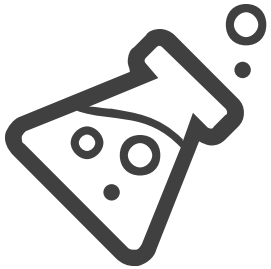


# UNLOCKING GAMER MOTIVATIONS

## INSIGHTS FROM 1.75+ MILLION GAMERS OVER A DECADE

QUANTIC FOUNDRY

# QUANTIC FOUNDRY'S GAMER MOTIVATION MODEL BASED ON DATA FROM OVER 1.75 MILLION VIDEO GAMERS REVEALED 6 KEY PAIRS OF MOTIVATIONS

| Action<br>"Boom!" | Social<br>"Let's Play Together" | Mastery<br>"Let Me Think" | Achievement<br>"I Want More" | Immersion<br>"Once Upon a Time" | Creativity<br>"What If?" |
|---|---|---|---|---|---|
| Destruction<br>Guns. Explosives. Chaos. Mayhem. | Competition<br>Duels. Matches. High on Ranking. | Challenge<br>Practice. High Difficulty. Challenges. | Completion<br>Get All Collectibles. Complete All Missions. | Fantasy<br>Being someone else, somewhere else. | Design<br>Expression. Customization. |
| Excitement<br>Fast-Paced. Action. Surprises. Thrills. | Community<br>Being on Team. Chatting. Interacting. | Strategy<br>Thinking Ahead. Making Decisions. | Power<br>Powerful Character. Powerful Equipment. | Story<br>Elaborate plots. Interesting characters. | Discovery<br>Explore. Tinker. Experiment. |

# IF THE BIG 5 IS SO BIG ...
# WHY NOT JUST USE THAT?

| Openness to Experience | Conscientiousness | Extraversion | Agreeableness | Neuroticism |
|---|---|---|---|---|
| Adventurous<br>Imaginative | Disciplined<br>Organized | Social<br>Energetic | Sympathetic<br>Compassionate | Anxious<br>Nervous |
| ⇕ | ⇕ | ⇕ | ⇕ | ⇕ |
| Down-To-Earth<br>Pragmatic | Flexible<br>Spontaneous | Reserved<br>Low-Key | Guarded<br>Objective | Calm<br>Relaxed |

# REYNARD

## SUMMARY

Starting from the premise that Real World (RW) characteristics are reflected in VW behavior, the IARPA Reynard program sought to identify behavioral indicators in VWs and MMOGs that are related to the RW characteristics of the users. Performers in the Reynard program were expected to produce one or more VW behavioral indicators that serve to identify RW attributes of individuals or groups. Attributes of interest included the following: gender, approximate age, economic status, educational level, occupation, ideology or "world view," degree of influence, "digital native" vs "digital immigrant," approximate physical geographic location, native language, and culture.

## PROPOSERS' DAY BRIEFINGS

- Reynard Proposers' Day Overview Briefing
- 21st Century Technologies
- comScore
- Cycorp
- Georgia Tech
- George Mason University
- Harris Corporation
- Netgent
- Palo Alto Research Center
- SAIC
- Social Science Automation, Inc.
- Stanford University
- University of North Carolina
- University of Southern California

## CONTACT INFORMATION

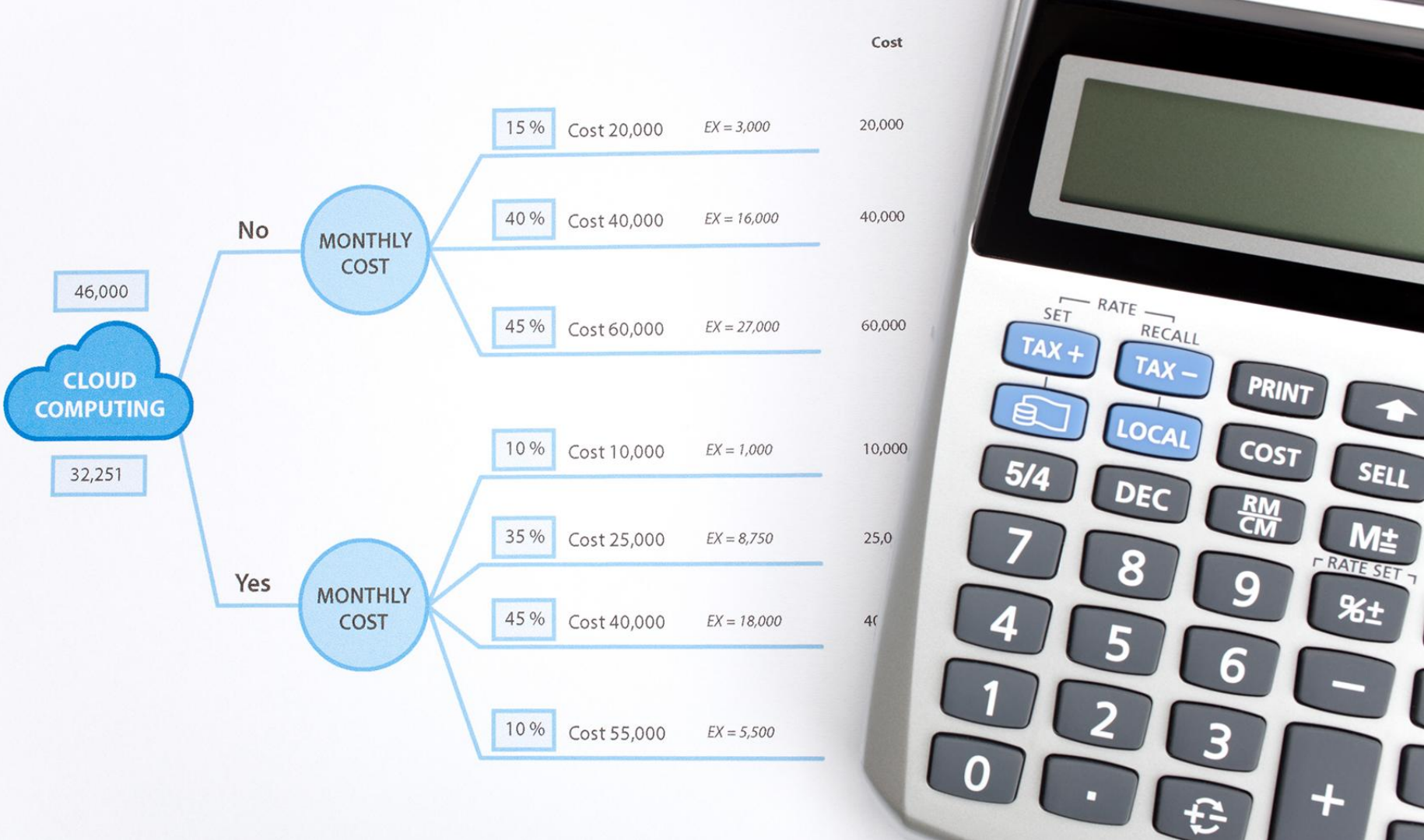
PROGRAM MANAGER
Main Office
dni-iarpa-info@iarpa.gov
301-243-1995

## RELATED PROGRAM(S)

Sirius

## BROAD AGENCY ANNOUNCEMENT (BAA)

LINK(S) TO BAA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CLOUD COMPUTING
46,000
32,251
No
MONTHLY COST
15 %
Cost 20,000
EX = 3,000
20,000
40 %
Cost 40,000
EX = 16,000
40,000
45 %
Cost 60,000
EX = 27,000
60,000
Yes
MONTHLY COST
10 %
Cost 10,000
EX = 1,000
10,000
35 %
Cost 25,000
EX = 8,750
25,0
45 %
Cost 40,000
EX = 18,000
10 %
Cost 55,000
EX = 5,500
RATE
SET
RECALL
TAX +
TAX –
LOCAL
PRINT
COST
SELL
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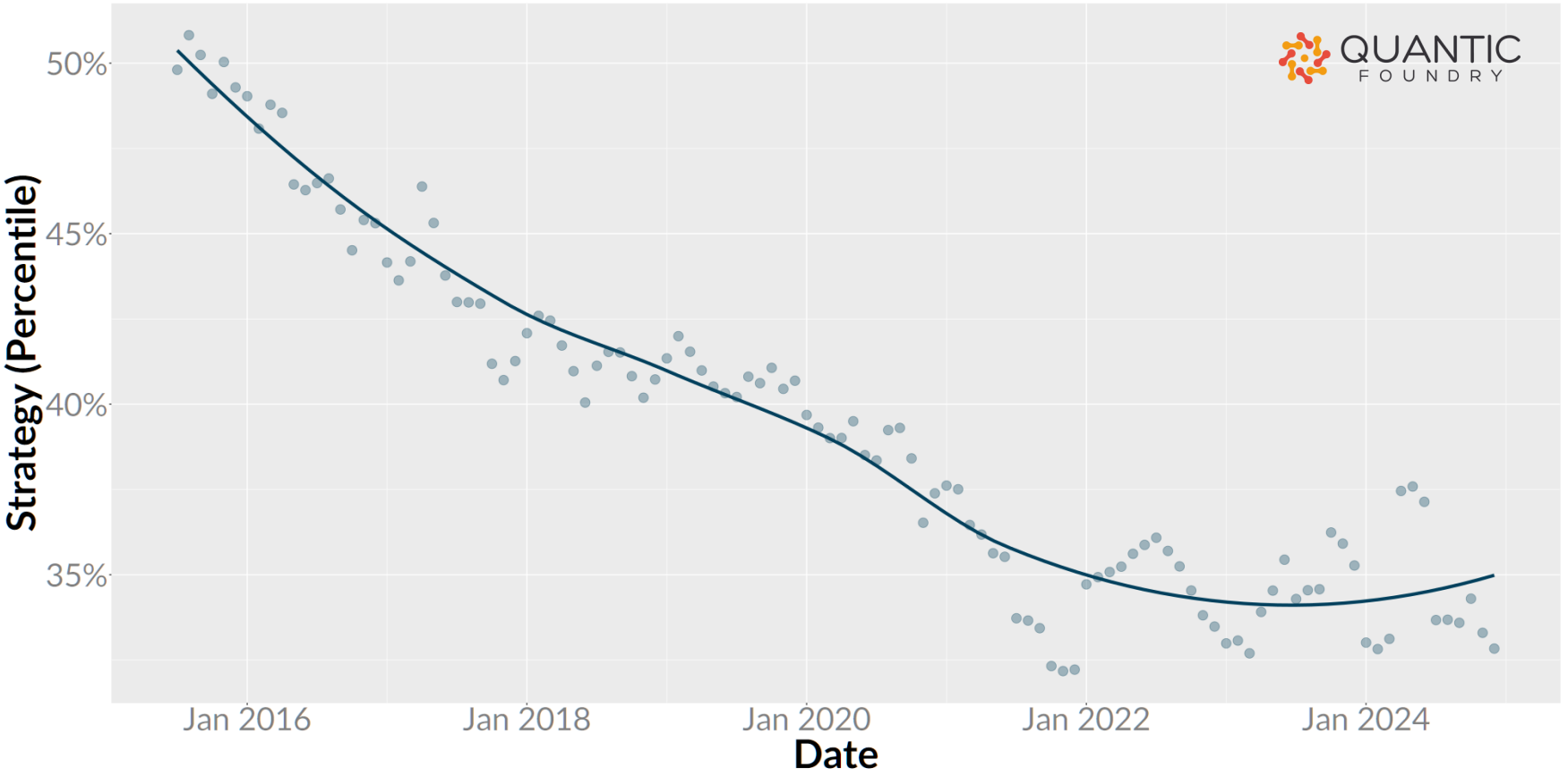
# THE APPEAL OF STRATEGY HAS DECLINED SUBSTANTIALLY OVER THE PAST 10 YEARS



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1,4
2,0
2,0
2,9
0,8
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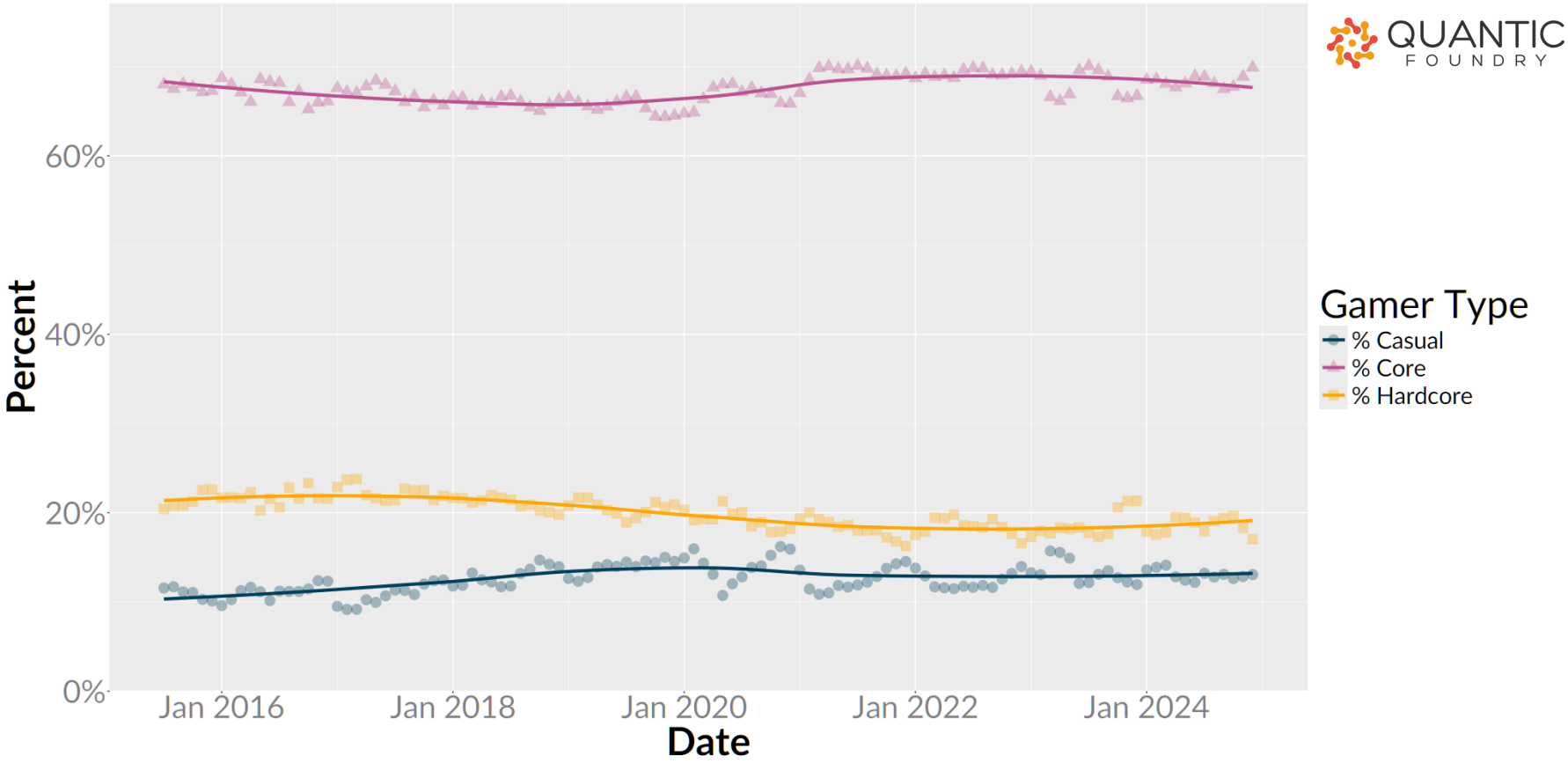
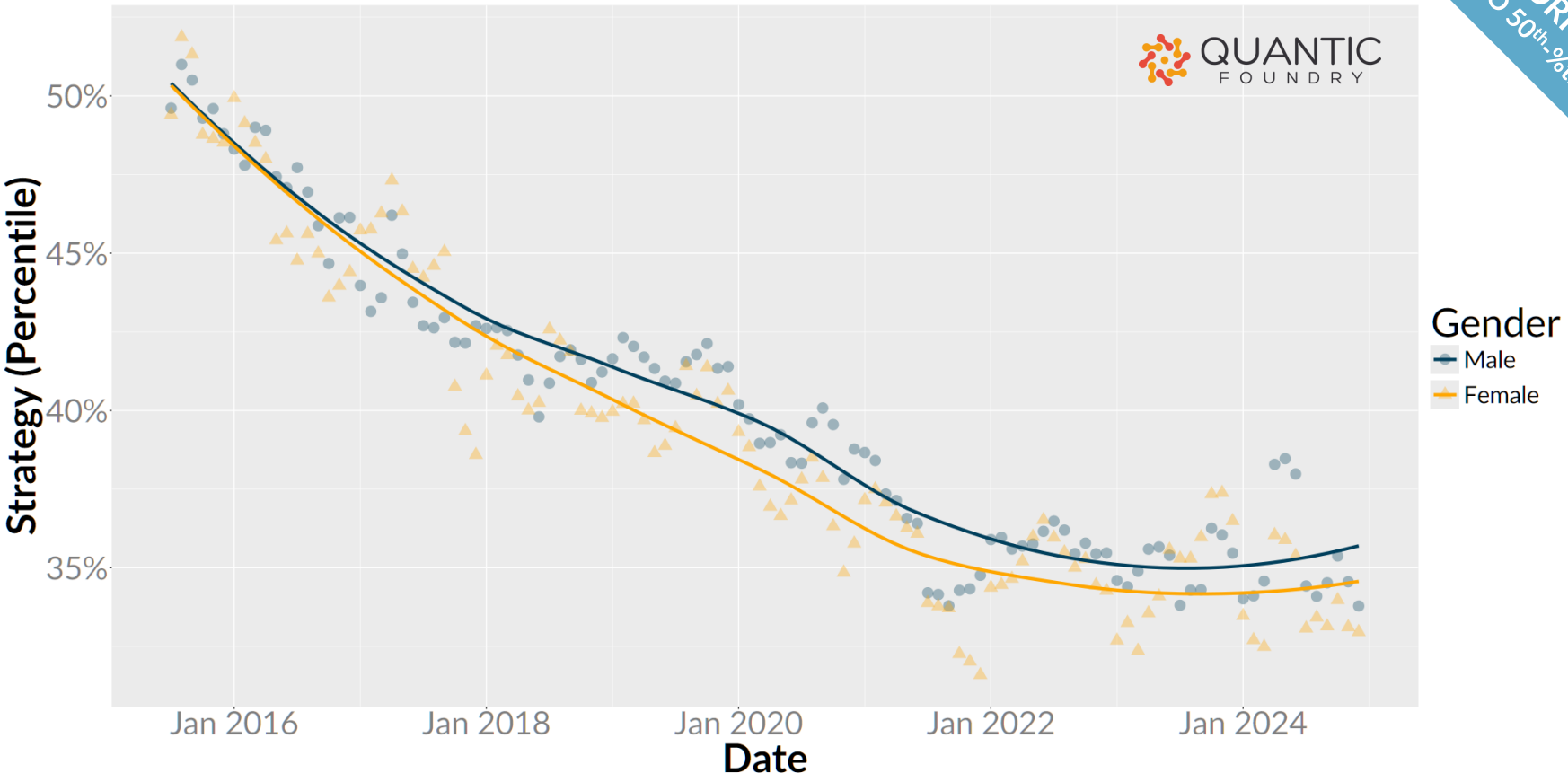
– 0,1
98
1999
2000
2001
2002

# THE PROPORTION OF CASUAL/CORE/HARDCORE GAMERS IN OUR SAMPLE HAVE REMAINED RELATIVELY CONSTANT



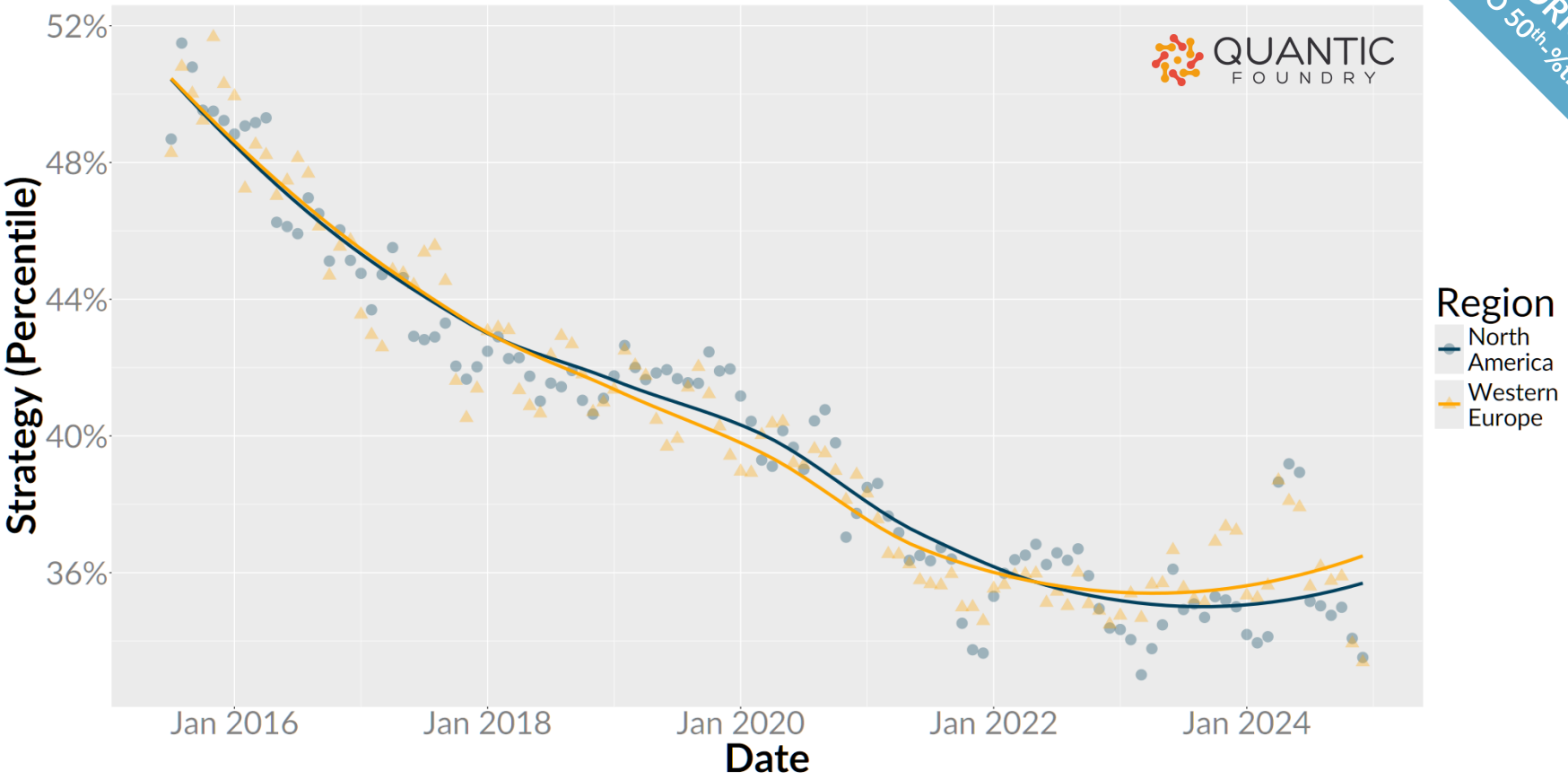
# THE DECLINE IS IDENTICAL
# FOR BOTH MEN AND WOMEN

DATA SERIES ORIGINS
ANCHORED TO 50th %tile



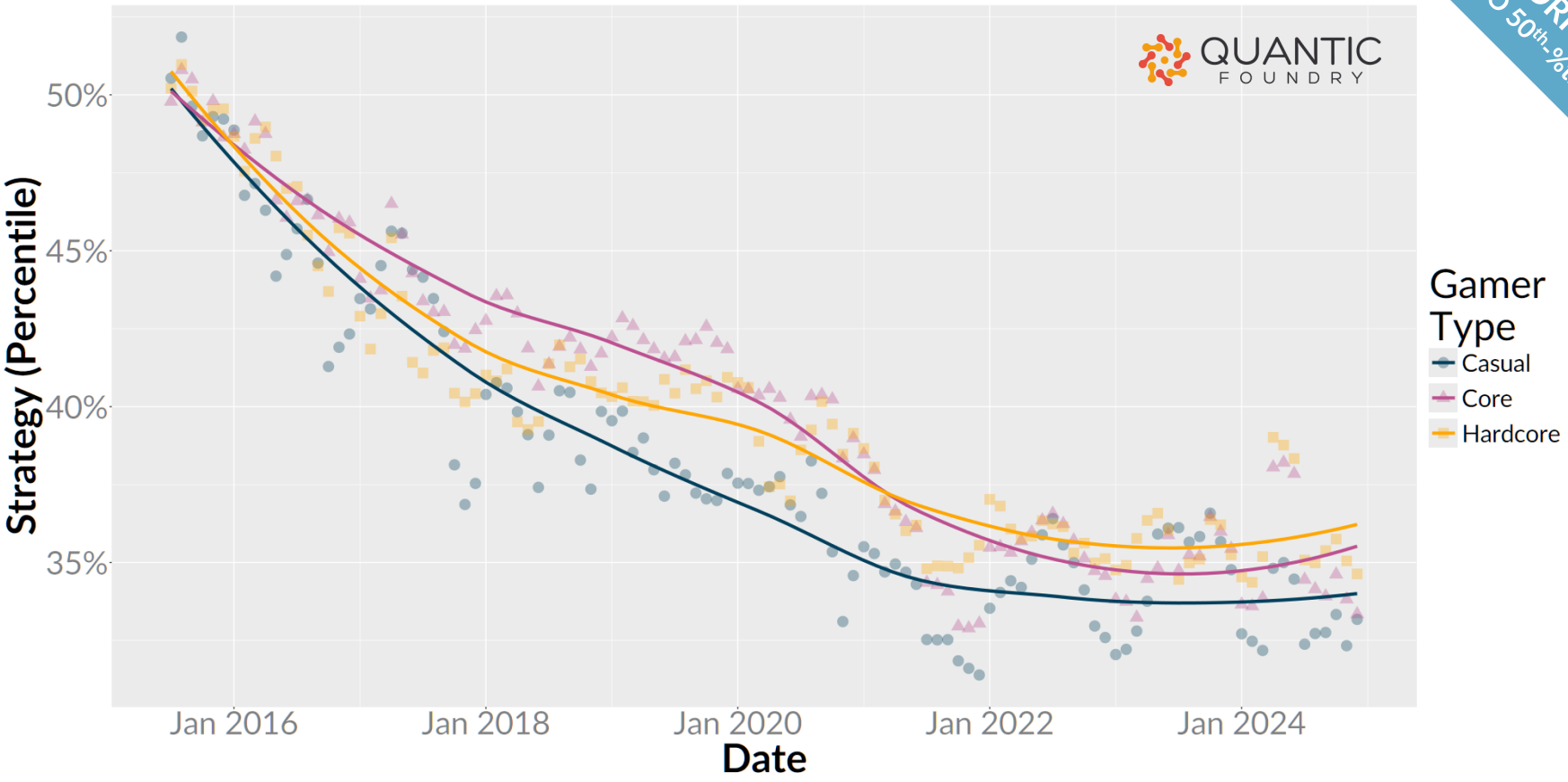
# THE DECLINE IS IDENTICAL
## FOR NORTH AMERICA & WESTERN EU

DATA SERIES ORIGINS
ANCHORED TO 50th %tile



# BUT WITHIN THESE GAMER TYPES,
# CASUAL GAMERS HAVE DECLINED A BIT MORE.

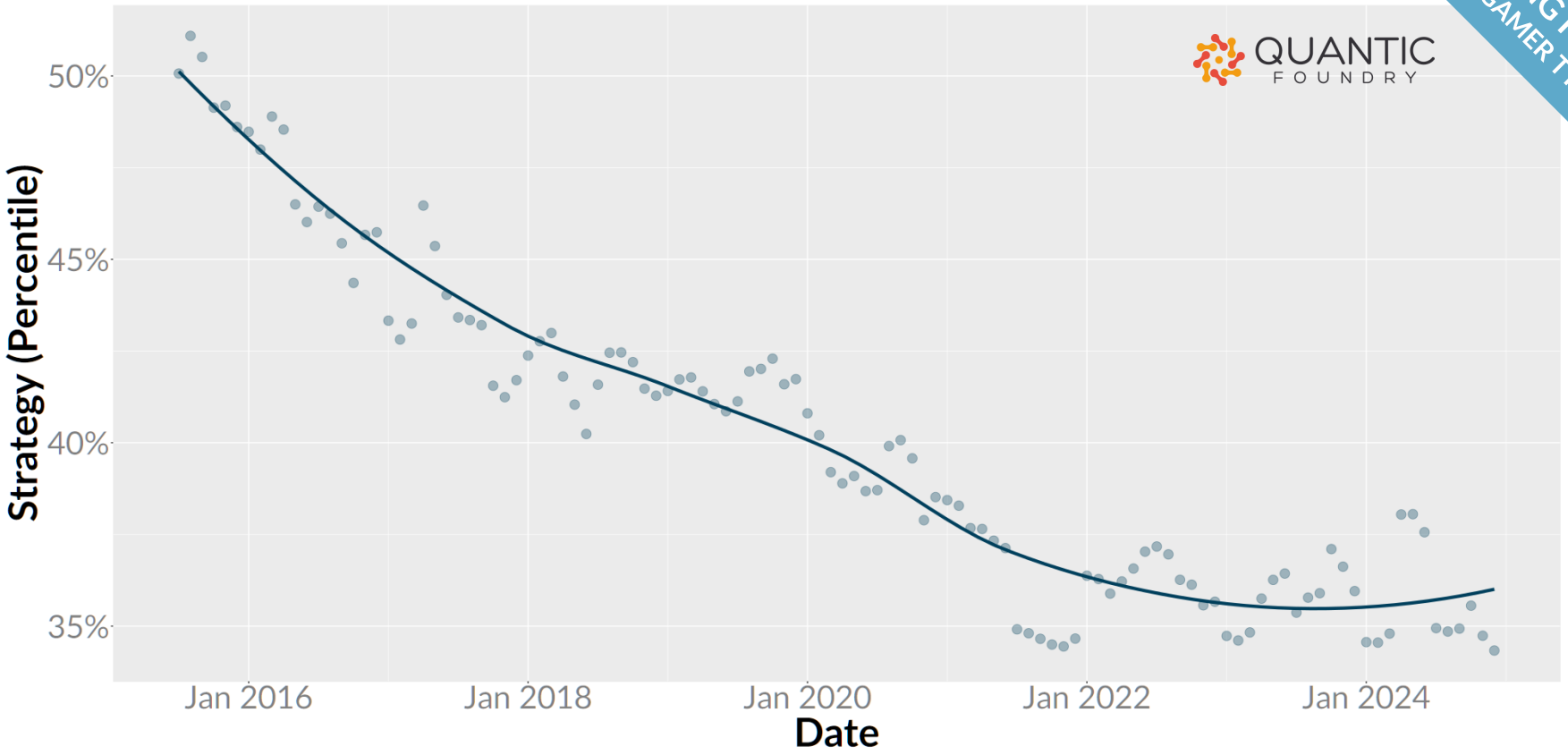
DATA SERIES ORIGINS ANCHORED TO 50th %tile



# WE CAN CONTROL FOR THESE VARIABLES

## AND THE STRATEGY CHART WOULD LOOK THE SAME

CONTROLLING FOR GENDER, AGE, GAMER TYPE




*Data controlled for Gender, Age, and Casual/Core/Hardcore*

**wattur** • 10mo ago

With the ever-increasing psychological tricks of making games addicting profit generators, it makes sense.

Instant gratification, dopamine hits, skinner box mechanics, gambling loot boxes, FOMO, etc.

11K 1 Share ...

**[deleted]** • 10mo ago

Yeah it's actually insane how prevalent this is almost without realising it. I remember watching a behind the scenes documentary and thinking games I play are not like this and man was I wrong. Things I wouldn't have ever thought about were only there to trigger dopamine. Most the games I played were not good and I wasn't having that much fun but I was hooked on the instant gratification I would get within minutes of booting up the game. I realised super slow games with lots of reading could no longer hold my attention for long.

Once I stopped playing them and fully shook them off I realised I never enjoyed them, they are not good games but I was just hooked on the feeling they gave me. After a long break I found myself able to enjoy much slower paced games and text heavy games that require a lot of stategic thinking and the like.

2.6K Award Share ...

**Dmitri Williams**

Love the data, and it sure does raise interesting questions. My first instinct was to go where you went—shorter attention spans, and the world is generally going to hell. I suspect that's at least part of it, but I wonder if there are other explanations, partly because "the world is going to hell" feels a little too self-satisfying to me.

Is it possible that strategy games are becoming less common, and so survey takers would reflect that not so much as a change in motivation but as an artifact of recall? Like "what have I been doing lately? Oh, I've been watching a lot of comedies this week, so I must like funny things in general." It could be that strategy was a more common element of games when they were relatively more niche, and with the rise of mainstream gaming, we see more non-strategy content.

Of course, that might reflect actual demand, and so the survey would still be spot on. It's a hypothesis, anyway, that reminds me of "the media don't tell us what to think, but they do tell us what to think about."

42w **Like** Reply 2

**Nick Yee**

Related to your point, there's certainly the chicken-and-egg aspect of games in the market creating a normative framework of what "games are supposed to be" and how that might shape gamers' tastes over time. The more games emphasize graphics and the more gamers get used to that, then the less they expect to do strategic thinking in games. And then it gets harder and harder to tease out expectation from desire.

And also, the world is totally going to hell 🙂

42w **Like** Reply Edited 2

**Amanda Lira Brandão** • 2nd
Consumer & Market Research @ Behaviour Interactive | Market & ...
(edited) 9mo

Strategy tends to be a very ''core'' motivation, so I would guess this decline is most likely due to the growth/diversification of the gaming audience, especially very action and social-oriented players (often more “casual” among engaged players)

...more

Like · 17 | Reply · 3 Replies

See previous replies

**Johannes Katsarov, PhD** • 2nd
Ethicist, Educational Scientist and Serious Game Designer at Leuphan...
9mo

Amanda Lira Brandão that was my thought, as well. We would need longitudinal analyses that focus on individual changes to conclude that people are losing interest in strategic games overall. With the proportion of citizens who play digital games growing over the years, it's possible that new audiences have been attracted to (non-strategic) games ...more

Like | Reply

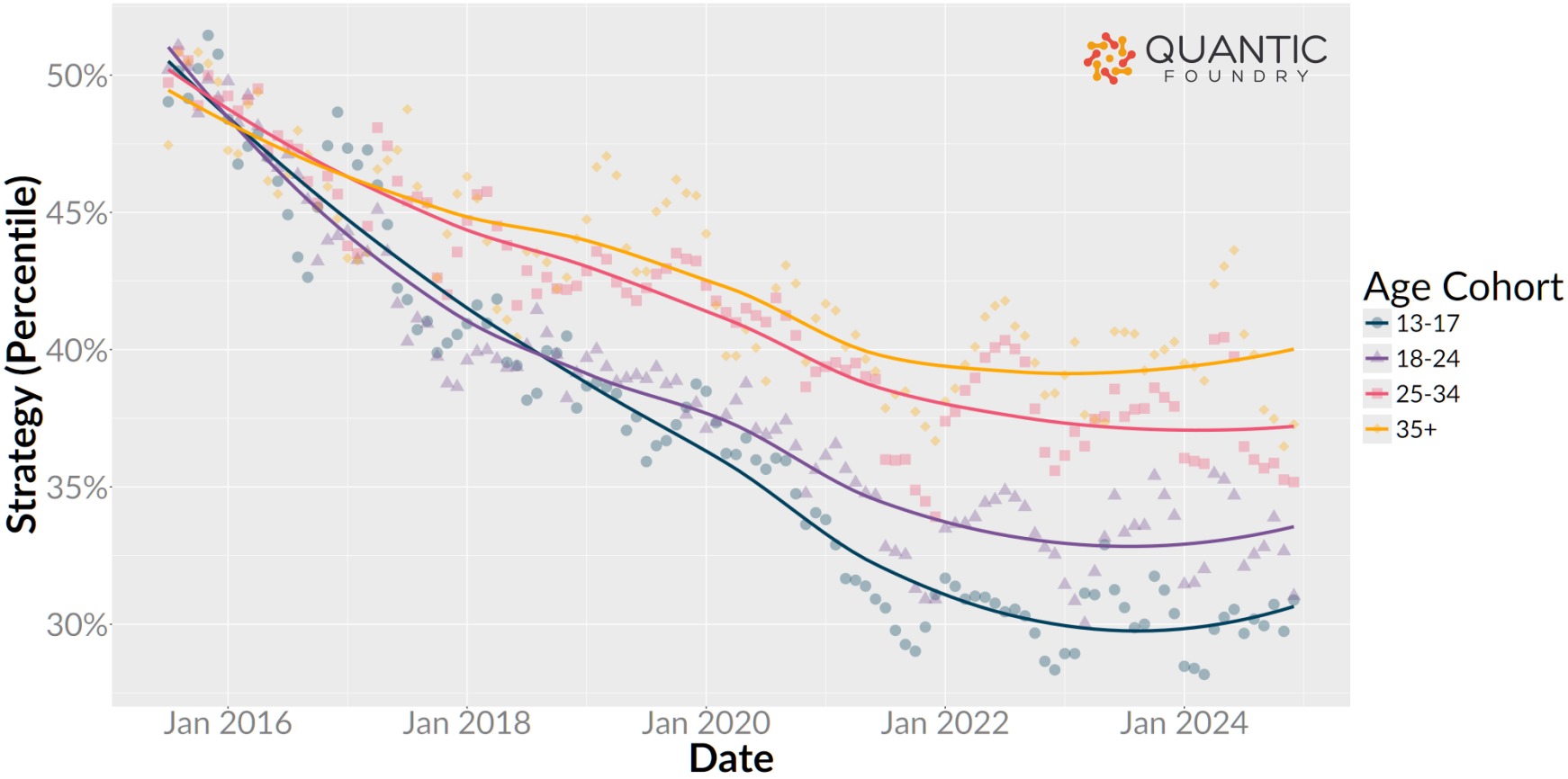
GAMES CHANGED

PEOPLE CHANGED

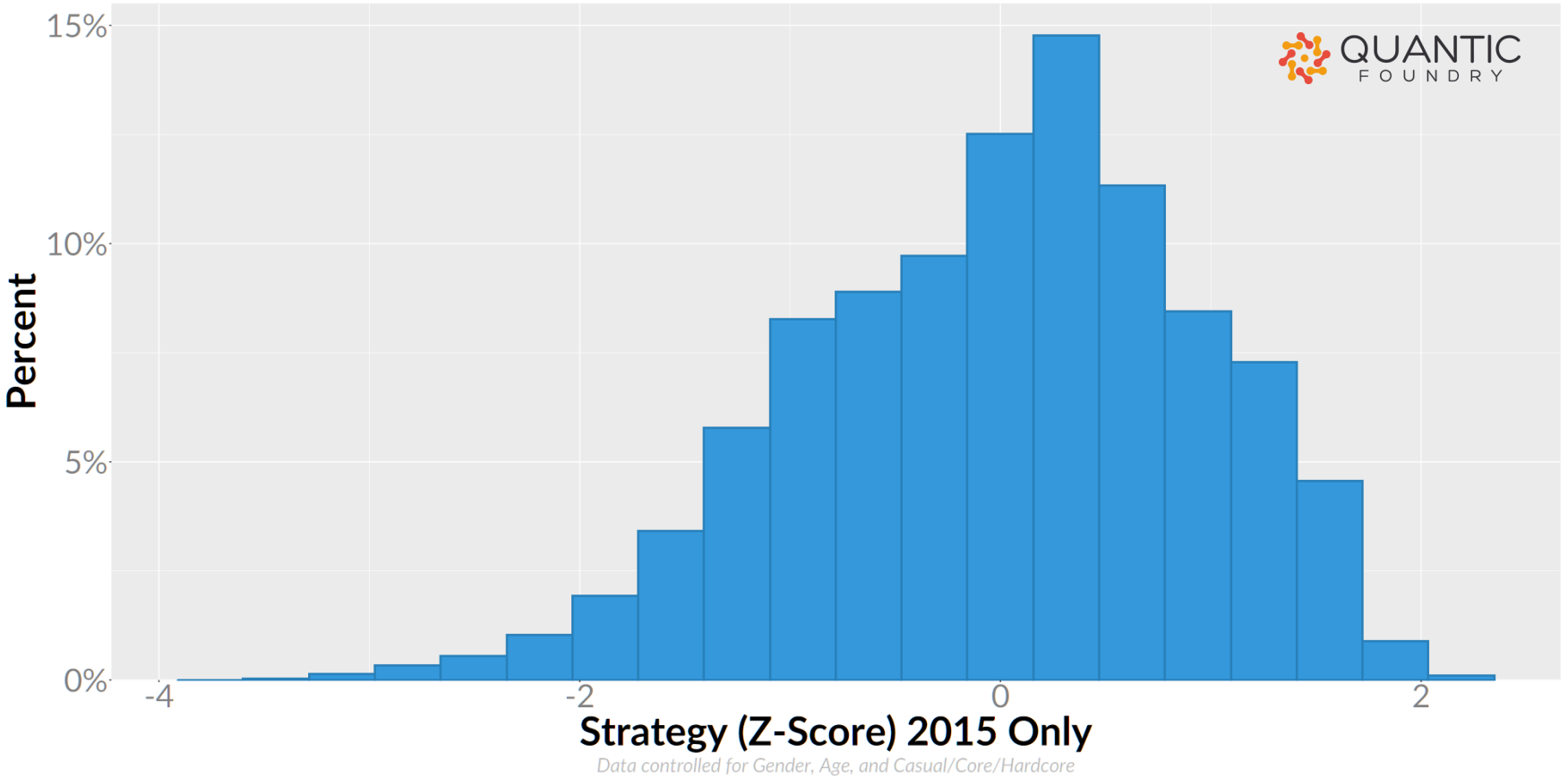
GAMERS CHANGED

# THE LARGEST COHORT DIFFERENCE IS IN AGE.

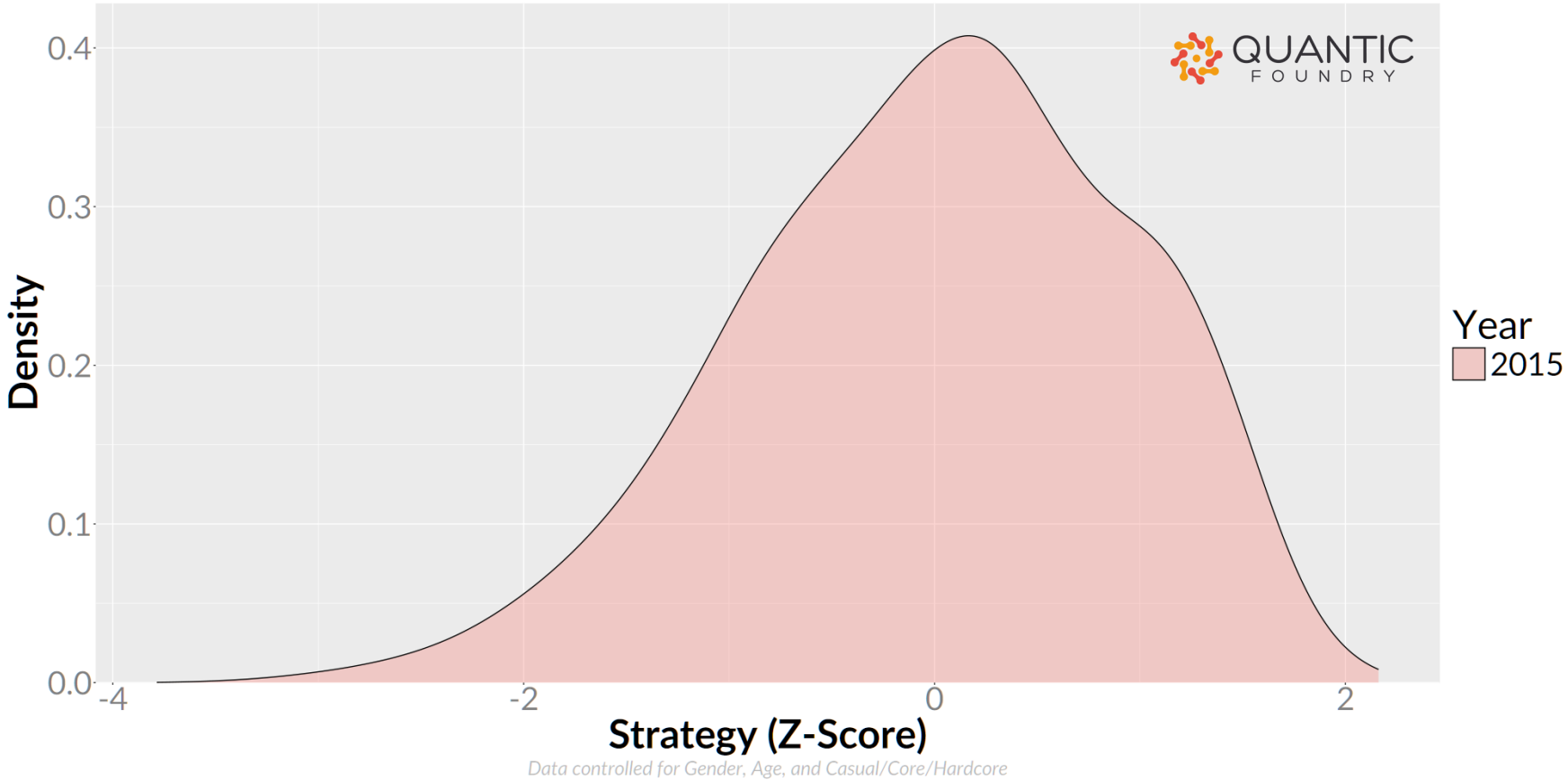
## THE YOUNGER THE PLAYER, THE LARGER THE DECLINE.



# CAN WE DIFFERENTIATE IF
# EVERYONE IS CHANGING OR NEW COHORTS ARE CHANGING?

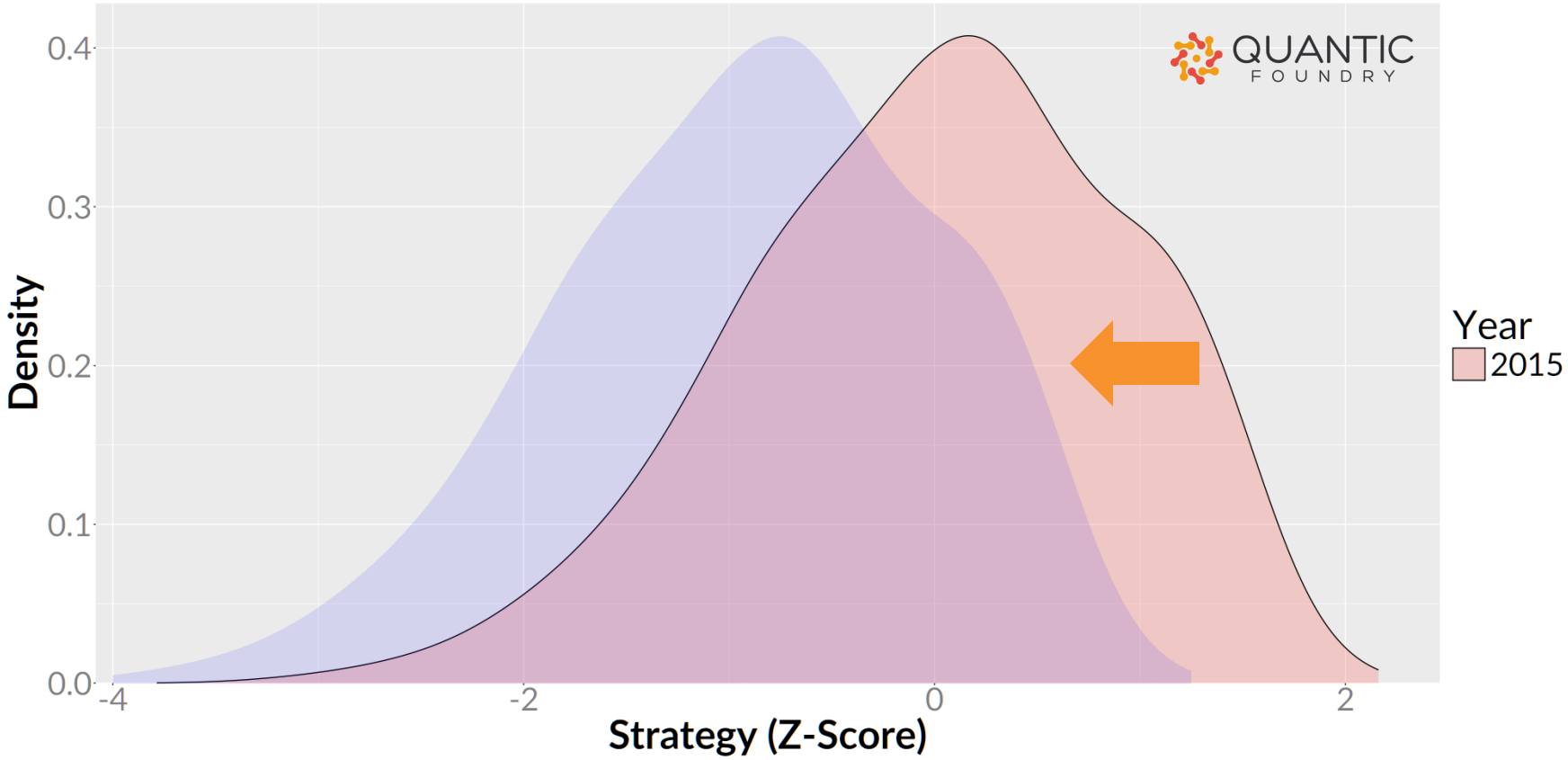


# DENSITY IS THE SMOOTHED VERSION OF THE HISTOGRAM



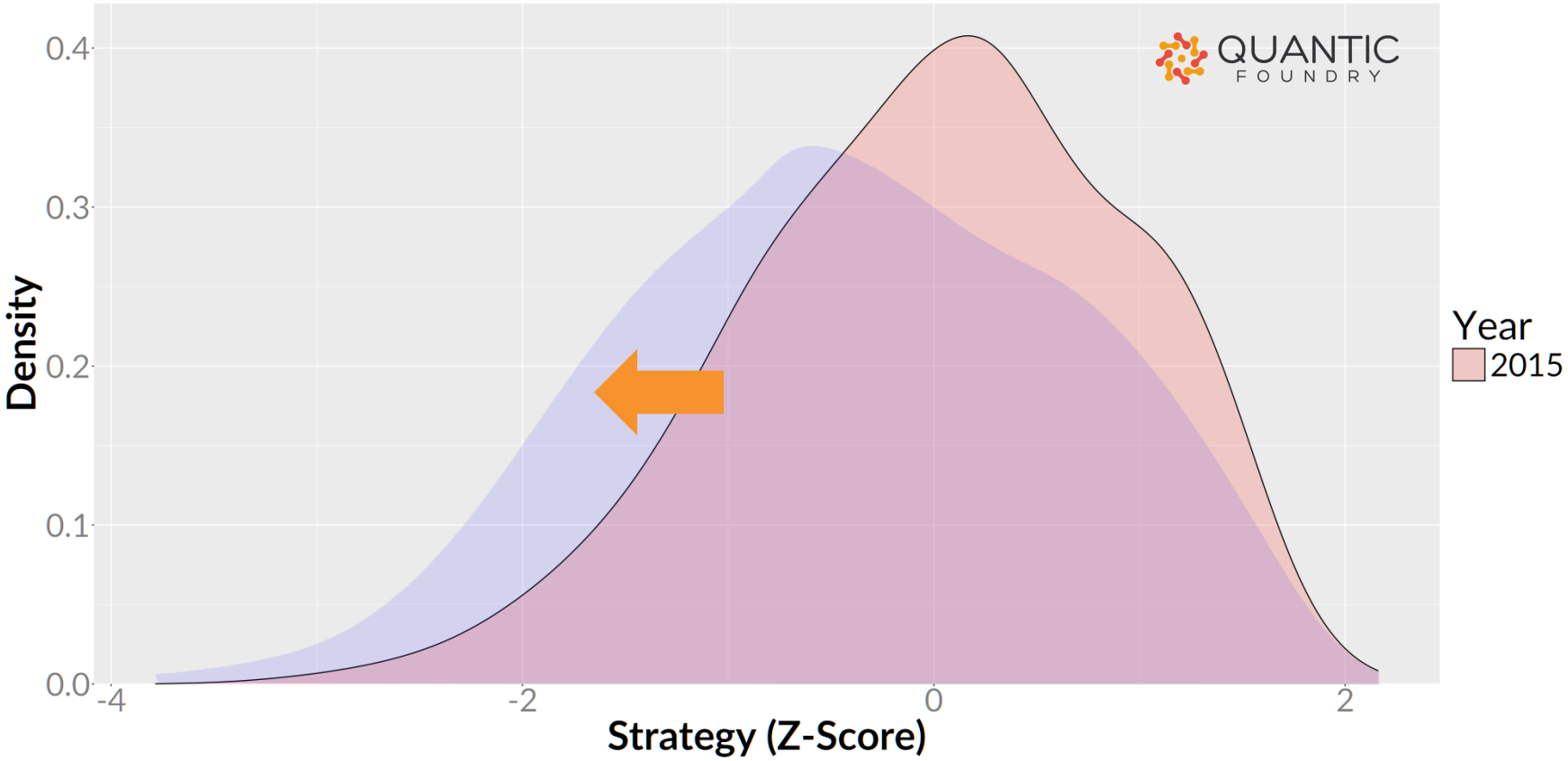
# SO DID EVERYONE CHANGE?

## AND THE ENTIRE DISTRIBUTION SHIFTED.



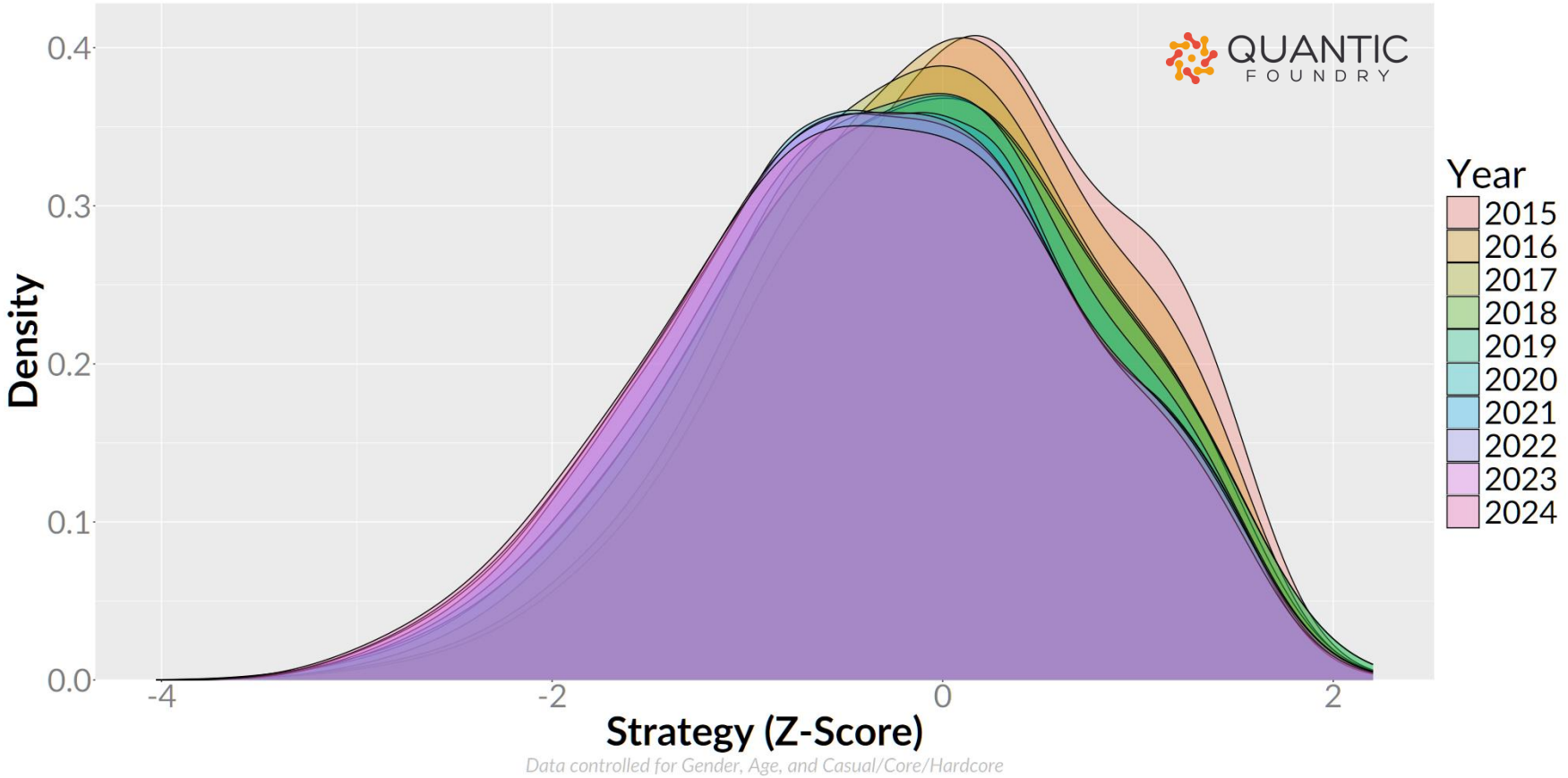
# OR DID NEWER COHORTS COME IN MUCH LOWER?

## AND THE LEFT TAIL HAS GROWN LARGER.



# NOT EVERYONE IS CHANGING.

## NEW COHORTS ARE DRIVING THE DISTRIBUTION LOWER.



# TOP GAMES IN 1999

## Top Games in 1999:

1. Roller Coaster Tycoon
2. Sim City 3000
3. Who Wants To Be a Millionaire?
4. Age of Empires II: Age of Kings
5. Starcraft
6. Half-Life
7. Command & Conquer: Tiberian Sun
8. Microsoft Flight Simulator
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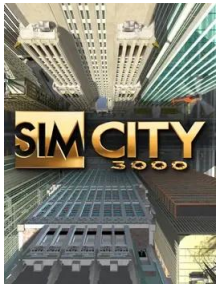
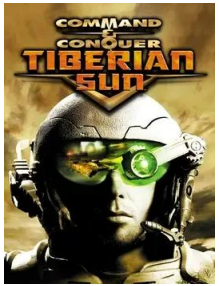
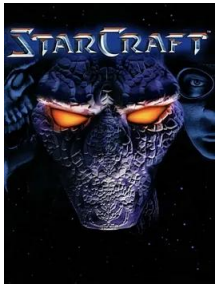
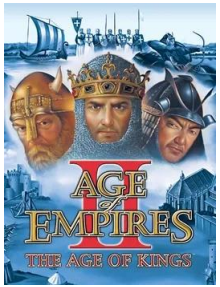
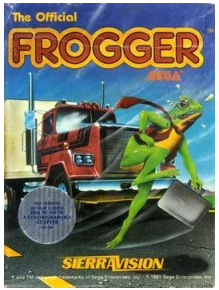
10. Baldur's Gate

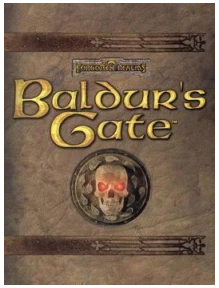


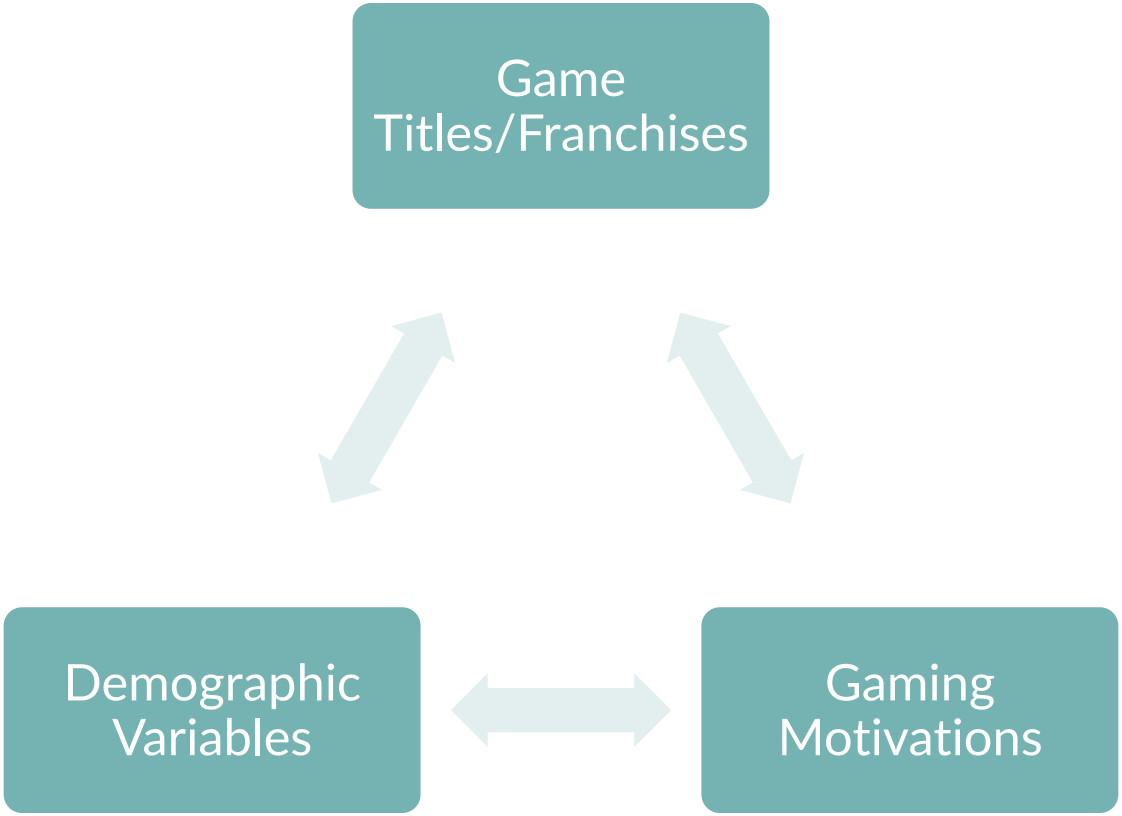


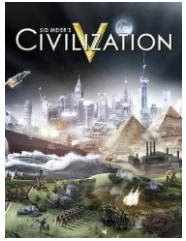


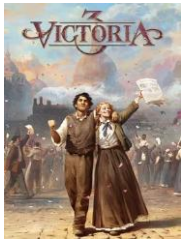


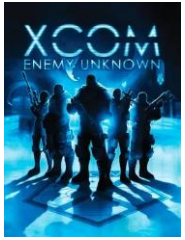



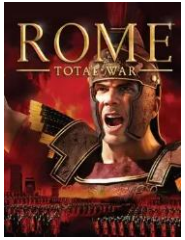

Game Titles/Franchises
Demographic Variables
Gaming Motivations

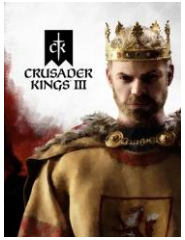
# STRATEGY GAMES

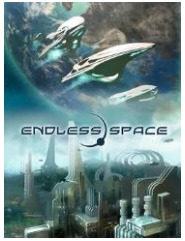


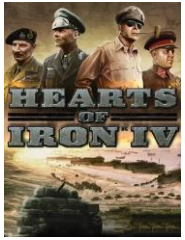


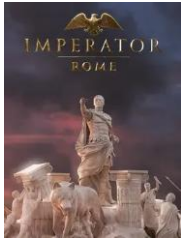



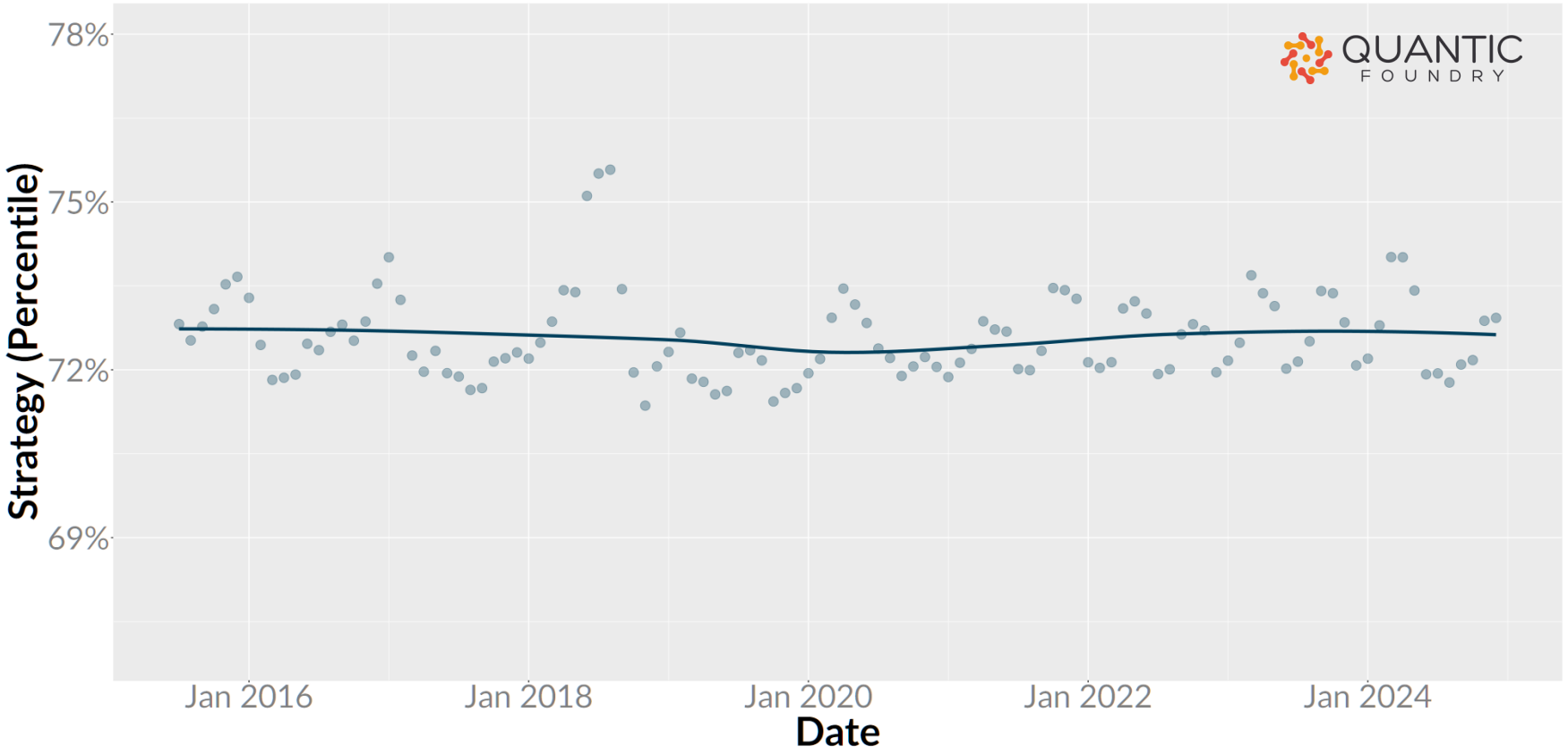






# WHEN WE ISOLATE JUST THESE STRATEGY GAMERS,
# THEIR STRATEGY SCORE HASN'T CHANGED AT ALL.




*Includes Selected Strategy Gamers Only. Data controlled for Gender, Age, and Casual/Core/Hardcore*

SELECT
GAMES CHANGED

GAMERS CHANGED

PEOPLE CHANGED

TAM

ACQUISITION

# TOP GAMES IN 1999

## Top Games in 1999:

1. Roller Coaster Tycoon
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3. Who Wants To Be a Millionaire?
4. Age of Empires II: Age of Kings
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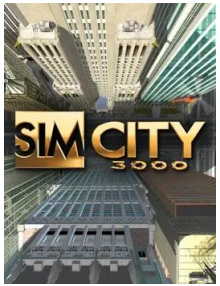
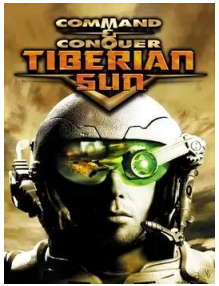
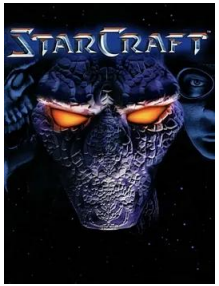
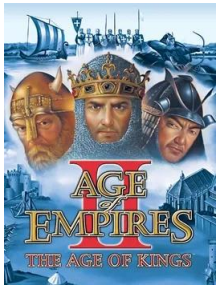
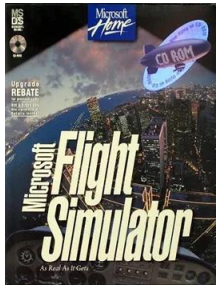
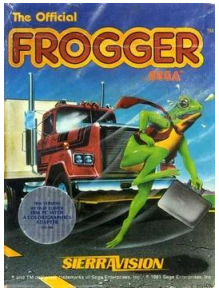


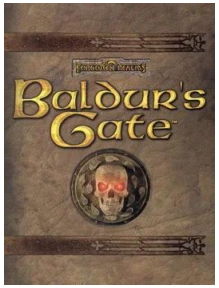




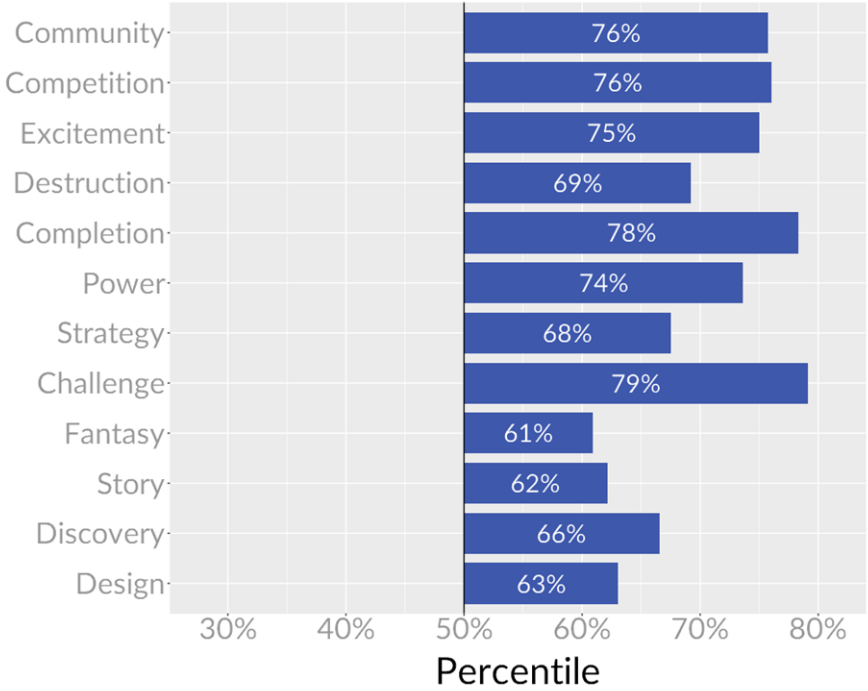



MARKET/USER
RESEARCH

MEDIA
LANDSCAPE

# GLADIATOR

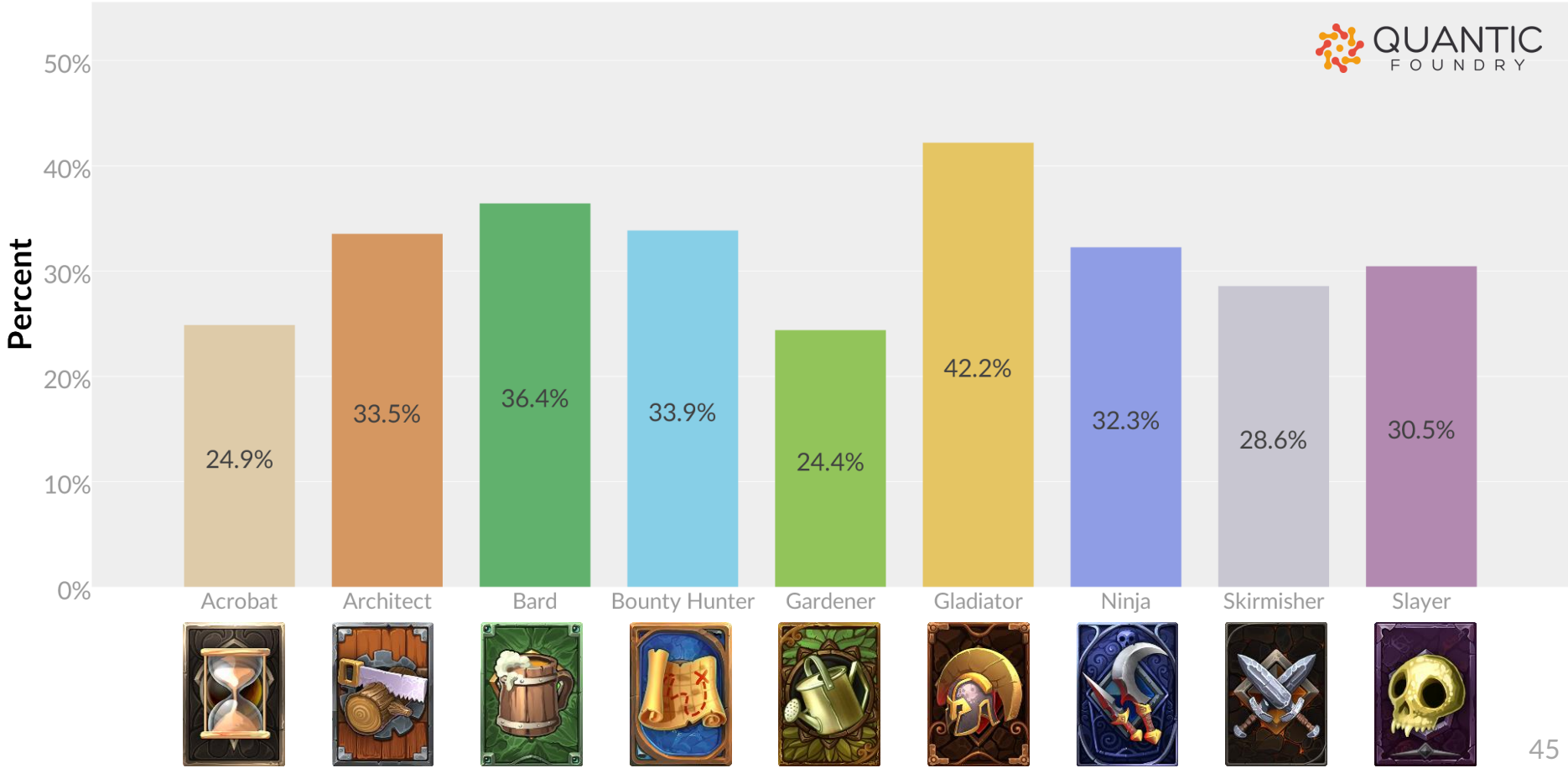
*"Dedicated, Hardcore Gaming."*



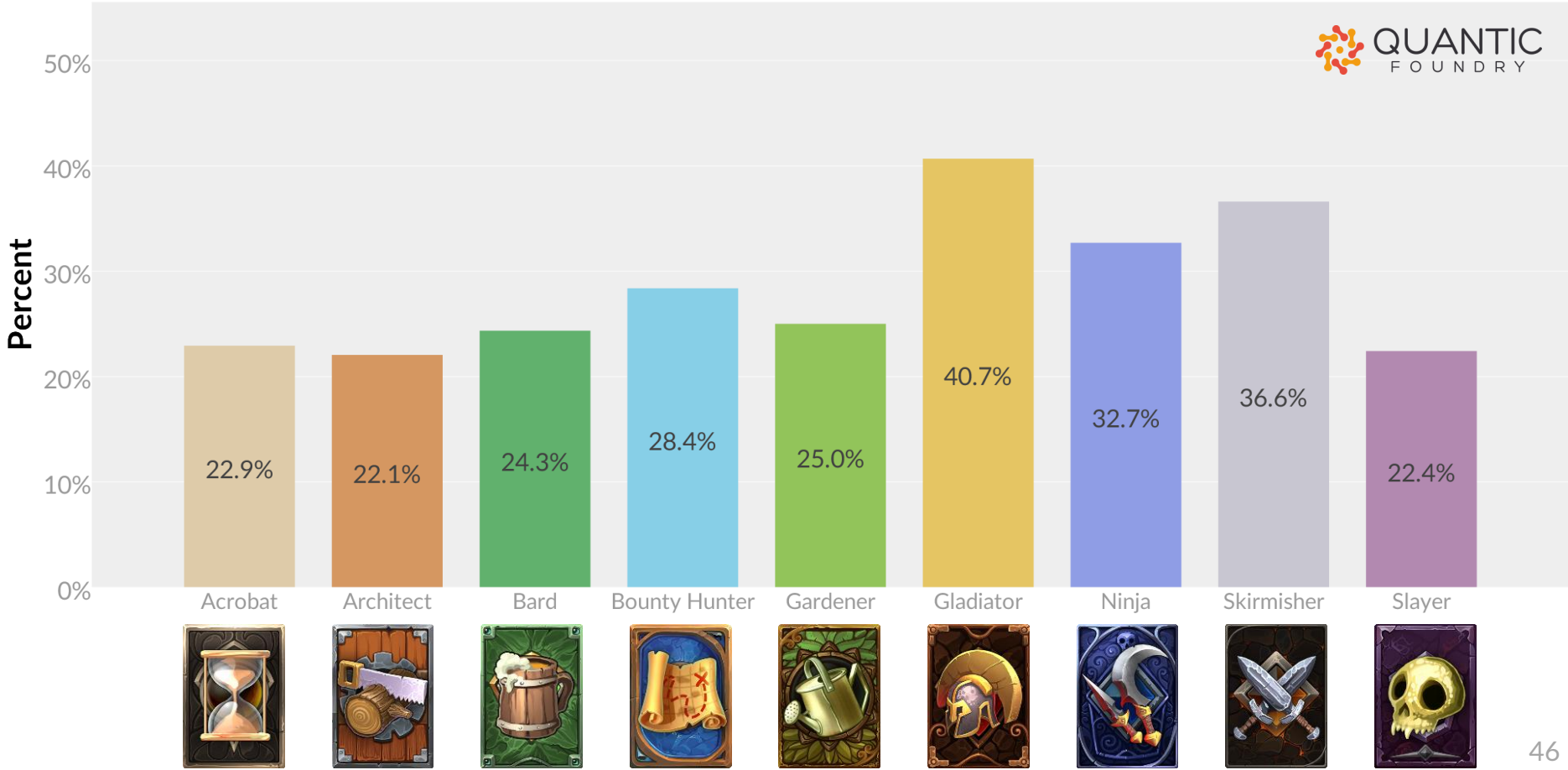

**Popular Games**

Mobile Legends, Dragon Nest, Destiny (series), TERA, Vainglory, Gears of War (series), Black Desert Online, Monster Hunter (series)

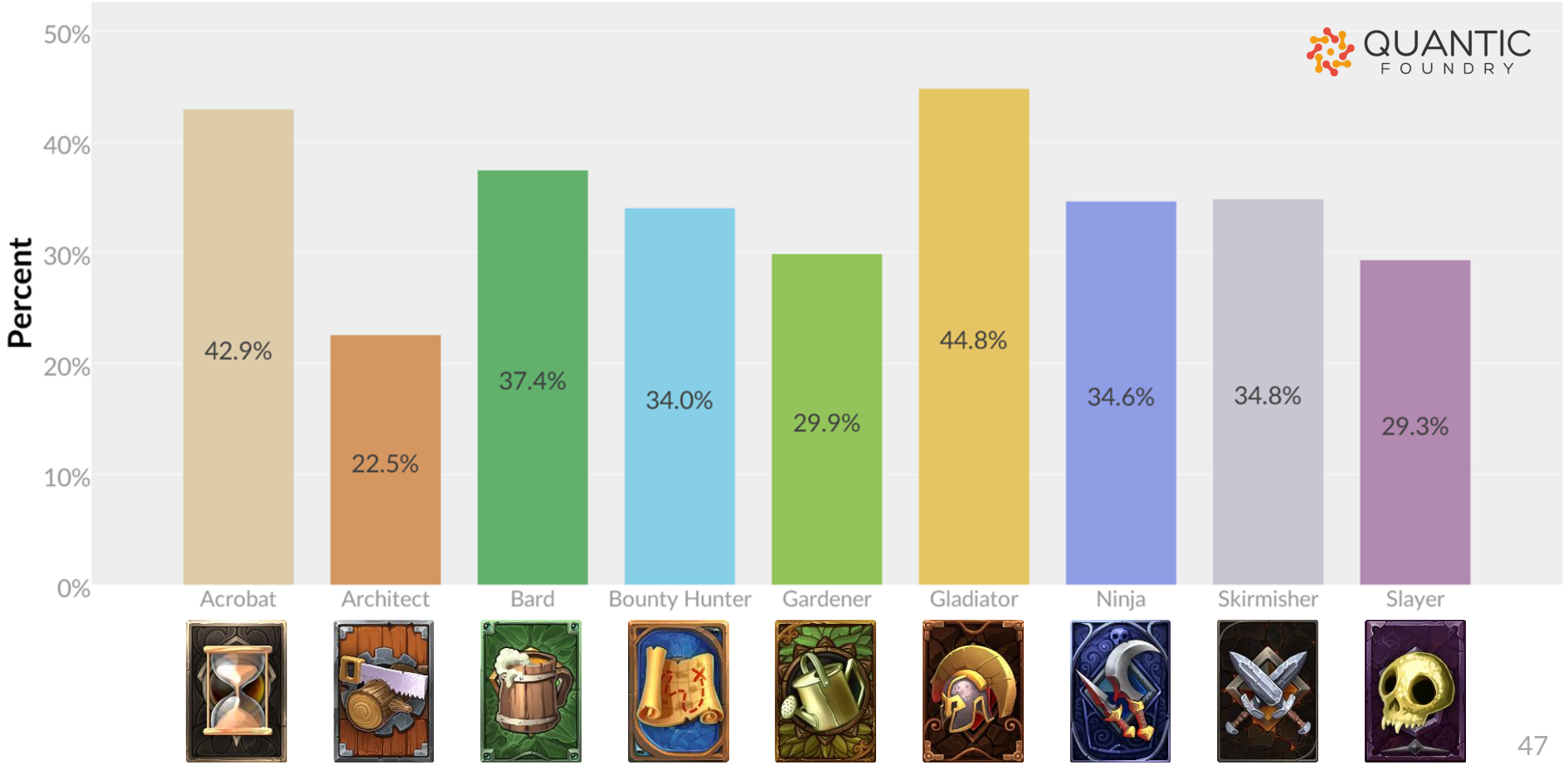
# % STAY UP TO DATE WITH NEW/UNRELEASED GAMES (BY 9 GAMER TYPES)



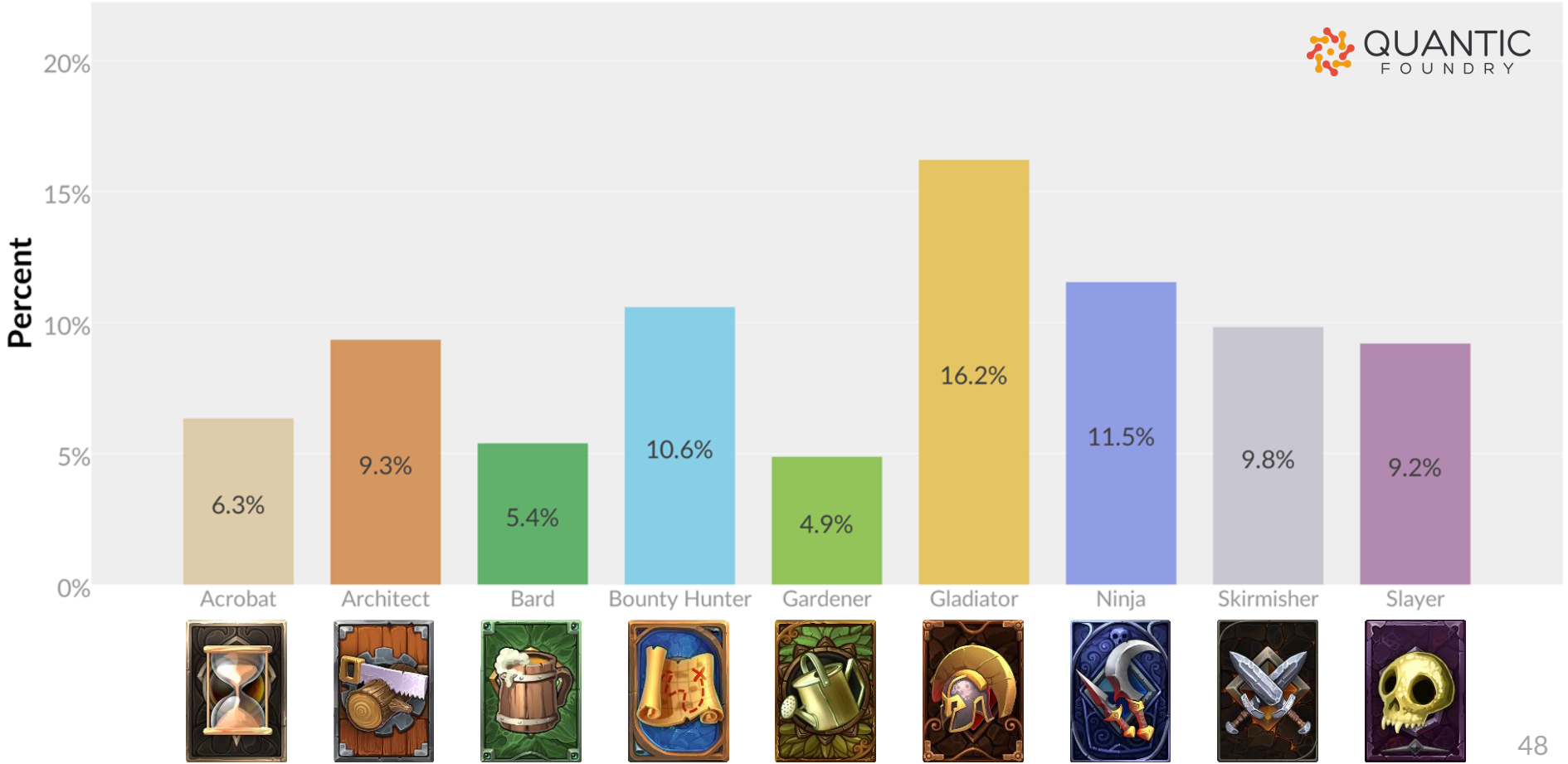
# % “GAMER” IS MAJOR PART OF IDENTITY (BY 9 GAMER TYPES)

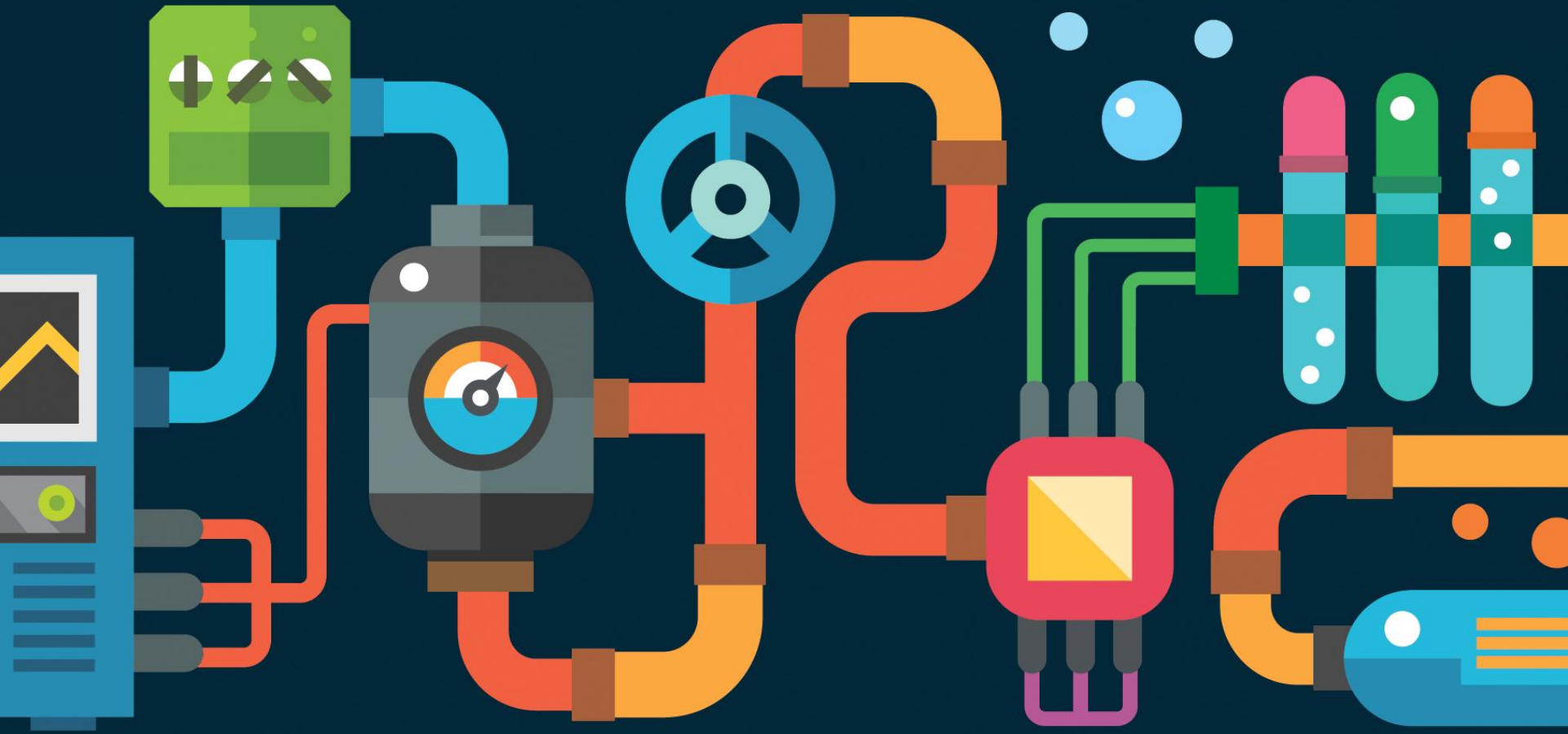


# % REGULARLY PLAY GAMES ACROSS MANY GENRES (BY 9 GAMER TYPES)



# % IMPORTANT TO OWN NEW GAME TECH (BY 9 GAMER TYPES)





ORGANIC
DATA

QUANTIC
FOUNDRY