdomadaire, En temps supplémentaire



Défis et compétitions

- Tournois et parties
 - Prédominant dans les jeux de sport, jeux de stratégie
 - FIFA Superstars; PGA Golf, ESPNU

The screenshot displays the FIFA Superstars game interface. On the left, a leaderboard shows the top four teams:

Rank	Player	Team	Score	Stars	Position
10	Abe Stein	FC Havlowjumper	79	5	1 st
2	Dean Takahashi	Bobcats	34	3	2 nd
14	Matthew Falk	FC Falkisaur	75	5	3 rd
3	Mia Consalvo	My Team	72	5	4

On the right, the 'My Team' stats are shown:

Rating	My Team
★★★★★	★★★★★
Formation	4 - 4 - 2
Training	100
Talent	57
Strikers	64
Midfielders	52
Defenders	58

At the bottom, the match results are displayed:

Win	Draw	Lose
XP	000	XP
●	000	●

Challenge your friends for glory and the chance to win extra league matches!

Texas HoldEm Poker



Défis asynchrones

- Crazy Caravans, City of Wonder permet aux joueurs de mettre au défi des inconnus pendant qu'ils voyagent (défis basés sur des statistiques)



Communication

- La majorité des jeux supposent une expérience asynchrone
 - Laisser des messages dans le monde du jeu pour ses amis
 - Publier sur le mur avec des messages standards et une possibilité de les personnaliser
 - Dragon Age Legends permet aux personnages de personnaliser les « cris de guerre »/« kill phrases » que les amis verront lorsqu'ils recrutent le joueur
 - Les interactions entre amis sont principalement à travers le jeu lui-même, plutôt qu'à travers la communication à propos du jeu

À quel point les jeux sociaux sont sociaux?

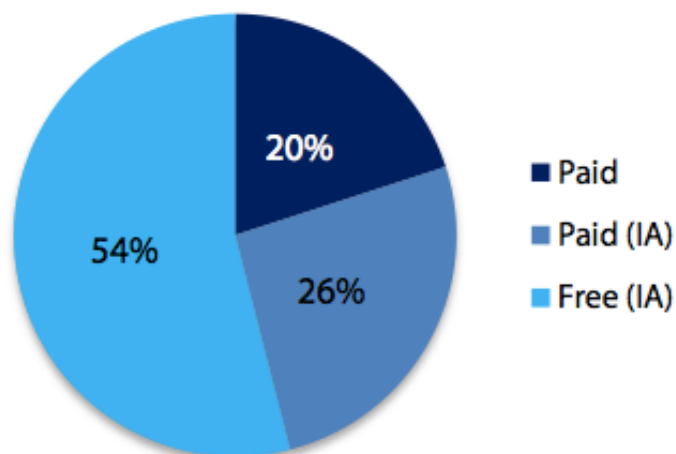
- Les amis ont une présence dans le jeu, mais sont principalement silencieux
 - Reproduction de l'expérience « bowling alone » de plusieurs joueurs MMOG
- L'aide des amis est principalement basée sur des transactions. Très peu de jeux utilisent les habiletés des amis pour aider les joueurs avec le jeu
- L'habileté est principalement mise en évidence dans les compétitions et la construction des statistiques

L'illusion du caractère social?

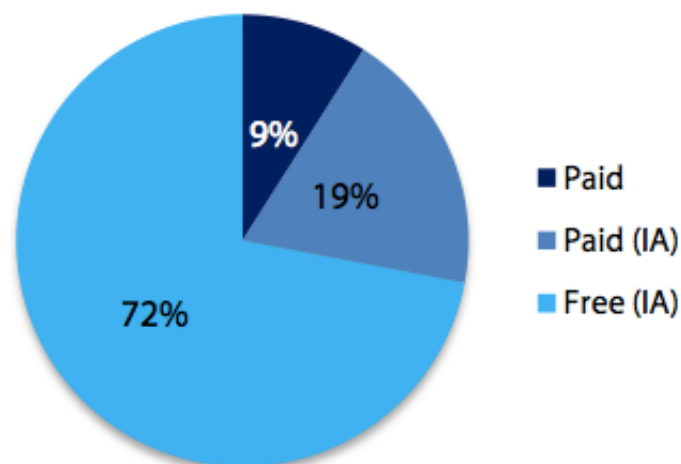
- Plus un joueur a d'amis, plus son statut est élevé dans le jeu
- Plus d'amis permettent d'avancer, de débloquent des niveaux, d'acquérir l'accès à des objets brillants particuliers
- Les amis peuvent inspirer la compétition, qu'elle soit réciproque ou non
- Les amis qui ne jouent plus peuvent être une ressource, peuvent signifier quels amis sont « socialement absents »
- Les amis ajoutent du contenu aux jeux à travers le système conçu

Figure 36 – iOS revenue by business model, 2011-12

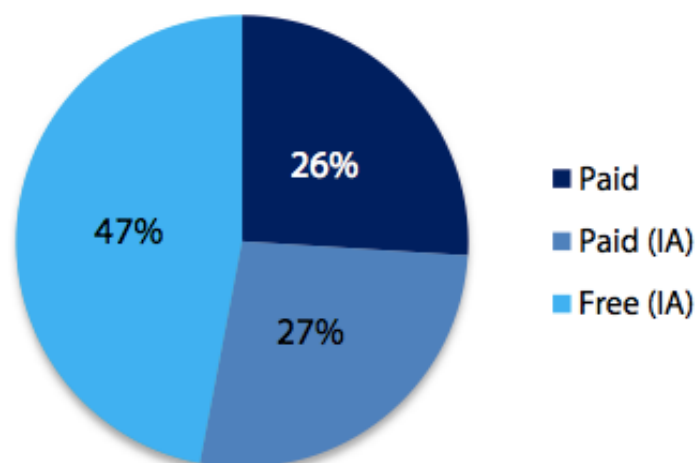
December 2011 (United States)



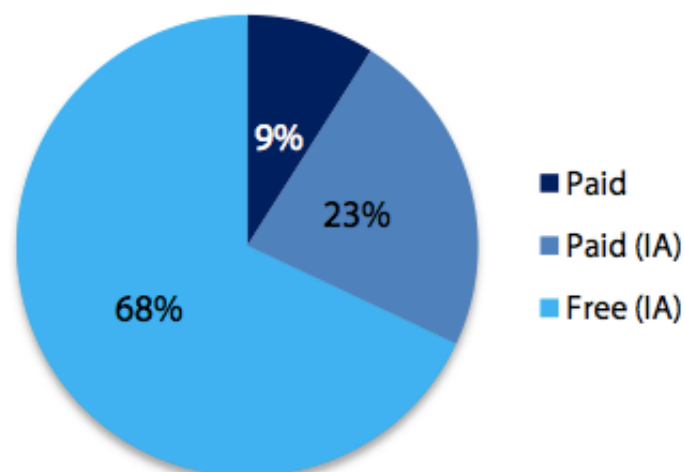
December 2012 (United States)



December 2011 (EU)



December 2012 (EU)



247 game companies generate more than \$1M in mobile revenue in the U.S. alone



Above: Clash of Clans for mobile devices.

Image Credit: Supercell

King Franchises: Platform Most Played On

For Candy Crush, Pet Rescue Saga, Farm Heroes and Papa Pear Saga gamers

Aggregated data for 12 countries:



55M

is the minimum number of gamers for any of these four King franchises

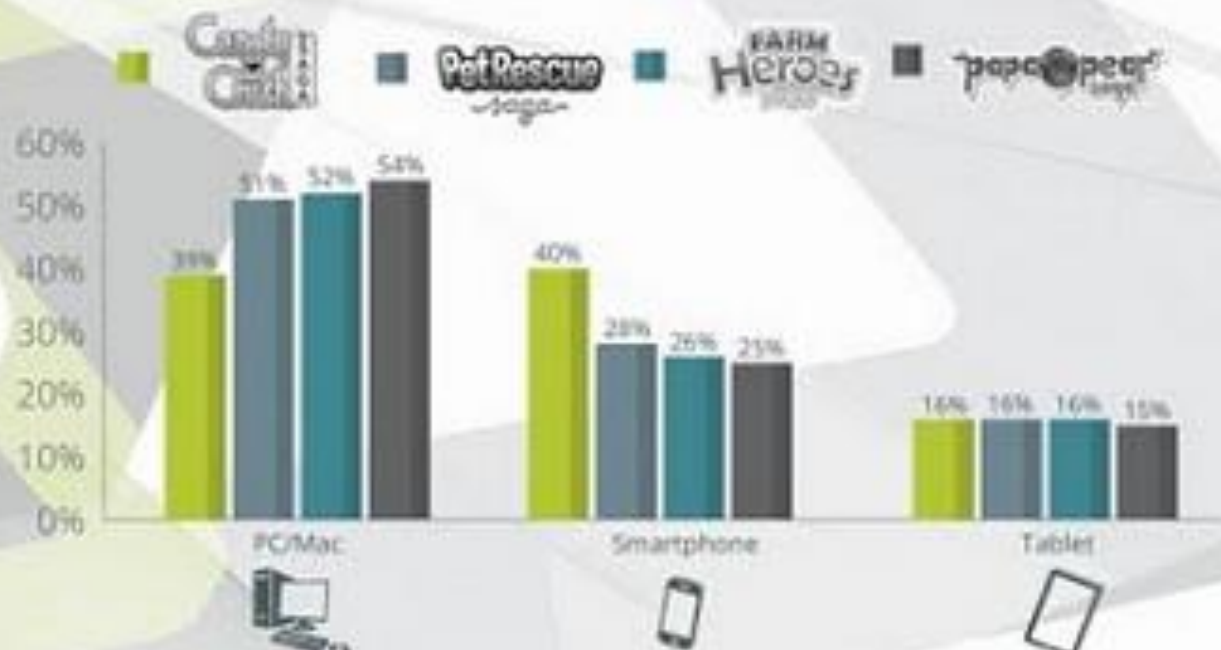


#2

grossing iOS game in the world, #2 for GooglePlay

#6

grossing iOS game in the world, #7 for GooglePlay



48%

of mobile Candy Crush gamers also plays one of King's other mobile titles

53%

of mobile Farm Heroes gamers also plays Candy Crush on mobile

38%

Of Candy Crush gamers has a Samsung phone

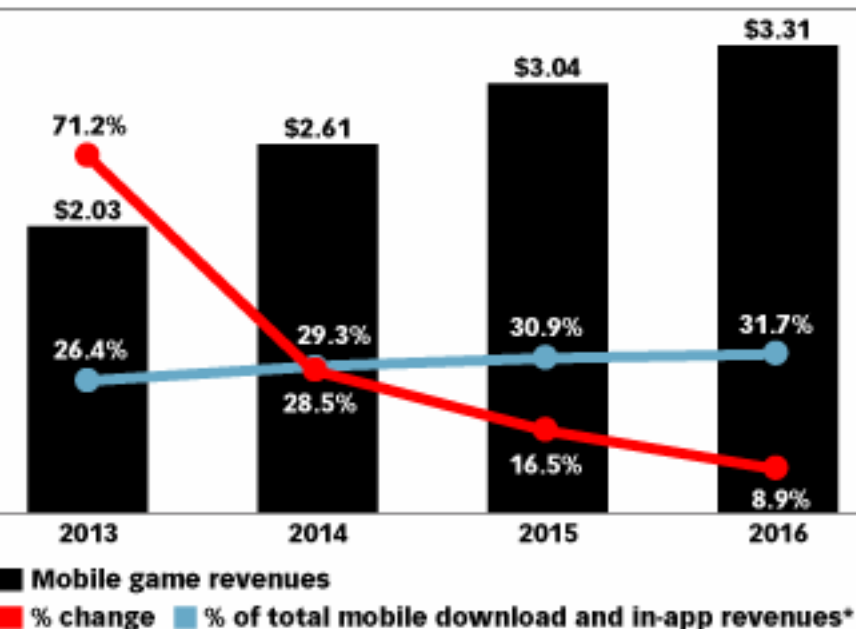
48%

Of Farm Heroes players lives with kids at home

Prévision des revenus sur mobile

US Mobile Game Revenues, 2013-2016

billions, % change and % of total mobile download and in-app revenues*



Note: includes game downloads and in-app purchases on ereaders, mobile phones and tablets; excludes ad-supported revenues and subscriptions;
*includes downloads of ebooks (including audiobooks), games, music and video, as well as game in-app purchases and other; includes ereaders, mobile phones and tablets; excludes ad-supported revenues and subscriptions

Source: eMarketer, Feb 2015

185159

www.eMarketer.com

US Mobile Game Revenues, by Venue, 2013-2016

	2013	2014	2015	2016
Game in-app purchases (billions)	\$1.12	\$1.51	\$1.82	\$1.99
—% change	99.3%	35.6%	19.9%	9.4%
—% of mobile game revenues	55.0%	58.1%	59.8%	60.1%
—% of total mobile download and in-app revenues*	14.6%	17.0%	18.5%	19.1%
Game downloads (billions)	\$0.91	\$1.09	\$1.22	\$1.32
—% change	46.0%	19.8%	11.7%	8.1%
—% of mobile game revenues	45.0%	41.9%	40.2%	39.9%
—% of total mobile download and in-app revenues*	11.9%	12.3%	12.4%	12.6%

Note: includes game downloads and in-app purchases on ereaders, mobile phones and tablets; excludes ad-supported revenues and subscriptions;
*includes downloads of ebooks (including audiobooks), games, music and video, as well as game in-app purchases and other; includes ereaders, mobile phones and tablets; excludes ad-supported revenues and subscriptions

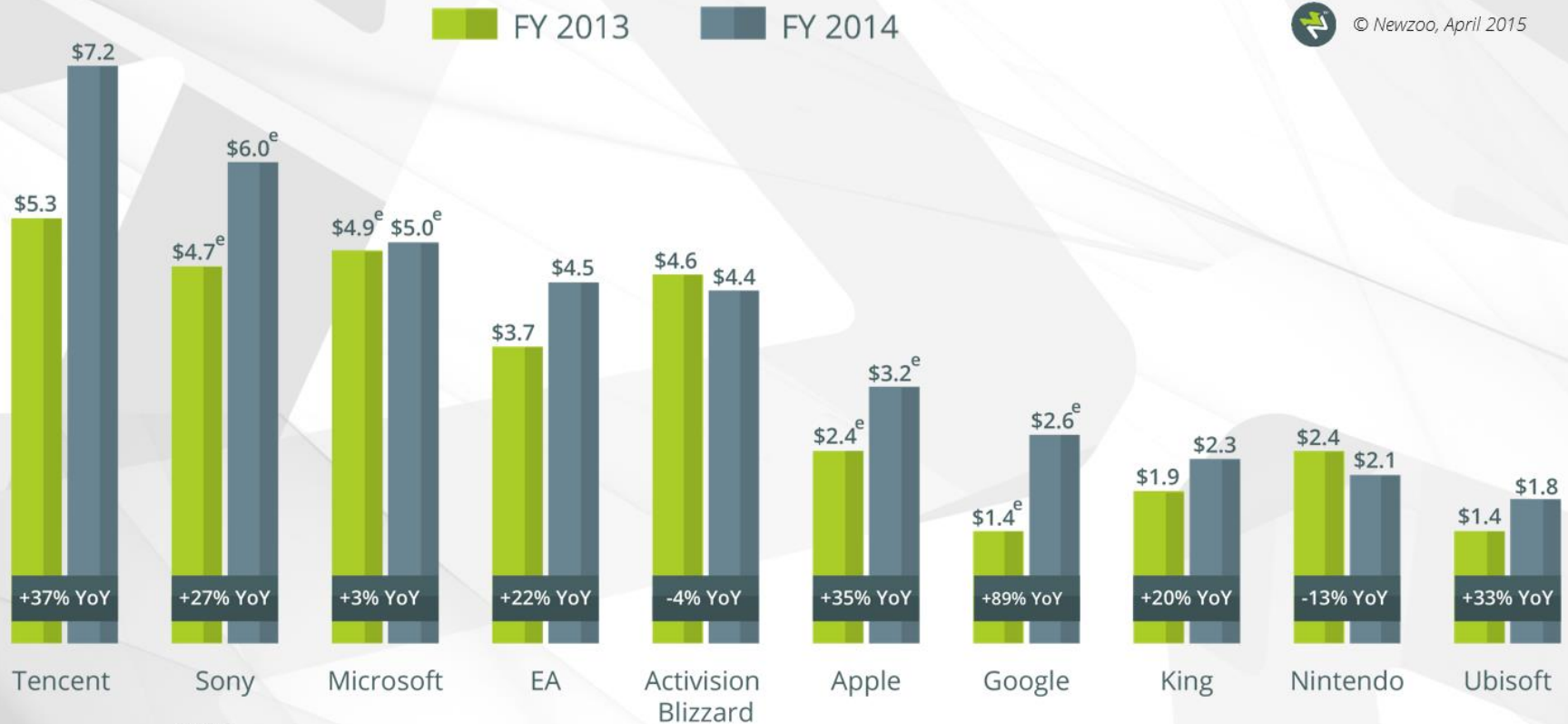
Source: eMarketer, Feb 2015

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www.eMarketer.com

Top 10 Public Companies by Game Revenues

Comparison of FY 2014 and FY 2013 Revenues (\$Bn)



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Notes

1. Based on US GAAP revenues in Calendar year 2014 and IFRS for Tencent
2. Based on exchange rates as per 31/12/2014
3. e: Estimates of game revenues using quarterly earning reports in which these are not specifically segmented out.

En résumé

- Une plateforme de jeu, son modèle de revenu et son design sont souvent interreliés
- Les modèles discutés ne sont pas globalement constants – il y a des différences importantes selon les régions et les territoires
- Le domaine du développement des jeux est en train d'être écarté
- Plusieurs développeurs et joueurs n'aiment pas les jeux gratuits, mais sa popularité actuelle les rend des éléments-clés dans l'industrie

En résumé

- Le jeu digital n'est plus une activité réservée, ou le domaine de quelques joueurs
- De nouveaux réseaux pour les joueurs signifient de nouveaux types de situations de jeu
- L'argent et les jeux ont toujours été interreliés

Merci!

@miaC