European Online Game Survey 2012

Community Network Games (CNG) project

For further information, please contact:

www.cng-project.eu

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Dr. Malte Behrmann, Secretary General
European Games Developer Federation (EGDF)
malte.behrmann@egdf.eu | www.egdf.eu

Katariinankatu 3 00179 Helsinki Finland
t. +358 (0)9 4289 1606
f. +358 (0)9 666 334

Dr Jonathan Freeman BSc MPhil PhD CPsychol AMRS
Managing Director, i2 Media Research ltd.

For more information on working with i2 media research to gain better insight into your customers, visit www.gold.ac.uk/i2 or email Jonathan on jonny.freeman@gmail.com

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CNG (Community Network Game project)

Massive Multiplayer Online Games (MMOGs) are growing exponentially due to advances in the generation of engaging immersive content and the availability of high speed and capacity networks. One of the main characteristics of the MMOGs is that they enable users to become members of active communities with common interests, shared adventures and common objectives. Enabling thousands of users to communicate with each other in a 3D online world creates large network demands, in terms of required bandwidth and low latency for the users to have a rewarding experience.

CNG intends to enhance collaborative activities between online gamers by developing new tools for the generation and distribution of UGC within existing MMOGs. CNG team will research and develop in-game community activities using in-game graphical insertion technology (IGIT) and a P2P (peer-to-peer) architecture for the distribution of video and other UGC. Current MMOG architecture typically relies on each object within a game being stored on central servers. These servers therefore host millions of items and share them to users upon request. The key innovation within the CNG project is the development of an architecture to run in parallel with the current MMOG client-server architecture. The new architecture will share a high volume of user generated content between multiple users of an MMOG game via P2P. This UGC P2P content delivery will occur without interrupting the MMOG data flow and the need to upload the user generated data to a MMOG server. Since UGC may be a heavy multimedia content, the network indirectly benefits from the use of P2P to distribute this content which is not streamed through the MMOG server..

The project intends to research and develop new sophisticated techniques for P2P 3D/Video streaming that are "friendly" to the MMOG client server traffic. Additionally, the Community Network Game project will support and enhance community activities between gamers which may be enhancing many current MMOGs, without the need to redevelop their game code. For this purpose, the InGame Graphics Insertion Technology (IGIT) can be used to change existing game graphics and to add additional windows on demand (e.g., browser, chat, etc.) that can be inserted floating on or out of the game area. CNG, with the use of IGIT, will allow the addition of new engaging community services without a need to change the game code, and without adding new processing or network loads to the MMOGs' central servers.
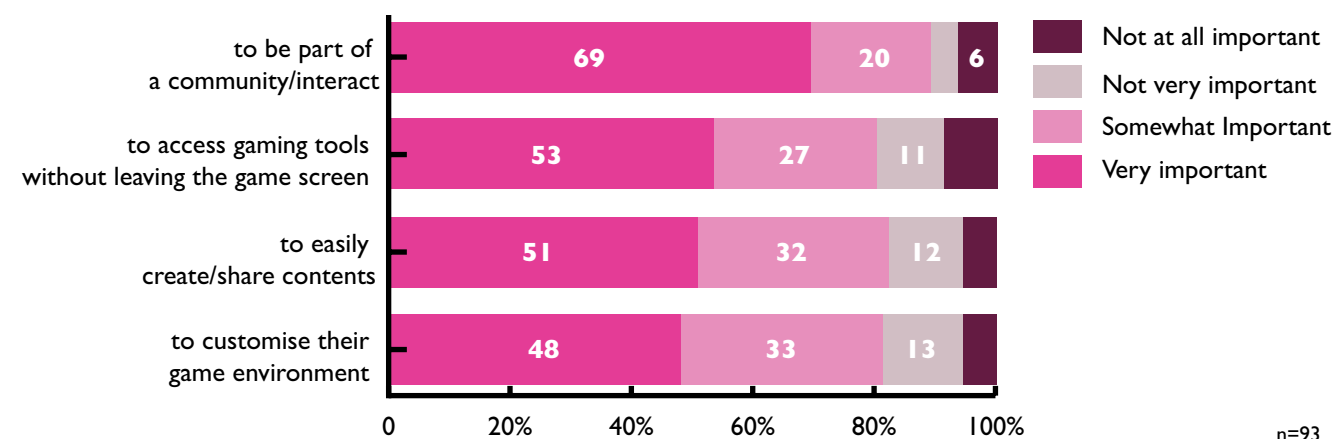
The CNG project is funded under the ICT (Information and Communication Technologies) priority of the European Union's FP7 (Seventh Framework Programme). The project is a STREP for 30 months.
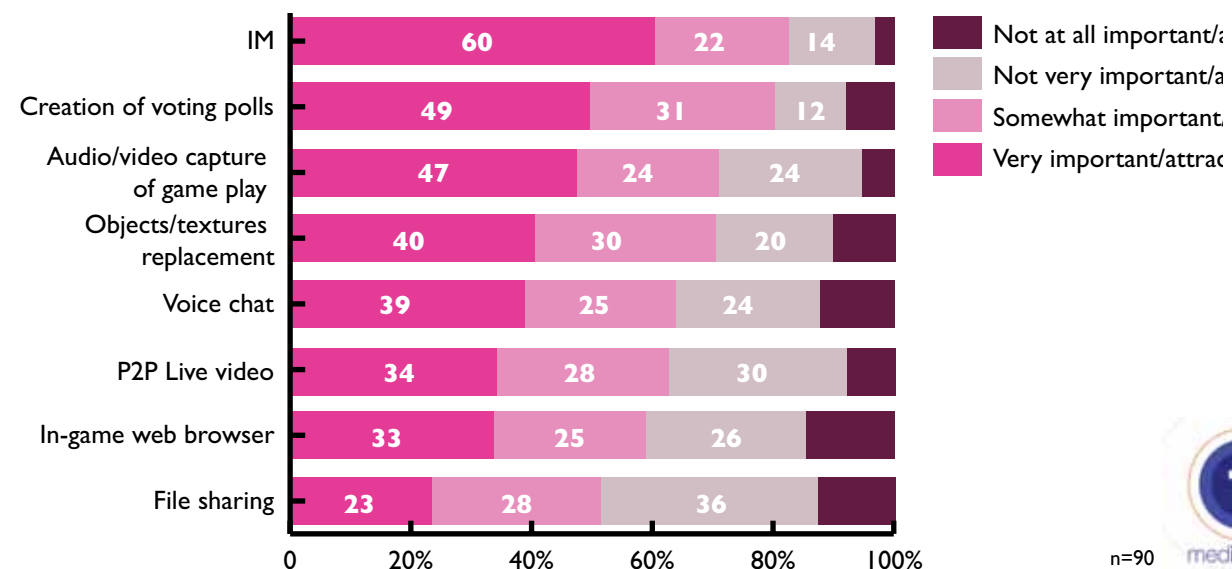
Massive Multiplayer Online Games

In 58% of European game developer studios , there has been one massive multiplayer online game among the last three games they have been developing

- 58% MMOG
- 42% No MMOG

n=85
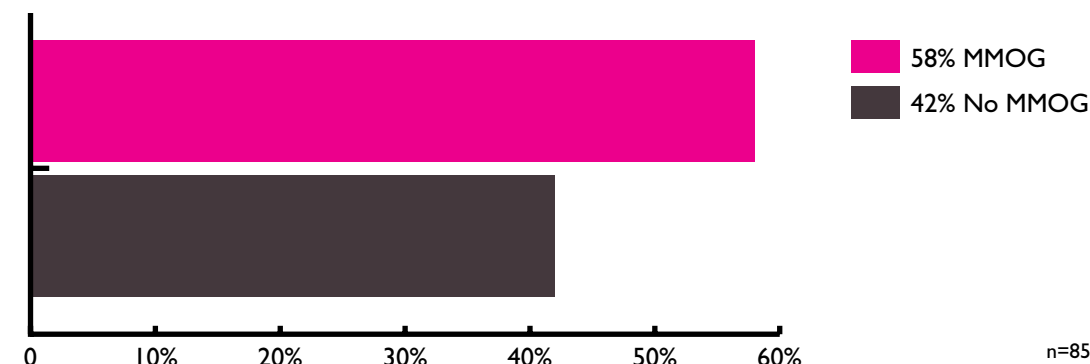
Almost 70% of game developers consider an ability to be a part of a community or to interact with it a very important part of a massive multiplayer online game design

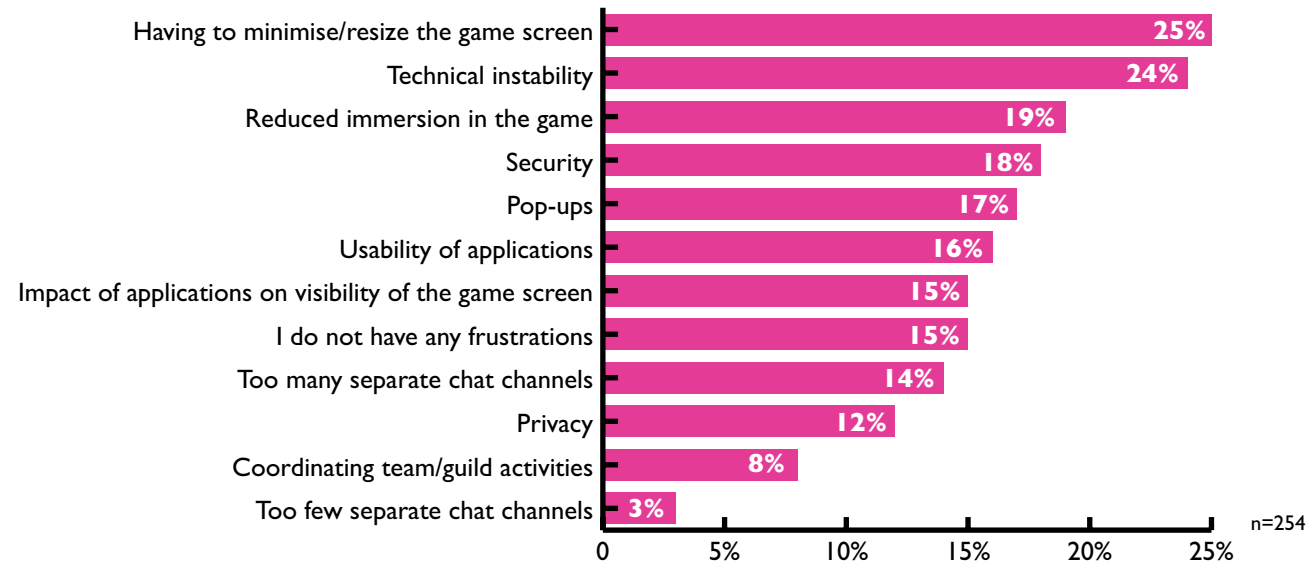|	Very important	Somewhat Important	Not very important	Not at all important
to be part of a community/interact	69	20	6	
to access gaming tools without leaving the game screen	53	27	11	
to easily create/share contents	51	32	12	
to customise their game environment	48	33	13	

n=93

Game developers consider Instant Messaging (IM) to be the most important tool provided by the Community Network Games project for user interaction in masssive multiplayer online games. Data (on IM) are even higher for companies that worked on MMOGs. This helped informing partners in the project on the functions that better responded to gamers' needs:

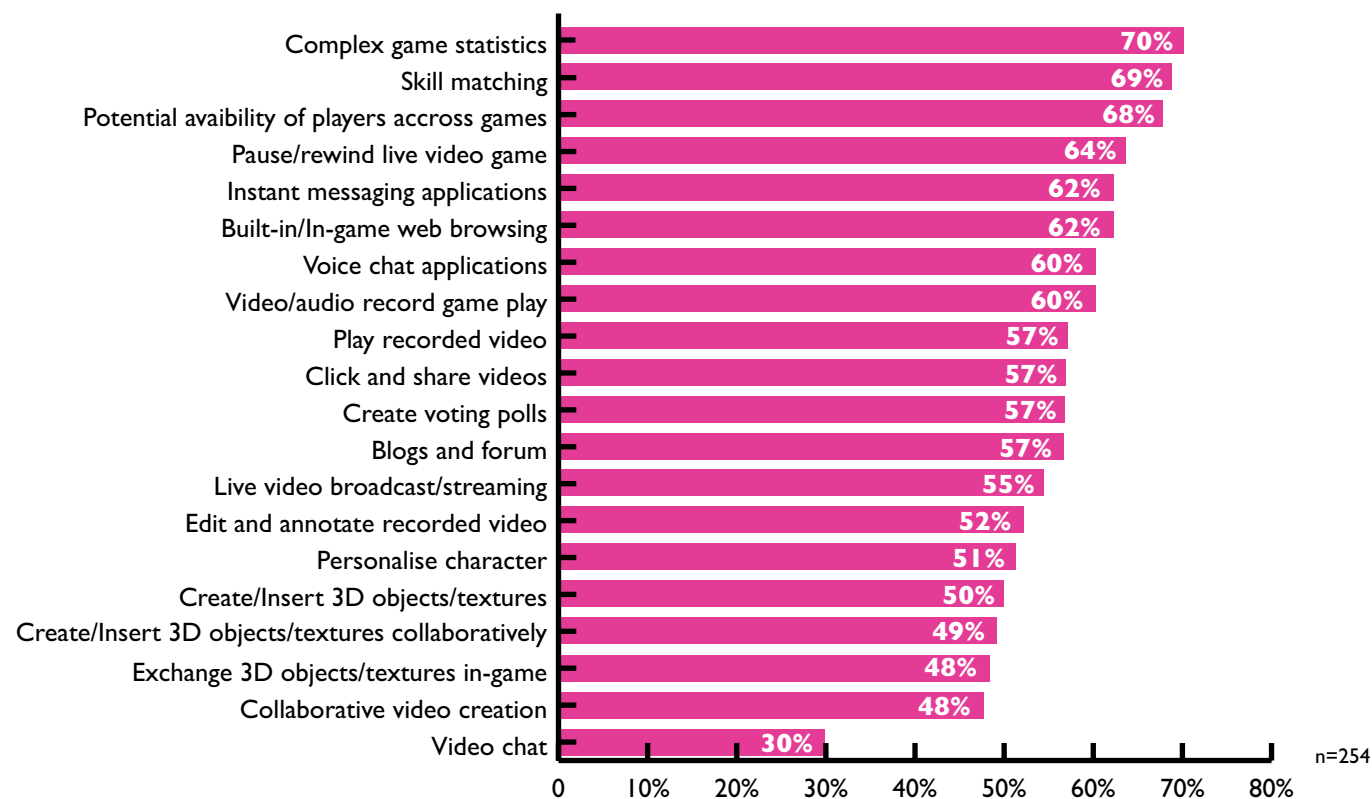|	Very important/attrac	Somewhat important	Not very important/a	Not at all important/
IM	60	22	14	
Creation of voting polls	49	31	12	
Audio/video capture of game play	47	24	24	
Objects/textures replacement	40	30	20	
Voice chat	39	25	24	
P2P Live video	34	28	30	
In-game web browser	33	25	26	
File sharing	23	28	36	

n=90

To understand motivations and barriers to using social tools in and around game, within the Community Network Game project i2 media research has conducted in-depth qualitative and large scale, international quantitative survey research. Headlines from this research are presented here.

i2 has developed a gamer segmentation which splits gamers by what motivates them to play. This is show below:

Gamers use a number of application and tools while gaming (e.g., to chat, create videos, walkthrough) - however this can be frustrating for a number of reasons:

Reason	%
Having to minimise/resize the game screen	25%
Technical instability	24%
Reduced immersion in the game	19%
Security	18%
Pop-ups	17%
Usability of applications	16%
Impact of applications on visibility of the game screen	15%
I do not have any frustrations	15%
Too many separate chat channels	14%
Privacy	12%
Coordinating team/guild activities	8%
Too few separate chat channels	3%

n=254

These are the social functions they are most interested in:

| Function	%
Complex game statistics	70%
Skill matching	69%
Potential avaibility of players accross games	68%
Pause/rewind live video game	64%
Instant messaging applications	62%
Built-in/In-game web browsing	62%
Voice chat applications	60%
Video/audio record game play	60%
Play recorded video	57%
Click and share videos	57%
Create voting polls	57%
Blogs and forum	57%
Live video broadcast/streaming	55%
Edit and annotate recorded video	52%
Personalise character	51%
Create/Insert 3D objects/textures	50%
Create/Insert 3D objects/textures collaboratively	49%
Exchange 3D objects/textures in-game	48%
Collaborative video creation	48%
Video chat	30%

n=254

Game and social tool developers can use insight from i2's segmentation to inform:
• product and service development and optimisation;
• go-to-market and monetisation strategies for different types of content.

Secmentation of gamers (n = 1154)
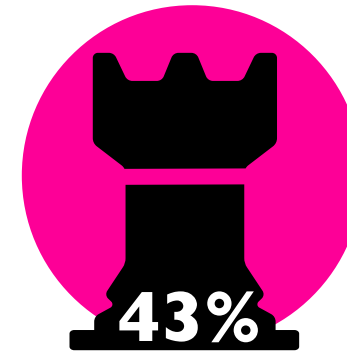
43%
CASUAL CLASSIC GAMERS
- **Age:** Older than average
- **Socioeconomic status:** More likely to be unemployed
- **Motivation to play:** Driven by Boredom, not by Socialisation
- **Platform:** Console (PC), single player
- **Genres:** Puzzle, Simulation
- **Time used for playing:** 9 hours per week
- **Social activity:** Fairly active on social communities (Facebook), very low content creation
- **CNG tools:** Lowest interest
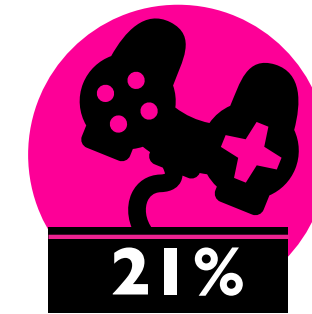
21%
OCCASIONAL GAMERS
- **Age:** Mostly below 30 years old
- **Socioeconomic status:** -
- **Motivation to play:** Boredom, fantasy
- **Platform:** Console (PC), mainly alone
- **Genres:** Mixed genres
- **Time used for playing:** 10 hours per week
- **Social activity:** Fairly active on social communities, tend to access rather than create game content
- **CNG tools:** Interested in customisation and communication functions

20%
GAMING PURISTS
- **Age and gender:** Younger than average, vastly males
- **Socioeconomic status:** Students
- **Motivation to play:** Fair competition, exploration
- **Platform:** PC
- **Genres:** RPG and Action games
- **Time used for playing:** 27 hours per week
- **Social activity:** Very active on online communities, MMO players (online familiars), sharing game related content, video (no customisation), on dedicated websites (game forums)
- **CNG tools:** High interest in CNG video/communication functions
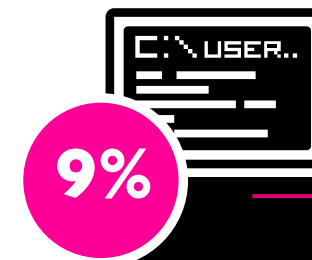
9%
OLD SCHOOL GAMERS
- **Age and gender:** Oldest gamers – 30/40+
- **Socioeconomic status:** More educated/employed than average
- **Motivation to play:** Fair competition, exploration – not for boredom
- **Platform:** Mainly PC (Mobile)
- **Genres:** strategy and puzzle games
- **Time used for playing:** 10 hours per week
- **Social activity:** Play with friends only, forum/blogs vs social network highest in the secondary tm in access/creation of game content
- **CNG tools:** CNG specific video (recording) and communication functions (voice chat)
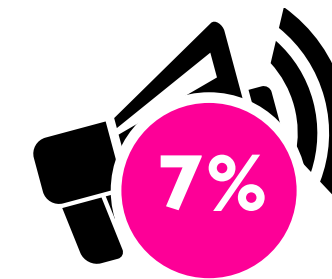
7%
COMMUNITY MINDED GAME FANATICS
- **Age and gender:** Youngest,
- **Socioeconomic status:** lower than average education
- **Motivation to play:** Combination of factors, socialisation
- **Platform:** Cross platform (PC)
- **Genres:** RPG (WoW 40%), Strategy
- **Time used for playing:** over 30 hours per week
- **Social activity:** High multiplayer/MMO (friends), social communities, heaviest producers of game related content that is mostly shared in YouTube
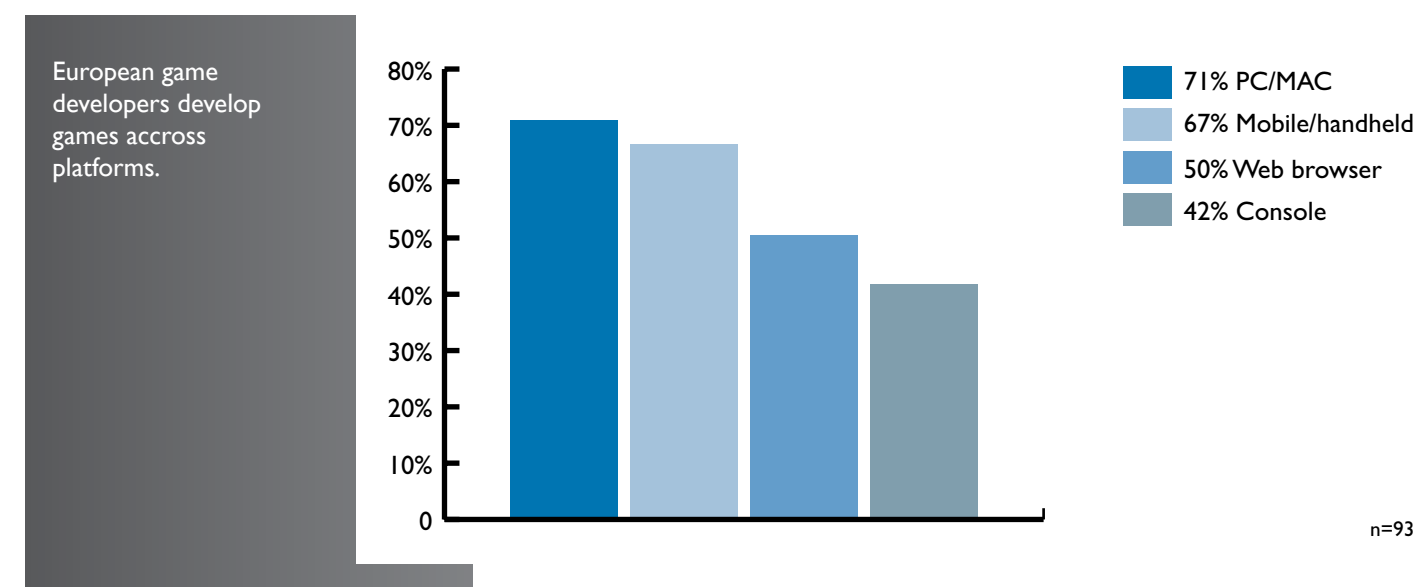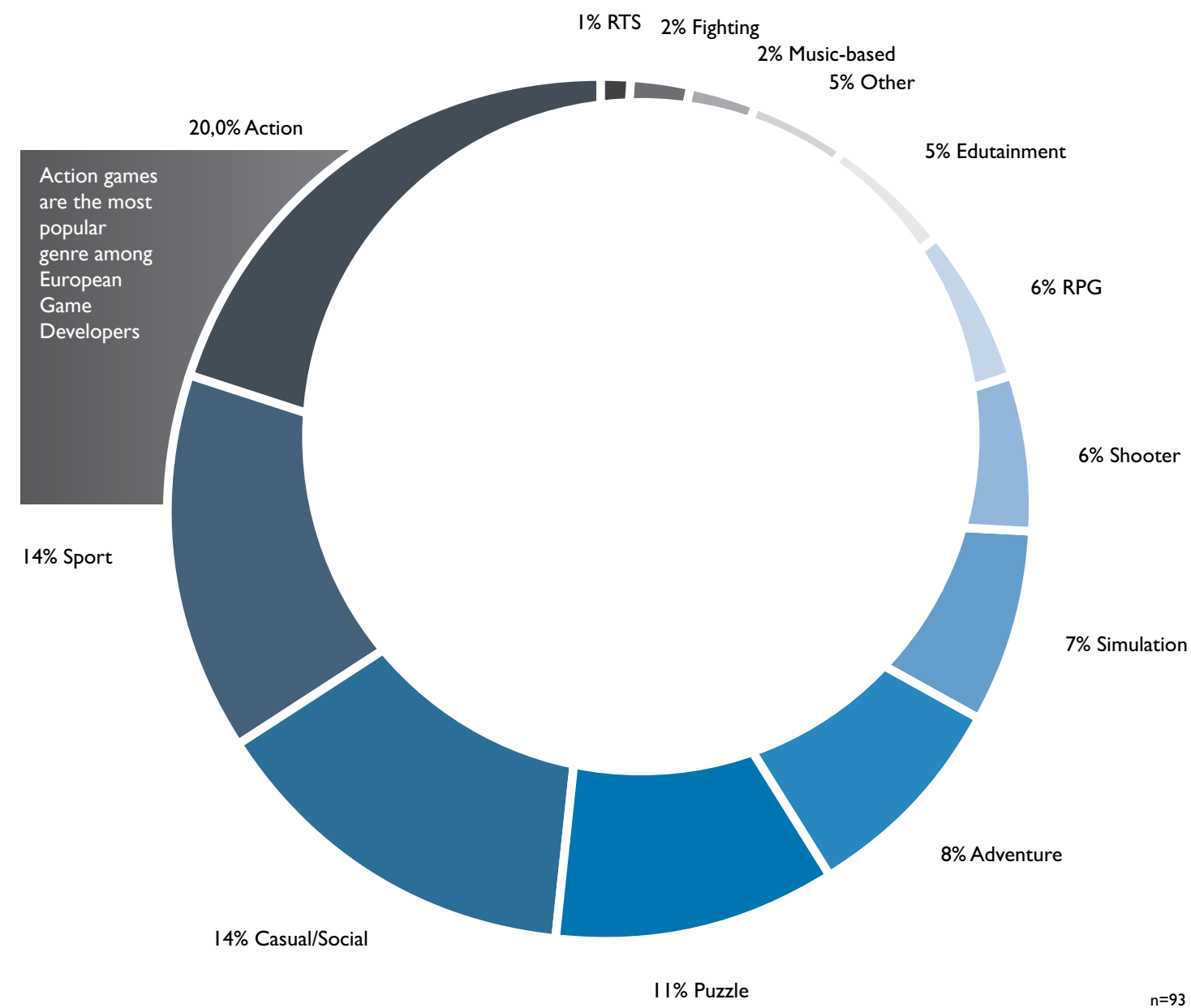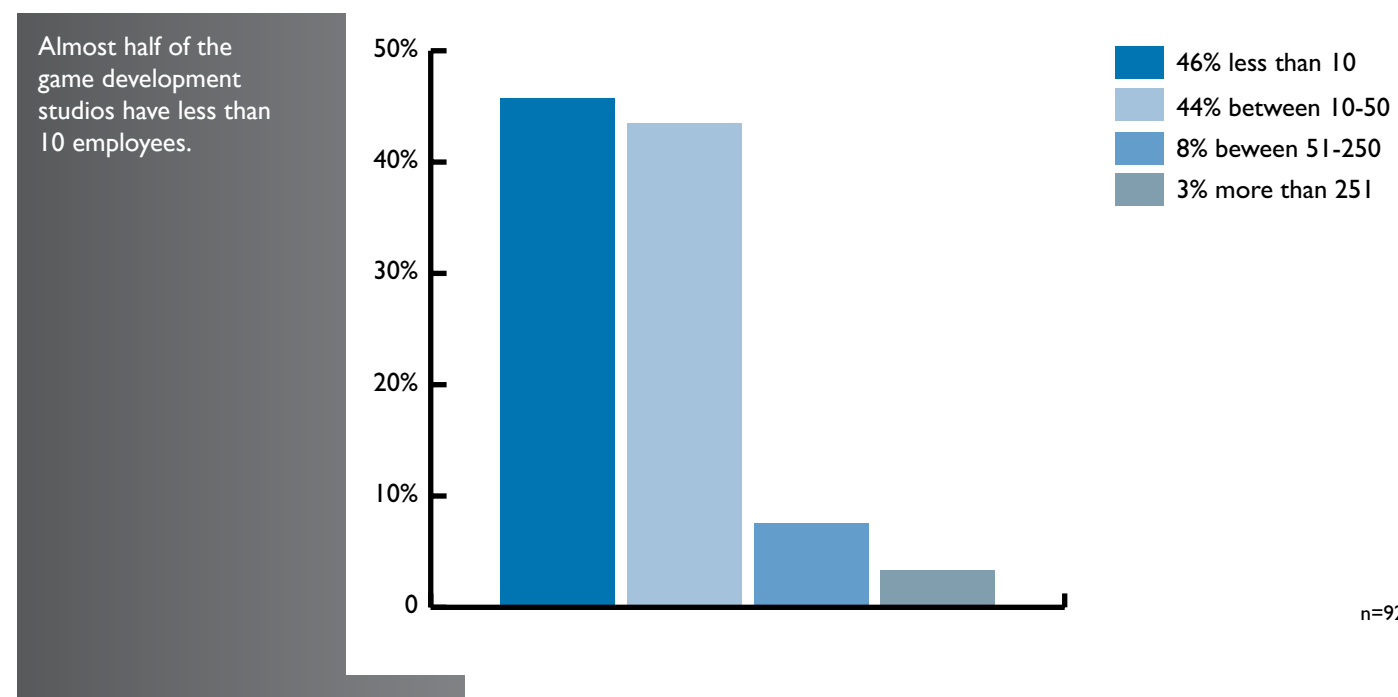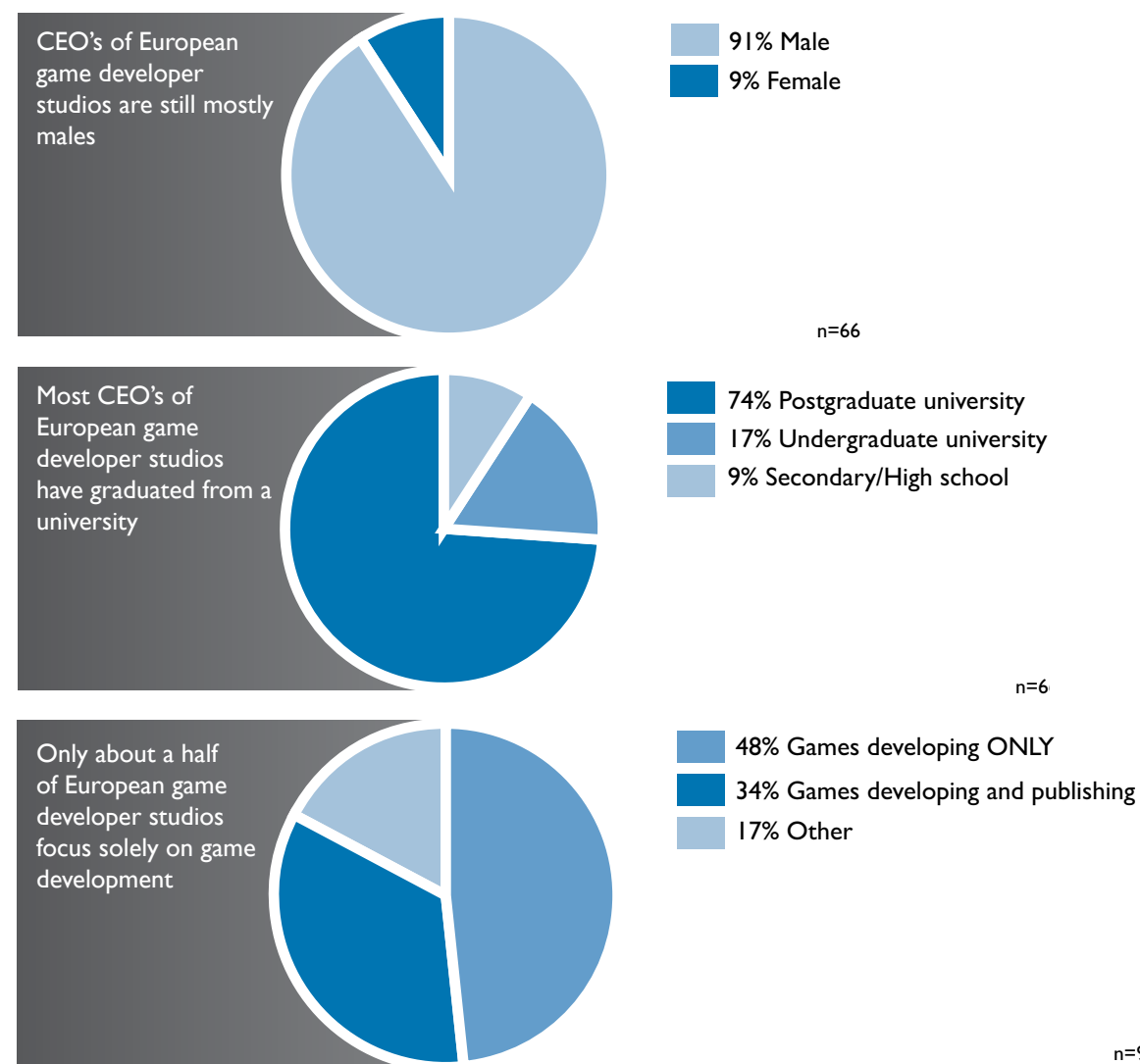- **CNG tools:** High interest in all CNG functions

For more information on how you can put i2's gamer segmentation to work for you, contact:

Dr Jonathan Freeman
Managing Director,
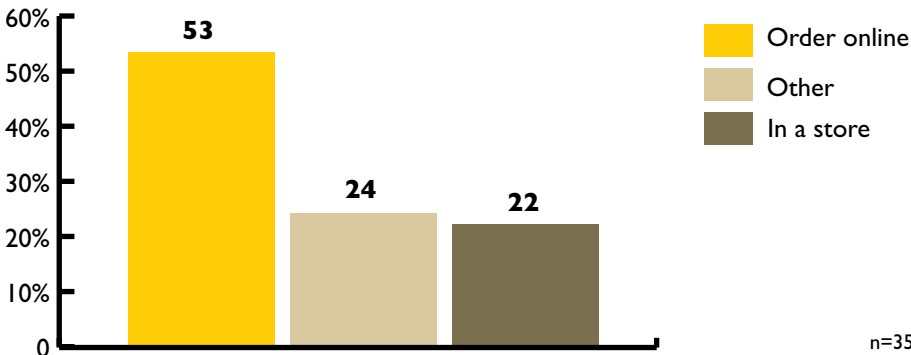i2 Media Research ltd.
jonny.freeman@gmail.com

Eva Ferrari
Research Psychologist
i2 Media Research ltd.
e.ferrari@gold.ac.uk
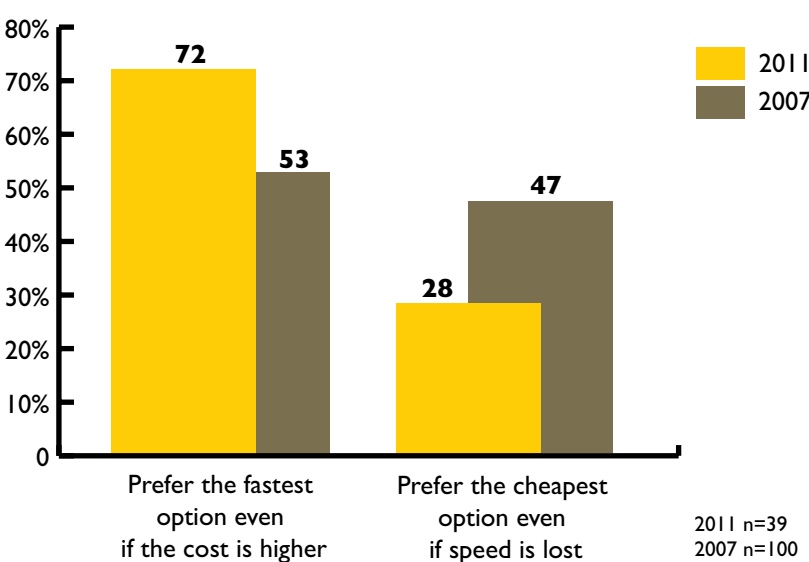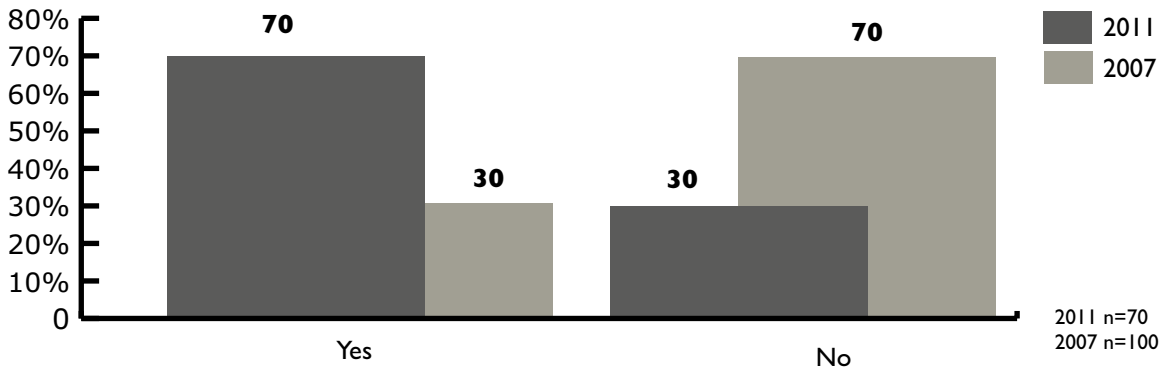
European Game Developers

CEO's of European game developer studios are still mostly males

- 91% Male
- 9% Female

n=66

Most CEO's of European game developer studios have graduated from a university

- 74% Postgraduate university
- 17% Undergraduate university
- 9% Secondary/High school

n=6

Only about a half of European game developer studios focus solely on game development

- 48% Games developing ONLY
- 34% Games developing and publishing
- 17% Other

n=93

Almost half of the game development studios have less than 10 employees.

- 46% less than 10
- 44% between 10-50
- 8% beween 51-250
- 3% more than 251

n=92

Action games are the most popular genre among European Game Developers

- 1% RTS
- 2% Fighting
- 2% Music-based
- 5% Other
- 5% Edutainment
- 20,0% Action
- 6% RPG
- 6% Shooter
- 7% Simulation
- 8% Adventure
- 11% Puzzle
- 14% Casual/Social
- 14% Sport

n=93

European game developers develop games accross platforms.

- 71% PC/MAC
- 67% Mobile/handheld
- 50% Web browser
- 42% Console

n=93

Hardware

About 50% game developers use online stores to update their processors

- Order online
- Other
- In a store

53 · 24 · 22

n=35

In 2012, game developers prefer the fastest processors over the cheapers ones

- 2011
- 2007

Prefer the fastest option even if the cost is higher: 72 / 53
Prefer the cheapest option even if speed is lost: 28 / 47

2011 n=39
2007 n=100

RAID has mainstreamed itself in the workstations of game developers during last five years

- 2011
- 2007

Yes: 70 / 30
No: 30 / 70

2011 n=70
2007 n=100

Most game developers do not buy processors from a single processor manufacturer

- Some Athlon/Pentium some Opteron/Xeon
- All/mostly Athlon/Pentium
- All/mostly Opteron/Xeon

62 · 29 · 9

n=35
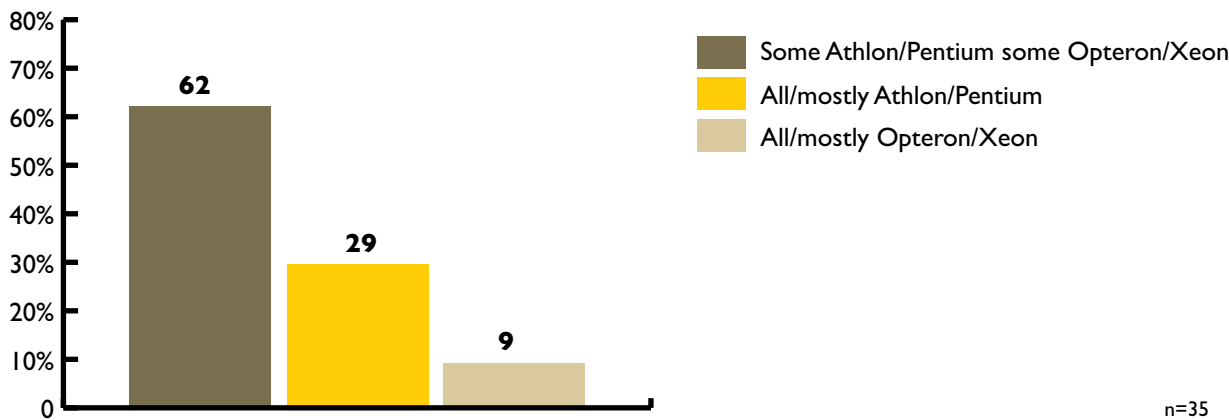
However, in 2012, 95% of game developers prefer Intel processors

- 2011
- 2007

Prefer Intel processors: 95 / 48
Prefer AMD processors: 5 / 52

2011 n=41
2007 n=100
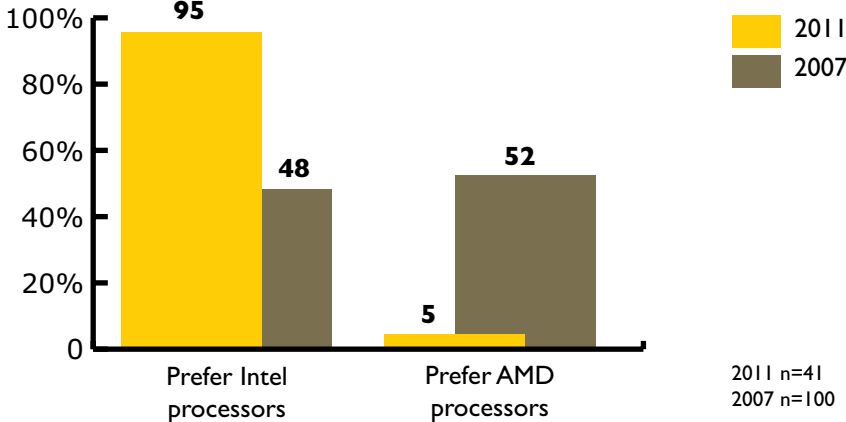
And, in 2012, almost 60% of game developers are planning to buy in an Intel Pentium processors in the future

- 2011
- 2007

Intel Pentium based: 58 / 41
Intel Xeon based: 28 / 14
AMD Athlon based: 8 / 33
AMD Operton based: 7 / 12

2011 n=46
2007 n=100
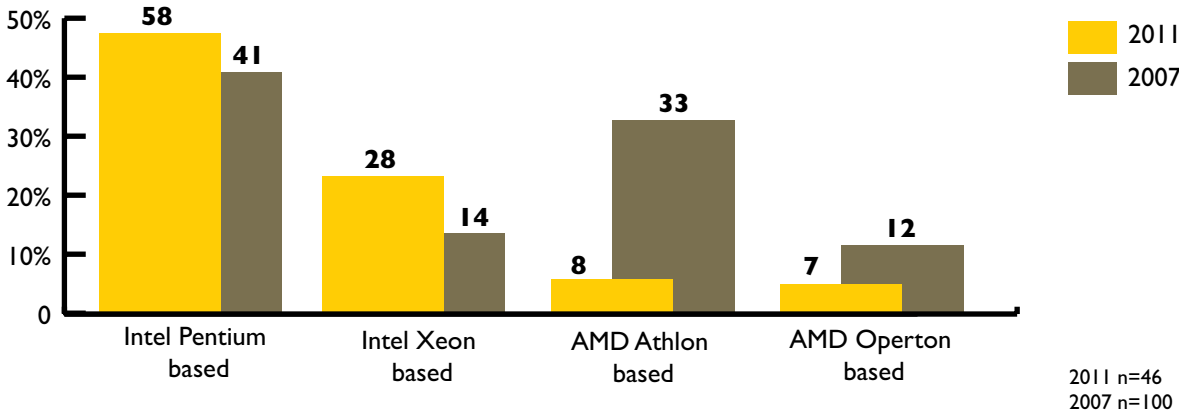
Graphic cards

Game developers prefer Nvidia cards

Bar chart (n=56):
- Nvidia Geforce: 80
- Nvidia Quadro: 63
- ATI Radeon: 50
- ATI FireGL: 32
- Other: 5
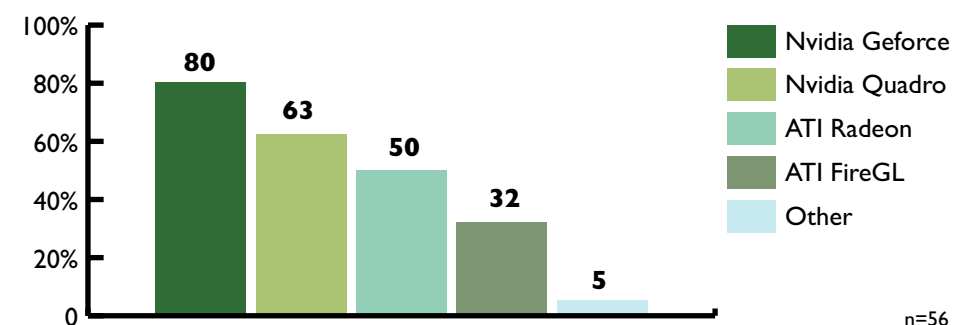
Game developers use both consumer and professional cards

Bar chart (n=54):
- Some consumer cards some professional cards: 44
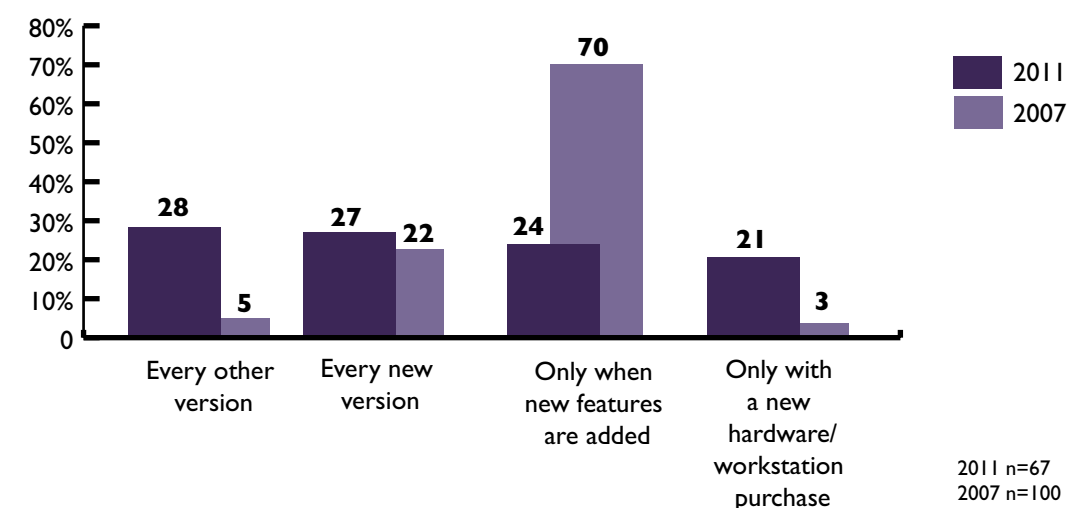- All/Mostly professional cards: 39
- All/Mostly consumer cards: 17
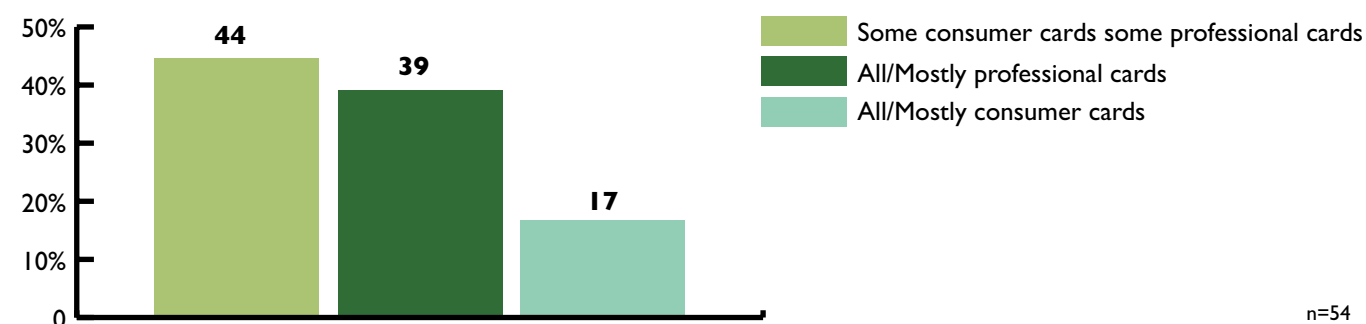
For those game developers, who update their cards most often, speed of the card is becoming more and more important factor

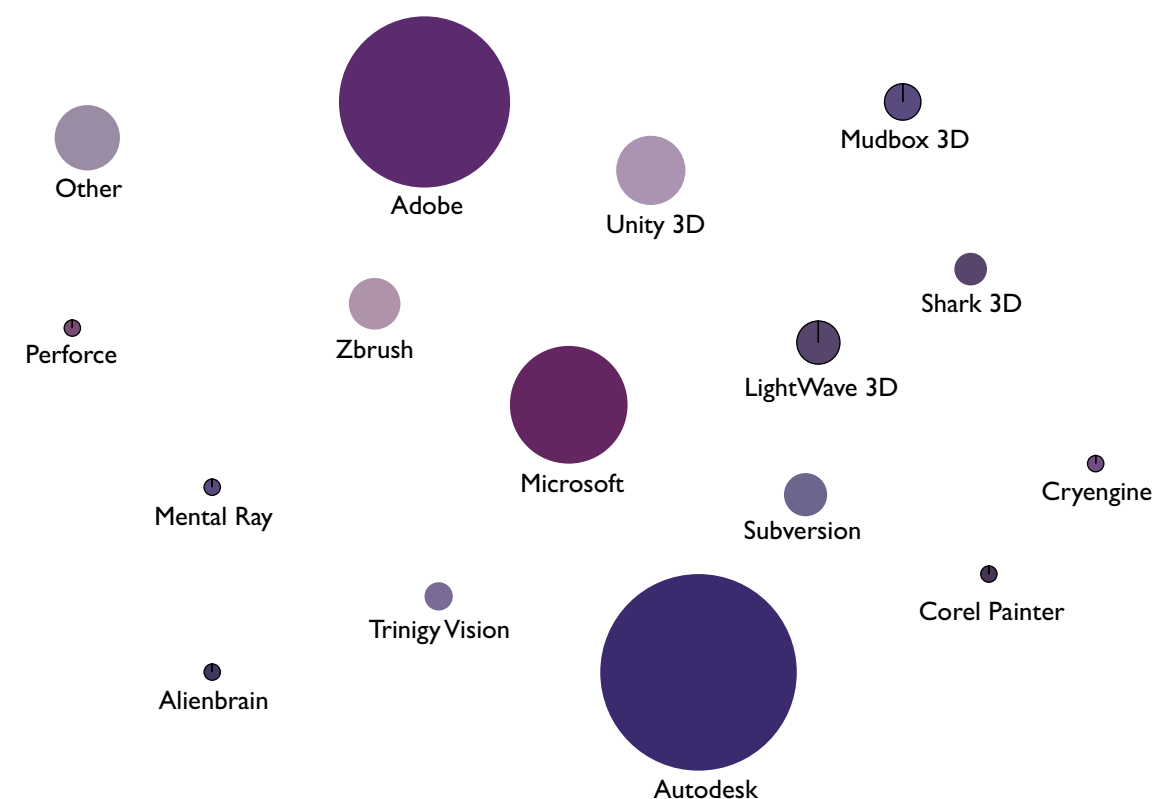Bar chart (2011 n=47, 2007 n=100):
- Only upgraded along with full PC upgrades or replacements: 2011 = 66, 2007 = 55
- Whenever a new shade or feature is available: 2011 = 21, 2007 = 45
- Whenever a faster card is available (always keep at the top): 2011 = 13
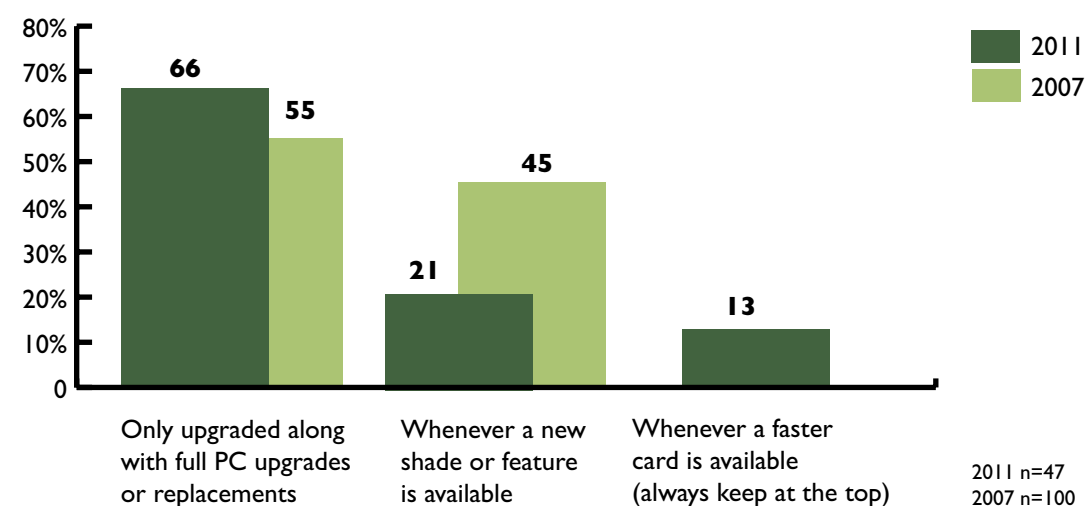
Software

It is more and more important for game developers to update their software to the latess or the almost latest versions

Bar chart (2011 n=67, 2007 n=100):
- Every other version: 2011 = 28, 2007 = 5
- Every new version: 2011 = 27, 2007 = 22
- Only when new features are added: 2011 = 24, 2007 = 70
- Only with a new hardware/ workstation purchase: 2011 = 21, 2007 = 3

Softwares provided by Adobe and Autodesk are the most commonly used among game developers

Bubble chart labels: Other, Adobe, Unity 3D, Mudbox 3D, Shark 3D, Perforce, Zbrush, LightWave 3D, Microsoft, Cryengine, Subversion, Corel Painter, Mental Ray, Trinigy Vision, Autodesk, Alienbrain