

Ipsos GamePlan Insights: Franchise Engagement Analysis

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A new way of assessing your gaming franchise

Introduction

When assessing the performance or health of a traditional retail gaming franchise, most people rely on unit sales or YoY growth. But often publishers and retailers do not understand who is driving the sales or whether they are likely to continue with the next installment of the franchise.

As keen observers of the gaming space, we are constantly in search of new metrics that offer a fresh and meaningful perspective for the industry. One such metric is Franchise Engagement, that uses data from our nationally representative weekly GamePlan Insights tracker to provide a unique viewpoint on the “stickiness” of a franchise. Franchise Engagement is calculated by looking at the ratio of Purchase Intent to Awareness and comparing the scores across a large number of franchises to provide benchmarks.

Methodology

The enclosed Franchise Engagement charts are based on 12 months of US only GamePlan data collected between August 22, 2010 and August 31, 2011 for titles launching between October 1, 2010 and June 30, 2012. The data pull is based on a sample size of 52,000 active US gamers (1,000 unique gamers per week) between the ages of 13 and 59 and includes over 200 titles (limited to current gen console and traditional retail PC).

Downloadable content (DLC), franchise duplicates, and titles with less than 10% Aided Awareness have been excluded from the list to improve data quality and consistency. For this public release, we included a top 25 overall list as well as a grid showing the most engaging franchises among specific demo groups.

Like any metric, Franchise Engagement is best viewed in the context of other metrics. GamePlan Insights syndicated tracker covers a wide range of tracking metrics including: Unaided & Aided Awareness, Purchase Intent, Purchase Timing, Top 3 Choice, Online Buzz, Perceived Value, and Ad Awareness for over 2,500 games.

US Top 25 Overall

Among franchises tracked in the last 12 months, Elder Scrolls has the highest average conversion of Awareness to Purchase Intent: meaning a Franchise Engagement Ratio (FER) score of .563. Since January 2011, not only has Awareness for The Elder Scrolls V: Skyrim doubled, but Purchase Intent has doubled as well. As a result, it has maintained an impressive conversion ratio and is growing at the ideal scale.

Improving upon the open-world gameplay consistent with the Elder Scrolls series, Skyrim is an Action RPG set in a fully realized fantasy world filled with lively cities, towns, and expansive wilderness. While the sales ceiling for Elder Scrolls may be lower than powerhouse franchises such as Call of Duty and Madden, it has an avid and growing fanbase and a bright future.

Assuming Skyrim receives the critical acclaim that many in the industry are predicting, loyal fans will continue to evangelize the franchise to friends and family. This bottom up approach takes time to develop (the first Elder Scrolls launched in 1994), but clearly Bethesda has developed a rock solid foundation and has identified a winning formula for a successful and healthy video game franchise.

“I love epic open-ended worlds where virtually anything seems possible and the Elder Scrolls series has always retained that sort of grandiose, immersive feel to the world and its lore...”

21 Yr Old Female GamePlan Respondent

Ranking second on the charts, Halo has an FER score of .541. In other words, 54% of those aware of the Halo Combat Evolved Anniversary Edition plan to purchase when it comes out in November. While the awareness for this title is appreciably lower than the standard Halo release, the FER score is indicative of a passionate core audience. Looking at historical FERs for the Halo franchise, ODST had an average of .547, Halo Wars (a Real-time Strategy spinoff) was significantly lower at .505, and Halo: Reach trumped all of them with a .568. We recently started tracking Halo 4, and while its holiday 2012 release disqualified it for these specific charts, the preliminary FER suggests that the Halo fanbase is more passionate than ever before.

“I’m really excited about Uncharted 3 because I have been a fan of the series since the very beginning, and this one just seems to raise the bar that much higher. I’m also excited to see how the story plays out.”

15 Year Old Male GamePlan Respondent

Uncharted comes in third place with an FER of .526. Developer Naughty Dog has done a remarkable job of creating the ultimate cinematic single player experience on the PS3, and this immersive story-telling is paying dividends.

The FER for Uncharted 2 averaged .508 which is notably lower than the upcoming Uncharted 3: Drake’s Deception (.526). So as Awareness for the franchise continues to grow, a higher percentage of gamers are being converted to intenders. That is definitely a formula for success and longevity, and we feel confident that the Uncharted franchise is well positioned for the future.

Legend of Zelda and Gears of War round out the top five, while Call of Duty comes in sixth place. It may come as a surprise that CoD is not ranked higher, but an FER of .498 is actually quite remarkable. Call of Duty is a mainstream global franchise, so a 50% conversion rate speaks volumes to its sustained quality.

Over the last three years, all tracked Call of Duty games received FERs ranging from .48 to .50, with the exception of World at War (.42). FER data combined with other tracking measures predicted that World at War would be significantly outsold by Modern Warfare 2 (and later by Black Ops). Given the impressive current score of .498 for Modern Warfare 3 it is expected that Activision will continue its proven track record of YoY growth for at least the next installment.

“I really loved Batman: Arkham Asylum. I think it was one of the best games I’ve ever played on the PS3. I’ve been looking forward to this game ever since I found out there would be a sequel. The first game was beautiful in the game play and graphics; I could only expect the same from the sequel.”

21 Year Old Male GamePlan Respondent

Looking outside the Top 25, it is clear that movie-based franchises are among the worst performers in the FER. This makes intuitive sense given that most of these titles are rushed to market to capitalize on the popularity of the films. One major exception to this rule is the Batman videogame franchise. The average FER for movie-based games is a paltry .30, but Batman ranks in the top 50 with an FER of .404. Thanks to the overwhelming success of Arkham Asylum and the highly anticipated Arkham City, gamers are aware that Batman titles are now synonymous with quality gameplay.

US Franchise Engagement by Demographic Groups

In addition to providing rankings among all active gamers, we also generated rankings by various age and gender groups. For this report we included the top ranked franchise in each demo group according to the FER score.

Looking at the under 18 demo target, the key take-away is that Call of Duty has the highest FER among young males. Rated M for Mature (ages 17 and up) by the ESRB, Modern Warfare 3 will clearly benefit from an audience outside of this suggested age range. Young females on the other hand are not as interested in first-person shooters. The top ranking franchise among females 13-17 is Just Dance which is published by Ubisoft.

It is worth noting that Call of Duty ranks 41st among females 13-17 and Just Dance ranks 139th among males 13-17.

Among males 18-34, The Legend of Zelda ranks ahead of Elder Scrolls and Call of Duty with an FER score of .615. Ranked fourth on the overall list and in the top ten among most female demo groups, The Legend of Zelda is the franchise with the most cross-over appeal between males and females. Among females 18-34, Disney Universe for the Wii takes the top spot with an FER score of .577.

Uncharted tops the male 35+ demo target, edging out Elder Scrolls, Halo and Madden. As the third ranked overall title, Uncharted performed well across all age groups. That said, older gamers aware of the franchise are more likely to pull the trigger on buying the game. Among females 35+, Mario & Sonic rises to the top ahead of Disney Universe. Looking at the demographics of this older female group, it is likely that they are most interested in active games that are fun for the whole family.

Summing up

Sales, anticipation, and buzz metrics have become a part of daily life for many professionals in the videogame industry. But all too often, these metrics are one-dimensional and lack the context necessary for understanding consumer motivations. Ipsos’s™ Franchise Engagement Ratio is an attempt to shed light into the current health of traditional retail gaming franchises and examine which demo groups are fueling interest and ultimately sales.

While many metrics will change dramatically from week to week, the FER analysis is a relatively stable Ratio that reflects a macro view of consumer engagement with major gaming franchises. Moving forward, updates to the FER will be made on a bi-annual basis.

To purchase a report featuring in depth analysis, comprehensive ranked lists by demo groups, and aggregated lists for publishers and genres, please contact gameplan@ipsos.com with your contact information.

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