

# DIGITAL GAMES IN MOTION



A Comparison between **Iran** and other countries

Knowledge  
Directs  
Differences



# Preface



When we talk about “digital games”, we talk about a new media which is leading among other ones, a new media which has made tight connection with its audience; a “digital art” that broadens the borders of usual art and connects entertainment with aesthetics; a convergent technology that enhances modern man abilities above its physical potentials. When we talk about “digital games”, we talk about “future”.

In last years, Iran has experienced a great development in both producing, and consuming of digital games. Both side of this development is dominantly on Mobile games. Playing with smartphones and tablets has been increased in Iran compared to last years. For some reasons, producing and consuming Computer and Console games have been decreased in Iran. Therefore, digital games motion is toward to mobile games in Iran; as a result, investing potentials, producing, and publishing must be activated in this area.

This report is an explicit reason that digital games ecosystem has been shaped by mobile games in Iran. This point can be seen entirely in reporting the statistics of digital games consuming in Iran and other countries.

Hopefully, Tehran Game Convention (TGC) can connect Iran and other international players in transferring knowledge, finding a place in world market for Iranian games, and investing in game production.

Iranian digital games are in motion by Mobile games...

**S. Seyed Hosseini, CEO, DIREC**

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# Iran and North America

## USA

Population (2016)<sup>1</sup>  **324,118,787**

Online Population (2016)<sup>2</sup>  **286,942,362**

GDP per capita (2015)<sup>3</sup>  **55,805**

## Canada

Population (2016)  **36,286,375**

Online Population (2016)  **32,120,519**

GDP per capita (2015)  **43,332**



## IRAN

Population (2016)  **79,926,270**

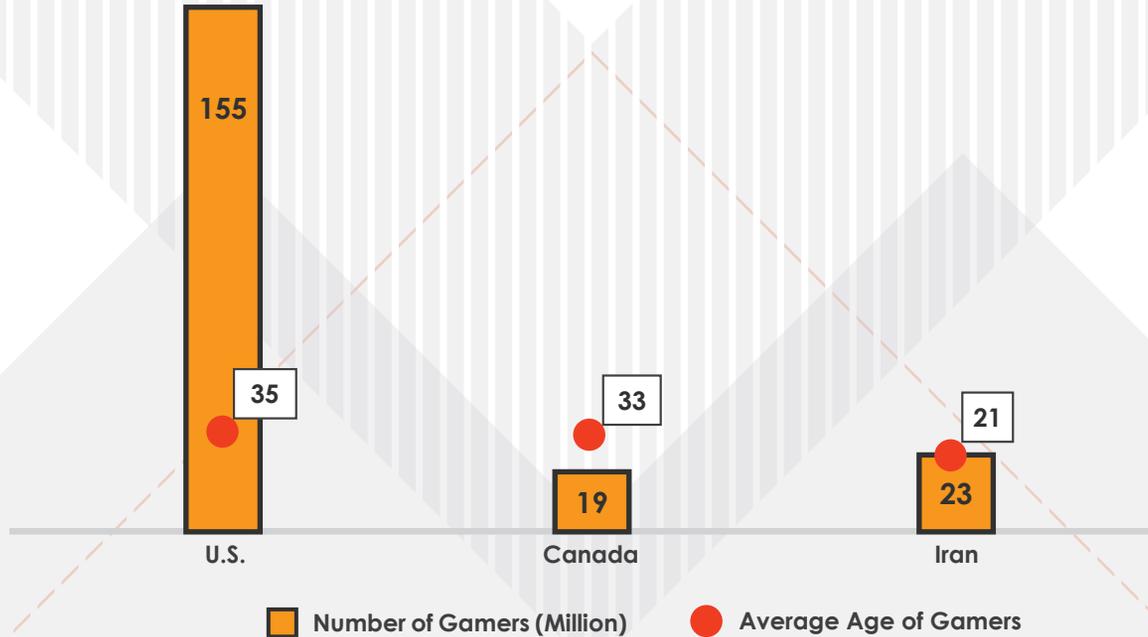
Online Population (2016)  **39,149,103**

GDP per capita (2015)  **4,877**

1. Worldometers, Statistical Center of Iran  
2. Internet Live Stats  
3. International Monetary Fund; World Economic Outlook Database (April 2016)



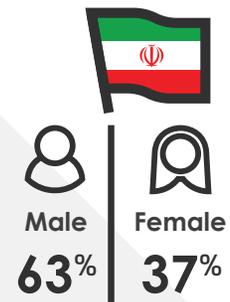
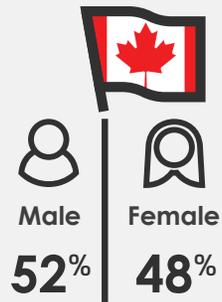
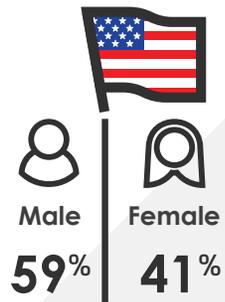
# Who Play Iran and North America



There are **23 million** gamers in Iran which is more than Canada gamers with **19 million** ones.

The average age of gamers in Iran is **21** which is less than U.S. and Canada with **33** and **35** years old, respectively. The low average age of gamers in Iran shows brighter future in gaming industry for this country.

The percentage of male and female gamers in three regions: 

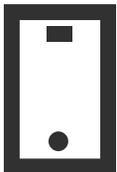
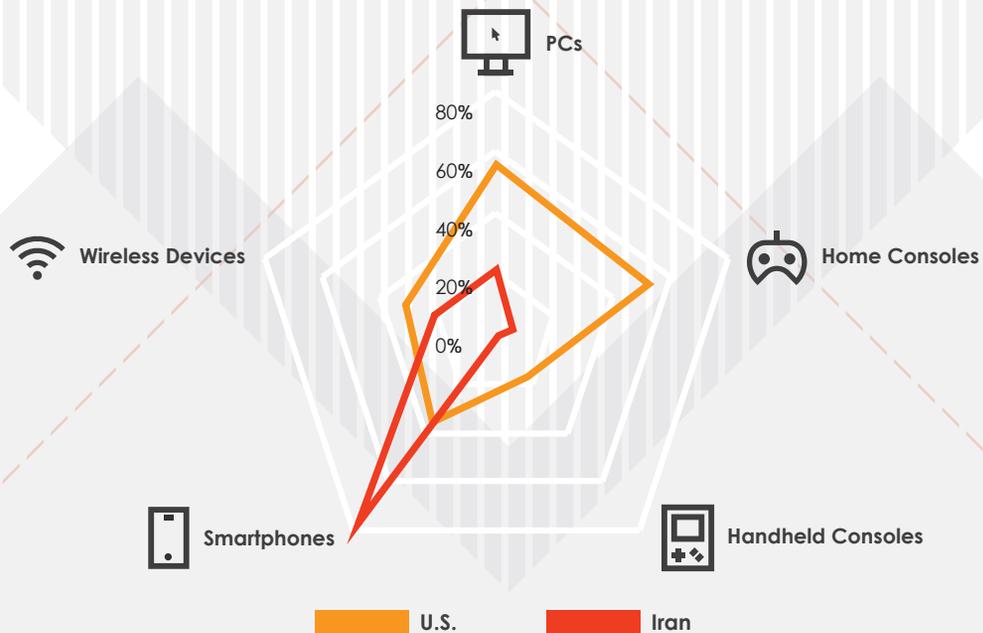


The percentage of gamers based on age groups: 



Iran's **35 years** old or younger gamers are considerably more than U.S. gamers in this age group. While this is entirely reversed for the gamers who are 35 years old or older in these regions.

### The percentage of gamers on each device:



Iranian favorite and popular device is smartphone which is being used by **77%** of gamers in this country, conversely, **only 36%** of U.S. gamers are into this device.



# How They Play

## Iran and North America

### The average number of years that gamers are playing:



U.S.

13



Iran

6

The average years that gamers are playing in Iran and U.S. is 6 and 13 years, respectively. Conclusively, these numbers indicate that Iran's gaming industry is so young.

### The percentage of gamers who play with the others in Iran and U.S.:



U.S.

54%



Iran

49%

The percentage of gamers who play with others in Iran and U.S. are close together with 49% and 54%, respectively.

### The percentage of parents who are aware of age rating in Iran and U.S.:



U.S.

86%



Iran

74%

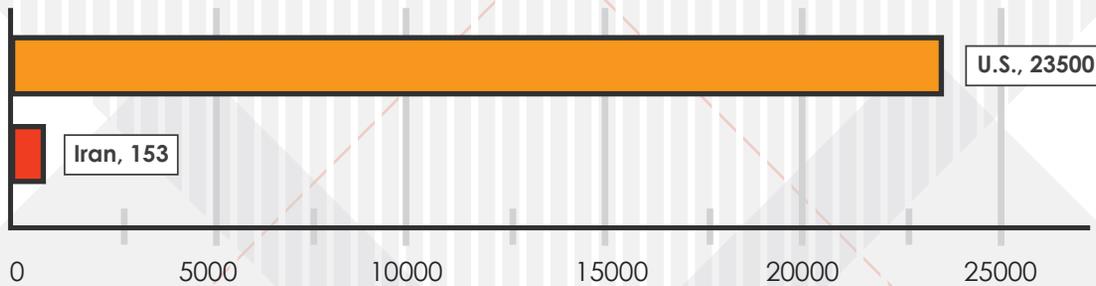
The parents' awareness of age rating is 74% and 86% in Iran and U.S., respectively.



# How They Pay

## Iran and North America

The total revenue of games industry (M\$)



The average age of gamers who pay:



U.S.

38



Iran

20

The average age of people who pay for games in Iran and U.S. are 20 and 38 years old, respectively.

The low average age of Iran's payers shows how young games industry is in this country. Hence, development in games industry can be expected for Iran in the near future.

The share of physical and digital sales:



23

Physical

77

Digital



44

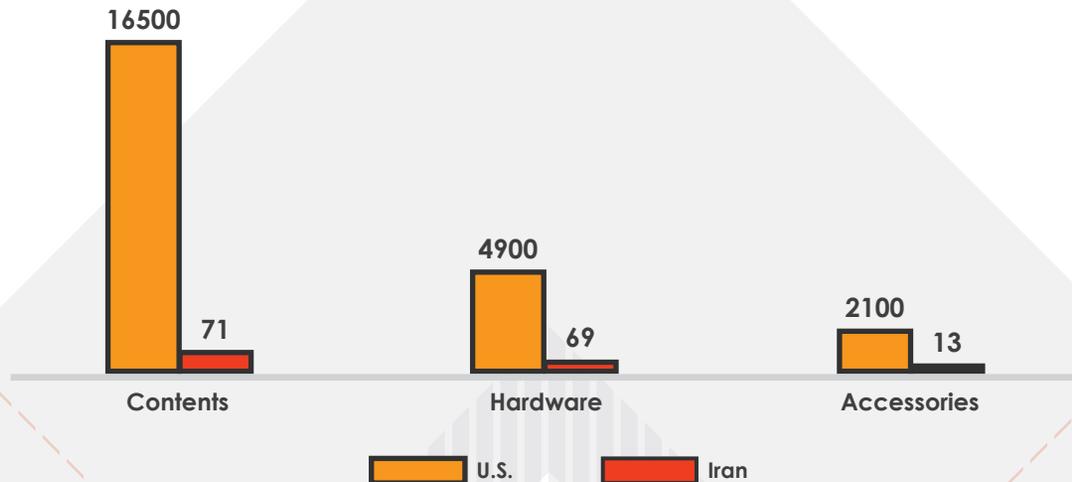
Physical

56

Digital

The share of digital distribution is more than physical distribution in both regions, however, this ratio in Iran is higher than U.S.

## The revenue of game industry based on contents, hardware, and accessories (M\$):



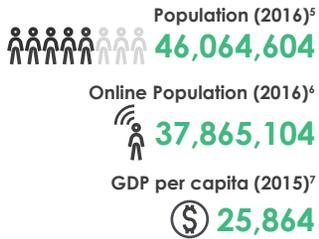
### How this research has been done

This report is found on accessible statistics of Iran and other regions of the world. Iran's statistics in digital games area are based on Digital Games Research Center (DIREC) survey in the country.

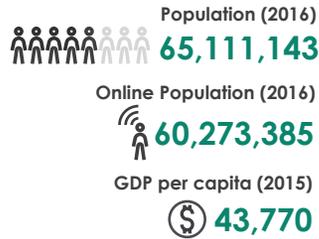
The presented statistics in this report about U.S. and Canada have been expressed in ESA<sup>4</sup> annual report. The presenting method of statistics are similar in Iran, U.S., and Canada. Hence, the descriptive statistics (average, frequency tables, etc.) have been employed to compare Iran with U.S. and Canada in gaming industry area. Moreover, the differences in ESA and DIREC reporting method have been unified and statistics are scaled. For instance, the percentage of gamers in different age groups was one of the different items that should have been integrated to report coherently.

# Iran and Europe

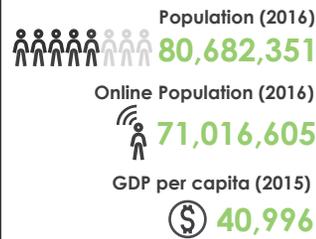
## Spain



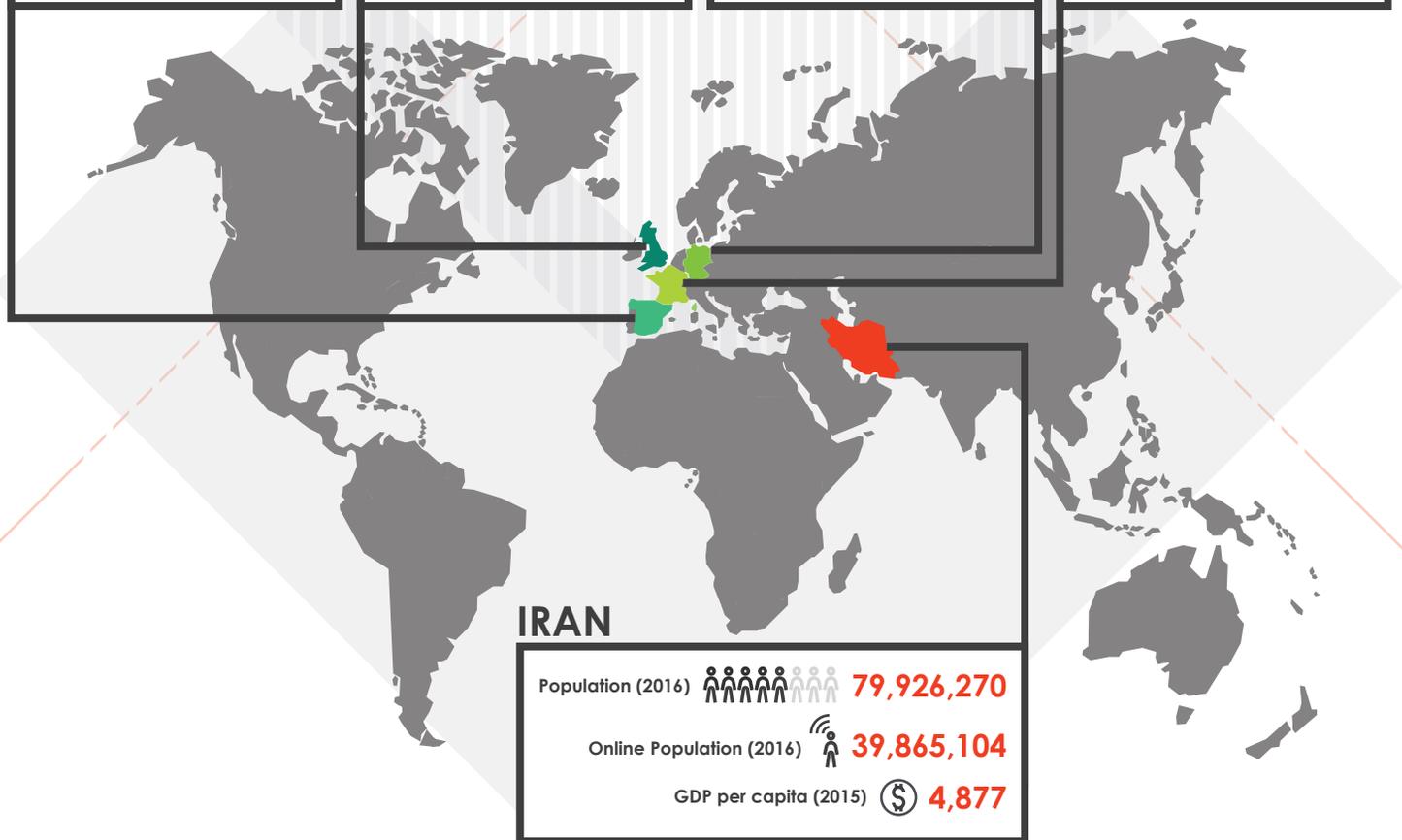
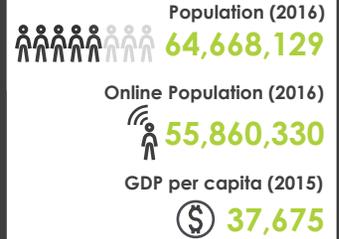
## U.K.



## Germany



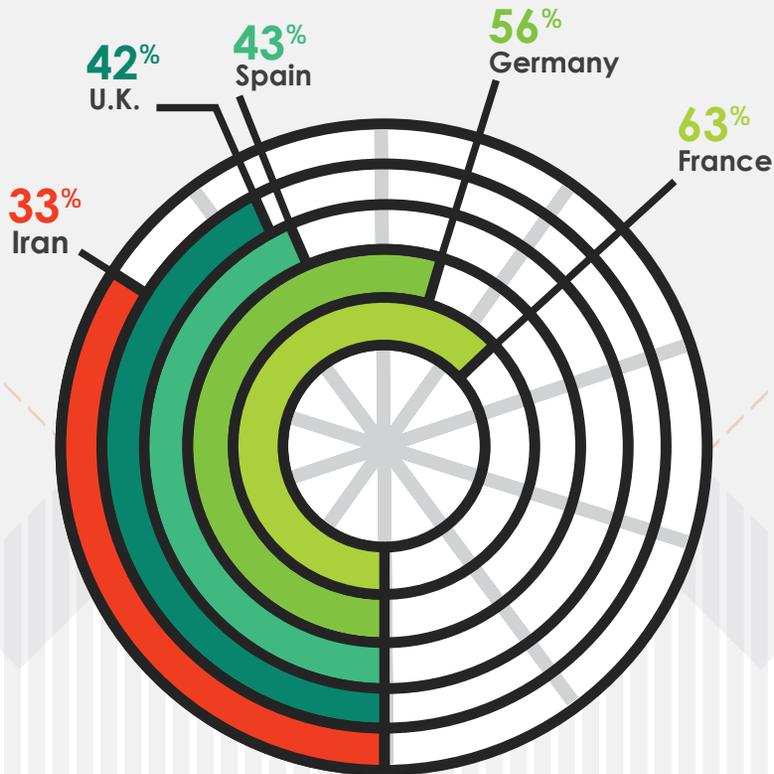
## France





# Who Play Iran and Europe

Although the percentage of Iran's gamers are less than four European countries, the high population of Iran make it three in ranking based on the number of gamers.



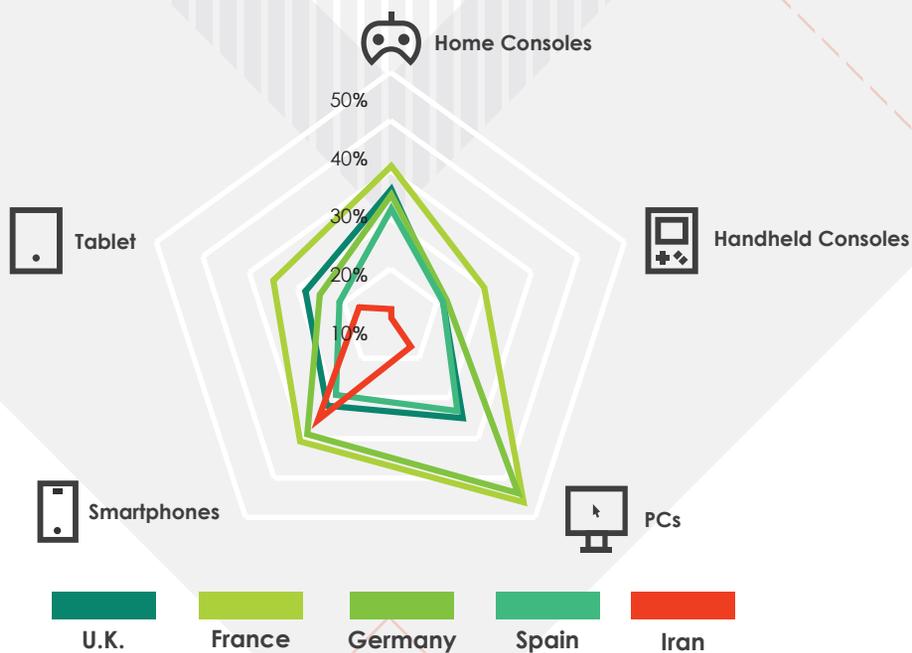
of the countries' population

There are **22 million** gamers in Iran which makes it three in ranking after France.  
**The number of Gamers (Million) in four European countries and Iran.**

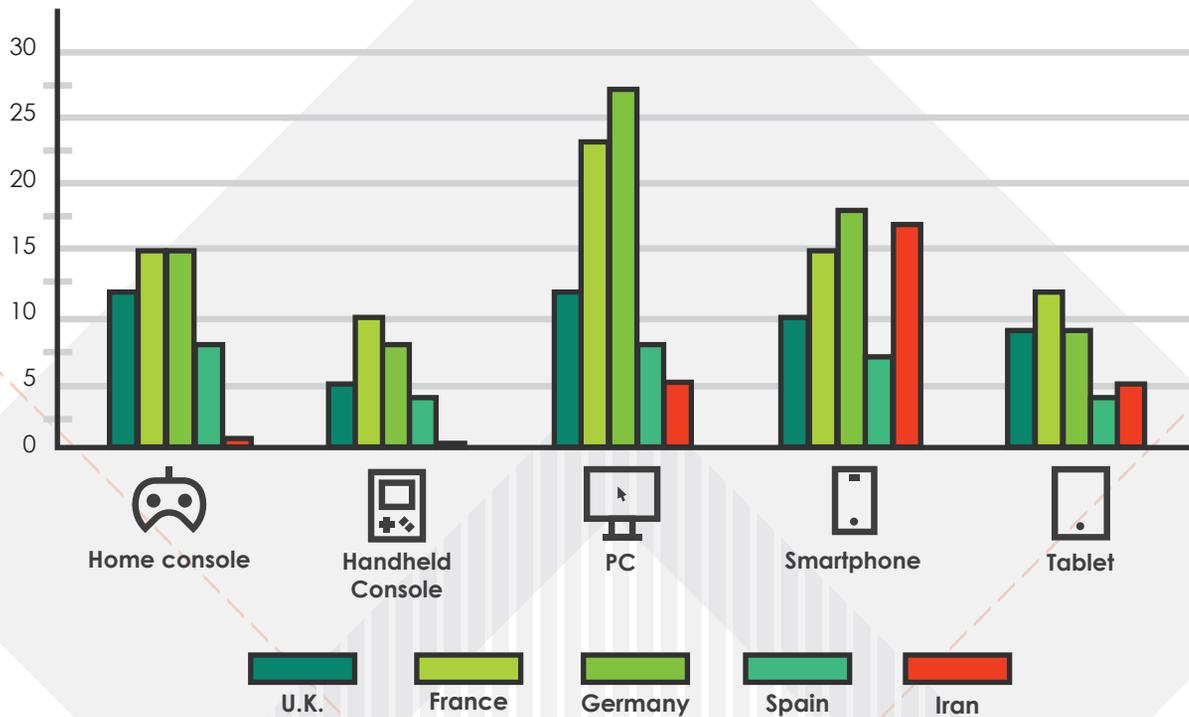


Comparing to other countries in Europe, Iran's gamers in smartphone device are more than the other ones. **17 million** smartphone gamers in Iran put it second in ranking after Germany.

**The percentage of gamers based on the devices:**



## The number of gamers who plays on each device (Million):



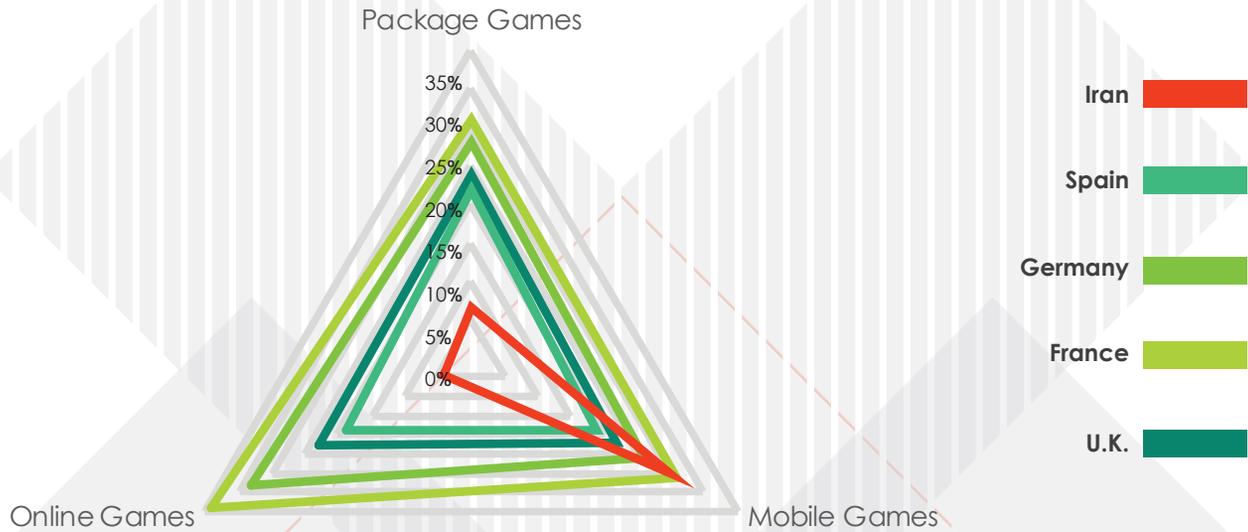
The games that need physical disks are defined as package games.

Mobile games can be categorized as free, in-app purchase, and premium which can be installed on smartphones or tablets.

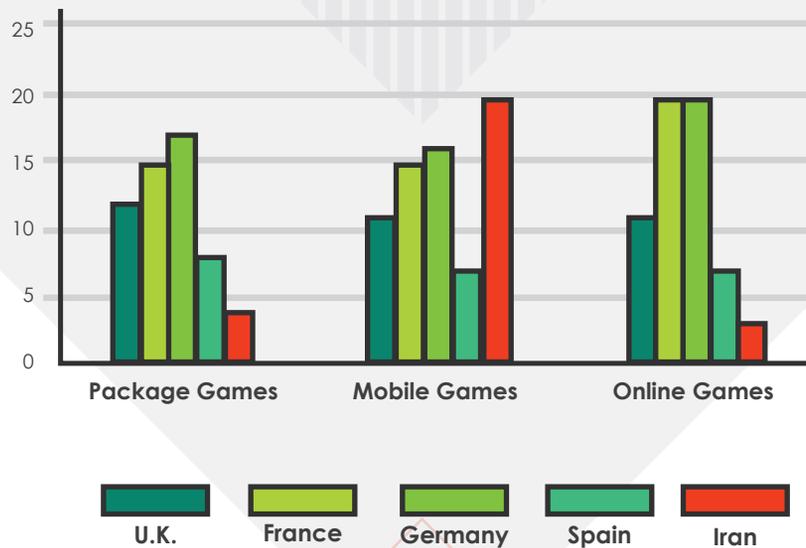
Online games are multiplayer, social, web browser, and fully downloaded (free or with payment) games.

Iran with **20 million** gamers on Mobile platform is **the first country** among four European countries.

### Package, Mobile, and Online gamers in each country:

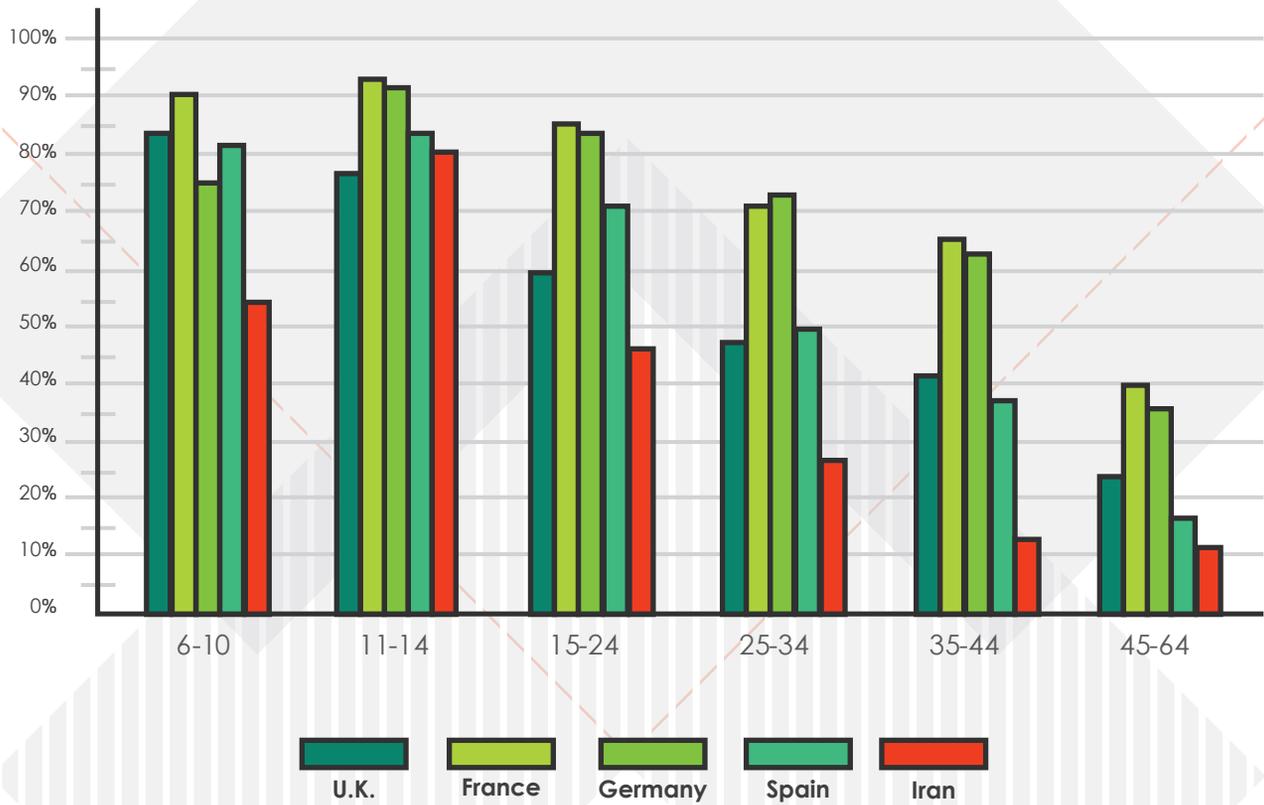


### The number of gamers (Million) in Package, Mobile, and Online games:



The population of Iran and four European countries who are gamers can be seen in Fig below, the categories are based on age groups. 11 to 14 years old male gamers are more than other categories in number, this pattern can be recognized in other countries, too. It should be considered that increasing age cause decreasing number of gamers.

**Gamers' share of population based on age groups:**



**64%** of gamers are male in Iran.

There are more male gamers in Iran than **four** European countries.

The gender of gamers in Iran and four European countries:



  
Female

**36%**

**46%**

**49%**

**51%**

**43%**

  
Male

**64%**

**54%**

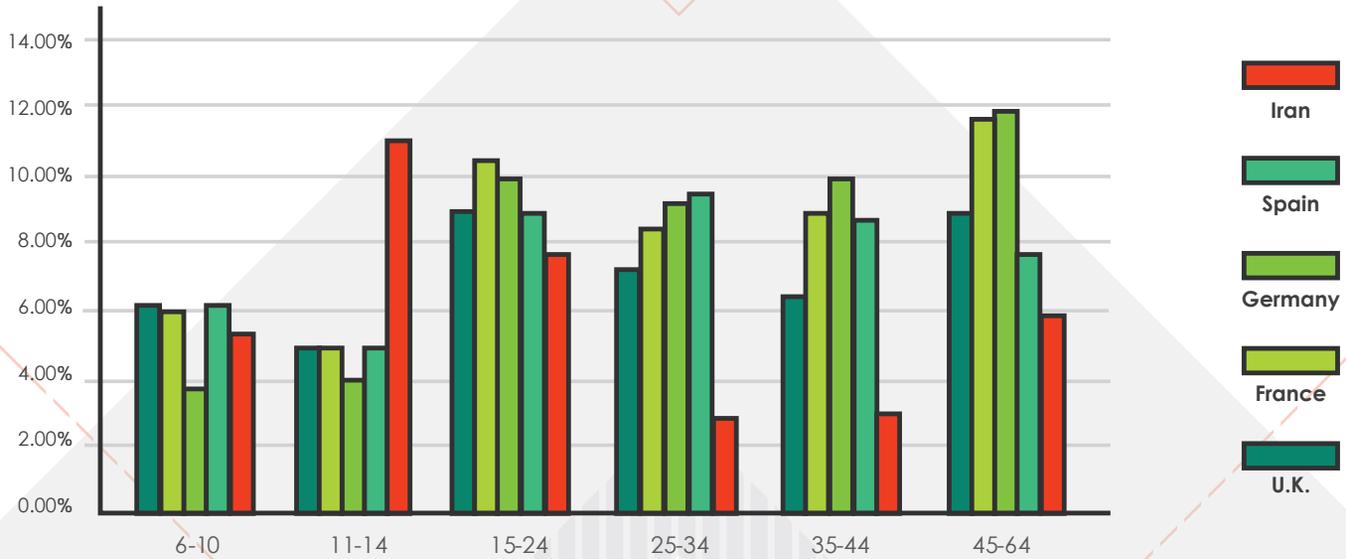
**51%**

**49%**

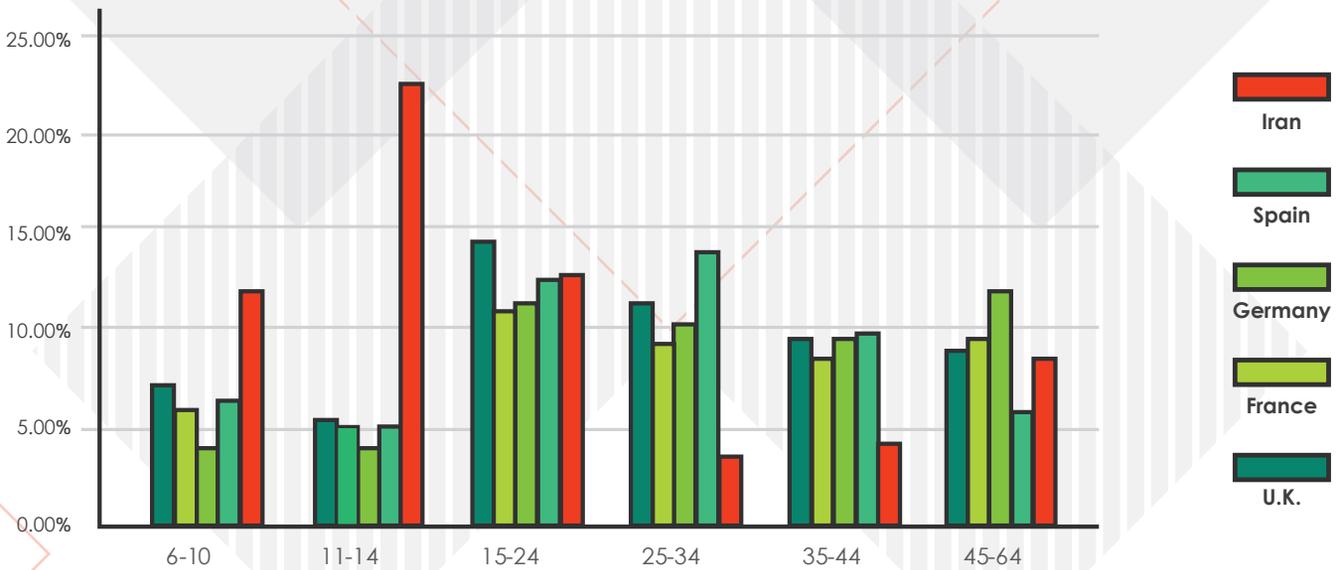
**57%**

The following Figs show the percentage of male and female gamers based on age groups. Male gamers who are **11 to 14** years old have more share in these categories than other age groups in Iran and other European countries in same category.

### The percentage of male gamers based on age groups:



### The percentage of female gamers based on age groups:





## How They Play Iran and Europe

Each gamer in Iran plays **9.2 hours** per week which makes **Iran** first in ranking compare to four European countries.

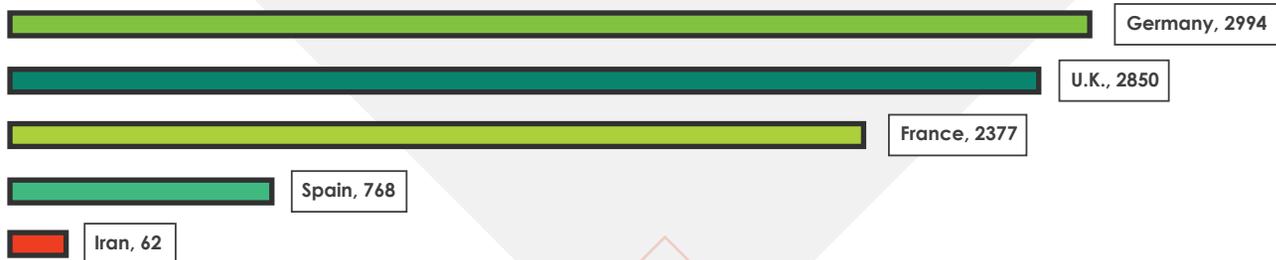
The gamers average playing hours in one week:



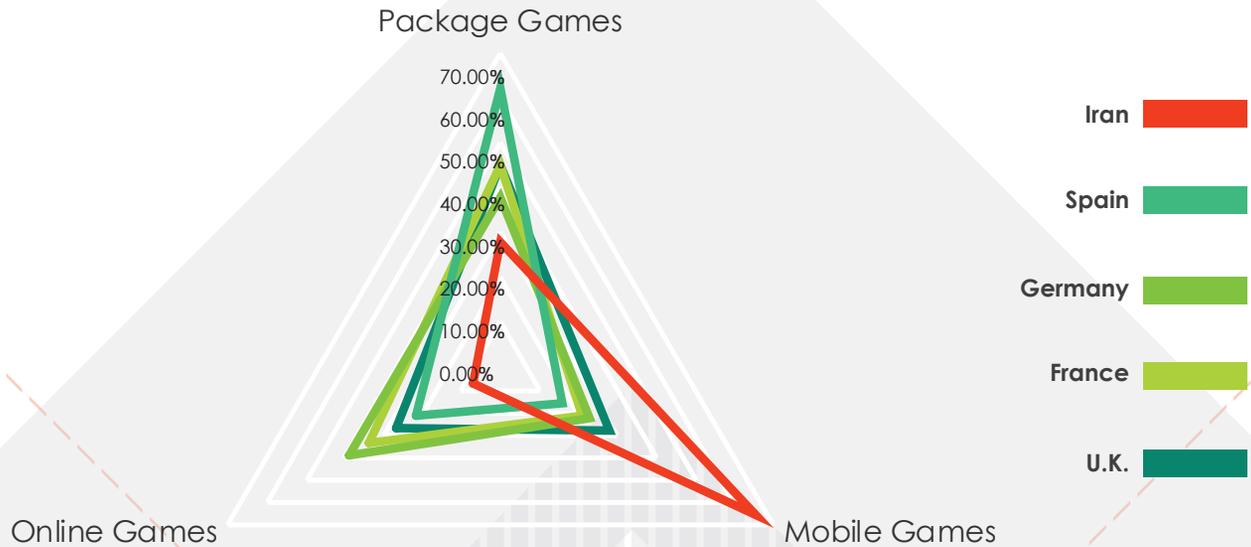
## How They Pay Iran and Europe

Although Iran's digital games revenue is less than four European countries, the share of Mobile games revenue in Iran is higher than the others. As a result, Iran's digital games revenues show different pattern with unique opportunities.

The market revenue (without hardware revenues, M€):



## The revenue shares of games



## How this research has been done

This report is found on accessible statistics of Iran and other regions of the world. Iran's statistics in digital games area are based on Digital Games Research Center (DIREC) survey in the country.

The presented statistics of four European countries are extracted from ISFE<sup>8</sup>/Ipsos<sup>9</sup> Connect report. Expressed statistics in this report is different with Iran. The stats are based on percentage of these countries' population. For instance, 42 percent of Spain population play digital games. Therefore, to comparing Iran with these countries in games industry statistics, extracting population data for Iran was requisite which has been provided by accessible statistics of data center. The presented statistics considered by age group if it was required for comparing to other countries. For instance, ISFE reported the gaming hours in a week 11 to 64 for people, this scale has been considered for Iran, too. Moreover, the descriptive statistics (average or frequency tables) have been used for this report.

8. Interactive Software Federation of Europe  
9. Ipsos: Global market and opinion research specialists

# Iran and Oceania

## IRAN

Population (2016)<sup>10</sup>  **79,926,270**

Online Population (2016)<sup>11</sup>  **39,149,103**

GDP per capita (2015)<sup>12</sup>  **4,877**

## Australia

Population (2016)  **24,309,330**

Online Population (2016)  **20,679,490**

GDP per capita (2015)  **50,961**

## New Zealand

Population (2016)  **4,565,185**

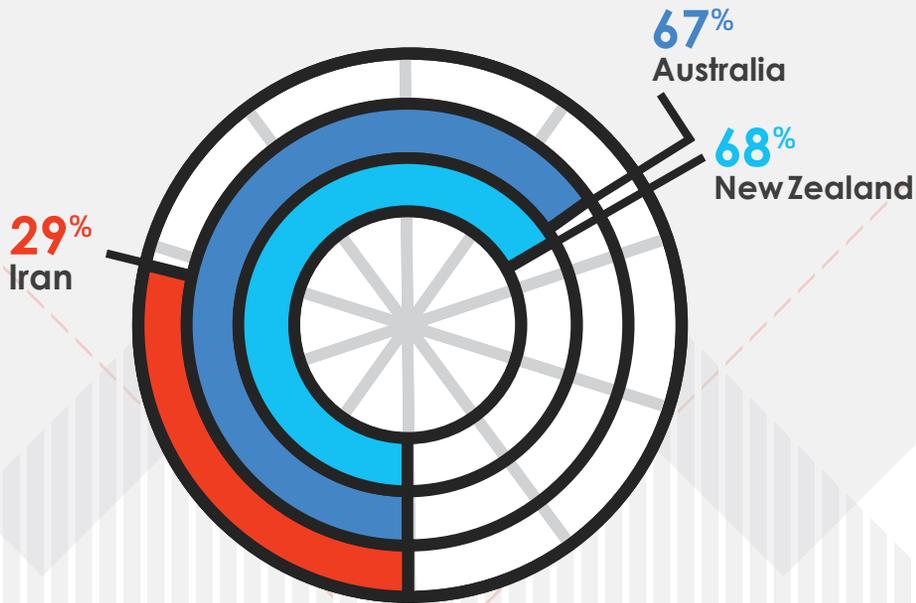
Online Population (2016)  **4,078,993**

GDP per capita (2015)  **37,044**



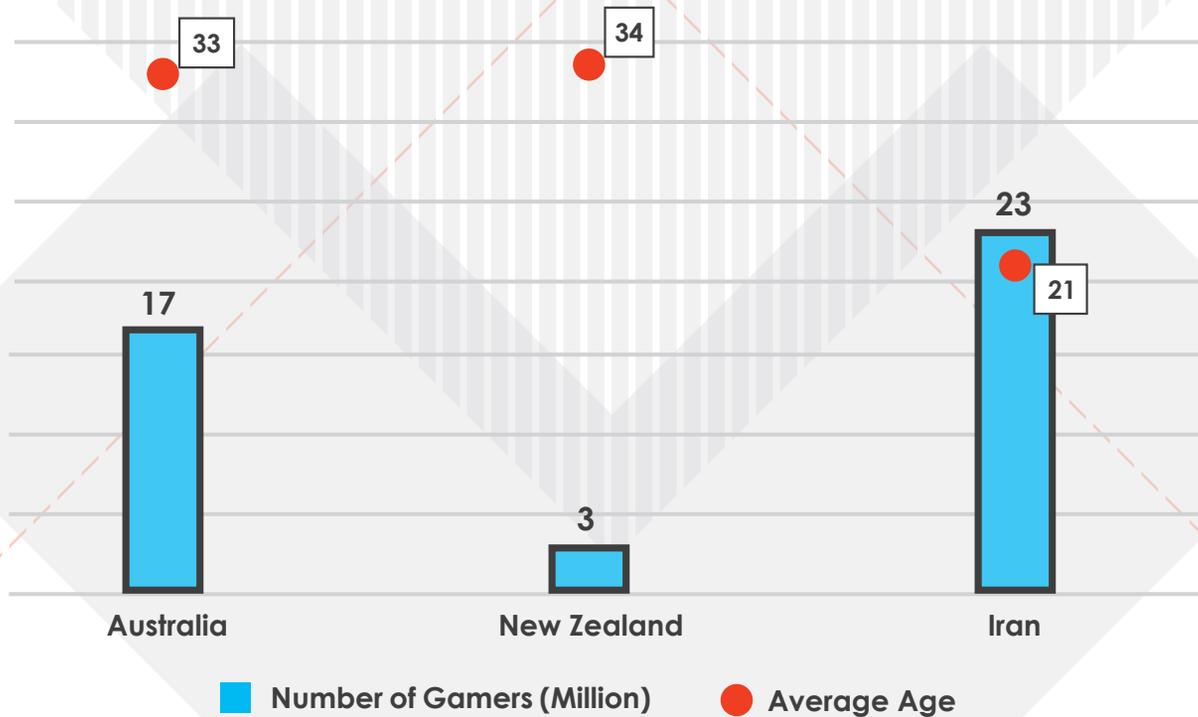
## Who Play Iran and Oceania

The following Fig shows that the percentage of Iran's gamers are less than Australia and New Zealand. However, Iran's population is more than the other two countries which results in more gamers in number than the other ones.

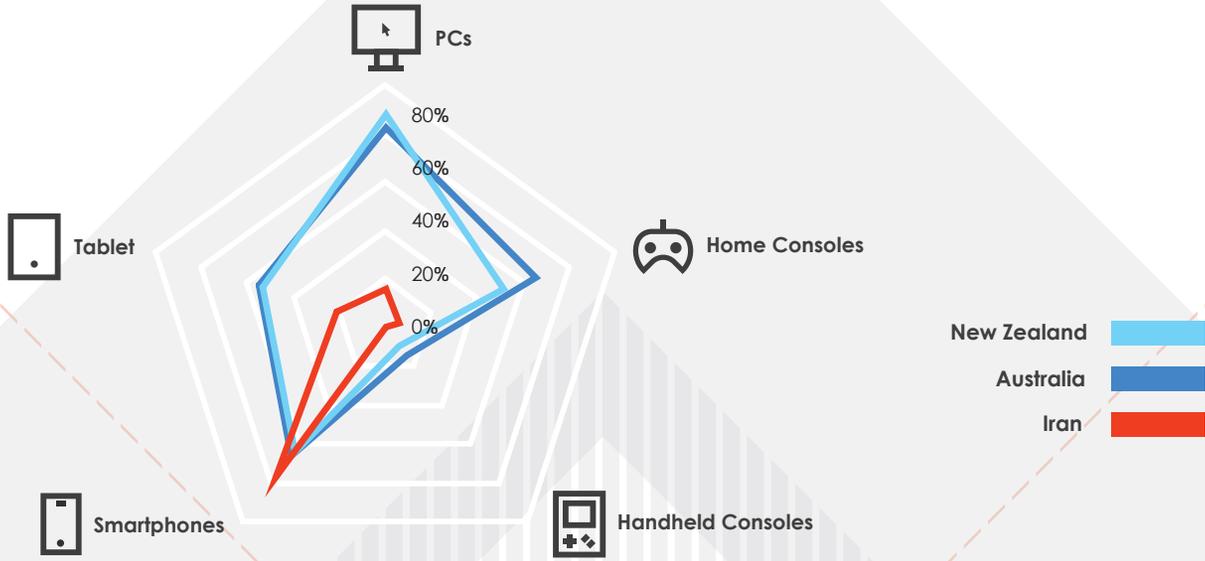


of the countries' population

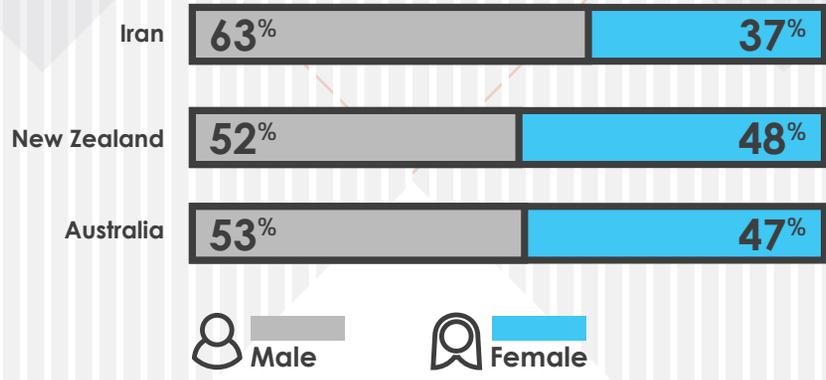
The average age of gamers is **34**, **33**, and **21** in New Zealand, Australia, and Iran, respectively. The low average age of Iran's gamers shows that digital games industry is young in Iran, as a result, it can be implied that Iran's digital games industry will be developed in near future.



In following Fig which is categorized based on devices, the percentage of smartphones gamers in Iran is more than the other two countries. **77%** of gamers play with smartphones in Iran, while this is **66%** and **64%** for Australia and New Zealand, respectively.

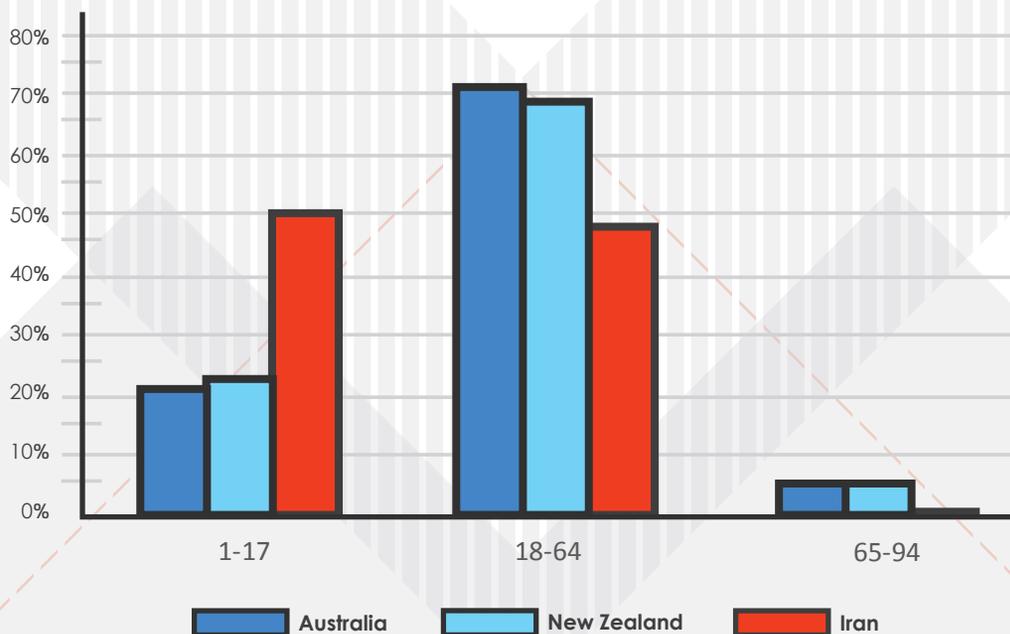


The percentage of gamers based on gender:



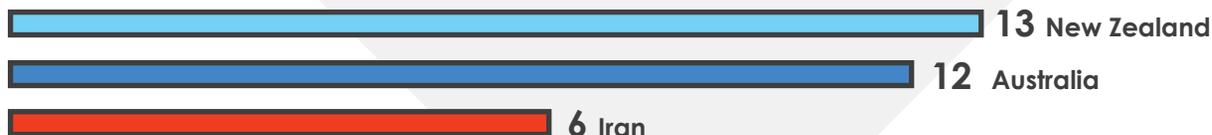
While the most gamers in Australia and New Zealand are between **18-64** years old, most of the gamers in Iran are **18** years old or younger.

The percentage of gamers based on age groups:



The number of years that Iran's gamers are playing is less than Australia and New Zealand; so, it can be concluded that Iran's gamers are young in their gaming experiences. As a result, bright future can be expected for Iran's gaming.

The average years that gamers are playing:





## How They Play

### Iran and Oceania

Although Iranian spending time on games is less than Australia and New Zealand people, this differential is little, and numbers are very close together.

The average of playing time in one day (Minutes): 



88 minutes



88 minutes



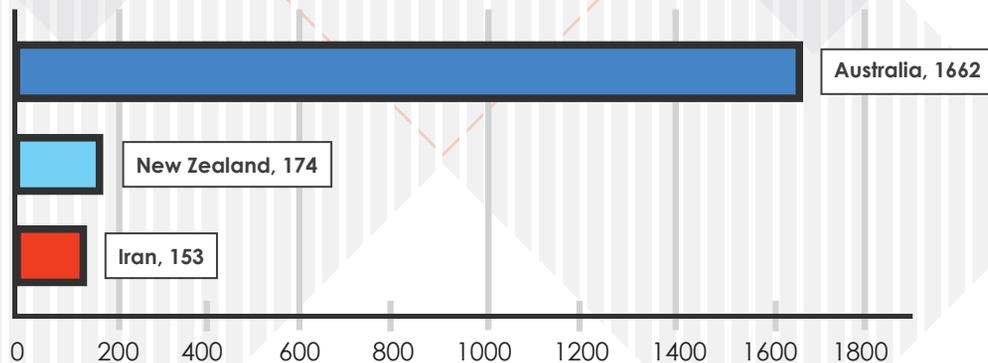
79 minutes



## How They Pay

### Iran and Oceania

Revenue (M\$):

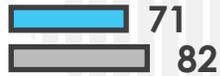


The revenue share of hardware is more than software in Iran's digital game industry, while this is entirely reversed in Australia, and New Zealand.

Hardware and software revenue in digital game industry (M\$)



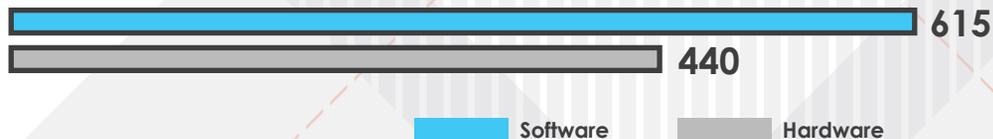
Iran



New Zealand



Australia



Software Hardware

## How this research has been done

This report is found on accessible statistics of Iran and other regions of the world. Iran's statistics in digital games area are based on Digital Games Research Center (DIREC) survey in the country.

The presented statistics of Australia and New Zealand have been extracted from joint report by Bond University and IGEA<sup>13</sup>. The presenting method for statistics in Oceania continent are close to how Iran expresses it. Therefore, the descriptive statistics (average, frequency table, etc.) have been used to compare Iran with other countries in Oceania region. It should be considered that Iran's statistics are extracted from national survey. Moreover, in some cases like age groups, Iran classification method was different with IGEA report. As a result, the unification process has been employed to present coherent statistics.

# Looking Forward...



One of the most important reasons that people and companies in all industries are looking for presenting their statistics and understanding others in the world is that all sides are trying to realize their right position. Hence, a comparison report about Iran and other countries has been provided to satisfy what seems to be required. In fact, it was important to see where we are in digital games industry, and we believe this evaluation can lighten the road for all industry players.

Determining Iran's position might be attractive and useful for publishers and other international players of digital games industry in Tehran Games Convention (TGC). Unfortunately, there were no scientific view on Iran's market and it was always a black box due to non-productive connections. We hope this report could show some potentials and unique opportunities in Iran alongside with other countries.

# About DIREC



## DIREC Group

In the growing market of digital games industry, particularly in Iran and Middle East, knowledge and accurate information seems requisite. This information is vital for analyzing regulations, policies, industry status, competitive environment, consumer preferences and other business development indexes.

Digital Games Research Center (DIREC) has been established to develop research in gaming industry since 2015. DIREC has made interactive connections to universities, developers, publishers, and media. Not only DIREC enhances research areas in gaming industry by these connections, but it also has access to an accurate and wide range of data by promoting the communications and implementing the periodic and sectional surveys. The most important survey of DIREC about gamers' behavior is the periodic nationwide survey with 45000 people as sample size in metropolises, cities and rural areas. Trends, behaviors, and preferences are gathered from 15000 gamers all around the country; subsequently, conclusions by statistical approaches are generalized to cover all regions and segments.

DIREC is presenting a variety of reports in digital games area, and it also conducts tailored research for its national and international customers. Moreover, DIREC is encouraging business intelligence by organizing analytical events, conferences, workshops and webinars in the game area. DIREC is the official center for digital games industry statistics in Iran.

## DIREC Other Services

Besides publishing reports and issues, DIREC other services can be expressed as:

- Information consulting to national and international corporations for developing their activities in industry.

# About DIREC

- Implementing research projects for policymaker organizations, developers, and publishers.
- Presenting key information of industry players, and gridding them together
- Reinforcing theoretical and scientific basis in digital games area by connecting to universities, research centers, and by supporting research both financially and scientifically. DIREC is also encouraging research by holding annual Digital Games Research Conferences (DGRC) in Iran.

## **DIREC Customers**

Based on DIREC different activities, a wide range of corporations, organizations, and foundations can be considered as our customers:

- Policy makers and managers.
- Games developers, publishers, national and international distributors.
- National and international investors and VCs.
- Complimentary industries.
- Media
- Researchers and academics.

## **Contact US**

- Address: DIREC, 4th Floor, No. 32, Golzar St, Zirak Zadeh St, Varavini St, Soleyman Khat-er St, Mottahari St, Tehran, Iran
- Website: [www.direc.ir](http://www.direc.ir)
- Email: [info@direc.ir](mailto:info@direc.ir)
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- Telegram: +98-9028492896

## Tehran Games Convention (TGC)



Tehran Game Convention exhibition (TGC) is the country's first and most important business to business (B2B) approached international event in the field of digital games. After July 2015, more than ever before, the potential was created to welcome Iran's digital games industry among game developers, investors, and publishers worldwide. As the policymaker and sponsor of the game industry in Iran, with years active in the field, the Iran Computer and Video Games Foundation (IRCG) decided to invite established players in the industry to Iran via a global event to introduce Iran's unique potential as well as offer an up-close look at the flairs of Iranian game developers and the aptitude of the Iranian game market.

Holding TGC 2017 in the heart of the Middle East provide great opportunity for those who are active in this area to participate in a robust and fruitful international event. TGC is comprised of multiple sections which are pavilions and B2B (business-to-business) areas, conferences, courses, and contests awarded by developers. Every section of the event shares two major principles in focus: exchanging knowledge among the world's most prominent game developers and Iranian counterparts, and facilitating deals with international publishers.

### Goals and Expectations

The main goal for this event is to create contact between digital games developers in Iran and international publishing companies.

The games industry in Iran has more than a decade's worth of experience and has created hundreds of fascinating games, yet it has never had an opportunity to enter the international market. It is TGC's intention to create this opportunity for the first time for Iranian game developers.

The community of game developers in Iran is incredibly large and active and they have always been of interest to international publishers. At TGC, these companies, can finally, by coming to Iran and seeing up close the talents and potentials of Iranian game developers and the Iranian games market, introduce even more growth to the games industry in this country.



# TEHRAN GAME CONVENTION

Your business bridge into Iran and MENA

[www.tehrangamecon.com](http://www.tehrangamecon.com)



## Game Connection – The Deal Making Event

In Game Connection, key players from the games industry meet & do business together. The deal making event for the digital games industry since 2001.

Game Connection is the international event where 2700+ developers, publishers, distributors and service providers come to find new partners and/or (in the case of service providers) find new clients. The industry leading Game Connection Meeting App enables attendees and exhibitors to organize meetings in advance of the event – optimizing their time on-site.

The survey results from the last Game Connection shows that attendees report an average ROI of \$300,000.

### Attendees and Audience

Game Connection is run twice a year – once in San Francisco and once in Paris.

The audience to these two events are quite different – though there are overlaps. Participants will meet some companies that they saw at the other Game Connection, but in general the event attracts a different group because of the location.

On a year to year basis (as opposed to between the two events in the same year), Game Connection attracts a core audience of 'buyers' to each event – publishers, distributors and some developers, looking for games, partners and service providers. This accounts for roughly 50% of the participants and Game Connection continuously adds new companies to this core group of participants. The remaining 50% is made up of new companies that have not attended a Game Connection before.

Overall, this means that participants are meeting with a large percentage of new companies both between the America and Europe versions, as well as year on year.

Alongside the fact that everyone attending is there to do business, that makes Game Connection the most effective business development tool for the games industry.

If someone is looking to find new partners and/or clients, then he/she needs to attend Game Connection.

You should be at Game Connection if you are:

A developer looking for: publishing and/or distribution partners, service providers, work-for-hire and co-production.

A publisher or distributor: looking for new games, partners, service providers.

Service provider: looking for new clients.

### The Effectiveness and Main Goal

It is this singular focus on 'doing business' that makes Game Connection so efficient.

Thanks to the Meeting App, participants are able to organize meetings in advance – saving a ton of time on-site. Many participants have back-to-back meetings throughout the 2 days – it's tiring for sure, but very effective.

Because of this over 80% of participants say they have signed deals thanks to meetings from Game Connection.



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