Bryter.

London, New York
Established 2010

Global Market Research in over
40 countries

And delivered over
1,000 projects
to clients in a variety of sectors

Using a variety of qual and quant methodologies

We work with clients to
deliver insight
with real commercial
advantage

Technology
Gaming
Retail
Mobile
Household Appliances
Healthcare & Pharmaceuticals
Background
Bryter’s Female Gamer Survey 2020

2018, Bryter’s first Female Gamers study with female gamers in the UK

In 2019, we repeated the survey, but included respondents from the US in order to compare differences across market

In 2020, building further on previous years, we targeted both female and male gamers, and explored areas such as eSports and toxicity in more detail
Females gamers are an important audience, accounting for nearly half of all gamers.

Almost half of all game enthusiasts are female.

Although long thought to be a male-dominated activity, the number of female gamers has continued to increase, now accounting for nearly half of all gamers.

Advancements in technology have made gaming more accessible, meaning the audience is more diverse than ever, and not just in terms of gender.

*Source: Newzoo Gamer Segmentation May 2019*
We surveyed over 2,000 gamers across the UK and US

Respondents were male and female, aged 16+ and played video games on a PC or console at least monthly...

PlayStation 57%
Nintendo 36%
Xbox 46%
PC 47%

Respondents did not have to play mobile games to qualify, although the majority (90%) did

S3. Which of the following gaming platforms, if any, do you currently play video games on at least once a month?
Base: All gamers (2006), female gamers (1001), male gamers (1003)
Gaming behaviours
Respondent demographics and behaviours

**Age**

<table>
<thead>
<tr>
<th>Age</th>
<th>Female (%)</th>
<th>Male (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-24</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>25-34</td>
<td>33%</td>
<td>31%</td>
</tr>
<tr>
<td>35-44</td>
<td>23%</td>
<td>25%</td>
</tr>
<tr>
<td>45-54</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>55+</td>
<td>12%</td>
<td>16%</td>
</tr>
</tbody>
</table>

**Gender**

- **Female**: 50%
- **Male**: 50%

**Sexuality**

<table>
<thead>
<tr>
<th>Sexuality</th>
<th>Female (%)</th>
<th>Male (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heterosexual</td>
<td>85%</td>
<td>3%</td>
</tr>
<tr>
<td>Lesbian/Gay</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Bi-/Pansexual</td>
<td>10%</td>
<td>4%</td>
</tr>
</tbody>
</table>

**Ethnicity**

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Female (%)</th>
<th>Male (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>79%</td>
<td>76%</td>
</tr>
<tr>
<td>BAME</td>
<td>20%</td>
<td>23%</td>
</tr>
</tbody>
</table>

**Consoles owned**

- PlayStation: 52%
- Xbox: 62%
- Nintendo: 46%
- Desktop: 50%

**Hours played (weekly average)**

- **Female**: 8.3 hrs
- **Male**: 12.1 hrs

**Who do they typically play with**

- **Alone**: 46%
- **Online friends**: 45%
- **Partner**: 13%
- **Random opponent**: 6%
- **Their kids**: 9%

S1/S2/S3/Q1.6/C2/C4/C5.
Base: All gamers (2006), Female gamers (1001), Male gamers (1003)
For 1 in 3 female gamers, the only gaming they do is offline alone

Gaming behaviours

Play alone offline: 84% (F) vs 86% (M)
Play online multiplayers: 51% (F) vs 67% (M)
Play offline with friends: 48% (F) vs 54% (M)
Only play alone offline: 32% (F) vs 24% (M)

Is playing with others too intimidating? Does it relate to the genres they play?

Top 10 genres on console/PC (based on total sample)

<table>
<thead>
<tr>
<th>Genre</th>
<th>Female (F)</th>
<th>Male (M)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Adventure</td>
<td>50%</td>
<td>61%</td>
</tr>
<tr>
<td>Classic/Tactical Shooters</td>
<td>35%</td>
<td>46%</td>
</tr>
<tr>
<td>Open-World Action</td>
<td>32%</td>
<td>45%</td>
</tr>
<tr>
<td>Action-RPG</td>
<td>28%</td>
<td>42%</td>
</tr>
<tr>
<td>Racing/Driving</td>
<td>29%</td>
<td>36%</td>
</tr>
<tr>
<td>Fighting</td>
<td>29%</td>
<td>35%</td>
</tr>
<tr>
<td>Battle Royale Shooters</td>
<td>25%</td>
<td>35%</td>
</tr>
<tr>
<td>Sports</td>
<td>16%</td>
<td>43%</td>
</tr>
<tr>
<td>Horror</td>
<td>25%</td>
<td>29%</td>
</tr>
<tr>
<td>Strategy</td>
<td>24%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Females more likely to play Puzzle/card (36%), Simulation/RM (32%), Platformers (30%)

Q1.1/Q1.5x
Base: All gamers (2006), Female gamers (1001), Male gamers (1003)
Q.1.2 Which of the following statements about you and gaming, if any, do you agree with?

Base: All gamers (2006), Female gamers (1001), Male gamers (1003)

**Motivations**

Reasons for gaming are similar across genders:
- 69% play to **relax**, 40% for the **intellectual challenge**, 39% play to help with their **mental health**

![Motivations infographic]

- Games are an **important** part of my life: 24%
- Games are an **important** part of my life: 37%
- I wouldn’t call myself a ‘**proper**’ gamer: 32%
- I wouldn’t call myself a ‘**proper**’ gamer: 25%
- I like to keep updated with **latest gaming news**: 22%
- I like to keep updated with **latest gaming news**: 38%
- I play games to **connect** with other people: 28%
- I play games to **connect** with other people: 37%
- I would describe myself as a **hardcore** gamer: 9%
- I would describe myself as a **hardcore** gamer: 21%

**1 in 3 females don’t consider themselves ‘proper’ gamers while males are significantly more likely to say they are hardcore gamers**
Males are motivated more by action and social aspects. Females are more likely to want to express their creativity.

Q1.3 Which of the following, if any, are important to you when playing video games?

Base: All gamers (2006), Female gamers (1001), Male gamers (1003)

- **Males (36%)** are significantly more likely than females (24%) to play games to compete against others.
- **Females (30%)** are significantly more likely than males (25%) to play games to express their creativity.

---

**Top 5 Motivations (Males)**

1. Feeling challenged: 49%
2. Having attractive visuals/graphics: 48%
3. An immersive storyline: 44%
4. Thinking ahead, making tactical decisions: 43%
5. Clear levels and path of progression: 41%

**Top 5 Motivations (Females)**

1. Feeling challenged: 48%
2. Having attractive visuals/graphics: 45%
3. An immersive storyline: 44%
4. Thinking ahead, making tactical decisions: 43%
5. Clear levels and path of progression: 41%

---

**Motivation Comparison**

- **Mastery**: Males (67%) vs. Females (63%)
- **Creativity**: Males (71%) vs. Females (64%)
- **Achievement**: Males (63%) vs. Females (63%)
- **Immersion**: Males (57%) vs. Females (58%)
- **Social**: Males (52%) vs. Females (39%)

---

**Females (30%)** are significantly more likely than males (25%) to play games to express their creativity.
When searching for their next game, the majority look to peers for advice, but online reviews & ads are also influential factors.

Most seek advice from friends/peers

- Friends’ recommendations: 50% (Female), 47% (Male)
- Word of mouth: 47% (Female), 45% (Male)

Online channels are also very influential

- Online player reviews: 33% (Female), 37% (Male)
- Gameplay videos/walkthroughs: 30% (Female), 39% (Male)
- Online expert reviews: 18% (Female), 31% (Male)

Nearly half use ads to help them decide

- Ads on video streaming sites (e.g. YouTube, Twitch): 28% (Female), 32% (Male)
- Ads on social media (e.g. Facebook): 28% (Female), 25% (Male)

Q1.4 Which of the following, if any, do you use to help you make a decision as to what game to buy/play?
Base: All gamers (2006), Female gamers (1001), Male gamers (1003)
The majority of gamers tend to buy a mix of digital and hard copies, with males more likely to buy hard copies.

Figures from The Entertainment Retailers Association showed that 80% of UK video game sales in 2018 were digital, and data from the US showed a similar story with 83% of all computer and video games being sold in digital form (statista.com). Despite this, a 2018 gamesindustry.biz article reported that ‘when it comes to AAA launches, an estimated 75% of an average game's sale still comes via physical goods sold via Amazon, GAME, GameStop etc.’

Q1.4B. Do you tend to buy digital copies of games (including through subscriptions), or hard copies?
Base: All gamers (2006), Female gamers (1001), Male gamers (1003)
Although awareness of Cloud gaming platforms is sometimes limited, there is potential for high uptake in the future:

- **Overall awareness** is higher amongst males, particularly for PS Now, Stadia and Geforce Now.
- **% Aware of at least one of the above services**: 
  - Female: 75%
  - Male: 84%

Base: All gamers (2006), Female gamers (1001), Male gamers (1003)
Streaming & eSports
Half of all gamers are regularly watching other gamers online, of which, 1 in 3 feel there is a lot of toxicity in this space.

<table>
<thead>
<tr>
<th>Watch other people play games online (weekly+)</th>
<th>49%</th>
<th>45%</th>
<th>54%</th>
</tr>
</thead>
<tbody>
<tr>
<td>By gaming frequency</td>
<td>&lt;5hrs 32%</td>
<td>6–20 hrs 58%</td>
<td>20+ hrs 73%</td>
</tr>
<tr>
<td>Stream themselves playing online (weekly+)</td>
<td>26%</td>
<td>23%</td>
<td>28%</td>
</tr>
</tbody>
</table>

**Attitudes to streaming**
Those who watch others play weekly+ (% Agree)

- There are not enough female streamers
  - **Female**: 44%, **Male**: 41%

- A lot of streaming content is sexist or misogynistic
  - **Female**: 32%, **Male**: 24%

- There is a lot of toxicity/discrimination in online games streaming
  - **Female**: 34%, **Male**: 34%

Q1.8 (a,b,c)/Q1.9/Q1.10
Base: All gamers (2006), Female (1001), Male (1003), Watch others play (1450): Female (692), Male (756), Watch others play weekly+ (985): Female (446), Male (539)
Males are more likely to be regular eSports viewers, however, better representation could increase female viewership.

**Watch eSports events/ tournaments (weekly+)**
- **Female:** 28%
- **Male:** 33%

**By gaming frequency**
- <5hrs: 17%
- 6–20 hrs: 34%
- >20 hrs: 47%

**Have attended a live eSports event**
- **Female:** 26%
- **Male:** 28%

**Would feel intimidated/ uncomfortable going to eSports tournament**
- **Female:** 22%
- **Male:** 16%

**Would consider entering eSports tournament themselves**
- **Female:** 19%
- **Male:** 30%

**There is a lack of diversity in eSports**
- **Female:** 27%
- **Male:** 22%

**There is a lack of female gamers in eSports**
- **Female:** 44%
- **Male:** 37%

**Would watch more eSports if there were more female teams/ tournaments**
- **Female:** 33%
- **Male:** 29%

**Gaming community isn’t doing enough to encourage female gamers in eSports**
- **Female:** 40%
- **Male:** 33%
Abuse & discrimination
Over half of male and female gamers have experienced abuse, and for nearly a third this abuse happens regularly.

- **58%** have ever experienced abuse from other gamers.
- **28%** experience it very/quite regularly.
- **22%** experience it regularly from male gamers (vs. 14% from females).

**Where they experience this abuse**

- **Playing Online**: 66%
- Online forums/discussions: 42%
- Playing with friends (offline): 31%
- When browsing/buying games: 22%
- In the gaming industry: 16%

**Where they experience this abuse**

- **Playing Online**: 70%
- Online forums/discussions: 36%
- Playing with friends (offline): 25%
- In the gaming industry: 20%
- When browsing/buying games: 17%

**Base:** All respondents (2006), Female gamers (1001), Male gamers (1003), Those who have experienced abuse (1114): Female (530), Male (582).
Females gamers are more likely to experience sexually inappropriate behaviour, and being excluded from games

Q3.2 Which of the following types of abuse or discrimination have you ever experienced in and around gaming?
Base: Gamers who have experienced abuse (1114); Female (530), Male (582)

- **Verbal abuse** from male gamers while **playing online multiplayers**
- **Being sent inappropriate content** or messages from male/other gamers
- **Sexual harassment** from male/other gamers
- **Negative actions or gameplay** in online games from male/other gamers
- **Excluded** from participation in games because of their gender
- **Verbal abuse** from male/other gamers **offline**
- **Abuse** on social media/other digital channels
- **Threats of rape** from male/other gamers

▲ Significantly higher than other gender
This widespread toxicity is having an impact on players’ gaming, particularly so for female gamers.

Females are significantly more likely to feel upset and intimidated by abuse, and 1 in 4 say it makes them not want to play again.

- **Depressed**
- **Upset**
- **Intimidated**
- **Scared**
- **Anxious**
- **Angry**
- **Like not playing again**

For all gamers:
- 50% feel they’d have to practice before joining an online multiplayer game.
- 14% avoid online multiplayer games altogether, through fear of negative reactions from male players.

For those who play online:
- 31% I often don’t reveal that I am a female gamer when playing online multiplayer games.
- 33% avoid speaking in online multiplayer games, through fear of negative reactions from male/other players.

No improvement since 2019 (30%).
Although males are more likely to view abuse as an unavoidable part of gaming, both believe there are inadequate processes to deal with it.

11% It’s harmless fun, people don’t take it seriously
10% It’s part of the entertainment
20% For better or worse, it’s part of online gaming
45% It ruins the gaming experience

<table>
<thead>
<tr>
<th>Gender</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>25%</td>
<td>33%</td>
</tr>
<tr>
<td>Male</td>
<td>43%</td>
<td>51%</td>
</tr>
</tbody>
</table>

49% Yes
29% No
20% Don’t know

It’s just general abuse, you have to accept there are so many ppl online you won’t get on with. It’s part and parcel, best thing to do is ignore the fools and enjoy your friends.

-Male, 36 | UK | Xbox One, Nintendo Wii, PC

[I’ve been called] the usual things that most people get called. Retard, idiot, dumbass, etc...
I’ve also been told to kill myself. None of it bothers me though.

-Male, 31 | US | PS4, Xbox One, Nintendo Switch, PC
A minority of players admit to taking part in abuse, and those who do largely report it as a response to abuse.

1 in 6 female gamers have ever engaged in negative comments/behaviours
13% “Everyone does it, I just join in”
13% “It’s part of the entertainment”
32% “As a response to something done to me”
17% “It’s a way of getting a psychological edge”

1 in 4 male gamers have ever engaged in negative comments/behaviours
20% “Everyone does it, I just join in”
20% “It’s a way of getting a psychological edge”
23% “It’s part of the entertainment”
33% “As a response to something done to me”

Q3.4B/Q3.4C
Base: All respondents (2006), Female gamers (1001), Male gamers (1003), Those who have engaged in abuse (431): Female (167), Male (264)
Attitudes towards the industry
Female representation in the gaming industry has continued to improve, but 1 in 5 female gamers still see it as masculine.

Males are more likely to be *wholly* positive about the gaming industry, more often describing it as ‘progressive’, ‘inclusive’ and ‘innovative’, whereas females were significantly more likely to describe it as ‘sexist’ and ‘masculine’.

41% of gamers agree that the industry is doing more to encourage females into gaming careers.

Women are very/quite well represented in the gaming industry:

- **2018**: 22%
- **2019**: 27%
- **2020**: 35%

45% of male gamers think women are well represented.

Q2.1/Q2.2
Base: All respondents (2006), Female gamers (1001), Male gamers (1003)
Male gamers are more likely to feel they can relate to characters, while females largely still feel that female characters are lacking.

Female characters are often oversexualised in video games

I often feel I can relate to (female) characters in video games

There are not enough strong female characters in video games

Female characters are often underrepresented in video games

There is a lack of racial diversity in video game characters

Scores are largely consistent with last year

Base: All respondents (2006), Female gamers (1001), Male gamers (1003)
Males are more likely to feel that progress is being made, although there has also been positive change among female gamers since last year.

- **54%** 56% Number of female characters has increased
- **45%** 52% Depiction of female characters has improved
- **44%** 47% More games are being designed with females in mind
- **42%** 50% The industry is doing more to encourage female gamers

% of those agreeing with the statement. Q2.5
Base: All respondents (2006), Female gamers (1001), Male gamers (1003)
Mobile gaming
The majority of gamers are playing mobile games weekly, and are more likely to play casual genres.

Female gamers are more likely to play mobile games (% playing weekly+)

Female: 82%  
Male: 74%

Top genres on mobile (based on total sample)

- Puzzle RPG: Female 53%, Male 36%
- Match3 / Puzzle games: Female 47%, Male 23%
- Quiz / Trivia: Female 43%, Male 22%
- Action RPG: Female 30%, Male 21%
- Battle Royale Shooters: Female 21%, Male 14%
- Strategy: Female 18%, Male 16%
- Simulation: Female 20%, Male 13%
- Platformer: Female 14%, Male 18%

Indicates where a gender scores significantly higher.
As with console and PC, challenge is the top priority for mobile games

<table>
<thead>
<tr>
<th>Mastery</th>
<th>% selecting statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling challenged</td>
<td>43%</td>
</tr>
<tr>
<td>Trying to get the highest score</td>
<td>28%</td>
</tr>
<tr>
<td>Making tactical decisions</td>
<td>27%</td>
</tr>
<tr>
<td>Clear levels and path of progression</td>
<td>34%</td>
</tr>
<tr>
<td>Completing all the missions</td>
<td>25%</td>
</tr>
<tr>
<td>Being able to power up/upgrade my character</td>
<td>21%</td>
</tr>
<tr>
<td>Having attractive visuals</td>
<td>31%</td>
</tr>
<tr>
<td>Being able to explore the game world freely</td>
<td>20%</td>
</tr>
<tr>
<td>Expressing my creativity through building/customising</td>
<td>15%</td>
</tr>
<tr>
<td>Fast-paced gameplay</td>
<td>19%</td>
</tr>
<tr>
<td>The thrill</td>
<td>17%</td>
</tr>
<tr>
<td>Blowing things up</td>
<td>12%</td>
</tr>
<tr>
<td>An immersive storyline</td>
<td>19%</td>
</tr>
<tr>
<td>Getting to know the characters</td>
<td>14%</td>
</tr>
<tr>
<td>Characters I can relate to</td>
<td>13%</td>
</tr>
<tr>
<td>Competing against others</td>
<td>18%</td>
</tr>
<tr>
<td>Being able to play with others online</td>
<td>16%</td>
</tr>
<tr>
<td>Being able to share accomplishments with others</td>
<td>11%</td>
</tr>
</tbody>
</table>

Q4.3 Which of the following, if any, are important to you when playing mobile games?
Base: Those who play mobile games (1803): Female (934), Male (867)

Indicates where a gender scores significantly higher
Females are significantly more likely to watch video ads to progress, but both genders are reluctant to spend real money. 

<table>
<thead>
<tr>
<th>Statement</th>
<th>Females (%)</th>
<th>Males (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Happy to watch video ad in-game, in order to gain rewards or progress faster</td>
<td>61%</td>
<td>55%</td>
</tr>
<tr>
<td>Would rather stop playing a game and delete it, than pay money to progress further</td>
<td>53%</td>
<td>54%</td>
</tr>
<tr>
<td>Like to buy additional items or features to personalise characters</td>
<td>30%</td>
<td>33%</td>
</tr>
<tr>
<td>Often use real money to buy in-game boosters to progress faster</td>
<td>27%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Q4.4 To what extent do you agree or disagree with the following statements about mobile gaming?  
Base: Those who play mobile games (1803): Female (934), Male (867)
We combine the latest thinking with innovative approaches, to deliver insights that help businesses connect with customers or players.

- **Who buys and why**: Understand who to target and how to connect with them.
- **How they buy**: Identify how to get noticed and chosen by potential players.
- **Why they stay**: Discover why players stick with you or why they choose competitors.
- **NPD**: Uncover opportunities and create compelling products & experiences.
More about our playtesting methodologies...

**Face-to-face playtests**
Face-to-face qualitative groups held in a viewing facility. Consisting of gameplay and focus group discussion. We can also test other assets such as name/logo design, key artwork, narrative etc.

✓ Easy observation for clients in real time (streaming up to 6 screens simultaneously to the viewing room or online)
✓ In-the-moment responses captured
✓ Hardware and technical issues can be dealt with instantly
✓ Audience are brought to life to a greater extent

**Example Structure**
- Review of marketing materials (pre-play expectations)
  - Individual gameplay
  - Follow-up survey
  - Group discussion
  - Revisit marketing materials

**Online playtests**
Playtesting via an online platform. This can be set up as a one-off session, or to run over several days. We can set specific tasks/objectives or allow ‘free-play’. As well as recording gameplay, we can also include follow-up surveys

✓ Players play in a more natural environment
✓ Screen recording functionality to capture natural gameplay (video montage of gameplay can be created as a deliverable)
✓ Individual surveys to capture unbiased responses before any group discussion
✓ Longitudinal; gamers play over an extended period and we can see attitudes evolve
✓ Geographical spread of respondents

**Example Structure**
- Individual gameplay (recorded)
  - Follow-up survey
- Multiplayer gameplay (recorded)
  - Follow-up survey
  - Group discussion
- Revisit marketing materials

More about our playtesting methodologies…
**CASE STUDY | Face to face mobile playtesting**

We helped a mobile gaming developer with the development of a brand new midcore title

**CHALLENGE**

Our client was in the progress of developing a new midcore mobile title, and wanted to test both the gameplay mechanics and the gameplay experience, in order to establish whether it was engaging and to which audiences. As a secondary objective, they also wanted to identify which marketing assets would be the most effective in driving players to download the game.

**SOLUTION**

A series of playtest focus groups, with players from a mix of possible relevant genres. We firstly tested the marketing assets and players’ perceptions of the game based on these. We then invited players to play the game during the session (live streaming each player’s gameplay screen into the observation room), and then evaluate it, before open group discussion. Conversation covered a range of aspects such as narrative, characters and comprehension, as well as general enjoyment of the game.

**OUTCOME**

Our research identified which elements of the game were most engaging and which could be further developed in order to increase retention. We also identified which marketing assets would be most likely to encourage download, and possible improvements for these.
Our client were finalising their new PC title, ready to launch the following month. After previous research had showed some player churn in the initial levels, our client wanted to understand player’s perceptions of the onboarding process, and also to identify any specific pain points during early gameplay that may prevent player retention.

We conducted two phases of playtesting in order to test different game modes, with two different target audiences. The test was carried out on an online platform, allowing individual gameplay sessions with screen recording, follow-up surveys, group gameplay sessions, and focus group discussion. This allowed us to observe players’ gameplay experience in both solo and multiplayer mode, as well as to further explore their reactions to the game, both at an individual and group level.

We were able to identify specific points within the game that resulted in confusion or frustration, and consequently, suggest player-based solutions. The insights also uncovered the key game components or features driving player engagement, helping to identify which to build on more or prioritise in comms.
Our client was developing the next instalment of a game franchise for PC and console. They wanted to identify the most engaging title, that would appeal to their current loyal fans, but also attract new players to the franchise. They also wanted to refine their logo and boxart design, in terms of colour, font and imagery.

We conducted an online quantitative survey, using a mixed sample of the client’s own franchise players, plus a broad spectrum of ‘competitor’ shooter players. The survey used a laddered approach, first testing the name alone, then gradually adding elements, such as the logo, and boxart.

Our survey helped identify the ideal game name and logo/boxart combination to maximise interest amongst both current franchise players and prospective players. We were also able to offer general feedback and suggestions for the new title, based on open opinions from fans.
Our client – well known in the PC and console space – were developing their mobile offering and wanted to understand how they could leverage the overall brand within this space. They wanted to understand brand awareness and perceptions, and how these compared to competitors. It was also important to explore this brand identity across different markets.

We recommended a two-stage approach, covering two key but very different markets; S. Korea and the US. The first, qualitative stage was conducting four focus groups in each market, in order to understand how players perceive brands and how this transfers to the mobile category. We then conducted an online survey within both markets, using advanced statistical tools such as drivers analysis and perceptual mapping, in order to quantify the key brand attributes across the competitor landscape.

Firstly, we uncovered brand awareness issues, looking across platforms and at a brand versus IP level. The insights also created clear maps of the market landscape, identifying which attributes drove brand affinity, and which ones were distinct to the brand in question versus competitors.
CASE STUDY | Increasing Virtual Reality engagement

We helped a major console developer identify possible barriers to usage/ purchase for their VR hardware

CHALLENGE

Our client wanted to grow the player base of their VR hardware, by driving positive engagement and avoiding purchase regret. In order to do this, we wanted to understand how players used their VR hardware, how this may have changed over time, and if there were any barriers to usage.

SOLUTION

We conducted research across 6 markets, using a two-stage approach. Firstly, we carried out 20 in-home interviews with VR owners to see first-hand how they interacted with the VR hardware. We then used these insights to create an online survey to help identify the key barriers and behaviours.

OUTCOME

The insights generated helped the client to really understand the player experience, through videos and photos. We also identified key causes of declining usage and possible purchase barriers, that needed to be addressed in order to grow the player base.
CASE STUDY | Identifying a target audience and shaping marcomms

We helped a major mobile games developer in shaping their creative and marcomms strategy for a new game

CHALLENGE

Our client wanted to develop their launch strategy for a new game:
• Firstly, understanding which game elements were most appealing, in order to inform development of the creative and production strategy.
• Secondly, they wanted to test different game positionings in order to identify the most engaging marcomms.

SOLUTION

Online quantitative survey to test appeal of different creative routes for the game, both in terms of actual gameplay elements and game messaging (app store description, images, video, game titles).

OUTCOME

Our research provided the client with the insight that helped them decide which elements of gameplay should be further developed or prioritised.

We also helped them identify how best to position the game, in terms of the name, the imagery and messaging used.