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Playing with brands



SURVEY STUDY OF BRANDING IN FINNISH GAME COMPANIES

muova

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Preface

Game industry is full of brands. In order to stand out, you must have a distinct voice. You need to wrap your core message in understandable, clear and deliverable package. In game industry, branding is typically based on the game, game developer or publisher. In addition, brands exist in the minds of players whether they are intentionally branded or not. No matter who owns the brand, it has to live up to its brand promise and meet the player expectations.

“We don’t see ourselves as a brand.” This is how an appreciated leader of a successful Nordic game company answered when I asked whether they see themselves as a brand. However, every time the company releases a new game, players expect certain gaming experience, gameplay and aesthetics. Financial success and positive feedback from critics strongly imply that the company has met player expectations. In fact, the company has reached the essence of branding. They are doing it!

This dialogue inspired us to conduct a desktop research about games and brands. The number of hits was scarce. We found out, that research has rarely focused on branding in game companies. In addition, there was lack of practical tools for developing brands in game startups. This was the starting point for creating branding toolbox for startups.

Branding will be one of the critical success factors for game companies in the future.



Reply+ project made it possible to devote time and resources for this important theme. Reply+ project was funded by EU as a collaborative project between Vaasa University of applied sciences/Design Centre MUOVA, Novia University of applied sciences and Åbo Akademi University. The aim of the Reply+ project was to strengthen and speed up the start-up phase for businesses in the interface between technical knowledge and artistic competence. The project was carried out in Ostrobothnia region. In the Reply+ project partners created a toolbox for startup companies in the field of game development.

This paper reports the results of a survey conducted by Design Centre Muova. In the survey two background questions formed the ground for the content. Firstly, the research team was interested in investigating how game companies, especially start-up companies integrate their potential customers in the branding and secondly, how the companies perceive the branding in

their organization, what kind of issues are considered and how they evaluate their resources and capabilities.

The results of the survey were utilized in the design of branding canvases for strengthening the brand knowledge in game companies. Branding canvases are part of Reply+ project toolbox, which can be found in www.replyplus.fi. Other project partners have provided canvases for user experience, user-centered design and monetization strategy. The first version of the branding canvases can be found from the appendix part of this report. Only by applying them in real life context can they be further developed. We are committed to iterative development, so please share your experiences with us!

Vaasa, 22.03.2017

Jussi Loukiainen
Project manager
Design Centre MUOVA

1. Introduction

Branding has become a core activity in organizations (Aspara, Aula, Tienari, & Tikkanen, 2014). However, very little knowledge can be found on brand building in the software business, SMEs (Ojasalo, Nätti, & Olkkonen, 2008), game companies or startups. Nevertheless, branding is a crucial activity for the successful establishment of a new company. It helps in customer acquisition, retention and building a favorable reputation (Bresciani & Eppler, 2010).

Because of the lack of research, entrepreneurs can rarely find specific and tailored guidelines for branding in the traditional literature. The literature has mainly focused on multinational and well established companies, and covers topics that are not yet highly relevant for new ventures (Bresciani & Eppler, 2010; Rode & Vallaster, 2005). Only recent literature has discussed branding as a part of marketing activities in the context of game industry (see Zackariasson & Dymek, 2017).

Ojasalo et al. (2008) suggest that the lack of research might be partly explained by the logic of software product development. In addition, technology and engineering has traditionally dominated the operations in those organizations, and the marketing approach has been sidelined. However, if start-ups are not able to establish their corporate brand in the market within a relatively short time frame, they disappear from the market. (Rode & Vallaster, 2005)

Startups provide a specific context for corporate branding. Bresciani & Eppler (2010) summarize the specific features in startups which leads to the specific branding needs. These features are: (1) lack of resources, (2) lack of internal structures and processes, (3) a fundamental need to build a reputation, and (4) to find clients. Ojasalo et al. (2008) remind that small companies with limited resources can do branding as well as bigger ones but the means of branding are often different. New ventures need to develop more creative, targeted and affordable approaches for branding (Ojasalo et al., 2008) and use more unconventional branding activities (Bresciani & Eppler, 2010). For example organizing events, actively creating positive word-of-mouth, and developing on-line branding strategies in Social Media (Bresciani & Eppler, 2010) have been mentioned as potential activities for new ventures.


In the era of social media, brand building has become a vexing challenge (Holt, 2016). Social media has challenged the old rules in branding. In fact, Ostrom et al. (2010) has suggested that the emerging opportunities to harness the brand impact of social media is an important topic area to study in the future. Exploiting the opportunities provided by social media while keeping an unwavering eye on their brand promise has been suggested as a recipe for success. In other

words, social media make it more important than ever for companies to focus on developing and reliably delivering on a compelling brand promise (Barwise & Meehan, 2010).

What has changed then? The logics of creating effective branded identities are also in flux. According to Aspara et al. (2014) the traditional understanding of branding is based on one-way supply of brand images from marketers to rather passive customers who do not actively ponder the motivations of marketers. Recent research underlines that strong branded identities are created through co-creational processes in which multiple stakeholders are actively involved (Aspara et al., 2014). Now, it is less important what an advertiser says about the brand and more about what the brand means to the customer. Furthermore, the meaning is increasingly derived through social media (Ostrom et al., 2010).

Consumers have always wanted a clear brand promise and the offerings they value. Social media has changed the number and the nature of touch points where the customers are the most open to influences. Also, the type of interaction in these touch points has changed. This may require a major adjustment to realign marketing strategy and budgets with the platforms where consumers are actually spending their time (Edelman, 2010). Social media can boost brand awareness, trial, and ultimately sales, especially, when a campaign goes viral. In addition, social networks can be used as a powerful new way for learning about customers and for exploring their lives and opinions (Barwise & Meehan, 2010).

Now it is less what the advertiser says the brand is and more what the brand means to the customer. (Ostrom et al., 2010)



Barwise & Meehan (2010) analyzed the strategies and performance of a diverse range of companies and suggest that great brands share four fundamental qualities:

- 1) They offer and communicate a clear, relevant customer promise,
- 2) They build trust by delivering on that promise,
- 3) They drive the market by continually improving the promise, and finally
- 4) They seek further advantage by innovating beyond the familiar.


In the Hubspothis blog article Kevin Barber (2014) discusses about the challenges that startups meet when branding. Barber (ibid) has recognized, that for startups, it is extremely important “to ‘go live’ and start generating revenue before running out of seed capital” which

drives a sense of urgency to launch games quickly. In this hectic phase, the game gets the priority. After that logos, voice and tone, website design and social media hit the top of the list. However, Barber reminds that branding should go deeper than only the surface of colors, logos, voice and tone (Barber, 2014).

Barber (2014) continues by summing up some main reasons why startup companies fail with branding. Entrepreneurs mistakenly focus on brand identity and awareness when they should first focus on brand experience. Barber (ibid) argues that one potential pitfall is that the company focuses too much on their own idea of the brand identity and brand awareness

without asking for feedback from customers. They might even ignore the negative feedback they receive it. The attempts to improve results without customer feedback often leads to fine tuning things that customers don't really care about (Barber, 2014).

Attempts to improve results without customer feedback often leads to fine tuning things that customers don't really care about. (Barber, 2014)



2. Survey background

In order to strengthen the understanding of the current state and needs of the Finnish game companies in brand management Design Center Muova conducted a survey study where e-Lomake application was used. Survey was open between 27th September and 8th November, 2016. Muova was responsible in conducting the research as well analyzing and reporting the results. The inquiry was structured around six themes (see table 1).

Table 1. The themes and questions of the inquiry

| THEME | SURVEY QUESTIONS |
|--------------------------|--|
| COMPANY BACKGROUND | current state of the company, main development platform, amount of launched games, full time employees, respondent's position in a company |
| FINANCY | company's main revenue model, financial options used, turnover |
| GROWTH ORIENTATION | company's intention to grow |
| DEVELOPMENT OF GAME IDEA | sources of ideas, players' role in the game development, marketing practices to support development |
| BRAND MANAGEMENT | state of branding in a company, importance of different brand management aspects, knowledge and capabilities in branding |
| COMPETENCE NEEDS | competence needs in marketing, branding and business |

The target group for the survey was all kind of game companies not only start-ups. In order to gather respondents, a survey invitation message (including an open access link to e-lomake application) was designed and distributed to three Facebook groups (PlayFinland, IGDA Finland and Ostrobothnia game industry). The Facebook groups are widely followed in the game industry both at the national and local levels. Several Facebook-group members also shared the survey invitation message in their own networks. In addition, prior personal contacts were used when sending an invitation message directly to game companies, game labs and game developers in Finland. The survey was also promoted in seminars and in several face-to-face meetings with game companies and persons operating in the game industry.

3. Respondent profile

The survey accrued 23 valid responses. Even the total amount of respondents remained small, the survey reached the desired target group; game companies and startups.

83 % of the respondents were working in a registered company with a business id. In addition, 9 % of the respondents were going to get a business id in the future. Hence, the survey respondents were both game companies and developer teams that aim to establish a company.

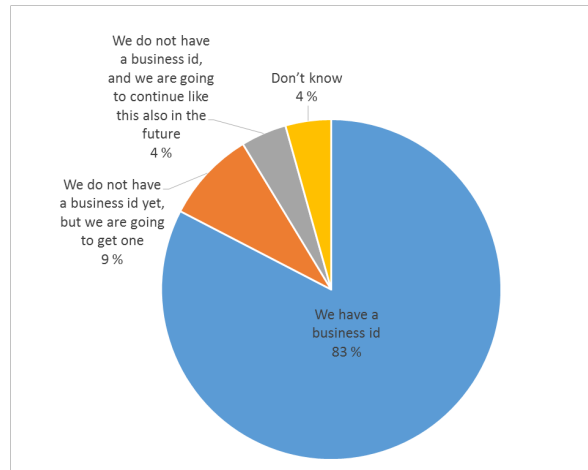


Figure 1. What is the current status of your

Respondents represented small companies, which is also in line with the aim of the survey. 13 % of the respondents worked in a company with no fulltime employees and 48 % in companies having 1-3 full time employees.

The rest of the respondents (39 %) worked in bigger companies, ranging from 4-6 full time employees up to over 30 full time employees.

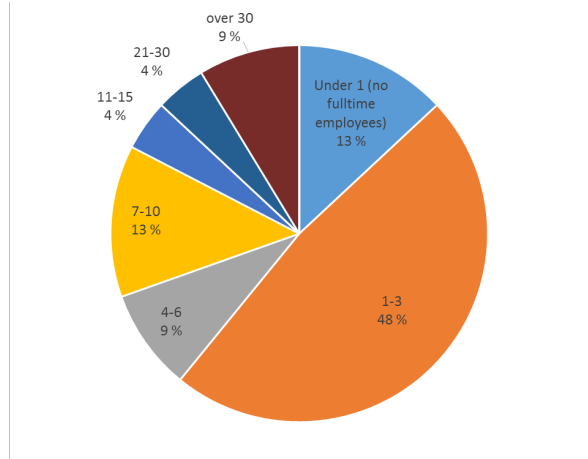


Figure 2. How many employees your company

Majority of the respondents worked in a company which is in their early stage of the business. 44 % of the respondents reported that they were currently developing their first game. 26 % of respondents had launched one game. Instead, 30 % of respondent had already launched several games.

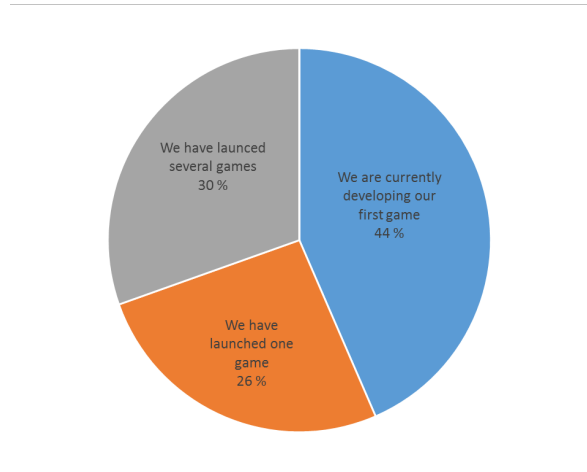


Figure 3. How many games your company has

57 % of the companies did not have any turnover yet. In addition 18 % reported that their company's turnover is under 50 000 €

Rest of the survey respondents reported company turnover ranging from 100 000 € to over 10 mil €.

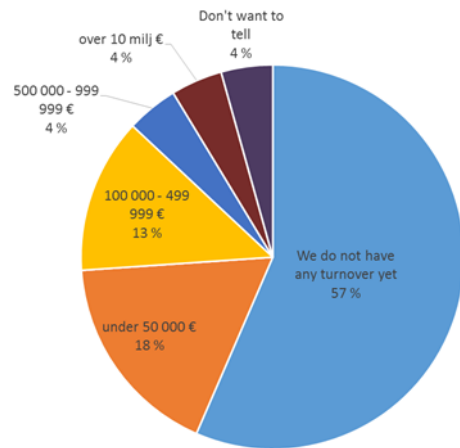


Figure 4. What is your company's turnover?

Respondents were asked to specify the development platform that is the most important for their company. The results show that 48 % of the respondents used PC as their main platform. Mobile was used by 35 % of the respondents.

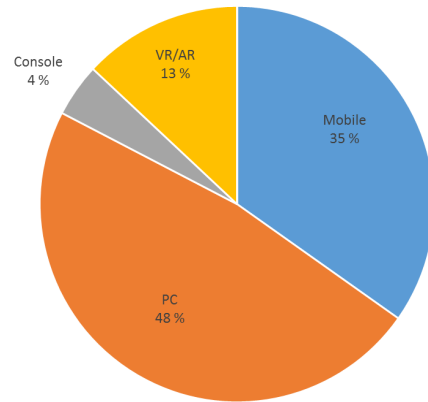


Figure 5. What is your company's main development platform?

Next, respondents' were asked to specify their position in the company. Several selections were allowed. As typical in small and recently established companies, the respondents occupied several positions in their company. Respondents' main fields of responsibility were business development (18 selections) and game development (16 selections). In addition, sales and marketing was included in 7 respondents' position.

These results are in line with other investigations among the startups. For example Gulati & Desantola (2016) have found that founders in a startup company typically do a bit of everything, "whatever it takes to get the business off the ground". Gulati & Desantola continue with arguing that founders typically hire fellow generalist through informal channels. Together they cobble their roles and responsibilities based on their own passion and confronting tasks which needs to be done. But as organizations expand, they face new levels of complexity that require them to define and assign tasks more formally. To accomplish this, they typically seek specialization (ibid).

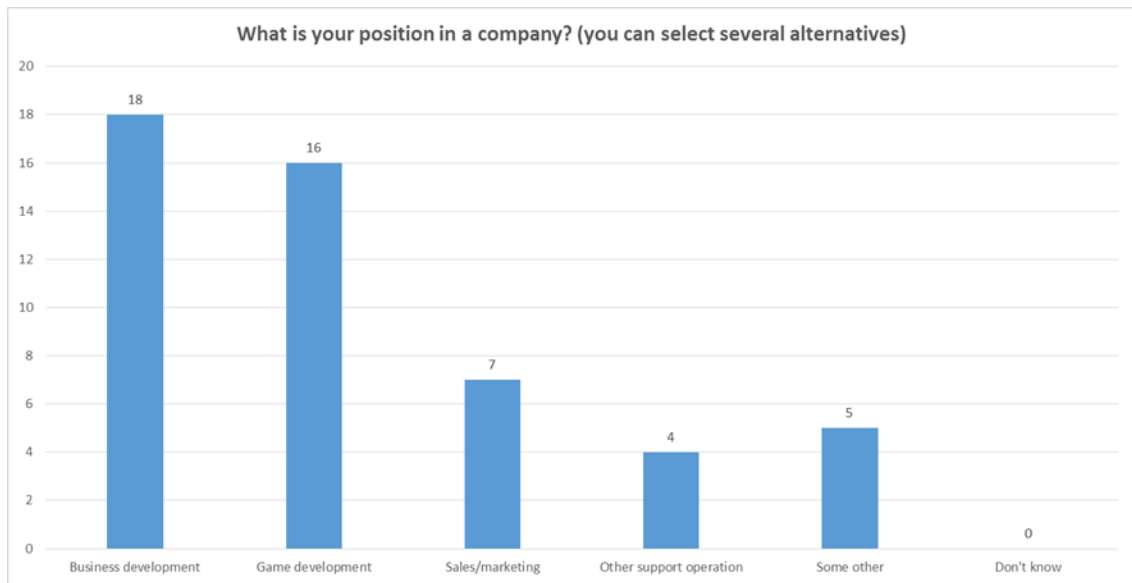


Figure 6. What is your position in a company?

This leads us to ask, who is responsible of branding in small game companies? Is it part of the business development or is it something that hits the agenda only when the game is ready to be launched? Ojasalo et al (2008) remind that both technical and marketing-oriented personnel need to be involved in brand building. Internal cooperation is important in order to develop and maintain a consistent line in communication (ibid). But how about in game companies if no-one is specially focused on marketing or branding issues? This highlights the fact that key employees in game companies need to have competences and skills not only in game development but also in business field including marketing and branding.

The most used revenue model, according to the survey, was single purchase. This is in line with the dominance of PC game developers within the survey respondents.

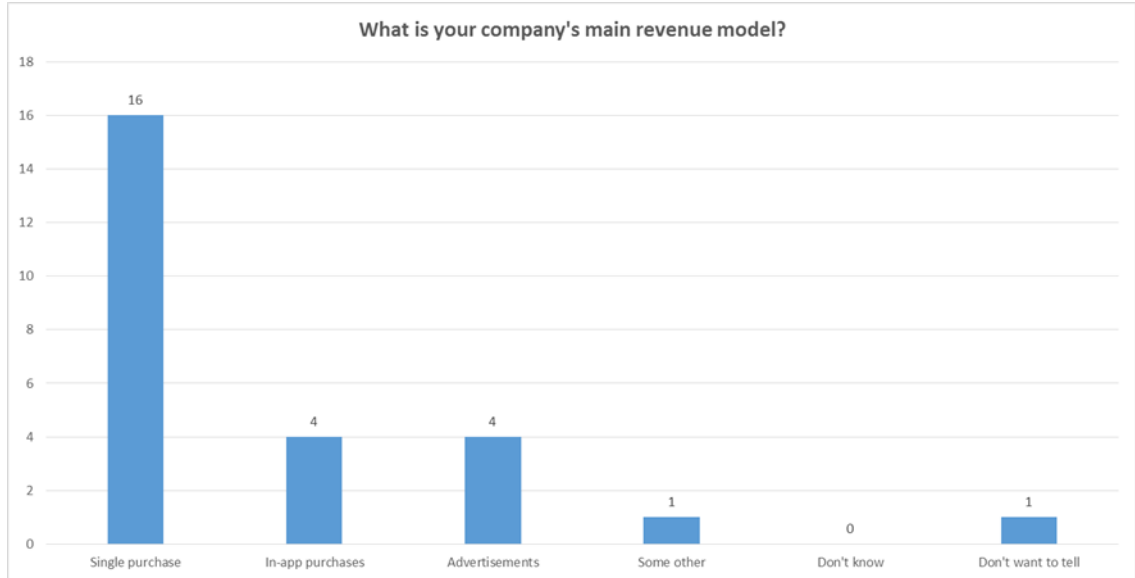


Figure 7. What is your company's main revenue model?

The respondents were able to select several options related to the financial instruments that have been used in their company. As foreseeable, own financing was the most used financing instrument with 20 responses. Also public investments (such as Tekes and Ely) were commonly used (9 responses).

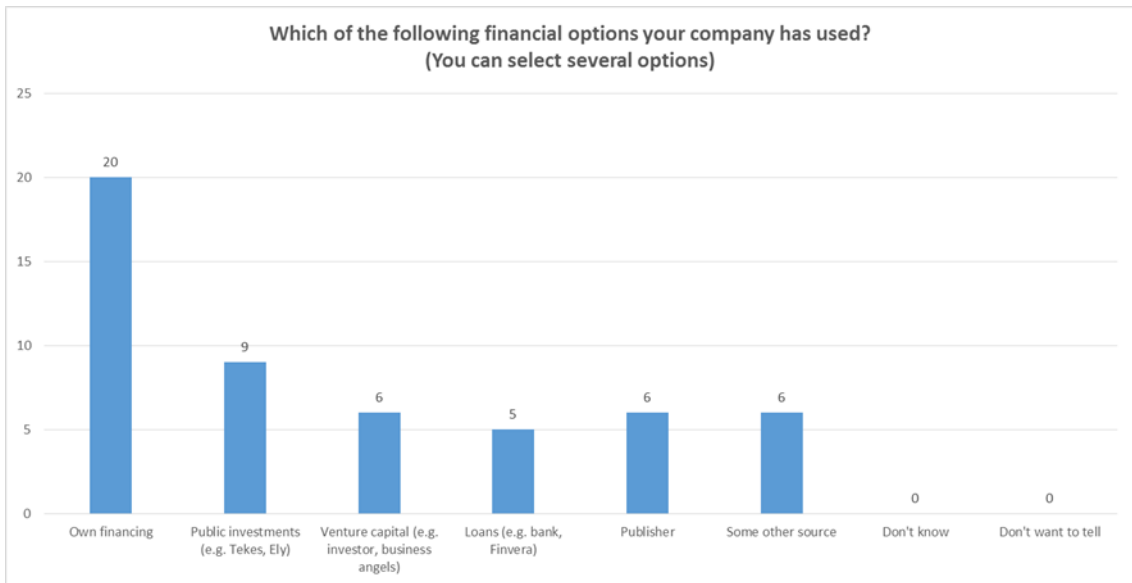


Figure 8. Which financial options your company has used?

When evaluating the companies' intentions to grow, 30 % of respondents reported that their company is strongly growth oriented. In addition, 48 % of the companies anticipated that they probably would grow in the future.

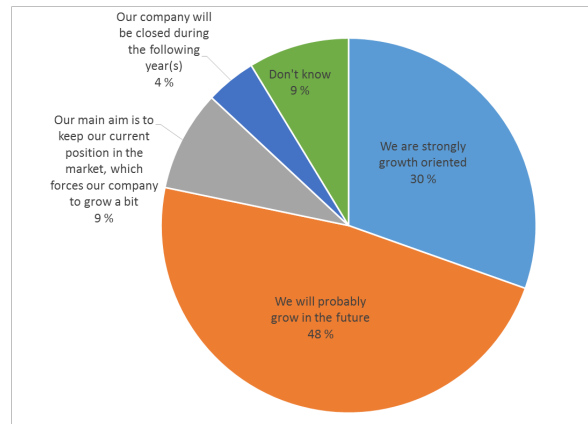


Figure 9. What is your company's intention to grow?

4. Development of game ideas

In search of game ideas, the developers themselves are the clearly the most important source of new ideas. 96 % of respondents found it either very important or somewhat important. The feedback from players was seen as very important or somewhat important source of game ideas by 79 % of the respondents.

New game mechanics (39 %), other games (26 %) and new technological opportunities (26 %) were also widely used as a main source of game ideas. Also popular culture (e.g. movies, music, and comics) was regarded as an important source of ideas (17 %).

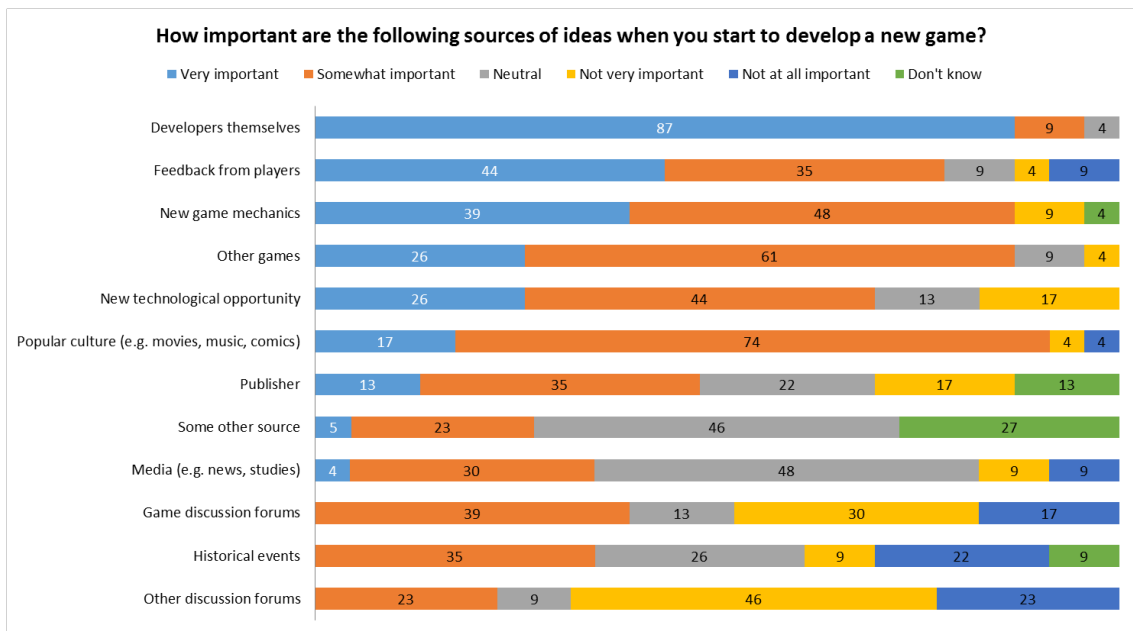


Figure 10. Sources of new game ideas

On the other hand, media (e.g. news, studies) and discussion forums (game or other) were not regarded highly important source of game ideas. Previous research has also suggested that different social networks could provide a powerful ways to explore consumers' lives and opinions (Barwise & Meehan, 2010). Hofemann (2013) suggests that companies should focus on providing a solution to some relevant customer problems. However, this requires an open dialogue between the customer and the supplier (Wikner, 2010). As mentioned earlier Barwise & Meehan (2010)

suggest that through social media companies can gain rich, unmediated customer insights (Barwise & Meehan, 2010). The results of this survey indicate, that strengthening the use of different social media platforms in search of game ideas might be something new for game companies.

Strengthening the use of different social media platforms in search of game ideas might be something new for game companies

74 % of respondents reported that when developing a new game, players are often asked for feedback on the game. However, 57 % of the respondents stated (9 % strongly agree and 48 % agree) that they systematically collect players' ideas to be used in the game development. This may indicate, that companies are collecting information on the perceived problems of customers as well as prototypes are redesigned based on the feedback (Sandén, 2007). In other words, players seem to have some role in the game development process at least in prototype testing phase.

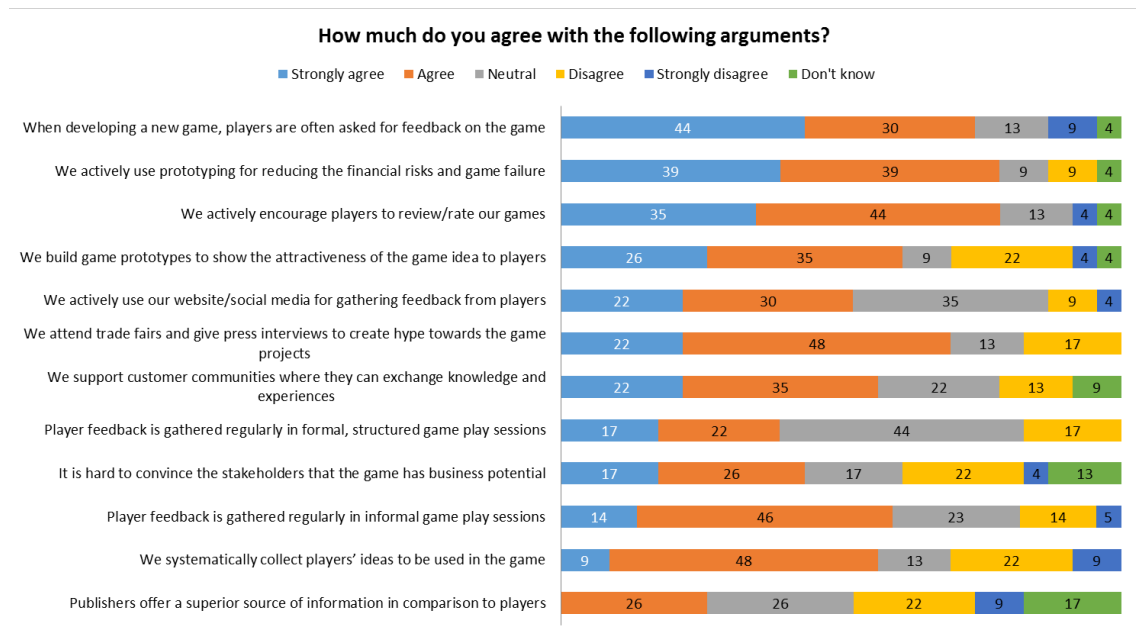


Figure 11. Development of new game ideas

79 % of respondent reported that they actively encourage players to review/rate the game. This relates mainly to promotion of the game, because App ratings can positively or negatively affect important aspects of how people discover apps. However, ratings can also create expectations, again positive or negative, towards the game.

The only way to becoming a 5-star app is to first have an excellent user experience. (Matt Galligan)

In the survey, the use of different sources for collecting players' feedback distributed as follows: website/social media (52 %), formal and structured game playing session (39 %), and informal game play sessions (60 %). In addition, 57 % of respondents support customer communities where players can exchange knowledge and experiences. Game prototypes were used for reducing the financial risks and game failure (78 %) and showing the attractiveness of the game idea to players (61 %).

5. Brand management

A dedicated and capable team is in the very heart of the young game companies. 87 % of the respondents agreed or strongly agreed with the argument that their company has the dedicated and capable team to achieve company goals. Some strategy work has also been done in companies since 70 % of respondents reported that they have defined what they want to accomplish as a company.

39 % of the respondents found that they have devoted enough time to think about branding. 61 % of the respondents found that their company has appropriate skills to create a visual brand or marketing material. On the other hand, respondents were not as convinced in their skills in creating appealing and convincing brand messages. 57 % of respondents agreed or strongly agreed with the argument that the company has enough skills to create appealing and convincing brand messages. 35 % of respondents found that they know how to communicate the brand to customers. 43 % of the respondents think that they know how to handle community management. 34 % of respondents found that company brand is better than separate game brands. However, 26 % of respondents disagreed with this argument. Also 57 % believed that people are interested to know the companies behind games.

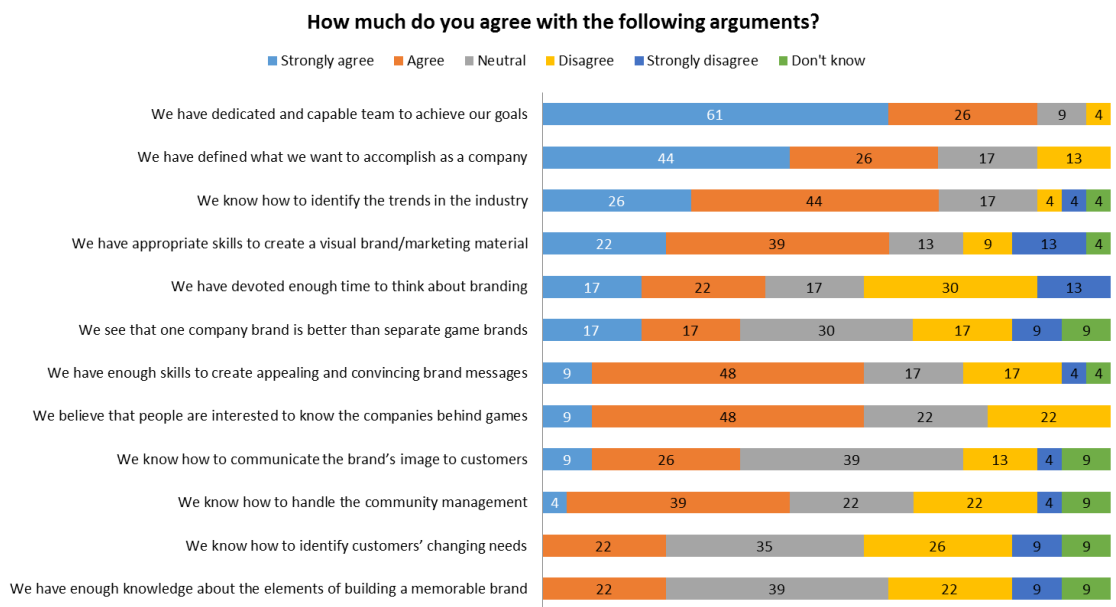


Figure 13. Brand management in game companies

When going deeper into branding, the respondents become more hesitant. Only 22 % of respondent agreed that they have enough knowledge about the elements of building a memorable brand. This may refer to the knowledge needs in traditional brand-building activities which aim to build consistent and memorable customer associations with a product or brand identity (Payne, Storbacka, & Frow, 2008).

Only 22 % of respondents somewhat agreed with the argument that they know how to identify customers' changing needs. This may indicate a need to strengthen the game companies' capability to analyze their customer's needs, values and decision-making. This is in line with Edelman (2010) who emphasize the understanding the consumers' decision journey.

Also Heinonen et al. (2010) suggest that companies need to focus on understanding of customers' activities and design an offering based on the new in-depth knowledge of customers. This means that the design is not based on what the offering can do, but what customers want to achieve, be it functional performance, mental experience, or both (Heinonen et al., 2010). Same approach can be applied also to branding (Strandvik & Heinonen, 2013).

6. Relevant competences for brand management

In the last section of the survey, the respondents were asked to evaluate the importance of different communication channels in their company's brand management. 92 % of the respondent found that social networks have central role in the brand management. Also 'what people say' was regarded important by 92 % of the respondents. The role of the company's spokesperson was also regarded important branding aspect by 78 % of the respondents.

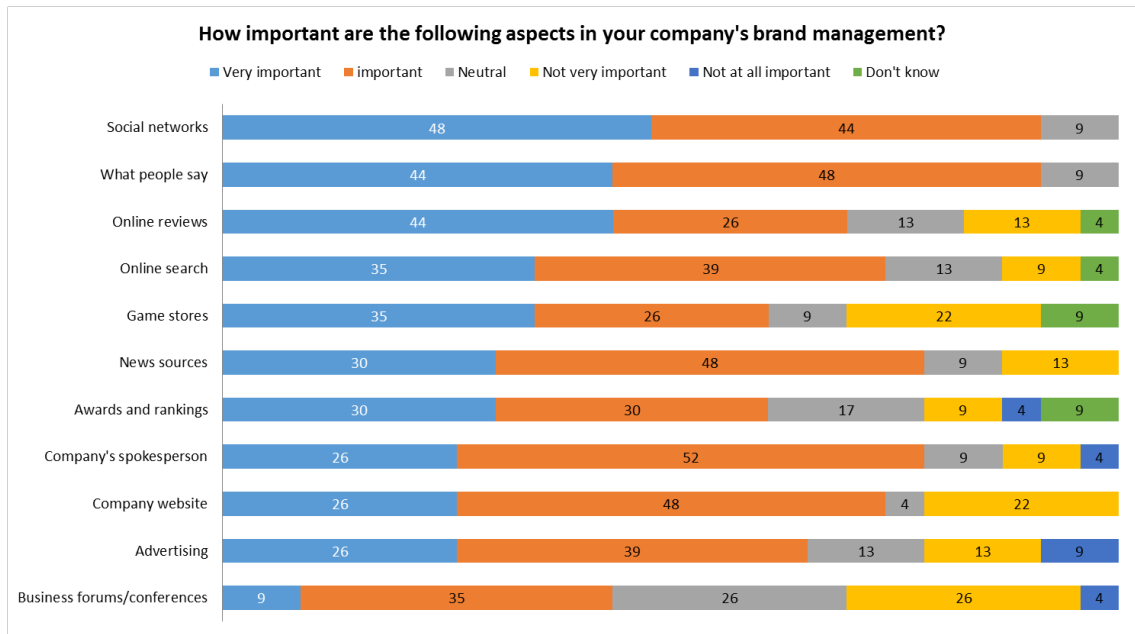


Figure 14. Importance of communication channels

Respondents evaluated the importance of given branding tasks and activities. All of the respondents' argued that finding out how to stand out of the mass is one of the main questions that their company needs to tackle.

Other important tasks were: creation of awareness in digital delivery channels (91 %), creation of hype for the game (87 %), gathering of the fan base for the game (95 %), creating loyalty among the players (78 %) and increasing the commitment among employees (89 %). 73 % found that they should put more effort on defining company identity (including the vision and mission statements).

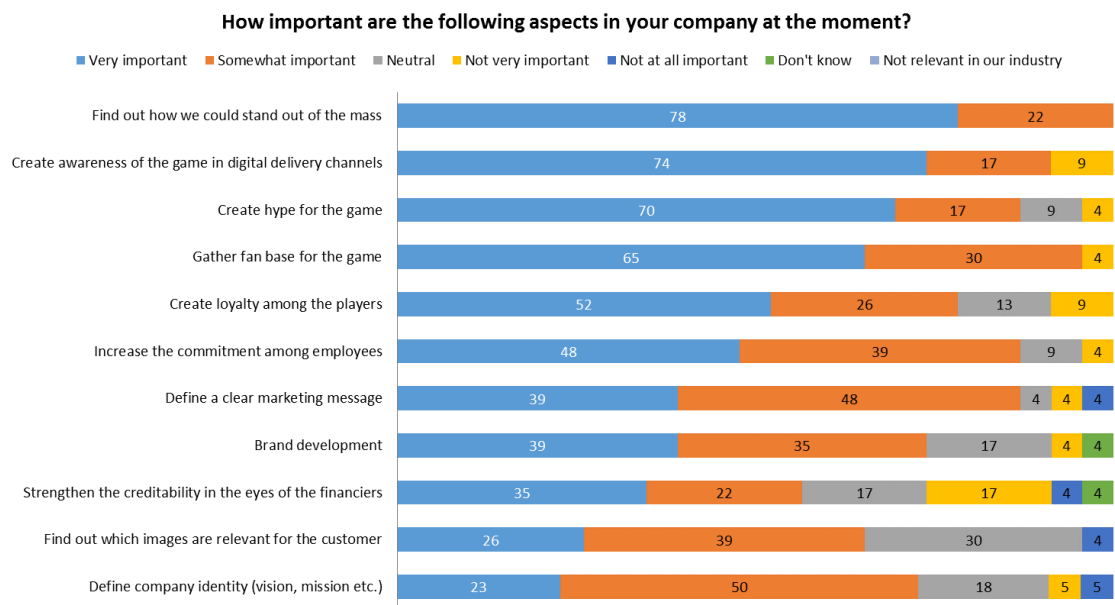


Figure 15. Importance of different branding activities

Defining a clear marketing message was seen important by 87 % of respondents. Brand development was seen as an important task by 74 % of respondents. On the other hand, finding out, which images are relevant for the customer was seen important task by 65 % of respondents. This may imply that branding is seen as something that is done in the final phase of the game development. However, Barber (2014) reminds that the essence of branding is to create a connection between company and customer. First, the priority is in learning to understand

customers and why they love the product. Once the company understand customers and what drives them to the product, the company can create the brand’s visual identity (Barber, 2014).

Finally, the respondents were asked to evaluate the importance of selected competences for a company at the moment. The most important competencies were related to the art of game development: designing the gaming experience (100 %), understanding fun (96 %), artistic skills (96 %), technical skills (100 %) and game development process (100 %).

As mentioned earlier, many of the respondents worked in a company, which is currently developing their first game. More business related competences such as project management (87 %), marketing or brand building (74 %) and knowledge of business model development (74 %) hits the agenda when estimated game launch is coming closer.

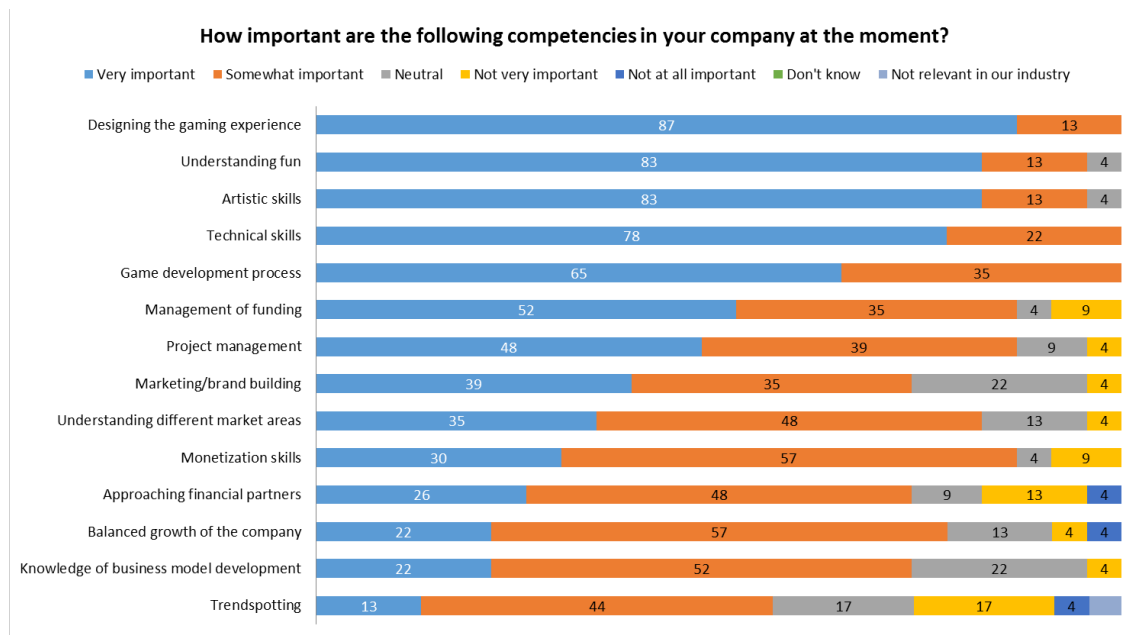


Figure 14. Importance of different competences

Previous research has discussed about the periodization challenge in startups. For startups, cash flow is a king and branding doesn’t seem something with a very rapid payback (Ojasalo et al., 2008). This causes that the entrepreneurs are usually more concentrated on financial and production issues than branding and communication strategy.

Although this approach is understandable in the logic of the entrepreneur, many companies later recognize that a clear brand vision is a sound investment for them, because the costs of subsequent changes to their corporate identity can be very high (Bresciani & Eppler, 2010). Also Ojasalo et al. (2008) urge startups to make a conscious decision if they invest in branding or not, and to do that decision early in the product development cycle. The authors suggest that the branding decision ought to be made even prior to technical product development, because the chances for successful branding may be limited or non-existent if the technical development has already taken place.

7. Conclusions

This report has focused on analyzing the results of the survey conducted for understanding the current state and needs in branding in the Finnish game startups. The survey accrued 23 valid responses. Due to the small amount of responses, the findings can be regarded as initial opening for discussion and further research.

The findings indicate that game startups are interested in branding and they see branding as an important topic. However, the findings imply the need to strengthen the knowledge and capabilities in branding. Especially, the early integration of branding should be emphasized. In fact, it can be argued that branding should start before even a single line of code is written. Also deeper integration of players into various points of the game development process could provide new insights for both in game and brand development activities.

The survey provided an appropriate framework for revealing current knowledge gaps related to branding. In order to deepen the findings, the repetition of the survey with bigger coverage of game companies is needed. Further initiatives are also needed to support the game startups in their journey of branding.

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Appendix: Branding canvases



ReplyPlus toolkit

Branding

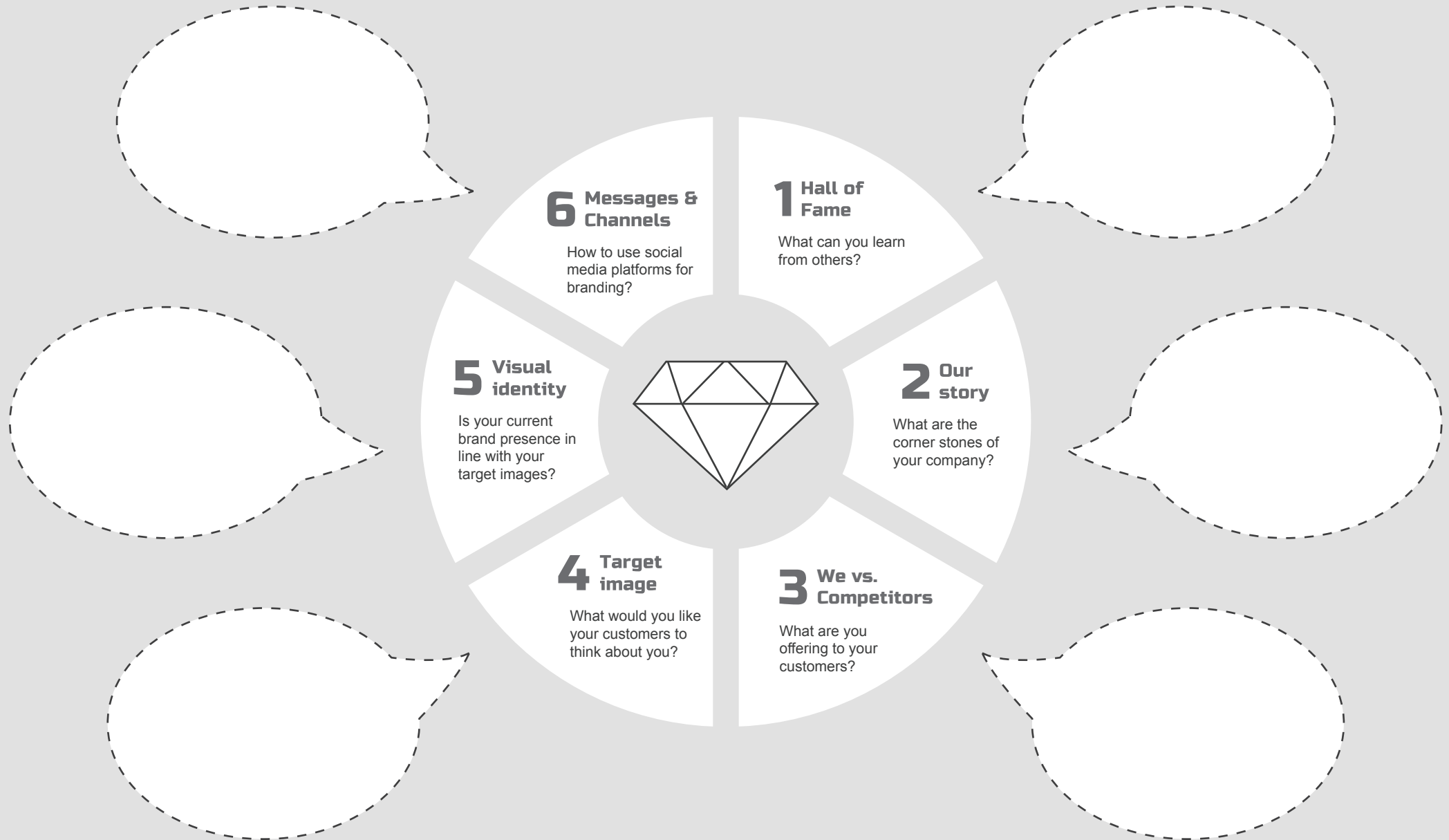


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Branding toolkit aims to support the brand development in your company. You can use this template twice:

1. Use the speech bubbles to list your current ideas related to the questions in the circle.
2. After you have studied the Branding toolkit, return and revise your previous answers.





1. Wall of Fame

What brands do you admire and why? Please consider brands in any field of business. Choose three brands.



Name the brand you admire.

1st

Name the brand you admire.

2nd

Name the brand you admire.

3rd

Why do you admire this brand?

1st

Why do you admire this brand?

2nd

Why do you admire this brand?

3rd



What can you learn from this Brand? How to make this applicable to your company?

What can you learn from this Brand? How to make this applicable to your company?

What can you learn from this Brand? How to make this applicable to your company?



2. Our story

What is your company's elevator pitch? What are the most important learnings from the past? What are you doing at the moment? Where are you going in the future? What are you doing at the moment? Where are you going in the future? Tell the story of your company by using the storyboard.



In the beginning..

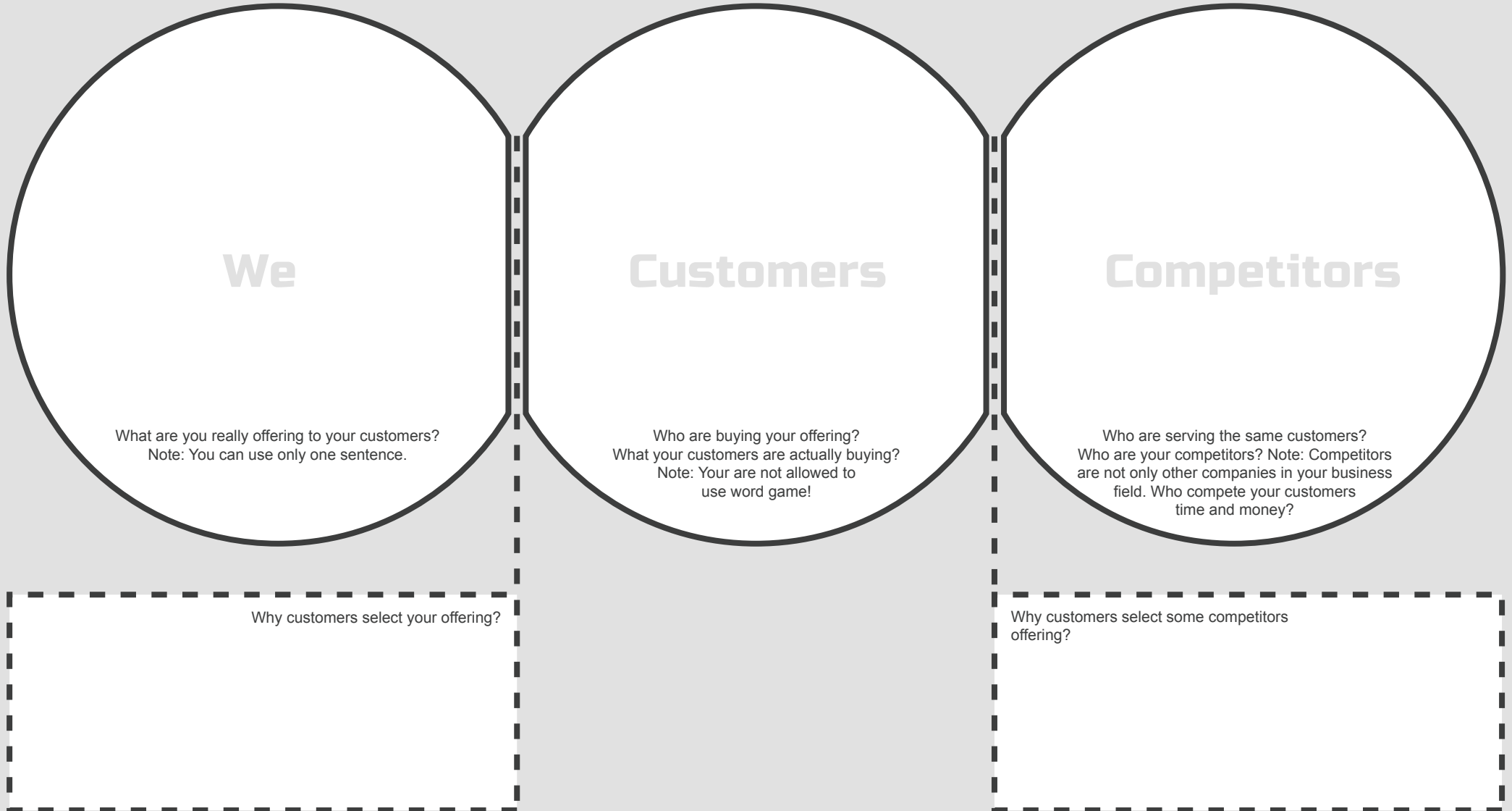
At the moment..

In the future..



3. We vs. Competitors

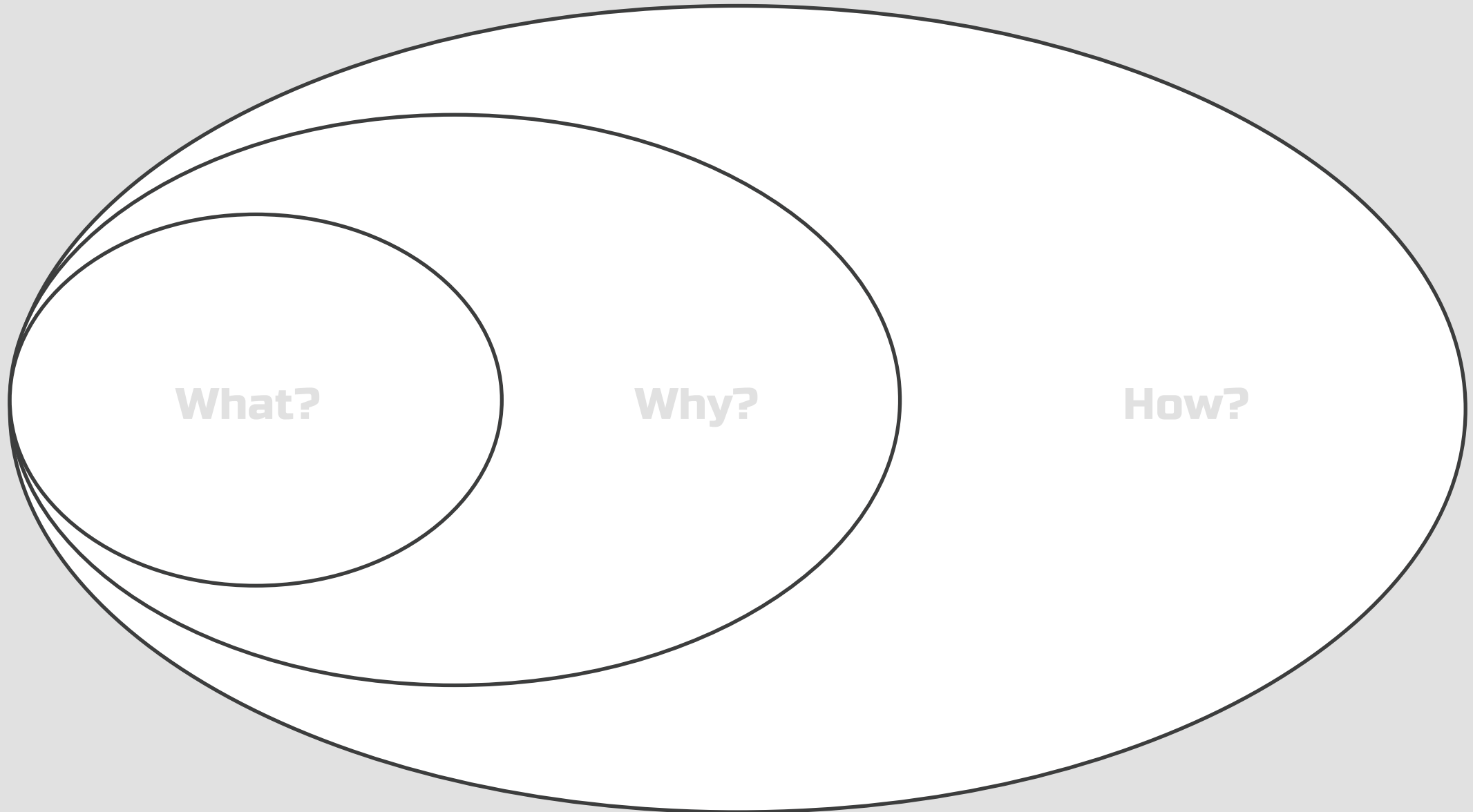
What is your clear and unique position in the market? Please consider your own offering in relation to your competitors one.





4. Target image

What kind of images you want your customers to have when thinking about your company?
Why these images are important to you? Why they are important to your customers?
How you are going to create these images?





5. Visual identity

Search (Google image) pictures reflecting your company's target image. Do the same with your company name. What kind of pictures you find? What do these pictures tell about your company?



Target image. What kind of pictures you found?
List 5-10.



Company name. What kind of pictures you found?
List 5-10.



What do these pictures represent? Do we want to be here?



Ask your colleagues, friends or customers opinion. What do they think about your visual identity? List these stakeholder comments here.





6. Messages & Channels

How you use social media to support your business goals?

