



Lessons learned from MMO surveys





About this document...

- *GameStatistics* is a small French company specialized in **online surveys on videogames topics**.

- This document is a **summary of lessons learned** from all *GameStatistics* surveys made on **MMO games and their players**.
 - From 2012 to 2014, nine surveys have been conducted on various MMOs, from *Star Wars : The Old Republic* up to *The Elder Scrolls Online*.
 - All these surveys were done two or three months after the game public release, using exactly the same methodology.
 - All data included in this document comes from these surveys results.
 - With “MMO” (*Massively Multiplayer Online games*), we include MMORPG and MMOFPS, but not MOBA or traditional online shooter : games such as *League of Legends*, *World of Tanks* or *Counter Strike* are out of the scope.

- For any question, feel free to contact us : contact@gamestatistics.fr



Methodology 1/2

- Data comes from *GameStatistics* surveys done on the following **2012 – 2014 MMO** games :
 - ❖ ***Star Wars : The Old Republic*** - SWTOR (survey made in February 2012)
 - ❖ ***Wakfu*** (October 2012)
 - ❖ ***Guild Wars 2*** (November 2012)
 - ❖ ***PlanetSide 2*** (February 2013)
 - ❖ ***Defiance*** (June 2013)
 - ❖ ***Neverwinter Nights*** (July 2013)
 - ❖ ***Final Fantasy XIV*** (December 2013)
 - ❖ ***The Elder scrolls Online*** (July 2014)
 - ❖ ***Wildstar*** (September 2014)

- Most of major MMO released between 2012 and 2014 are included in our analysis, with the exceptions of *Tera* , *The secret World* and *ArcheAge*.

- All these surveys were done using exactly the **same methodology**, making the results comparables from a survey to another :
 - ✓ Same timing (2 - 3 months after the game official release)
 - ✓ Same data collection (online survey in free access during one week)
 - ✓ Same questionnaire (key questions with the same wording for each game)



Methodology 2/2

- All these surveys were done using samples of **French players**
 - Our experience on French players allowed us to collect very stables samples ...
 - ... and our limited experience in international surveys let us think that the trends observed here are probably quite similar for European and North-American players, even if it is only an hypothesis.

GameStatistics made an international survey for Guild wars 2 one year after its launch, with a public report available

- Key questions asked for each MMO players sample:
 - **Overall Satisfaction** of players about the game (how much do they like it)
 - **Loyalty** of players (how long do they intent to play the game)
 - **Specific satisfaction** about **general criteria** (visuals, sounds and music, originality, etc...)
 - **Specific satisfaction** about **MMO criteria** (immersion, balanced classes, lags, etc...)
 - **Type of game bought** (collector or standard edition, physical or digital)
 - **Demographics** (age and gender of respondents)
 - Opinions regarding the survey itself

Note : survey questions very specifics to a game are not included in this document, which focuses on general lessons learned

- All these surveys data allowed us to explore a dataset of more than **5000 respondents opinions** about MMOs.

Lesson 1 :

“Guild Wars 2, PlanetSide 2 and Final Fantasy XIV are the three MMO with the best reception at launch of past three years”



Satisfaction / lesson 1

- What is a “good reception” for a game, and how can we measure it ?
 - **Critics** : *metascore* from website *metacritics* is probably the most appropriate metric
 - **Players satisfaction at launch** : our surveys gave us an average players satisfaction score for all MMOs, ~3 months after their launch

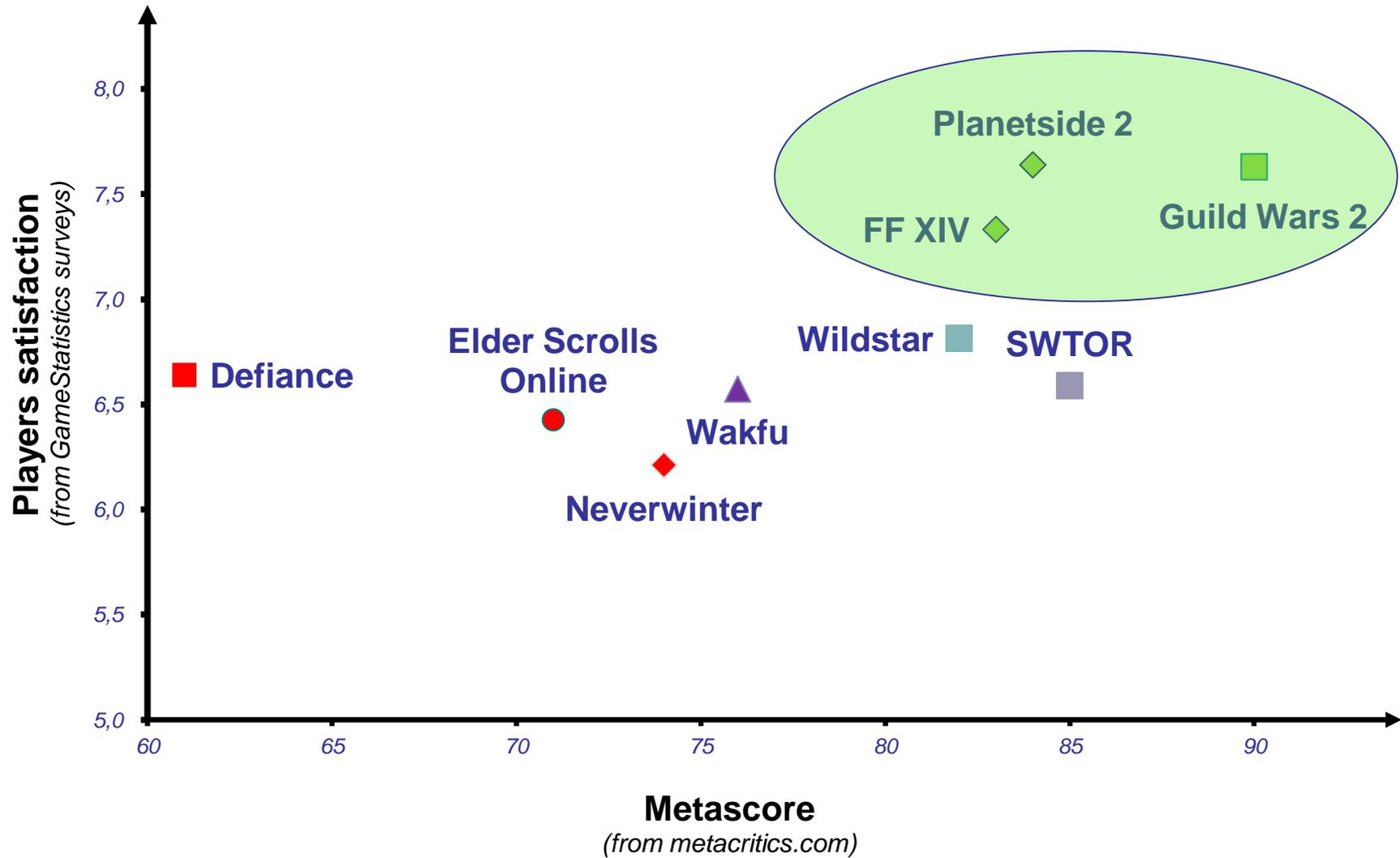
- Critics and players satisfaction from our surveys are **highly correlated**
 - An interesting exception is *Star Wars : The Old Republic* : very good critics, but weak reception by players
 - On the other side, *Defiance* had poor critics, but was a bit less severely judged by its players

- Regarding the results : (*see next page*)
 - **Guild Wars 2** had overall the best reception (*7.6/10 from players, 90 /100 from critics*)
 - **PlanetSide 2** (*7.6/10 from players, 84/100 from critics*) and **Final Fantasy XIV** (*7.3/10 from players, 83/100 from critics*) had very good receptions too
 - On the opposite side, *Defiance*, *Neverwinter* but also *The Elder Scrolls Online* had the worst reception

Reminder : World of Warcraft is not included as only MMO released in 2012 – 2014 were targeted by our surveys



Satisfaction / lesson 1



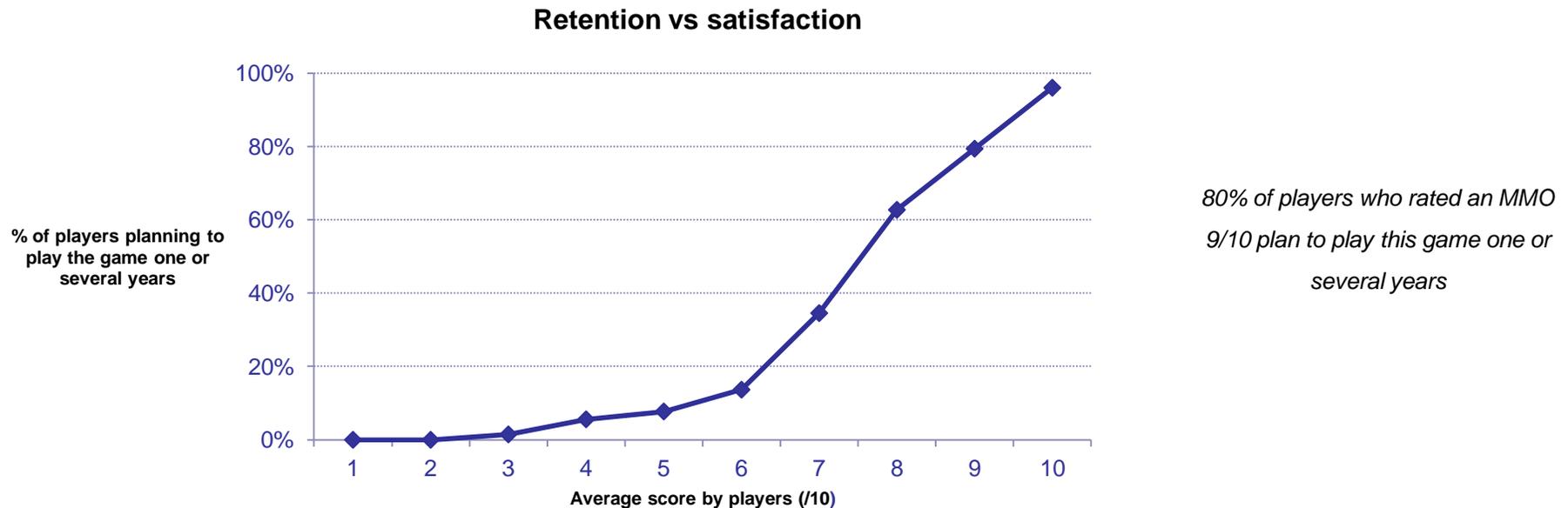
Lesson 2 :

“Only very satisfied players will continue playing a MMO in the long run”



Retention / lesson 2

- Such “lesson” is obvious, but it is still interesting to remember it : at the end, a **high players satisfaction level is the key if you want them to play a MMO in the long run.**
- Respondents of the various surveys are always telling the same story : if **they are not very fond of the game they’ve tried, they almost never plan to play it more than a few months.** Only games they liked a lot will be played more than several years.



- Whereas a player rates a MMO as bad (less than 3/10) or just average (between 4 /10 and 6 / 10) doesn't really matter : he will almost never stay. **Only very satisfied players plan to stay one or several years in a MMO.**

Lesson 3 :

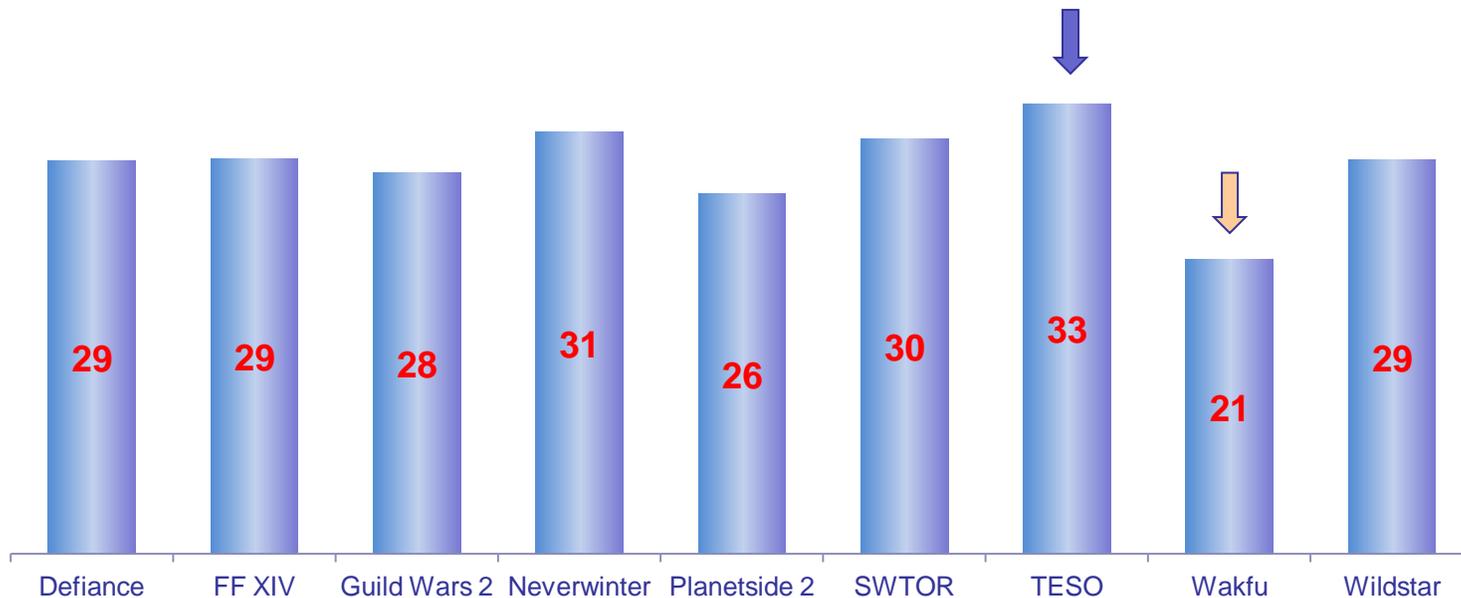
“The average MMO gamer is 28 years old”



Age / lesson 3

- The average age of respondents is also quite stable from a survey to another : **the average MMO gamer is around 28 years old.**

Average age of respondents



- *Wakfu* has an average age much lower than other MMOs, which is not very surprising regarding its specific design.
- Average age is also a bit higher for *The Elder Scrolls Online* : maybe the traditional audience for solo RPG games is a bit older ?

Lesson 4 :

“MMO gamers like answering surveys”

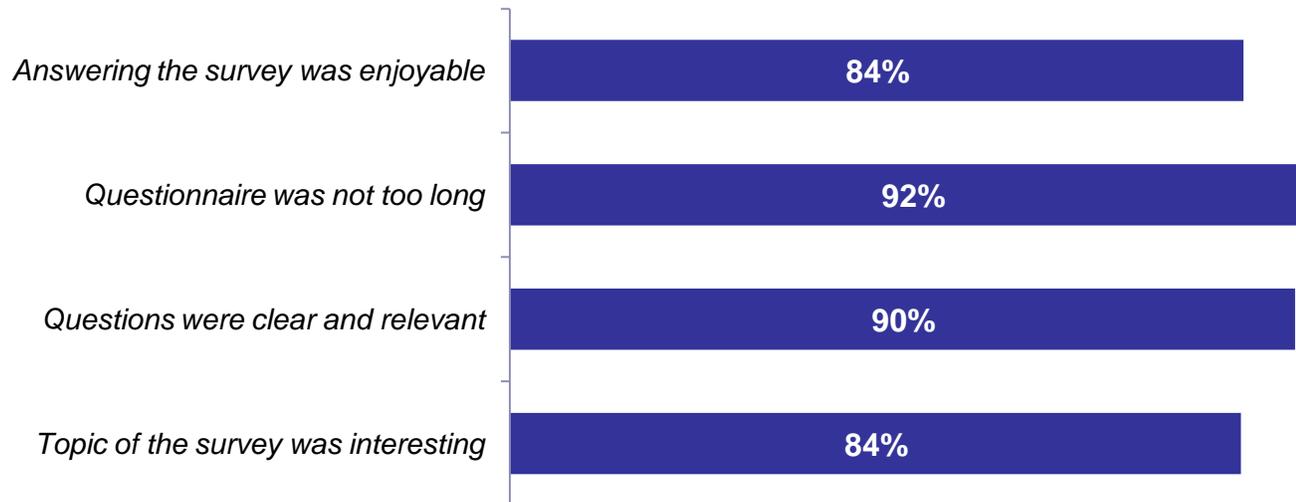
(at least GameStatistics surveys !)



Players and surveys / lesson 4

- Internet is full of places where gamers share their opinions about videogames : then it is not surprising to see that **gamers like answering surveys**, as long as the survey is clear, enjoyable, interesting and not too long. All *GameStatistics* surveys were positively judged by their respondents.

Average surveys appreciations



- **A professional survey is a powerful tool to understand a game audience** : it is especially true for videogame industry, as gamers always love to tell their opinions. Reading forums or blogs for players opinions is useful, but only professional surveys can provide a representative and numerical overview of these opinions. **Having a clear and numerical view of players opinions is a great help to take good decisions.**

Lesson 5 :

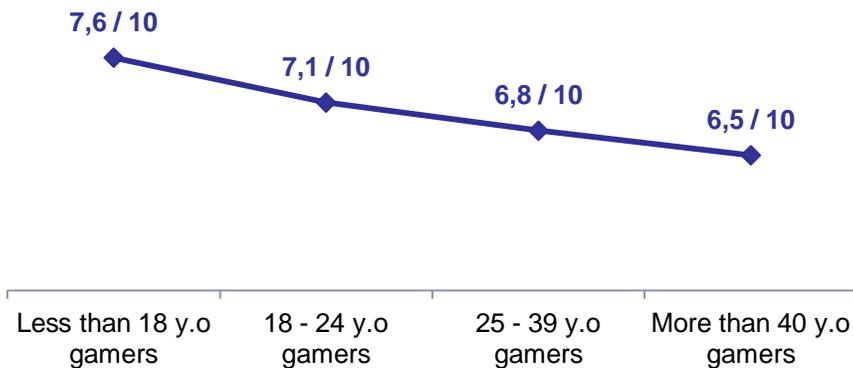
“Older MMO gamers are less enthusiasts, but more profitable”



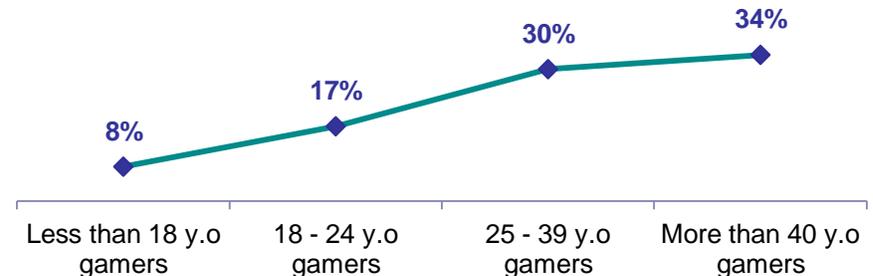
Older players / lesson 5

- If the average age of MMO gamers is very close from a survey to another, we always **note important differences between young MMO gamers and older ones.**

Average ratings for MMO



proportions of collector buyers



- **Older MMO gamers are always less enthusiasts**, with lower ratings on games.
- However, **older gamers buy collector editions of MMO much more frequently** than younger ones.

Lesson 6 :

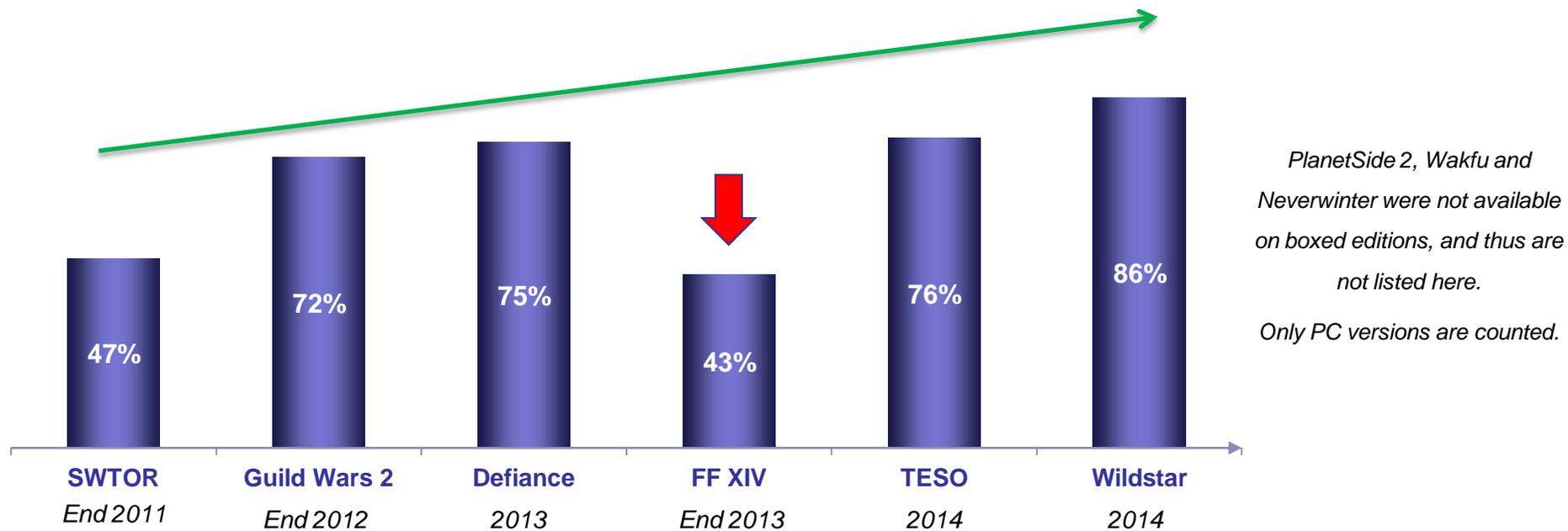
“Digital purchase is still growing”



Digital vs physical / lesson 6

- From the first survey in 2012 to the last one end 2014, we have noticed a **clear increasing trend of MMO digital purchases**.

Proportions of digital purchases



- Final fantasy IX appears as an exception (less than 50% digital purchase, even if we exclude console players), probably due to the very low cost of its physical collector edition.
- Again, we notice great differences on this topic between older and younger players : young players are still numerous to buy physical editions.

Lesson 7 :

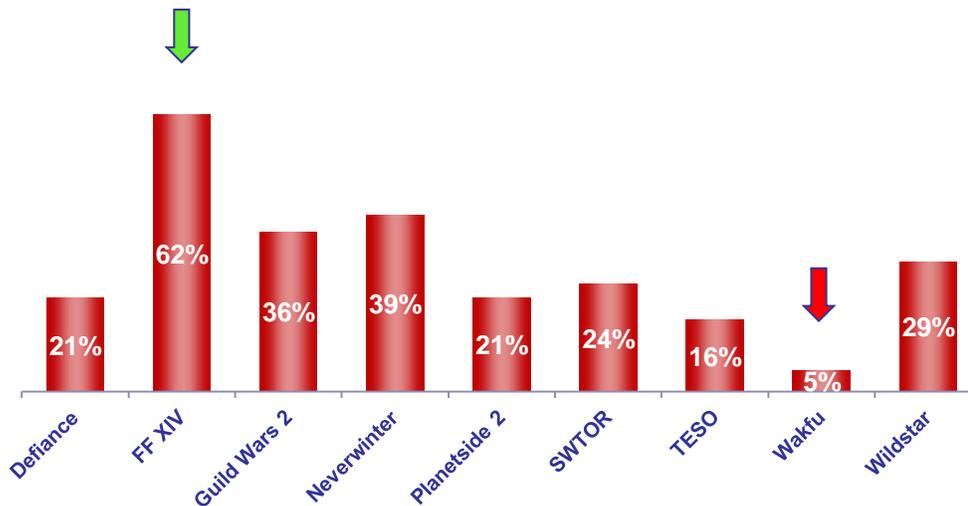
“Bugs, unbalanced classes and bots : the traditional MMO weaknesses”



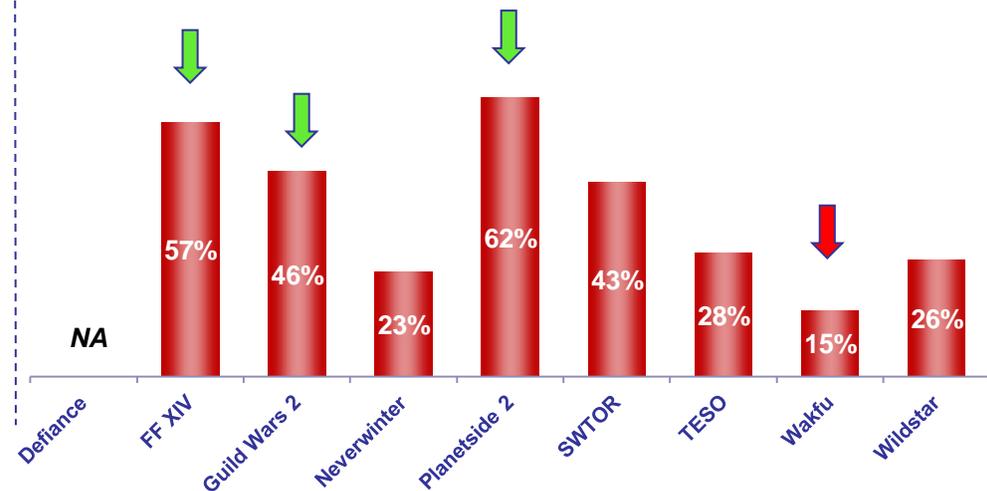
Traditional MMO weaknesses / lesson 7

- In each survey, players were asked about their opinions on many specific points of the MMO. Some of these points are almost always seen as weaknesses :
 - **Bugs** : with Final fantasy XIV as a notable exception, almost all MMO had more than 50% of respondents thinking the game has too many bugs.
 - **Balanced classes** : even if it varies a bit more between games, unbalanced classes are a common MMO weakness, according to their players. Final Fantasy, Planet Side 2 and Guild Wars 2 managed to be quite positively seen on this topic.
 - **Bots / cheating** : another recurrent MMO concern, with only 20 / 30 % of respondents thinking the game does not have any problem with bots or cheating. This low score does not vary a lot between games.

Number of players agree with
« **this game is bug free** »



Number of players agree with
« **this game has balanced classes** »



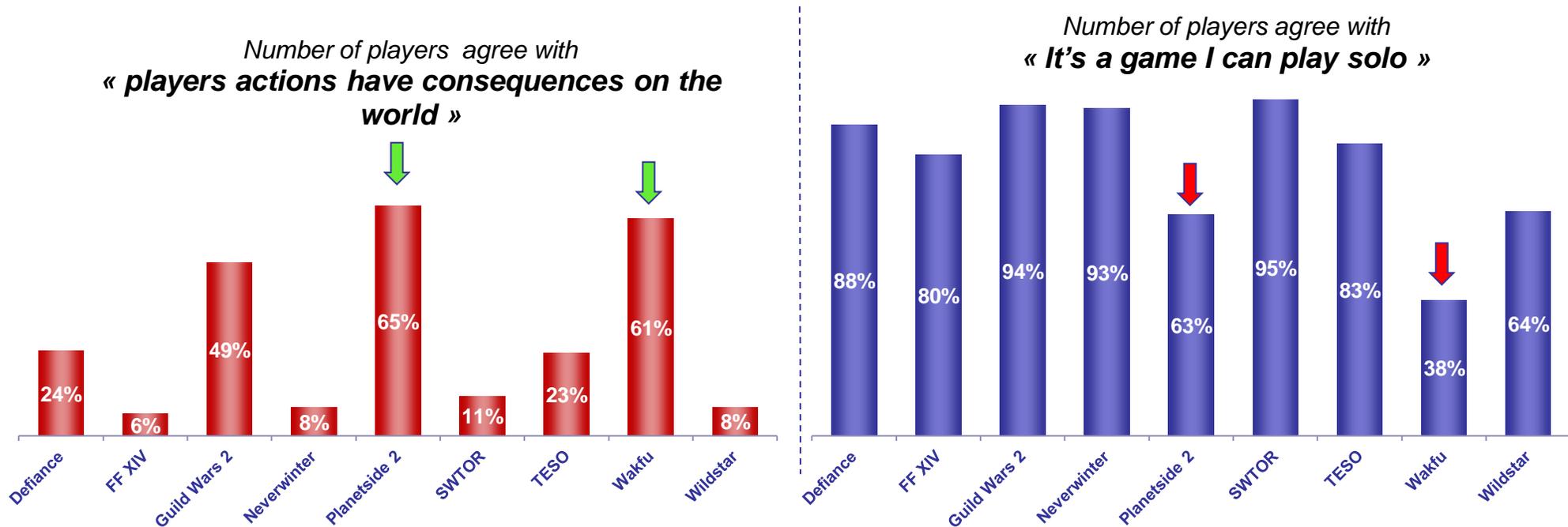
Lesson 8 :

*“MMOs are **M**ultiplayer **O**nline games for sure...
.. but not really **M**assively”*



'Massively' in MMO / lesson 8

- “Sandbox” versus “Theme-Park” is a traditional debate for MMO players and designers. If we look at the games included in our surveys, we clearly see that the “Theme park” approach is still the rule, according to their main players: most of them say that **in those games, players actions do not have any real consequences on the world**, and **they are games which can be played without any interaction with other players**.
- On these topics, *Wakfu* and *Planetside 2* have very different scores from other games.



Lesson 9 :

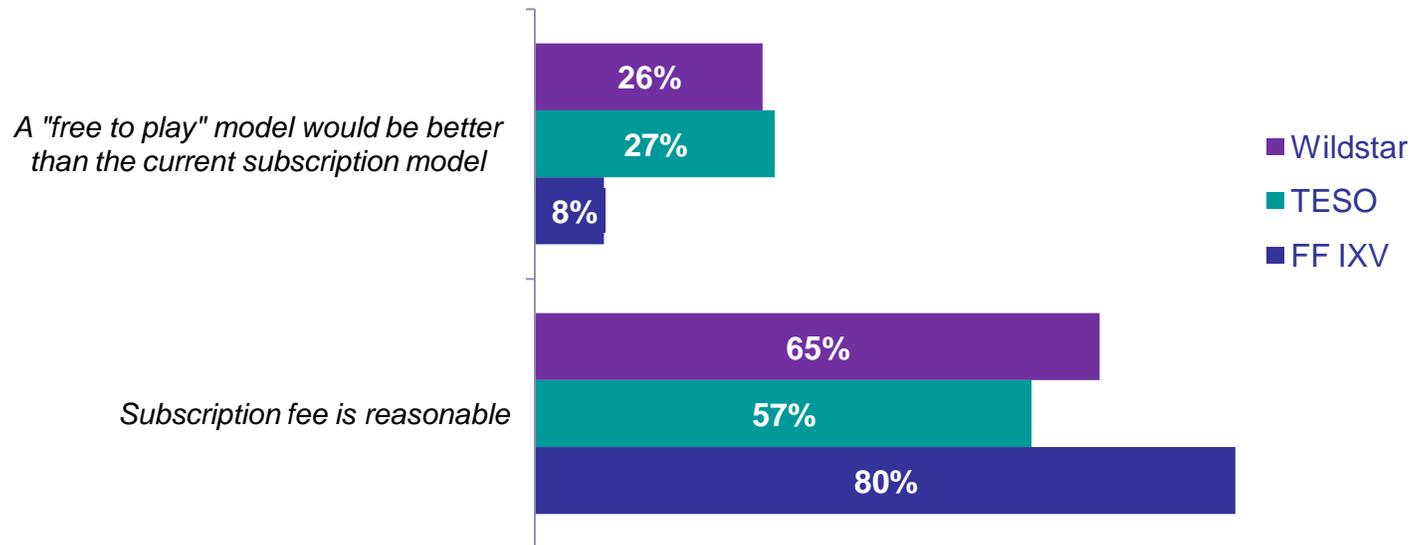
“Subscription model for MMO may not be totally dead”



Subscription model / lesson 9

- Among the various tested games, three of them have a subscription model : *Final Fantasy XIV*, *The Elder scrolls Online* and *Wildstar*. Players of those games were asked about their **opinions on their subscription model**.

Players opinions on subscription model



- Sure, samples of these surveys is mainly about “core players”, who have a strong connection with their game. However, if we look at these very low proportions of players who would have preferred a “free to play” model, we can say there is still an audience for subscription, at least for the MMORPG : **Final Fantasy XIV is probably the best example, with a high satisfaction level about the game AND its subscription model.**

SUMMARY



Summary

- Lesson 1** ➤ *Guild Wars 2, PlanetSide 2 and Final Fantasy XIV are the three MMO with the best reception at launch of past three years*
- Lesson 2** ➤ *Only very satisfied players will continue playing a MMO in the long run*
- Lesson 3** ➤ *The average MMO gamer is 28 years old*
- Lesson 4** ➤ *MMO gamers like answering surveys*
- Lesson 5** ➤ *Older MMO gamers are less enthusiasts, but more profitable*
- Lesson 6** ➤ *Digital purchase is still growing*
- Lesson 7** ➤ *Bugs, unbalanced classes and bots : the traditional MMO weaknesses*
- Lesson 8** ➤ *MMOs are Multiplayer Online games for sure... but not really Massively*
- Lesson 9** ➤ *Subscription model for MMO may not be totally dead*



Feel free to contact us

- **Any comment or remark about this document ?**
- **Interested to see the raw results file used for this data?**
- **Any need of survey for your own game or community ?**



contact@gamestatistics.fr