[THE BUSINESS MODEL OF STEAM]

Because steam is much more than just play online
Lo studio che è stato condotto riguardo al modello di business di Steam parte con una breve presentazione del prodotto, soffermandosi sulle caratteristiche innovative che rendono Steam una “soluzione” davvero originale. Da questa analisi scopriremo come in realtà ogni scelta e prerogativa abbiano contribuito a rafforzare il business e il grande successo commerciale di questa piattaforma di gioco. Più in dettaglio la sezione “caratteristiche ecommerce di Steam” illustrerà il vero lato commerciale dell’applicazione, dimostrando come ogni caratteristica di Steam rientri perfettamente in un’ottica di business (trust, satisfaction, loyalty, earning, marketing), come Steam abbia affrontato la tematica del “consumer behaviour”, e come si possa applicare il modello AIDA(S). “Steam è molto più che il semplice giocare online”.

Si cercherà di focalizzare l’attenzione del lettore sulla grande abilità che ha avuto Steam nel rendere i propri clienti i principali promoter della piattaforma stessa, attraverso forum, “gifts”, e scambio di consigli. Da qui le varie strategie di marketing, attraverso sondaggi, forum e importanti partner.

Al termine una conclusione con la domanda sui possibili risvolti futuri di Steam
## Summary

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1 - Steam & Valve

Today Steam is considered the world’s largest online gaming platform. Created by Valve, which has enjoyed a reputation as one of the most highly entertainment software and technology companies, Steam turns any PC or Mac into a gaming powerhouse by providing instant access to a huge library of titles, as well as connecting gamers with each other, making it easy to find friends and easily playing games together. At its debut, Steam was ideated as a service for updating Valve’s own game Counter-Strike, and now it has grown to become a service used world-wide, translated into 21 languages, with content servers on every continent (save Antarctica, but, as Steam says, “we’re sure that’s just a matter of time”), and an estimated community of more than 25 million users.

Steam success has been greatly encourage by Valve’s successful products: his portfolio of entertainment titles includes further entries in the Half-Life® universe, including Half-Life 2 and Half-Life 2 Episodes 1 and 2; the four-player cooperative action horror franchise Left 4 Dead®; the multiplayer combat franchise Team Fortress®; the award-winning Portal™; and #1 online action game Counter-Strike®. This portfolio of titles accounts for over 20 million retail units sold worldwide, and Valve games account for over 80% of the PC online action market.

First fundamental point of success: trustworthiness. Steam’s credibility was based on Valve’s reputation and visitor’s previous experience with Valve’s products

2- More than playing a game

Steamworks focus its attention not only to the finished product: its process involves the entire game-life-cycle, improving, as first step, the development of games, with utilities and special features. For example, it lets producers share games in-progress with remote team members or participants in a private beta, basing the compatibility work on users’ pc hardware, and, thanks to Steam Hardware Survey, target their development and support of games. Another service is Steam Bug Reporting: with this
technology, sellers can track most frequent crashes in real time (identified by number of unique users)... all this before customers contact support.

Then, when a great game is released, players will expect it to be supported by a robust set of community and networking features. Steam is much more than playing a game; it lets every player create and manage his profile, it lets players find each other, talk to each other, join games together, organize matches, compare achievements and talk about the next match. They’ll also be able to get access to their games from any Mac or PC, and they'll be protected from cheaters. It’s the most efficient way to build communities of gamers and providing a strong incentive to play more and recruit others.

Second fundamental point of success: free and not-intrusive marketing. Market in Steam is made by users, promoting their results and their successes in games they play to other friends, or to new users (“play more and recruit others”)

Steam’s multiplayer is not a simple “multiplayer modality” we can generally find implemented in games. Multiplayer back-end is powered by robust matchmaking and lobby technology, it gives users more features, for example the “built-in voice” functionality, which can create in-game or out-game chat rooms, or it let players to work quickly to strategize their next mission (best for team death-match, capture the flag, or in general, for team-mode match). Steam is now using Skype's SILK codec for improved chat quality (last month news). Gamers can easily get access to a lot of official game groups: they are great communities where people, who have in common passions, tastes, can organize matches, post concept art, announce news, or simply chat about anything they like about (picture 1).

No worry about different game version, an issue that block people to play together. With Steam auto-updating feature, player’s games are always automatically updated at the last version, with patches and mods, when available.
Another feature which cannot be forgotten is Steam cloud. Expanded from 1 MB per user to 100 MB per user, the Steam Cloud API allows players’ game to write and retrieve files for each user. It can be used for personalized settings like keyboard, mouse, and gamepad configurations, multiplayer sprays, or even saved games. Steam Cloud is a natural extension of the portability that Steam affords gamers. Shipped first with Left 4 Dead, Steam Cloud is now a proven resource and is becoming an integral part of the Steam experience.

3 – Security as an additional value

For every e-commerce site (not only, but in particular...) security is a very fundamental matter, and it mustn’t be not considered apart from trust. Everyone, who can get access to an user account, can have a full control of his profile (username and password), list of games, and (if saved) some details of his credit card (which he could have used for purchasing games). An account can save a list of hundreds of games and for losing a password all the list can be lost. Some procedures are available for stolen account, but Steam offers “in primis” a lot of interesting “security seals”.
The access to users’ games is based on a customer account, not tied to a computer. The 100% of Steam gamers has installed on their main computer the Steam Client, an application which lets players play online (or offline too) and stay immediately in contact with their friend (it has more feature than a Steam online account, accessible from a web browser), via an authentication system. Steam has implemented the “Custom Executable Generation”: this technology creates a unique build of a game for each user, making it difficult for any one user to share the game with any other user. Each individual copy of a CEG-protected game is only playable by the Steam account authorized to access it. CEG is transparent, and does not impose limits on users. It lets users access their content from any hardware, and allows unlimited hardware configuration changes without the content becoming unplayable. In fact, no changes are made to user's computer for CEG to work. Instead, CEG works in tandem with Steam authentication, enabling content access based on user accounts, not arbitrary hardware-based "rights-management" restrictions (pictures 2).

Third fundamental point of success: security as an additional trust and value of the purchased products.

A Steam user can access his online account via the client, installed on his own computer, or through a web browser. While in the first alternative the user is the “responsible” of his computer (and its owner), access from a different computer (via a web browser) must be guaranteed. Recently, in addition to a “simple” authentication requested in the main page of Steam, Valve has introduced a further level of security, Steam Valve, making it harder for any user’s Steam account to fall into wrong hands. When Steam Guard is enable, anyone attempting to login to user’s Steam account from an unrecognized computer must provide additional authorization. A special
access code will be sent to his contact email address (used in Steam’s registration), and this code must be entered into Steam before your login is complete.

Advantages aren’t only on customers’ side... thanks to the encryption technology, sellers can preload their game to users on Steam. Special offers are displayed in Steam’s main page as “Pre-purchase now” (in most cases with additional exclusive features): an user who wants to pre-buy it will download encrypted data weeks in advance (zero piracy aim), in order to have access to the game only the moment it’s released, increasing expectation and satisfaction in users, and ensuring a high number of players already in the game first critical life days. The best solution between sellers and players (pictures 4).
4 – Valve & Steam Business

So... after this short introduction to Steam world, we analyze now how much impact these features have had on consumer (and seller) choice. What benefits, advantages and exclusives for them? How did they reply? Here some articles found in Tom’s Hardware and VGChartz Ltd will be just the answer we need.

1- Valve is worth 4 billion dollars, thanks to Steam’s monopoly (17/02/11)

Valve Corporation, thanks to the service of selling online games Steam, became a financial giant with a value estimated at 2-4 billion dollars. Steam, with his 30 million of clients, controls 70% of the market for downloadable PC games (value: 4 billion dollars). At Bellevue (Washington), where Valve was born, a team of 250 people is able to rack up annual sales of several hundred million dollars – in 2005 they were 70. Last October Valve confirmed to have reached unprecedented financial results, with a year-past-year growth of 200%.

A last feature of Valve’s online market lets people exchange and buy games “Mod”, with weapons and accessories personalized by the same community users. In this way, people say some independent developers can earn 20 thousand dollars every week. Steam’s trading monopoly thanks to vendors too: in facts their attention is attracted by the possibility to sell to people, without intermediaries (such as distributors). The gross margin on each title is around 70% - far more than the 30% obtained in a “physical” store.

From this analysis, we must grasp these success factors. The first point is this: Steam offers special conditions to sellers, special financial advantages and development tools. More and more producers choose Steam, (with particular trading agreements between sellers and Steam) and try to call back clients and passionate gamers to buy their Steam-Version gaming product, which, we have seen, is full of unique features. As Said Miles Jacobson, Managing Director of Sports Interactive, makers of Football Manager, ”It’s obviously of benefit to smaller developers to be able to get a suite of tools like this for free, and will help to encourage more people to start using digital distribution methods, which is the likely reason for Valve doing this.”

In the picture below, Gabe Newell, the founder of Valve.

Fourth fundamental point of success: special financial advantages for producers and independent developers.
Retail and digital figures for tracked markets, seen below, came to over $33 billion in 2010, on over 3.2 billion game purchases. Overall, digital download revenues in 2010 totaled $2.5 billion representing 7.6% of the market total – a figure expected to increase significantly over the next few years. In terms of unit sales, digital platforms (in particular Apple) are already dominating with only just over 20% of unit sales on Nintendo's Wii & DS, Sony's Playstation 3 (PS3), Playstation Portable (PSP) & Playstation 2 (PS2), and Microsoft's Xbox 360 (X360). **Valve's Steam service took almost $1 billion in revenue in 2010 and is quickly approaching the size of some declining retail markets.** With the remaining PC digital markets estimated at around $250 million in 2010, Steam dominates with nearly 80% of the overall PC digital market (results in chart 1).

**Revenue (USD, Millions)**

<table>
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<th>Platform</th>
<th>Revenue (USD, Millions)</th>
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<tr>
<td>Playstation 3 (PS3)</td>
<td>7293</td>
</tr>
<tr>
<td>Xbox 360</td>
<td>7242</td>
</tr>
<tr>
<td>Wii</td>
<td>6083</td>
</tr>
<tr>
<td>PC</td>
<td>5000</td>
</tr>
<tr>
<td>Nintendo DS</td>
<td>2562</td>
</tr>
<tr>
<td>Playstation Portable (PSP)</td>
<td>1016</td>
</tr>
<tr>
<td>Steam (DD, 910)</td>
<td></td>
</tr>
<tr>
<td>Playstation 2 (PS2)</td>
<td>756</td>
</tr>
<tr>
<td>iOS Devices (DD, 749)</td>
<td></td>
</tr>
<tr>
<td>Downloadable Content X360 / PS3</td>
<td>300</td>
</tr>
<tr>
<td>Non-Steam Digital Download PC</td>
<td>250</td>
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</tbody>
</table>

Chart 1
Reading this article, it seems Steam is killing the retail marketing (in Tom’s Hardware appeared an article which title was: “Steam kills the market, war declared by retailers”). Steam control 78% of the online market (more than the previous 70%), and the 15% of the pc game software (end of 2010). Next article shows us more in detail game sales.

3. PC games are downloaded with Steam

Valve, as video-games editor, would be the third power of the store with an income of $80 million, most of which derived from the sale of Left 4 Dead 2. Talking only about sold copies - excluding the economic aspect - Valve is the software house that has sold more. Among the titles that have had more success on Steam we Call of Duty, Black Ops and Modern Warfare 2, which had occupied respectively the first and second place in terms of gross sales. In only two month in the online market, Black Ops has sold on Steam 1.6 million of copies (sales value: $100 million).

Thanks to the popularity of its titles and expansions, Activision has been the number one publisher on the 2010 store, with a revenue of 153 million dollars. Here the most wanted gaming title (sales in $):

- Call of Duty: Black Ops (Activision) - 98.2 million
- Call of Duty: Modern Warfare 2 (Activision) - 39.4 million
- Left 4 Dead 2 (Valve) - 36 million
- Battlefield: Bad Company 2 (Electronic Arts) - 25.4 million
- Sid Meier's Civilization V (2K Games) - 21.9 million
- Portal (Valve) - 20 million
- Fallout: New Vegas (Bethesda Softworks) - 17 million
- Metro 2033 (THQ) - 13.4 million
- Mafia II (2K Games) - 11.9 million
- Warhammer 40,000: Dawn of War II: Chaos Rising (THQ) - 10.8 million

Sales of video games in digital form continues to grow, one payment method is convenient because it forces users not to leave their homes, either because the price (with discounts that are presented in continuous rhythm) are sometimes very favorable. We must also consider that the Internet lines, as in Italy there is a huge job to do, are expanding and more and more people are taking advantage of contracts "flat " that allow people to leave their PC to download their purchase with confidence.
The question is: “what is the secret of Steam? How could Activision sell 1.6 million of copies of Call of Duty via Steam in two months? Is all of this promoted by discounts, is all of only a trend or is there anything other behind?”. Let’s discover Steam’s ecommerce features.

5 – Ecommerce strategy

When we talk about ecommerce, we don’t point out only the commercial and economic aspect of a company: in fact, ecommerce is a process which includes all those modalities that relate the marketing strategy, the study of customers (their behavior, their relationship with the company, ...) and the study of those factors that affect the final buyer’s decision. The ecommerce strategy as the delicate line between customers and company: a wrong move and the company may lose the client. The consumer must be the focus of a company, so let’s learn about consumer behavior online.

a. Consumer Behavior

i. Main factors of influence: social and environmental factors

Steam is a community, but in particular it can be considered a community of friends. Friends play a fundamental role in Steam, in fact they become the main business advisers, becoming sponsors of the games that have (not only). An user can view friends’ purchased games, some statistics, his screenshots (during the play, the gamer can print-the-screen with f12, and share that screen capture in Steam), and send / receive some personalized message (see how-to in the next picture). Automatic advises (such as: “friends’ last two weeks favorite games”) are also displayed in friends’ main page, depended on how much time they spend online.
ii. Product / Service factors

Customer services

Now the problem is: how friends can stay in contact during the game? With a simple but inefficiency game chat (but in most of games there are team chat and “to-all” chat, not “to-friends” chat) ? There are some clients that support vocal chat, like Xfire or Skype, but they may decrease the available bandwidth (to play “well” online), and become quite problematic if users have to exit and then back into the game every time they receive or do a call (the game may encounter issues and may stop). With Steam, during the play, gamers press “shift + tab” without exit the game, and they can directly access friends menu, and call them, create a chat room. The experience in a team-modality matches, staying in contact with friends (in particular, with team-friends) will be unique. Steam vocal chat uses Skype codecs now (since the first months of 2011).

Sharing an online play is very simple: no coordination or instructions are required among friends, but only an invitation to play. A lot of games purchased via Steam have usually one more voice in their multiplayer main menu: “invite friends”. Users can also invite friends with Steam client. With these features, people can rapidly meet and stay in contact, with few and simple steps.
Pricing and promotions

In Steam we are facing waves of discounts: every week a customer can find a lot of special prices and game packets. An offer is about a particular game, or about games of a software-house (“special Rockstar games week-end”, for example). Discounts are a modality to revisit old titles and, under the pretext of these ones, people are inclined to spend money (“oh wow... I did an affair”).

![Picture 7]

We can find another type of discount in pre-purchase items: game special edition at the price of the standard one, or real discounts (with some presents).

![Picture 8]
It’s another way to say: “buy it right now... don’t wait”. This phrase appears (implicitly) often. The strategy of sales is this: high short-term discounts. Gamers usually haven’t so much time to think (probably they didn’t want... or they don’t think about this). About consumer’s behavior? There is an Imbalance between its current state of necessity and the desired. Discounts talk clear: “now, or never more”.

b. AIDAS Model

AIDA(S) model was introduced in 1898 to describe advertising effectiveness. With this model, we describe Steam’s business strategy:

**A-Attention**: attract the attention of the customers (great discounts; games already owned by friends).

**I-Interest**: Steam is full of advantages and features (in-game chat, print-screen, “in-game friends”) both to customers both to producers (a lot of tools support the development of their game, for example).

**D-Desire**: consumer is convinced that the products satisfy his needs (by Steam itself and by his friends).

**A–Action**: the consumer hasn’t a lot of time to decide (his friends’ pressure and discounts’ one).

c. Consumer Decision Process

We talk about “pressure” in the consumer decision process. In fact, a lot of players “play” a really important role in the final action of purchasing a game. We have friends, whose importance has already been outlined, as influencers and deciders, Steam market as influencer, and the community. Community in Steam is very large: it includes several sectors (support, ideas, news, about, groups). But, like in every forum, we don’t find only positive comments and recommendations about a game. Users knows in advance of any problems, bugs, or every interesting thing about a title. I consider it as a form of transparency and trust (but don’t forget forums are moderated by admins). Have a look at picture 9.
d. Not only Mass Marketing

Few words about “one-to-one” market. Users visualize games sales in the main page of Steam market, but, in their home page, there are displayed some recommend purchases (not properly discounts, but the intent is to), based on precedent buying, wish list and friends games.
e. Satisfaction

*Satisfaction* is one of the most important consumer reactions in the B2C online environment. It’s tightly connected with: information quality, system quality and service quality. Steam guarantee a big support network for its clients: through its community and its official support channel. The client is not left to his own resources.

![Steam Support](image)

**picture 11**

6 – Payments

In the business success no less important are payments. Safety when paying on the internet for goods or services is very important to those who are buying, and a secure and transparent transaction increments company’s trust. When using systems such as PayPal customers have the assurance of total safety, as they are able to choose their payment method and get instant payment notification. In Steam, users can chose among different payment system: PayPal, MasterCard, Visa, but also paysafecard (a sort of disposable credit card, but without any personal data) and many others. There is a really wide availability of “first-class” alternative. To ensure maximum protection, Steam uses the SSL protocol. (picture 12, payment in Steam)
Fifth important success point: major payment partners, increased security and trust

Other two innovative payment modalities are Steam Wallet and in-game transactions (in reality, they are interconnected): they were born to speed up small purchase and to reduce high fees in just as small money transactions. Steam Wallet (picture 13) is similar to paysafecard: an user buys virtual banknotes using any of the payment methods supported by Steam, and uses them to pay rapidly also during the game (if the game supports it). Also, different payment methods can be combined to make a single purchase. The Steam Wallet has officially been released along with the Team Fortress 2 Mann Co. Store, where players can now purchase items right within TF2 (picture 14)
When an user purchase a game on Steam, Steam offers the option to “gift” the item to anyone he chooses, whether or not the recipient is a current Steam user. The recipient will receive the gift as an attractive e-mail card with a personal message and instructions to redeem the game.

A Steam gift purchase is a one-time transfer—after the recipient has activated and installed the game, it is a non-refundable game in his or her Steam games collection. Also note that the user cannot transfer games he already owns. “That’d be like wrapping up and presenting the toaster you’ve used every morning for the past year”, Steam says... but is as to said that flea market is not allowed in Steam (that’s quite a pity).
Sixth important success point: sending gifts as the best way to “purchase” new clients (friends do it!)

7 – Market research

Adopting the right marketing strategy, a company will get a lot of advantages on the business side. From marketing a company can learn about factors which encourage online purchasing, how to identify real buyers, and what customers expect. In Steam, there is a dedicated section for stats, where we found great information about top games played, number of players online per day, and hardware and software survey. This last one is probably the most important on, because it allows to know users’ answer to technology, how and how much users can exploit next future hardware/software potential, what the market tendency is and many other things that Steam will know certainly. (picture 16 is about steam hw and sw survey)

Another way to conduct marketing is hearing directly from customers. Powerful and “unsuspected” marketing instruments are forums. Every day thousands of people share options and comments about games, hardware, any kind of issues, and, particularly important to Steam, about ideas to improve Steam quality / service. In this forum (picture 17) people propose new ideas, improvements of an existing service, share
their likes and dislikes, and discussions often arise between groups of people and moderators/administrators. What other better way to do marketing? Collecting these kind of data provide new opportunities, and create presupposition to obtain the best products and improvements (users ask them!)

Seventh important success point: users’ opinions and expectation as the best marketing research

![Steam Users' Forums > Steam Discussions](image)

picture 17

Let’s discover a curious case of partnership and alliance...

Some years ago, in a brilliantly concocted promotion, Valve announced that owners of AMD Radeon graphics cards can score a handful of free games via Steam. Half-Life 2: Lost Coast and Half-Life 2: Deathmatch are among the freebies, and the promotion includes discounts on other games as well. Anyone who buys the new AMD Radeon HD
2900 XT will also receive Team Fortress 2, Portal, and Half-Life 2: Episode Two. In short, a really tempting offer, both to Steam users, both to new entries. Here the manifest (picture 18)

![picture 18]

After a few years, a similar offer followed to NVidia owners. This tactic is a brilliant way to recruit new clients and to increase satisfaction among Steam users. Steam refers to “trusted agents” like NVidia and Radeon to improve its market!

Now the curious partnership: despite more than 50% of players have NVidia graphics cards, Steam has signed an agreement with AMD. Or, better, AMD has signed an agreement with Steam (“Here at AMD we’re big fans of Steam, and it’s not hard to see why! 25 million people love it just as much as we do”. – AMD site). Lots of benefits are been carried. In fact, as it’s possible to read, “Steam gamers will never again have to worry about finding the most recent AMD Catalyst™ graphics driver. PC gamers can now detect and install the latest AMD Catalyst™ driver for their AMD Radeon™ graphics card directly from within Steam! Gamers using AMD graphics will not only be kept posted on the latest available drivers for their hardware, but with every update they’ll know that they’re getting the overall best possible gaming experience AMD and Valve can provide.” The first AMD Catalyst driver update that was available via Steam was AMD Catalyst 10.9. See picture 19, and notice the dual different interests (AMD ads!). In picture 20, updating video card drivers.
Video driver updates made easy

Never again worry about having to track down the latest driver for your AMD Radeon™ HD graphics card.

Now you can detect and install the latest AMD Catalyst™ graphics driver directly from Steam. Just as Steam keeps your games up-to-date, now we can help you make sure you have the latest version of video drivers for the best gaming performance.

Just select ‘Update AMD Video Drivers’ from the ‘Steam’ menu at the top of your Steam client. Steam will take care of the rest.

About AMD

AMD featured technology

Looking for the latest edge in gaming hardware? Then look no further than AMD’s new Phenom™ II X6 six-core processors, the fastest processor AMD has ever built.

More about Phenom™ II X6

Get the latest in hard-core graphics adrenaline to pump up your gaming! The all new high-performance AMD Radeon™ HD 6800 Series graphics have arrived with full Direct3D 11 and AMD Eyefinity multi-monitor support for the ultimate in visual dominance.

AMD Radeon™ Graphics for Gamers
In six short years, Valve has evolved the Steam platform to become the preeminent destination for easy and fast access to the latest games and online multiplayer play, offering new features to gamers and to developers, taking PC gaming to new heights – and new audiences. Ok, there might be some resistance at publisher level due to possible conflicts of interest, but the tools and APIs Valve are making available can save so much time and hassle (particularly when it comes to running beta tests and protecting games from piracy) that it’s difficult to see any technical reason not to use Steamworks. And the price is right. “Steam is more than a digital delivery platform to Valve. It represents half-a-decade’s problem solving. How to connect with gamers. How to protect games from being pirated. How to track sales. Valve took the time to engage with all these problems, and now every developer in the world can benefit from their work.”

Would Steam be the future way to play games online? Let’s have a look at these pictures (about Steam servers stats):

![Steam & Game Stats](image)

*picture 21: steam users online peak: 3,080,687*
picture 22: servers used bandwidth: 313,666 Mbit

Probably, we have already the answer.