



Brand reputation as a critical success factor on the subscription-based gaming market – research results

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Abstract: This study aims to establish the role of a brand reputation as a critical success factor. Although there are studies on brand reputation, none of them focuses on the topic in the context of the subscription-based gaming market. The aim of the study is to establish how opinions of gamers about a game subscription provider and its performance (i.e. brand reputation) impact the success of this brand. An online survey was used as a method. All the findings reveal that the brand with a positive reputation is more successful than the brand with a negative or less positive reputation. Therefore, it may be stated that the positive reputation of a brand providing a video game subscription service supports the success of this service, while the negative reputation may contribute to its failure.

Keywords: brand reputation, video games, subscription services.

JEL Classification: M21, M31.

1. Introduction

The development of the video game industry brought new solutions and ideas, including new types of monetization. At first, revenue on the video game market came only from selling game copies (Klimas, 2019). The widespread availability of the Internet and online games has led to the creation of new sources of income for game producers, such as pay-to-play monthly subscriptions in the case of games like World of Warcraft, or the getting revenue from microtransactions – in-game purchases available mainly for free to play games, which allow players to purchase in-game items and bonuses.

The rising popularity of a subscription model can be observed in the last couple of years. It has been visible on many markets with particular regard to the movie industry. Also, game producers came out with subscription options for video games (Hansen, 2019; Klimas, 2019) allowing them to create a more steady revenue than the one coming from new game releases (Ashraf & Goodwin, 2020). Consumers of game subscription services pay a monthly fee to gain access to a vast library of games.

The global video game market has been growing significantly and rapidly since it started out in the 1950s. It was estimated to be worth \$178.73bn in 2021, which was an increase of 14.4% since 2020 (Padilla, 2018). The video game market constantly evolves and expands as far as demographics go. Gamers include a worldwide audience of any age as gaming has become a popular source of entertainment on a mass scale. Moreover, the growth of the gaming industry goes hand in hand with the rising involvement of gamers. Therefore, it seems reasonable to analyze the popularity of video game subscriptions in the context of opinions and behaviors of consumers.

The literature review has shown that there are not many studies covering this topic. Several studies deal with video games and subscription services separately, but hardly any study analyzes the subscription-based service model on the gaming market. The purpose is to fill the above research gap by exploring opinions of gamers about the brands offering video game subscription services. The aim of the study is to identify the potential relationship between a brand's reputation reflected in the opinions of users about the selected game subscription providers and the popularity of those providers. The following research question will be addressed: *How does the brand reputation of a game subscription provider, as reflected in the opinions of gamers about this brand, impact its market success?*

2. Literature review

Video games are among the most popular leisure activities in the modern society (Griffiths, 2019). In the literature, video games are defined as 'interactive electronic games, created with the aim to entertain players' (Quwaider, Alabed, & Duwairi, 2019, p. 576). They can be in a 2D or 3D form (some mention 2.5D) and specific rules apply to different game titles in a natural manner. As any other media format, they can be categorized into various types, depending on their unique characteristics. There are many genres of video games played throughout

the world, to mention only few, like adventure, action, racing, fighting, puzzle, RPG, shooter, simulation, sport or strategy (Sevin & DeCamp, 2020).

Video games are the subject of constant transformation, defining their aesthetics, functions, and audiences. Video game content can vary significantly from one game to another (Sevin & DeCamp, 2020). The game theory seems to be constantly swaying back and forth on a threshold, with many academics perceiving it as a predominantly academic discipline, while others seek to broaden the conversation between game designers, consumers, journalists, and scholars (Holland, Jenkins, & Squire, 2013).

Modern video game players represent a specific type of e-consumers (Teng, 2018). Their motivation to play video games has been studied by scientists (Vigato & Babic, 2021; Mills et al., 2017; Phillips et al., 2018) although the most natural interpretation would suggest that players are involved in playing video games just as a form of entertainment. There are many factors influencing the choice of a game by consumers, however, the previously released titles are the major factor that shapes the expectations towards every new game released by a publisher.

Reputation is one of the primary contributors to perceive quality of the products and services carrying the brand name. Companies and brands with good reputation are likely to attract more customers. According to Daugirdas (2019), a good reputation is valuable, but it is the bad one that may have a critical impact on the business and is really costly. Reputation builds expectations as the market expects consistency from brands. Customers will not perceive a brand as reliable and credible when it does not deliver what it promises. When a brand loses a good reputation and eventually develops a bad one, it means it repeatedly failed to fulfill its obligations and promises made to the market (Veloutsou & Moutinho, 2009).

The role of a positive reputation as the key factor of a brand's position is especially visible on the video game market, where the ratings of users or experts may either increase or destroy the chances for a success of a particular product. The perceived quality of a video game might explain up to 15% of a video game's distribution (Joeckel, 2007). Video game vendors recognize that a community of fans has a significant impact on the commercial success of the game and the company's brand.

The video game market is a sub-sector within the creative business, which includes numerous companies with different characteristics by size, types, and activity (Angelova, 2019). A specific part of the video game market makes subscription-based services, where consumers of a video game pay a monthly fee to

gain access to a vast library of games. There are multiple services available on consoles, mobile devices, or personal computers. Subscription services are offered at different prices by various companies, with multiple games to choose from (ReportLinker, 2022).

Examples of the most popular subscription services offered on the gaming market are Xbox Game Pass, EA Play and Ubisoft+. All of those services offer access to a library of video games for a monthly fee payment. They differ significantly except for one common thing, i.e. that they are all available at least on personal computers. Xbox Game Pass offers the greatest number of games. EA Play offers much fewer games at a higher price, while Ubisoft+ offers the smallest number of games, which is still more than a hundred, at the highest price. EA Play, available from 2016, is the oldest available service out of those three, Ubisoft+ is the newest one as it started in 2019.

3. Methods and measures

The study utilizes both types of data, primary and secondary ones. Literature studies were conducted with the use of online databases (i.e. Scopus, Science Direct, Google Scholar, Proquest) to identify relevant works to be included in the analysis. The search covered scientific and popular articles published mostly in English, as well as conference papers and book chapters, published in the years 2005-2022. The keywords used for the search were related to video games, subscriptions, consumer behavior and brand reputation. Data about companies offering subscription-based gaming services was gathered online as a part of the secondary research. Information was taken from the official websites of Xbox Game Pass, EA Play and Ubisoft+, as well as from the social media of the companies offering these services (see Table 1).

As the primary source of the data, an online survey was chosen as the method that allowed to gather information about the popularity of video game subscription services and to check the assessment of their various attributes. A non-random method of self-selected sampling was used. The link to the online survey was posted on the social media, as well as on the gaming Discord servers. The sample included 100 participants. The sample size is not representative due to the time and financial restrictions but the exploratory character of the study may prove it sufficient. The study was conducted between March and July 2022. The average time each respondent took to fill in the questionnaire was 10 minutes.

The survey was conducted mostly among gamers. The questionnaire consisted of over 20 questions and the respondents were asked about their gaming habits and preferences. The participants were also asked to evaluate 3 subscription service platforms: Xbox Game Pass, EA Play, and Ubisoft+. They rated several features of each platform on a 5-point scale, where 1 represented the lowest rating. Another part of the survey was related to the use of the subscription platforms, e.g. reasons for using and not using them, habits connected with using the platforms, factors determining the choice of a service, currently used subscriptions, etc. The respondents, who had used some of the selected platforms (Xbox Game Pass, EA Play, Ubisoft+), were asked to assess their satisfaction with the services. The last part of the questionnaire included demographic questions.

Table 1. Comparison of Xbox Game Pass, EA Play and Ubisoft+ subscription services

Feature	Xbox Game Pass	EA Play	Ubisoft+
Creation date	1 June 2017	12 January 2016 (as Origin Access)	3 September 2019 (as Uplay+)
Number of games available (11.12.2021)	393, including 66 from EA Play	138 or 187 in Pro version	130
Number of subscribers (Q1 2021)	18 mil	6.5 mil	N/a
Appearance in rankings (based on 5 rankings)	5/5	3/5	4/5
Price per month	PLN 39.99	PLN 14.99 or PLN 59.90 for EA Play Pro	PLN 59.90
Availability of games	Games made by Microsoft are kept in the library forever. The exception is Forza Horizon series, caused by licensing problems. Games made by other developers are rotating, e.g. Red Dead Redemption 2 was available for the shortest amount of time – 4 months	Games made by other developers are removed after ca. 2 years, sports games made by EA are also removed because of licensing problems (e.g. licensing of cars, sports players). Older games from FIFA series, from FIFA 15 up to 19 are not available anymore. FIFA 20, 21 and 22 are available in a Pro version	A full library of games made only by Ubisoft, none of the games leaves the service
Extra information	Promotions are available very often, first month costs 4 PLN. Games available in subscription are discounted, as well as DLCs. Xbox Game Studios games are available to play on the release date. Xbox Game Pass access includes access to a basic EA Play subscription	Available on Steam. Games available in subscription are discounted, as well as DLCs. Bonuses such as skins in games. Pre-release access to games for 10 h in a basic version. Pro version offers more than 10 h of pre-release access as well as season passes available in games	Pre-release access without any limits, extra skins and season passes

Source: Own study based on: PC Game Pass (n.d.); Electronic Arts (n.d.); Ubisoft+ (n.d.); Ackerman (n.d.); De Leon (n.d.); Rosa (2021); Lyles (2021); Clemons (2022).

Before the reputation of each video game subscription service was assessed by the means of the survey, to assess whether a brand reputation could be a critical success factor, some measures of success had to be adopted. As for the specific nature of the subscription-based gaming market, the most obvious measure of success would be the number of subscribers each service has.

According to the data released by the companies, Xbox Game Pass reached 18 million subscribers in the first quarter of 2021 (Makuch, 2021), while EA reached 6.5 million at the same time (McAloon, 2020). Unfortunately, Ubisoft does not publish the number of Ubisoft+ subscribers, hence, in the case of this platform the approximation to estimate this number based on other accessible data had to be used. It was decided to use the number of Twitter followers and the average ratio of subscribers to followers, that was calculated for two other service providers as a benchmark for this approximation. The ratio of subscribers to followers for Xbox Game Pass was 15:1 and for EA Play 36,5:1, making the average subscriber-to-follower ratio 25,7:1. With 246 787 Twitter followers, the number of Ubisoft+ subscribers can be estimated between 6.2-8.7 million. This is just a rough estimate, and the number can be higher. As it can be seen, Xbox Game Pass with the best reputation has the highest number of subscribers, as well as overwhelmingly the highest number of Twitter followers. EA Play, with the worst reputation among the researched services, has the smallest number of Twitter followers.

To compensate for the weaknesses of the previous approach, yet another success indicator was used. One way to reflect the success of companies developing games is to measure the success of their products. Therefore, the average Metacritic¹ ratings of the most popular franchises available in each service (Metacritic, n.d.) were used. The newest titles for the ten most popular franchises of all three providers were considered. Metascore is based on critics' reviews, with a maximum score of 100. The user score is based on customer reviews, with a maximum score of 10. Aggregated scores for the analyzed companies are presented in Table 2.

¹ Metacritic aggregates reviews of e.g. movies, books, and video games.

Table 2. Average metascores and user scores for the most popular games available on Xbox Game Pass, Ubisoft+ and EA Play

Brand Indicator	Xbox Game Pass		Ubisoft+		EA Play	
	metascore*	user score**	metascore	user score	metascore	user score
Average	79.1	6.8	76.2	5.7	70.7	3.8

* max score = 100, ** max score = 10.

Source: Own study based on: Metacritic (n.d.).

According to the average scores, Xbox Game Pass is the most successful, with Ubisoft right behind and EA Play scoring much lower – particularly in terms of the assessment of users.

Based on the survey, the overall reputation of video game subscription services of Xbox Game Pass, EA Play and Ubisoft+ was assessed. Results are presented in the next sections.

4. Survey results

The survey on the video game subscription services popularity was conducted by means of the Sphinx Declic platform. A total of 100 respondents were questioned, among which 90 declared playing video games on PCs or laptops. When it comes to socio-demographic characteristics, most of the respondents were males (68%) aged between 21 and 26 (49%) who had a higher education (48%). In terms of finances, the majority of the respondents (53%) declared a good financial situation.

4.1. Gamers' habits

Table 3 presents the summary information about the gaming habits of the respondents. More than half (57%) of the surveyed gamers have been playing games for more than 15 years. The biggest group of gamers (41%) spends between 3 and 5 hours gaming daily, while only 14% play video games for less than an hour a day.

Table 3. Gaming habits of the respondents (N=90)

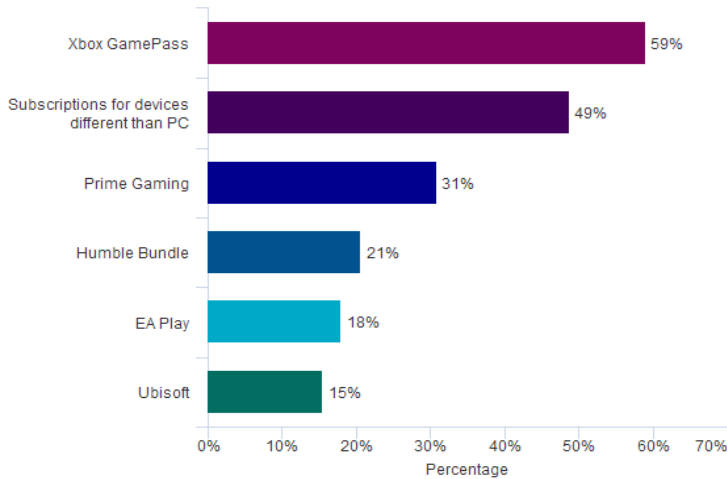
Detail	Frequency	Percentage
Time spent on playing video games		
Less than 5 years	9	10%
6-10 years	14	16%
11-15 years	16	18%
More than 15 years	51	57%
Time spent on games daily		
Less than 1 hour	13	14%
1-2 hours	23	26%
3-5 hours	37	41%
More than 6 hours	12	19%
Preferred game mode		
Single-player	50	56%
Multi-player with at least one player known to the respondent	33	37%
Multi-player with random players	6	7%
Subscription period		
Less than 3 months	14	32%
3-6 months	6	14%
6-12 months	5	11%
Over 1 year	19	43%
Frequency of buying a subscription		
Every month	14	32%
Only use trial periods and promotions	2	5%
Only when they are interested	24	55%
Annual package	4	9%
Number of other gamers known by a respondent		
0-5	18	20%
6-20	33	37%
More than 20	39	43%

Source: Own calculations based on the survey data.

The preferred game mode for 56% of the respondents is single-player, while the smallest percentage of the respondents (7%) choose to play multi-player games with unknown random players. One-third of the respondents have been using subscription services for less than 3 months, while 43% have been using such services for more than a year. More than half of the gamers (55%) purchase a subscription only when they are interested in a specific game and 43% of the participants know more than 20 other gamers.

The respondents were asked which video game subscription services they currently used (Figure 1). The majority of them (59%) indicated Xbox Game Pass. Nearly half of them use subscriptions for devices other than a PC, i.e. con-

soles or mobile devices. Almost one-third use Prime Gaming, included for free with Amazon Prime, while more than one-fifth selected Humble Bundle – a subscription that offers ownership over a bundle of different games each month and gives a portion of their income to charity.



The numbers do not total to 100% as respondents could select more than one option.

Figure 1. Currently used subscription services (N=39)

Source: Own calculations based on the survey data.

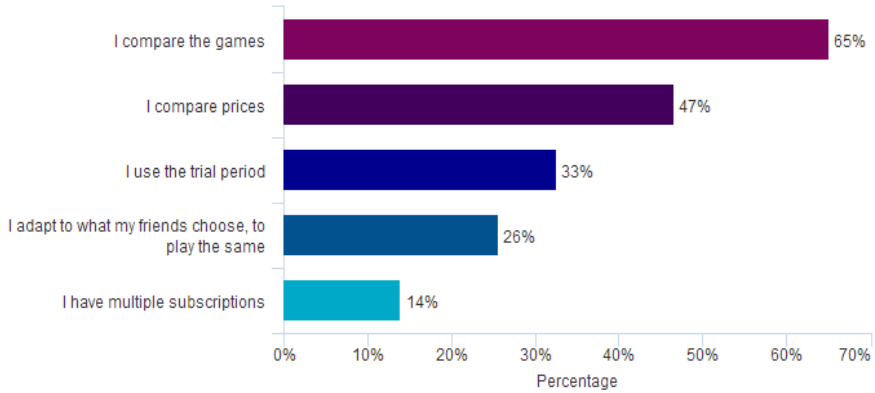
Only 18% of the respondents use EA Play, a service that has been included for free with the PC version of Xbox Game Pass since 2021, but it is also available for consumers to purchase it separately. The smallest percentage of the participants (15%) use Ubisoft+ subscription.

4.2. Role of brand reputation in platform selection

More than half of the respondents (52%) have used a gaming subscription service before. The money the majority of the subscribers (66%) spend on a monthly subscription is between EUR 5 and 15. When it comes to knowledge about the platforms, almost every respondent has heard about Xbox Game Pass, 87% of the participants know the EA Play service, and 84% know the Ubisoft+ service.

The respondents that purchased a subscription service at least once were asked how they chose it (Figure 2). The majority of them usually select a platform by comparing the games available in each option (65%). Less than half of

the subscribers compare prices across the services, while one third use the trial period.

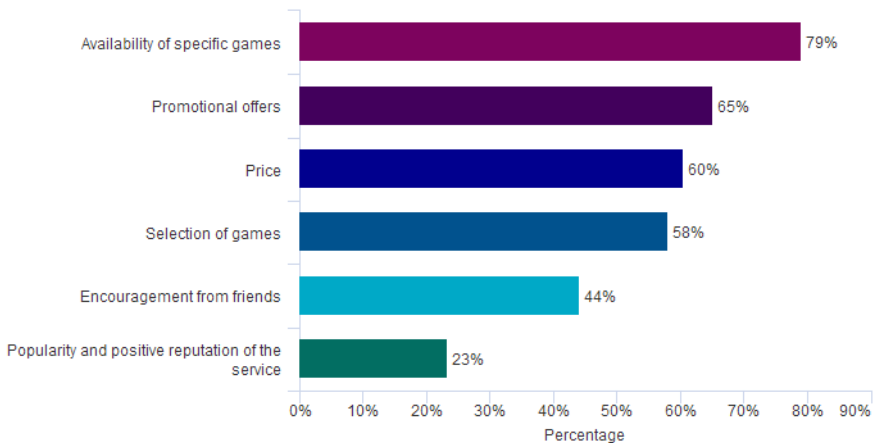


The numbers do not total to 100% as respondents could select more than one option.

Figure 2. Ways of selecting a subscription service (N=43)

Source: Own calculations based on the survey data.

Almost 80% of the respondents purchased a subscription service for the first time based on the availability of specific games they were interested in (Figure 3).



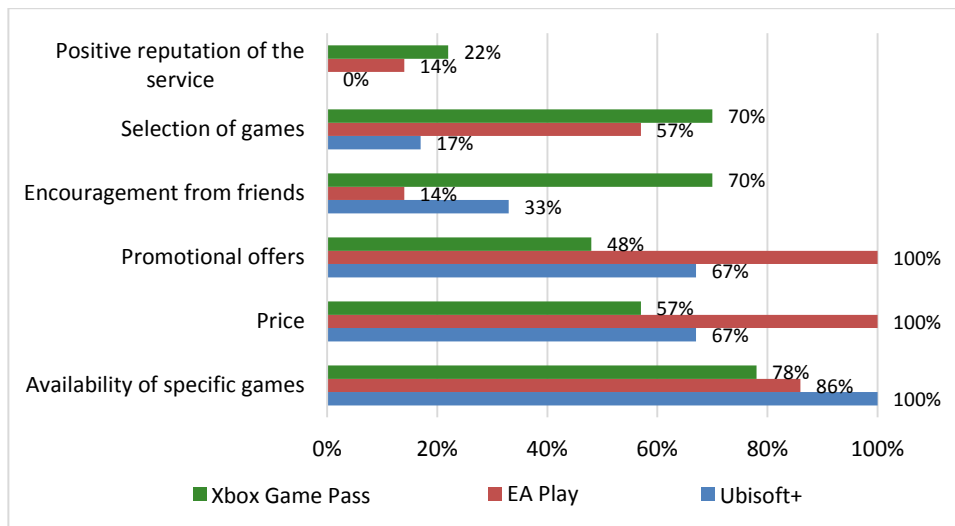
The numbers do not total to 100% as respondents could select more than one option.

Figure 3. Factors that convinced customers to subscribe to a gaming subscription platform for the first time (N=43)

Source: Own calculations based on the survey data.

Almost two-third of the respondents subscribed to a platform because of the availability of promotional offers, such as free trials or discounts. More than half of them decided to use a subscription because of the low price (60%) and wide selection of games (58%). When asked about the role of popularity and reputation of a service, no more than a quarter of the respondents stated they paid attention to this factor. But it should be considered that for an average consumer, the reputation is reflected in opinions of others about a certain service. Therefore, the respondents were asked about the meaning of encouragement from friends to use a subscription service, assuming that it would mirror its reputation. It occurs that as many as 44% of the respondents purchased a subscription for the first time because of encouragement from their friends which indirectly indicates the role of the opinions of others.

The respondents, who use one of the considered services, i.e. Xbox Game Pass, Ubisoft+ or EA Play, were asked about the determinants convincing them to select that platform (Figure 4).



The numbers do not total to 100% as respondents could select more than one option.

Figure 4. Factors that convinced customers of Xbox Game Pass, EA Play and Ubisoft+ to subscribe to these services (N=43)

Source: Own calculations based on the survey data.

The main reasons for the participants to choose Xbox Game Pass was the availability of specific titles and the overall wide selection of games. The former was also critical for the Ubisoft+ subscribers. The factors that convinced all of

the EA Play subscribers to purchase its services were promotional offers and the price of the service.

The respondents were once again asked about the role of brand reputation in their decision-making process. When asked directly about the meaning of positive reputation, the interviewees assessed it as relatively low in comparison with the criteria mentioned above. However, as many as 22% of Xbox Game Pass users considered this factor when selecting a platform. Taking into account that the respective data for EA Play equals 14%, and none of the Ubisoft subscribers used this criterion, this is the first sign that the Xbox Game Pass may have a much better reputation than the two other services. Considering a broader perspective on the reputation, i.e. encouragement from friends as the factor determining the choice of a specific platform, it may be noted that 70% of Xbox Game Pass subscribers were motivated by their friends to choose this offer. The respective indication for Ubisoft+ was 33% and only 14% for EA Play.

4.3. Evaluation of the selected platforms

The main focus of this paper is the reputation of the selected platforms and brands. Reputation should not be treated only as an overall positive or negative perception of a brand in the minds of consumers. It is also a detailed reflection of all the features characterizing a product or service. In the case of video game subscription services, such features may include a choice of games, the attractiveness of the games offered, the convenience of use, innovation, brand credibility, brand image, company's involvement in the gaming community, pricing, reliability and stability of the offered software, and quality of customer service.

Considering the above, the participants familiar with the selected platforms were asked to rate their attributes on a scale from 1 to 5, with 1 representing the lowest rating. Both individual scores for all attributes, as well as the overall score for a platform, were used as the basis for assessing the reputation of the three brands. The results, in the form of mean ratings, are presented in Figure 5.

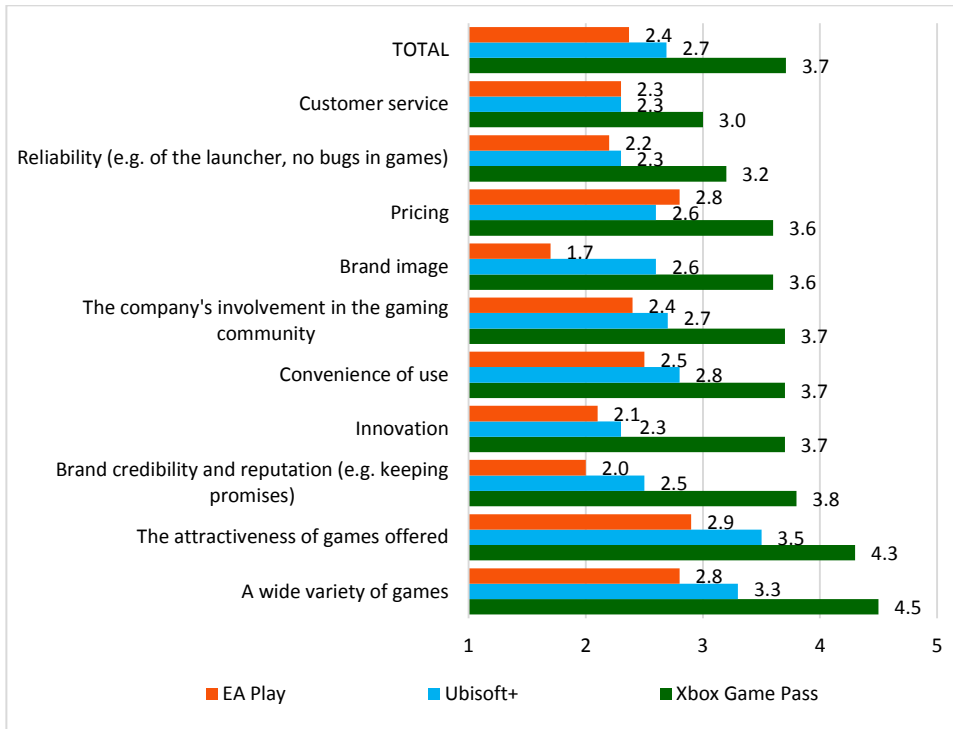


Figure 5. Assessment of the platforms according to the selected attributes (mean rating, scale 1-5, N=43)

Source: Own calculations based on the survey data.

Xbox Game Pass received the best total rating of 3.7. It also scored the highest points in every category. On a scale 1-5, their best-rated attributes are: the wide variety of games (4.5) and attractiveness of the games offered (4.3). There was not a single category where Xbox Game Pass would score a mean rating lower than 3.0.

Ubisoft+ total mean rating was 2.7. Its service had the highest score (but still only slightly above the average) in the case of the attractiveness of the games offered – the mean rating was 3.5. Consumers rated a variety of games offered at 3.3. The brand received the lowest scores (2.3) for customer service, reliability of its software and innovation.

EA Play received the lowest total mean rating of 2.4. The highest rated attribute, the attractiveness of the offered games, received a rating just below the average of 2.9. However, it was rated higher than Ubisoft+ when it comes to pricing – for Ubisoft+ the mean score for pricing was 2.6, for EA Play 2.8. EA

had the lowest score from all the attributes in the brand image category, ending up with a score of 1.7. Consumers do not perceive this brand as credible (2.0) or innovative (2.1). This brand scored low or below the average in every presented category.

To obtain the complete assessment of the perception of the three platforms among the respondents, they were asked to rate their satisfaction with each subscription on a scale from 1 to 5, 1 being the lowest score (Figure 6).

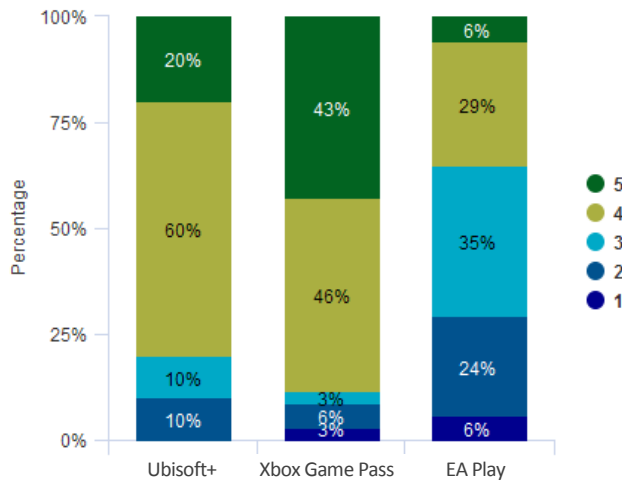


Figure 6. Satisfaction of consumers with Xbox Game Pass, EA Play and Ubisoft+ (scale 1-5, N=62)

Source: Own calculations based on the survey data.

It occurs that 43% of Xbox Game Pass users are extremely satisfied with the service, with a total of 89% of them being satisfied. Only 9% declared some level of dissatisfaction. At the same time, 80% of Ubisoft+ subscribers are satisfied with the subscription, including 20% of them being extremely satisfied. Ubisoft+ did not receive any rating representing extreme dissatisfaction. Finally, EA Play has the smallest number of satisfied consumers – 35%, with only 6% of them being extremely satisfied. More than one-third of the participants rated their satisfaction with EA Play as average, while 30% of them expressed their dissatisfaction.

To establish overall knowledge of the selected video game subscription services among the gamers, the number of their Twitter followers was compared (Figure 7). As Ubisoft+ does not have its own FB page, Ubisoft Connect account was considered.

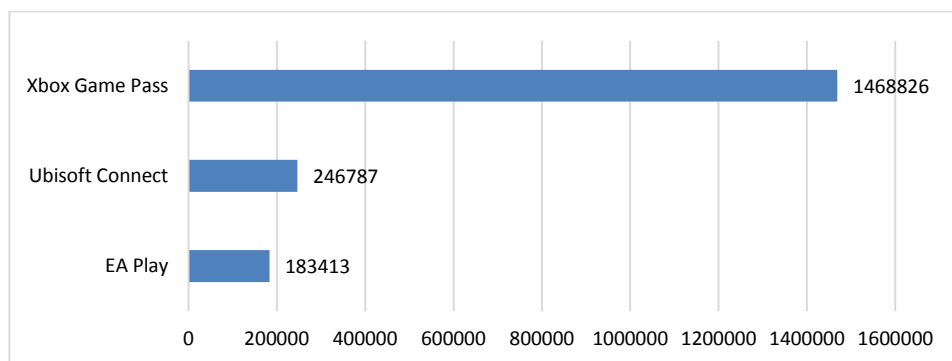


Figure 7. Comparison of the followers of Xbox Game Pass, EA Play and Ubisoft Connect accounts on Twitter (as of 9.01.2023)

Source: Own calculations based on: Xbox Game Pass (n.d.); Ubisoft Connect (n.d.); EA Play Twitter account (n.d.).

Xbox Game Pass has the biggest number of followers – over 1.4 million. Ubisoft Connect has more than 240 000 followers. EA Play closes the chart with only 183 000 followers. This comparison confirms the survey results, proving the highest popularity of Xbox Game Pass.

5. Discussion and conclusions

The study was aimed at answering the question: *How does the brand reputation of a game subscription provider, as reflected in the opinions of gamers about this brand, impact its market success?* Taking into account the results of the above analyses, the reputation of the three services can be ranked as follows: Xbox Game Pass having the best, Ubisoft+ – mediocre, and EA Play having the worst reputation among the players.

When compiling data about the success of the companies and their identified brand reputation, it can be concluded that the most successful is the company with the best reputation, i.e. Xbox Game Pass, while EA Play, having relatively negative reputation, scored the lowest in this ranking.

All the findings reveal that the brand with a positive reputation is more successful than the brand with a negative or less positive reputation. There is no doubt that opinions of players about subscription services shape the reputation of brands, and at the same time they influence the success or failure of their providers.

Therefore, the results support the introductory assumption that there is a relationship between the positive reputation of a brand providing a video game subscription service and the success of this service. At the same time a negative reputation may contribute to the failure of this business.

The role of the brand itself can also be considered a competitiveness factor. Brand reputation shapes expectations of gamers, pulling them in and encouraging subscriptions. The necessity of understanding the role of reputation on the contemporary market is essential for the brand to achieve success. The empirical findings lead to a better understanding of reputation factors in relation to brand success. The results confirm that the better reputation, the more successful the service. Brands offering video game subscription services can draw practical conclusions from this paper – working on a positive reputation and maintaining it will likely bring success to the offered service. A good plan for creating a successful video game subscription service should not only be aimed at the service itself but also consider the factor of brand reputation. The suggested methods to build a better reputation mainly improve the stability of launchers, increase community involvement and introduce more newly released games within services. Increasingly positive brand reputation can lead to a success of a service. It has been discovered that consumers show a positive attitude towards the idea of a subscription service when they are offered a library of games for a monthly price.

The results of this research are subject to serious limitations. The survey was conducted on a very small sample of 100 respondents, with some questions answered only by half of them. Therefore, the analyses have descriptive character and cannot provide any statistical verification of the analyzed relationship. However, they offer a valuable insight into the unexplored area and a good starting point for more advanced studies. The findings are also limited to only 3 subscription services. Further research on this topic is necessary as thorough knowledge about the role of a brand in the consumer purchase decision process will allow to compare it with other factors influencing the process. It should include more companies/brands, employ a bigger sample and possibly use other methods to define brand success.

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