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5

Discussions with developers: F2P and the changing landscape of games business development

Tom Phillips

Upon the launch of Apple's App Store in 2007, journalists were quick to apply the term 'gold rush' to the flurry of software development activity that followed (Stevens 2011, 3–4). Yet despite the sustained growth of the marketplace,¹ some commentators have noted that the supposed 'rush' is over (Streitfeld 2012; Evans 2013; Grubb 2013). Speaking in 2014, developer Matt Coombe noted 'In the early days [. . .] if you could make a decent app and get it out . . . you had a very good chance for success. [. . .] I think those days are over because there's so much quality out there' (Oliveira 2014). Yet Coombe's scepticism belies the sheer amount of money being spent on the App Store, which totalled over US\$10 billion in 2013. While few apps are guaranteed to be an overnight success – and indeed some that may be considered to be (such as *Angry Birds*) are in fact the result of numerous attempts (Stevens 2011, 11) – what such figures make evident is that the mobile application marketplace represents a significant opportunity for the capitalization of new gaming business models.

Significantly, gaming's dominance on the App Store – with over 320,000 games available as of February 2015 (Anon 2015) – appears to offer the most prominent outlet for the 'gold rush' to continue, with the dominance of the free-to-play (F2P) business model. Of the top ten grossing apps of any kind of 2013, all were games, with nine being F2P with additional in-app purchase (IAP) options (Schoger 2013). The potential for economic success is exemplified by development company Supercell, whose games *Clash of Clans* and *Hay Day* made up two of the top three grossing apps and had earnings of US\$462 million in 2013 (Grundberg and Rossi 2014). The startling success of this business model has led to the increasing dominance of F2P within the gaming sector, with many hoping to replicate the economic achievements of developers such as Supercell, King and Kabam. While the model has been lauded by some (Lovell 2013; Luton 2013; Clark 2014), others within the industry have treated it varying from expressing caution (Shokrizade 2013a) to outright disdain (Bogost 2014).

With the marketplace apparently crowded, there is a sense from game developers that the role of shrewd business development has become increasingly important. Such attitudes were apparent on 6 December 2013,² when a cohort of ten games developers and industry experts were invited to participate in a workshop to discuss the current state of the sector. Participants included independent games developers from across the United Kingdom and Europe, largely from small-sized studios, and all of whom develop exclusively for digital platforms. These included the CEO of a developer of F2P mobile games, a one-person development team who had their latest game funded via crowdfunding, the co-founder of an award-winning European micro studio, and the head of a digital product agency who has provided mobile and desktop games for commissioners at Channel 4 and the British Broadcasting Corporation (BBC). In addition, participants also included a game director from Sony, a representative from industry networking group the Scottish Games Network, a freelance games journalist, academic experts in (respectively) digital law and the European development of copyright law and policy, and a business affairs manager at the BBC. Proceedings were chaired by the author and colleagues introducing topics for discussion, seeking to understand current industrial discourse around broad topics such as business development, intellectual property and inter- and intra-industry relations.

While keeping direct quotes from participants anonymous, qualitative data from this workshop shapes the following discussion of contemporary industry concerns, allowing direct discussions with developers to explore the dominance of F2P and how it is valued by those within the industry. In addition, through analysis of popular and trade press, industry reports and academic literature, the impact of F2P's pervasiveness in the contemporary

sector is considered, particularly the influence it has on production processes (and approaches to games as 'art'), intra-industry relations and engagement with consumers. In an ever-changing landscape, this chapter captures a moment where F2P business models – and the wider implications they have for the industry at large – are a pressing issue. Shaped by the direct views of those in the industry, the chapter highlights the importance of communication between stakeholders to help shape the direction of their industry.

The workshop event began with a consideration of the current state of the industry. One of the key contexts that shaped debate on the day was the fact that the industry has changed and will continue to change. Participant A summarized as much when observing the state of the sector in late 2013:

One of the big issues I think we're facing as an industry is everything has changed. There used to be one way of doing development, one business model which was retail, and you had very clear routes to market. All of this has changed. We've now got multiple app stores, we've got multiple price points – different business models. And there's no one size fits all anymore. (6 December 2013)

In 2002, Dmitri Williams detailed the traditional vertical stages of the industry as applied to home consoles, PCs and handhelds, noting that although there are some fluctuations in competitiveness, the chain of production can be readily charted from development through publishing, manufacturing and distribution to retail (2002, 46). Focusing on the latter stages, Williams places an emphasis on the physical storage and delivery of games, noting the propensity for distributors to establish exclusive contracts with some major retail chains, while hinting at 'alternative distribution paths on the horizon' (2002, 48–9). While today agreements with particular retailers still exist,³ generally the traditional retail model has seen a reduction in sales amidst changing consumer habits and developers' preferences for a more economically favourable return on their games over time (as opposed to retailers' emphasis on repeated sales of pre-owned games, whereby all revenue is retained) (White and Searle 2013, 39–40).⁴ As a result of the downturn in retail sales the new horizon suggested by Williams is now a common part of contemporary business models, with prominent digital distribution platforms – such as Steam, the Apple App Store, Google Play and Xbox Live Arcade – demonstrating companies' rapid response to customers' changing demands, desires and preferences (Clemons, Gu and Spitler 2003), particularly with regard to incorporating differing price structures, increased product diversity (e.g. 'family-friendly' titles), social network connectivity and content that can be purchased on demand (White and Searle 2013).

Yet while some digital platforms apparently signal an embrace of new methods of production and distribution that work with consumers,⁵ one of the most prevalent points of appeal for some developers is the sheer amount of money to be made for relatively little financial risk. Claudio Feijoó notes for instance that ‘whereas development and marketing costs for a console or PC game may run in the millions of euros, the costs for a mobile game were already typically in the range of the hundreds of thousands and sometimes even less [. . .] Within the new [mobile distribution] platforms these costs may be even an order of magnitude lower’ (2012, 87). In bypassing costs associated with traditional models, which could see revenue filtered to retailers and publishers (Kerr 2006, 85), developers can instead produce low budget games with small marketing and distribution costs, promoting digital sales – across mobile, desktop and console platforms – where the majority of revenue is recouped and losses are minimal. As noted above, success is not guaranteed, but new retail models which diverge from the traditional can offer greater opportunity for success.

One example of such commercial success has been the widespread implementation of the F2P model. A F2P game is one which provides players with an option of playing the game without paying. Significantly, however, the game will still attempt to generate some revenue; sometimes this will be through in-game advertisements that may interrupt or encroach on gameplay. Yet most frequently, income is sought through ‘additional content’ players can purchase to enhance or extend their basic playing experience, commonly referred to as a microtransaction, IAP or freemium model (Jacobs 2012). Will Luton notes that monetized aspects of F2P games can be classified in one of four categories, which he terms the ‘four Cs’:

Content: Consisting of more levels, maps, characters or similar that give players more of a game’s world or new abilities in it.

Convenience: The purchase of anything that skips players ahead, providing them with something that gives access to what could be acquired through the game with time and dedication.

Competitive advantage: Anything that once purchased gives the player a winning edge whether against the game or other players.

Customization: The process of creative expression by fashioning, adorning or otherwise personalizing something. (2013, 76–81)

The economic success of applying such tactics has subsequently meant that those consumers who frequently use microtransactions are now a desired userbase by some developers and publishers. The pursuit of ‘whales’ – those who are typically defined as spending over US\$100 on a game per month

for at least three months (Clark 2014, 68) – has been coded by some trade press in terms of ‘manipulation’ or ‘exploitation’ (Rose 2013), with ‘coercive’ (Shokrizade 2013b) freemium strategies thought of in pejorative terms. Dave Cook, for instance, has noted the implementation of convenience mechanics in *Dungeon Keeper*, which although offer themselves as an *option* – allowing users to purchase gems to speed up building and excavation processes in their dungeons – make a point for the alternative to be overwhelmingly unappealing; in this case making users wait a full minute for each process to complete. Cook warns against a superficial reading of the F2P label, imploring users to ‘think about what that term actually means first’ (2014). Similarly, taking a strong view against F2P, Participant B stated:

If you follow [our game] one of our biggest marketing points on release was that we did not like the free to play model. It actually has nothing to do with the fundamentals of free to play.. . . We appreciate the thoughts behind it [but] every not-cynical implementation I’ve seen on iOS has failed. (6 December 2013)

Here Participant B takes a moral standpoint against F2P, claiming much like Cook that F2P’s commitment to being ‘free’ is questionable. The extent of a game’s ‘cynical’ nature is obviously subjective, which makes systematically attempting to chart the relative success of ‘un-cynical’ F2P games difficult. Yet what is important to note here is how Participant B places ethics and integrity in opposition to the F2P model, suggesting that to be successful at F2P one must operate cynically and, therefore, if one wants to operate ethically F2P should not be used.

Ben Cousins believes such negative-slanted views are representative of what he terms ‘The Establishment: game developers, fans, commentators and journalists from the traditional (pre-2007) business’ (2014) who may be unwilling to embrace holistic change in the industry. Participant A noted ‘there’s no one size fits all anymore’, and although this is an acknowledgement of the evolving nature of the games market (UKIE 2011, 4), it doesn’t necessarily signal comfort with such changes. The fact that different business models are being implemented to varying degrees of success and with varying degrees of reception suggests that the shift from the broader channels of integration (Williams 2002) to more custom approaches is one with which the industry as a whole has yet to reconcile itself. And as Participant A notes, this process often manifests itself in conflict:

[T]he problem is you’ll find case studies which argue both sides. And the game sector is absolutely terrible, universally, in thinking in a binary

fashion – it's 'this' or it's 'that'. So either everything's going to be free to play or nothing's going to be free to play, and the reality is of course between the two. And there's probably a whole raft of different models, surely. (6 December 2013)

The variable attitudes to developers' implementation of F2P, categorized in binary terms as either 'honest prospectors' or 'claim jumpers' in this particular 'gold rush' (Davidson, Dodson and Rigby 2012), makes clear the difficulty in trying to establish a dominant viewpoint on the merits of the model. As Participant A notes, these attitudes can be detrimental to the process of embracing new business models and do not reflect the intricacies of such models: instead making simplistic moralistic judgments on whether something is 'good' or 'bad'. Indeed, despite their negative stance, Participant B later goes on to note that F2P 'will be great to have for a number of games in the industry, and I do think that the idea of not requiring payment before buying the game . . . is a morally sound stance' (6 December 2013), yet is simultaneously unwillingly to wholeheartedly endorse the F2P model, as to do it *effectively* would be counter to their ethical stance.

Participant B's negotiation of their attitude towards good business sense and ethical games development feeds into another apparent discourse which pervades contemporary games development – that of a tension between business and art. Where games are seen as art, gameplay is lauded, moral integrity is valued and there is a perception of an ongoing communicative relationship between producer and player. In comparison, when games are seen as a business commodity, monetization techniques are a priority, developers are thought of as unscrupulous and players are consumers to be milked for cash. As Participant C notes:

[There is a general tension] between art and business, they are fundamentally different. Art is about creative expression, business is about making money. People get into the games industry because they love games, they generally don't get in because they want to make money. (6 December 2013)

Participant C here makes the claim that creativity in the games industry is innate among its cohort and as a result business acumen – or a prioritization of monetization – falls behind. Negating even the doubt that games can be considered an art form (Parker 2013), this view demonstrates the moral position taken against F2P; that creativity is about the game and gameplay experience and those who emphasize making money from players apparently do not love games. This places a hierarchy among developers, suggesting

that those who prove their commitment to games are more 'worthy' of being creative personnel and enjoying success.

Yet this creative-economic binary is complicated by the fact that even the most 'honourable' developer requires living costs. As Participant B notes: 'People romanticize being indie but actually it's the opposite of all that' (6 December 2013). As a result, there has been a dedicated effort by developers to educate their peers on the importance of optimizing for opportunity: 'making sure that your game is visible for the right people, making sure that your game has a hook, making sure that you know how much money you'll need, that you'll be sustainable in the long term' (Participant B, 6 December 2013). Such an approach to education will help potentially avoid what Participant C perceives as an unjust situation:

[You meet some] people who are, say, shuffling out all these apps that are complete rubbish, and they're making money and they've got really good business sense, doing extra optimization, and they're working out their costs, how much they're going to spend, they're doing different version of their games and they're making all this money. And it's just wrong that these really creative people – people who really love games, are sometimes the people who are the most uninterested in the business side, or lacking in the business skills. (6 December 2013)

Making the effort to educate 'creative', 'honourable' developers on recommended business development plans and share advice with peers who similarly 'love games' has become a significant aspect of contemporary games development. This does not necessarily mean that developers are actively partaking in creative collaborative practice (O'Donnell 2009), but discussion, discourse and fostering of community is prized, whether online via social networks or offline at conferences:

You go to Develop or GDC in the States and it's very open. I was surprised by how open it was. I first went to GDC three years ago, and I was actually quite surprised by how open everyone was – with their stats, with their analytics – and I'm sitting in a Microsoft talk which is supposed to be my direct competitors, and they're telling me all this stuff I can learn from, that I can take away. (Participant D, 6 December 2013)

Openness between peers and competitors is something which is helping to sustain the sector and promote creativity and new voices. As Participant B notes: 'We can't exist without that co-operation. There's no way for us to sustain ourselves without the help of other indies' (6 December 2013).

However, while there is an attempt here to break down binaries of creativity and economics, this is still done within the moralistic context of 'appropriate' developer behaviour. *Thomas Was Alone* developer Mike Bithell has observed how audiences online apparently made the arbitrary decision that he was 'nice' (Bithell 2014) and it is often those developers categorized as particularly 'nice', 'friendly' or 'creative' that are acclaimed.

In comparison, the vitriolic reaction afforded to Dong Nguyen upon the success of *Flappy Bird* makes evident how a successful independent F2P developer may be treated. Persistent and prominent attacks on Twitter, accusing Nguyen of employing bots to boost App Store rankings and plagiarizing other games, led to Nguyen deciding to remove the game from the App Store (Dredge 2014). Some of this vociferous response may have been a result of Nguyen's development practices not conforming to what is deemed 'appropriate' for an independent developer: chiefly that he was making an estimated US\$50,000 per day from a F2P game not perceived to be wholly original (Kushner 2014). Oscar Clark believes that 'successful game development is very much like standing on the shoulders of giants. We try to understand the games that formed our thinking and look at how we can build higher still' (2014, 105). Yet despite this, the differing treatment of Bithell and Nguyen demonstrates the way capital is afforded to different development practices by those within the industry.

What this suggests, then, is that the 'correct' approach to business, art and ethics is not fixed. Approaches are subjective and influenced and reinforced by creative communities within different spheres. However, these communities are not only those which exclusively inhabit developers – game players can be similarly influenced by binaries and norms enforced by developers. As Adam Green notes: 'The Establishment' taking aim at aspects of F2P leads not just to user complaints about an individual game, but complaints 'about the industry, the model and are frequently stating (in no uncertain terms) that it's putting them off freemium as a whole' (2014). Indeed, in a digital age where audience engagement with producers is more readily accessible via social media, channels of communication between developer and player have been opened.

One prominent facilitator of communication has been crowdfunding website Kickstarter, which has proved a popular resource for developers to find funding for their game projects. Some Kickstarter-funded games have had overwhelmingly successful campaigns,⁶ and in March 2014 the company announced that US\$1 billion had been pledged to projects in less than five years of operation, with US\$215.75 million going to game projects specifically (Corriea 2014). This success demonstrates the value of a crowdfunding business model, and Participant E's reflection on their successful Kickstarter

campaign places an emphasis on not only the resultant economic freedom, but also the way in which a closer relationship between producer and consumer is facilitated:

[With my backers] I actually had people I was responsible to, whereas before it was just me, messing around in my bedroom, now I had . . . to keep [backers] updated on what I was up to, and tell them why the game kept slipping by six months in the end. But what was really good was it was gamers that had basically funded me and not businessmen and not people who were looking for a return on an investment – they were very understanding. (6 December 2013)

While Anthony Smith (2015) argues that during the campaign phase crowdfunding's more direct relationship between producer and consumer can be interpreted in both positive terms (e.g. a greater understanding of consumer desires) and negative terms (e.g. a pragmatic attempt to attract more backers), in the post-campaign phase a sense of community is more readily perpetuated through backers' persistent influence – both direct and indirect – on the game development process. Again, while Smith maintains caution in celebrating the communal dynamic as decidedly un-cynical (2015, 204), the openness encouraged by a transparent communicative environment can lead to a greater understanding of game development processes and the choices which may lead to a game launched at a premium price point. For example, after a successful Kickstarter campaign for *Fist of Awesome*, developer Nicoll Hunt made his distribution process transparent via a public blog post, noting in detail the financial implications of launching a premium-priced game on mobile platforms in opposition to the current propensity for F2P titles. Much like Participant B's belief that a duty of care to the player and one's peers is in opposition to freemium's current position as the dominant F2P model, Hunt suggests that his premium price point is designed to impart the worth of his creativity and let players feel as if they are making an informed purchasing decision (Hunt 2013).

Yet in contrast, Clark argues how much more appealing F2P is for developers in comparison to premium models, observing how upfront payments '[cast] a shadow on the behavior of the user' by asking them to pay before experiencing the game (2014, 241). Clark's argument is that like the premium models advocated by Participant B and Hunt, F2P can prioritize the interests of the player. This approach encapsulates Clark's belief of treating games as a service, where the developer is 'not just making a game for [themselves]' (2014, 35), but is instead committed to delivering the game as part of a set of added value services, such as community engagement and support (2014, 224). Once

again dispelling binary assumptions, Clark's testimony reveals how similar to premium models F2P can be – arguing that F2P is just as concerned with cultivating a favourable and accessible experience for its players. The distinction between premium and F2P developers is similar to Laureline Chiapello's categorization of 'designer-gamers' and 'designer-agents' in this volume and, like those designers, premium and F2P developers similarly 'have a common understanding of what makes a good game: something fun, entertaining'. Yet in the disparity between the accounts of those such as Hunt and Clark, it is clear that the aspects of F2P which seek to bring producers and consumers closer together are not necessarily recognized by 'The Establishment' and new dominant models will take hold. As Participant F notes: 'The players will just vote with their feet ultimately' (6 December 2013).

The interwoven and malleable nature of these business models reflects the fast-paced manner in which the games industry is changing. The way in which premium and freemium models can both correlate and contradict one another makes evident the confusion which may accompany a particular 'gold rush'. Participant G comments on the way in which regulation is currently up in the air, with some freemium models increasingly considered by the European Commission to be 'potentially a complete breach of consumer protection laws. So the EU at the moment is discussing the fact that a lot of this free to play stuff and particularly microtransactions within fully priced games is an issue they're becoming concerned about' (6 December 2013). Similarly in 2014 the UK Office of Fair Trading released a set of guiding principles for the development of games which included microtransactions. As a result, issues of ethics are becoming part of discourses of creativity in the industry and the 'gold rush' is beginning to be shaped by policy intervention.

Yet although this policy will attempt to shape development practices from a legal standpoint, what is considered 'appropriate' for business models will still appear to be shaped from those within the industry. Ultimately, there is no one correct answer – a binary black and white opinion on ethical business practice appears misguided. However, the fact that such debates exist signals the way in which the development of business models can change industrial attitudes. There is no universal embrace or condemnation and conversations between stakeholders continue, in order for the further growth and improvement of the sector as a whole. What this chapter demonstrates is that it is perhaps not appropriate to attempt to detail a best practice guide for the contemporary games sector, for as Participant B notes: 'it's not a science' (6 December 2013). For all stakeholders – pre- and post-2007 members of 'The Establishment' – conversation, debate and communication should be prioritized, and such dialogue can be fruitful. Despite any changes that may occur with business models, or attitudes towards the tension between

business and art, the future of a thriving game sector is dependent on communication between stakeholders, regardless of individual perspectives on ethics or appropriateness.

Notes

- 1 By February 2015 over 1.5 million apps were available to download from Apple's App Store (Anon 2015).
- 2 The event was hosted at the University of Edinburgh as part of the 'Copyright and Games' project, one of forty under the auspices of CREATE – the Research Councils UK-funded centre for copyright and new business models in the creative economy (AHRC Grant Number AH/K000179/1).
- 3 See, for instance, the contemporary trend towards retailer-specific pre-order bonuses (Dutton 2011).
- 4 White and Searle detail the sale of pre-owned games in retail outlets, noting that 'Pre-owned games are a physical product that has been bought new . . . that has a trade-in value most commonly redeemed against another title. Traded games are then re-sold, sometimes multiple times, by the retailer at a reduced price. . . . As a result, computer games developers creating physical product for the retail market have access to a continuously shrinking share of consumer spend in the market' (2013, 39–40).
- 5 See, for instance, the way in which Valve Corporation have designed their digital distribution platform Steam to 'allow digital content creators to have a relationship with a worldwide audience' (Tufnell 2011).
- 6 For example, 61,290 backers donated US\$2.9million for *Wasteland 2*, exceeding the target of US\$900k. Similarly, 87,142 backers donated US\$3.3million for *Double Fine Adventure*, exceeding the target of US\$400k.

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