



Interactive Ontario Discoverability Report

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interactive ontario

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Introduction

Interactive Digital Media (IDM) companies in Ontario create interactive experiences for many different platforms such as mobile, web, PC, game consoles and VR. However, many Ontario IDM companies are up against consistent challenges related to discoverability, which are vital to overcome in order for more of the interactive experiences to be discovered by the right consumers, and successfully monetized.

The following challenges that many Ontario IDM companies face can be overcome, through the development and execution of impactful discoverability plans:

- Difficulty breaking through the clutter of the large volume of new IDM content released on a regular basis, with all IDM fighting for consumers' attention. In 2018 alone, it is estimated that over 9,000¹ new games were released on the Steam store platform, with over 11,000 released the two years prior.
- Lack of access to the same resources as larger global competitors, such as in-house discoverability experts and resources, insights and larger marketing and PR budgets.
- Competition from interactive experiences that are tied to existing and well-known IP and/or company/publisher brands with large established fan communities.

- Forced reliance on publishers to support discoverability, or on those who are not well versed in it to build and execute plans.
- A limited ability to access or understand consumer data on many platforms.
- A limited understanding of what works for discoverability.
- Many unique, rapidly changing markets. The rapidly changing markets mean that what has worked for past similar IDM content may not work again.

Impactful discoverability is far more than marketing and public relations – it is also harnessing the right insights to engage the right audiences, developing strategic relationships with platforms and more. This report highlights a range of tactics being used to ensure successful discoverability, as well as the challenges that Ontario IDM companies face and recommendations for how some challenges may be solved.

¹ Source: Statista "Number of games released on Steam worldwide from 2004 to 2018" (2019)



About Interactive Ontario

Interactive Ontario (IO) is a not-for-profit industry trade association committed to the economic and creative growth of the Ontario IDM industry.

IO fosters growth in the IDM industry in Ontario through government advocacy, research reports, thought-leadership and networking events, professional and emerging talent development, trade missions, connections to business development opportunities and meaningful partnerships with complementary organizations.

IO represents a diverse group of members ranging from SMEs (small & medium enterprises) to large international corporations. They produce interactive content in a variety of subsectors including video games, eLearning, multi-platform storytelling, extended reality and more.

Thank You to Our Report Sponsors

Support for this research report was provided by Ontario Creates, the Canadian Media Producers Association (CMPA), RBC, and Ubisoft. We greatly appreciate their support and thank them for making this study possible.



Approach & Methodology

Interactive Ontario engaged Laura Mingail to formally investigate and analyze the state of marketing and discoverability of Ontario IDM products, extract insights and offer suggestions on how it can be improved. In-depth interviews were conducted throughout the second half of 2019 with studio leaders, with a focus on their discoverability efforts and insights, along with several IDM funders and discoverability agencies. The studios selected ranged in terms of size, typical interactive digital products that they develop, and typical hardware that their interactive experiences are developed for. For the complete listing of companies interviewed for this report, please refer to the Appendix. The report, along with recommendations based on the findings, were then developed following these interviews.

Laura Mingail founded Archetypes & Effects to provide organizations in storytelling industries with impactful strategy, marketing and business development support. For more than a decade, Laura has developed and executed award-winning marketing campaigns, co-branded promotions and new consumer offerings. She has consistently driven studio, distributor, broadcaster and location-based operator results — spanning film, TV, music, immersive and interactive media industries.





The Interactive Ontario Discoverability Report Findings

The findings of this report have been categorized into four sections that are key to support IDM product discoverability: Insights, Strategic Relationships, Spending and Marketing and Communications Tactics. Each section dives into ways to leverage activities in these focus areas to support discoverability, along with the associated challenges and recommendations for success.



Insights That Support Product Discoverability

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Insights are needed at all points of the product lifecycle, from the conception of the experience, through to optimizing marketing and communication strategies once it is in market. The right insights can help a concept to stand out among the increasing number of new interactive experiences available to consumers, and to maximize the impact and return of discoverability efforts.

The most significant challenge for IDM companies to ensure that the right insights are captured throughout the product lifecycle, is the lack of resources required to get strong and actionable consumer and market data to inform a strategic approach to discoverability. It is not viable for small companies and often medium-sized companies to have staff fully dedicated to insights, since 49% of IDM companies in Ontario have no more than 5 full time employees, and another 35% have less than 20². Acquiring the right insights to aid in discoverability is also not often a significant part of budgets or plans due to the lack of awareness and limited funds. However, insights are an important approach to ensure that the investments into product development, through to communications tactics, provide a strong return on investment.

Audience groups and their behavior and needs constantly evolve, as do the platforms that they interact with, and competitor offerings. Therefore, it is important to avoid simply referring to what has worked for other projects as examples of what will keep working.

This section highlights how to leverage insights to support product discoverability, by focusing on:

- ✓ Identifying and understanding the core consumer group;
- ✓ Identifying an engaging IDM experience;
- ✓ Capturing useful insights during concept and user testing;

- ✓ Sourcing expert insights;
- ✓ Testing discoverability materials in-market;
- ✓ Identifying new markets; and,
- ✓ Tracking and optimizing discoverability tactics.

Identifying and Understanding the Core Consumer Group

Highly engaging experiences, and a deep understanding of consumer drivers to purchase, and how to reach them, make the return on discoverability efforts much stronger. In essence, discoverability support begins before the IDM product is even conceptualized. **Identifying and understanding the core consumer group**, what they want, and if it is something that does not already exist in market, before defining what the details of the experience will be, is essential to ensure that there is an audience for it, and that it best satisfies what their needs may be. It is therefore worth it for the success of the overall product, not just discoverability, to invest in securing the right data upfront about the target consumer groups. These insights can also help to validate that the product will have an engaged audience, to help to secure the right strategic relationships for the interactive experience.

Getting the right insights upfront takes time, expertise and money that is often limited for many of the IDM studios in Ontario. Larger studios do have access to on-demand insights, offering these studios a strong competitive advantage for discoverability, and more. For example, **Ubisoft** has a dedicated Consumer Marketing Knowledge Team that works in-house to ensure that the right insights are pulled together to identify clear opportunities to inform the development of highly engaging experiences and their discoverability efforts. The team's insights for

² Source: Measuring Success: The Impact of the Interactive Digital Media Sector in Ontario (May, 2019)

opportunity identification come from a database of player profiles and other useful statistics compiled from actual gameplay accumulated over many years, while also leveraging external data. Insights go as deep as understanding different player groups' motivations, such as their drive to compete, go on an adventure, explore, see personal progress and more. They also understand consumer habits around player behaviour, through to their media consumption habits, and even how these vary by demographic and psychographic. For [Ubisoft](#), the development of a new game starts with insights on which audience, which market, and which players would be beneficial to target, paired with a proposal on an innovation tied to the game experience, which is explored in the next section. Once the audience is defined, more insights are uncovered around how and where they access content and the value propositions consumers seek, to help to refine the new offering further.

For experiences that are intended to be sold in many regions, it is important to learn about unique needs of potential fans in each target region as well, and to then prioritize which secondary regions to focus on. This can be done with outsourcing for regional insights from marketing or research experts, or by securing a publisher for those regions. Very high-level insights can also be gathered using available data. For example, if a company is considering developing an experience for a certain niche genre, insights on how well movies of that same niche genre performed in these secondary regions can be gathered by sources such as Box Office Mojo. Sales platforms such as Steam track regional sales however those data points are only available to the studio tied to each game. If a studio is considering developing a new game that is a similar genre to what

they have published prior, that past regional sales data can be valuable as reference.

It is also valuable to understand **which interactive platforms** the target audience engages with, and why. This can help to identify not only the right platform to launch on, but other priority platforms. [Hollywood Suite](#) developed *Ferris's Room VR* - a companion piece to the feature length documentary, *Ferris's Room*. Not only was it released for VR headsets, but it also was developed so that the extended target audience of the documentary could engage with it on desktop and mobile, with 360 video, thereby reaching a larger portion of their target audience.

Identifying and understanding the core consumer group upfront also helps to **ensure that internal and external discoverability experts and agencies are set up for success.** [Innovate by Day](#) is a strategic marketing and digital content studio specializing in the cultural industries. They suggest that it is important to find data that can help to estimate the size of this audience at this stage, to validate the potential for a strong return. Then, studios can do an analysis around what those target consumer groups are engaging with, including identifying the narratives and points of difference that could engage this audience – from the story to game mechanics based on who they are, what they like, and where they prefer using IDM products. [Veria.ca](#) is a marketing agency that focuses on digital marketing in the entertainment industry. They highlight the importance and value of identifying and uncovering insights about a core consumer group first. By focusing on the core consumer first, the appeal of the game will not be diluted. And, by creating that 'perfect' offering, the core group will be more eager to share information about the experience with their network, at no cost. It gives them 'social capital.'

Identifying an Engaging IDM Experience

Determining what offering will be unique and engaging enough to incent user acquisition at launch is not something that can always be done simply by referring to insights. However, insights that can help to spark ideas include understanding **what does not yet exist for target consumers that they would like to experience**, as well as new platforms that may be launching around the time that the experience may be ready.

The following are some examples of how IDM studios in Ontario successfully identify engaging new product opportunities:

- When **Ubisoft** develops new game concepts, the teams start with gameplay innovations, and then analyze insights on consumer groups to assess which proposals will be most exciting and engaging for players. *Starlink: Battle for Atlas* began with an idea around the innovation to create modular starships that players customize on the fly – and the target audience was defined once this was locked in.
- **SHG Studios** identified a market niche in browser-based text Role-Playing Games (RPGs) as this category was emerging. Sometimes, an experience may already have been attempted in market, but the overall experience can be improved upon. While some games existed, customer service and community development was not strong, so *Star Pirates* was the first of their games to have success in this category.
- **Uken** was a first-mover in the industry to build games on Facebook. Through insights on relationships and market trends, the team identified the opportunity, received great success with players, and then extended this strategy to develop content for mobile platforms. Currently, Uken's

combined monthly active players across all its games is estimated to be between 2,000,000 to 2,500,000, and *Who Wants To Be A Millionaire?* and *Jeopardy! World Tour* are the #1 and #2 sustained top grossing trivia games in the U.S., respectively.

Insights to Capture During Concept and User Testing

User testing is valuable for overall experience development, but can also help with discoverability. It is valuable to ensure that **questions designed to uncover insights that inform discoverability tactics** are integrated into the concept and user testing phases. These questions can help to refine the right audience to target, and uncover insights such as where they look for information about new experiences, which can then be integrated into the communications strategy. And, it is important to ensure that concept testing actually includes players that represents the target audience, and not just friends and family or fans of a studio.

The following are some examples of how IDM studios in Ontario gain valuable insights that aid in discoverability, during concept and user testing:

- **Uken** employs a range of tactics to get concepts and products tested at different stages. This includes focus groups through to soft launches in certain small regions, that are also done in conjunction with testing discoverability tactics.
- **Relish Interactive** often does product testing with kids at a relatively low cost. When testing a new IDM product concept for a younger demographic, the product is brought to summer camps and summer schools, for example, which is appreciated by the kids and staff. The studio captures insights on what kids like

most about the experience which then helps to inform key messaging in discoverability tactics.

- **OccupiedVR** does user testing while also gathering insights on who is engaging most with the production, and with what specifically. While data to inform some insights can be captured in the experience itself, watching how people are interacting with the VR content can help as well.
- **Gameloft** captures in-game insights during testing and launch to understand what consumers are getting most engaged with, which can inform future creative. For example, a spike in interest around certain characters may result in those characters being featured in creative.

Expert Insights

Sourcing expert insights on subject matters and target audiences can be helpful to **understand overall trends as well as likes, dislikes and needs for segments of the target audiences**. This is helpful for a range of target audiences, such as younger kids or, for example, an adult audience group that is seeking interactive experiences to aid in mindfulness and meditation. **Sinking Ship** creates TV, film and interactive content for a wide range of kids. They have an in-house expert and also work with educational advisors. **Relish** also works with education consultants when developing their assets, to help them understand their unique preschool audience, and their parents. It is important to remember that expert insights are not a replacement for testing with actual consumers.

Expert insights can also **be leveraged as a means to get validation from sources that are trusted by target groups**, allowing for studios to build possible relationships for discoverability tactics such as tapping into their experts' own communities, through to product endorsement.

Testing Discoverability Materials In-Market

It is also important to ensure that marketing creative is impactful before an experience launches. This is a best practice to help to maximize the return on investment of the creative development and advertising costs. This can be done by doing **sample tests** to measure audience engagement with different creatives in market, leading up to the launch. And, once an experience has launched, as new creative is developed, testing of discoverability materials can be done ongoing.

Testing can be done many ways, and it is relatively inexpensive to test materials in market. The following are some examples of how IDM studios test their discoverability materials in-market:

- **Felix and Paul Studios** test different creative options, including the images on store platforms. For example, they rotate in new title art and measure page traffic and sales lifts.
- **Phantom Compass** leverages its online community to gain insights on what game visuals audiences are getting excited about, such as through social media platform Reddit, which in turn informs both the development of their experience, and also their creative. By publicizing their development process, they also grow game engagement among their online fans.
- **Uken** frequently tests creative on social media through to paid platforms, as the landscape is constantly changing resulting in the impact of various marketing creative changing. On average, they create two to three different ads each week to learn what works best.
- **4L Games** tests a variety of copy and keywords when promoting their ads on social media, and they measure how different ads perform overall and among different target demographics. This helps to inform the team about which message is most impactful and which audience is most engaged.

Tracking and Optimizing Discoverability Tactics

It is important to monitor more than simply IDM sales when tracking discoverability tactics, to understand who is most likely to engage with an experience, and where they can be reached. These insights can help to ensure that discoverability tactics are constantly optimized to ensure that time and dollars invested into discoverability are as impactful as possible.

Understanding the value of each discoverability tactic is therefore essential, as is having resources to revise campaign plans in order to drive the greatest return on investment.

Discoverability tactics can range in terms of objectives and measurements of success. IDM companies should define their objectives for each tactic, and set measurement for success accordingly. For example, PR efforts prior to a game release may have the objective to secure coverage for a game with a target number of top gaming media covering news of the release, as well as an objective to drive Steam “wish list” adds. As another example, a paid video ad as part of a social media campaign may have the objective of driving views and shares, to maximize views at a set budget. When discoverability tactics can drive target audiences directly to buy an IDM product, the conversion rate from those who clicked through becomes valuable to measure.

Not all discoverability tactics link directly to sales, as consumers may engage with an experience only after they have become aware that an experience is launching a few months prior to launch, read about it in an article, and then decided to go directly to a store platform to purchase. Therefore, not all discoverability tactics have the same key performance indicators (KPI). For example, the success of a PR campaign to make consumers aware of an upcoming launch date may be measured by “wishlist” adds if the game is on Steam, and media impressions, based on posted article viewership numbers or estimates on viewership based on media platforms' typical readership which may be provided in their media kits. Whereas a YouTube video ad's success may be measured by how many people viewed the ad in full or

clicked through to the product page for more information.

Sometimes, tracking the right insights requires studios to **develop or outsource creative ways to capture the success of discoverability tactics**. Here are some examples of how Ontario IDM companies are able to capture insights that store platforms do not yet provide:

- **Uken** shared that a key KPI of theirs is user retention over a certain period of time. On average it is 10% after 30 days from the download of the mobile game. It is valuable to profile users most likely to continue to engage in the experience, in order to target like audiences, although sometimes they do spend on reengagement ads for lapsed users. Uken leverages attribution marketing platforms such as *Adjust*, to gain insights into the impact of all marketing tactics to continue to optimize its acquisition strategies. Attribution marketing tools do exist for mobile apps, however, there are not yet similar solutions for store platforms that are more closed when it comes to insights.
- **Gameloft** finds value in including in-game surveys to learn more about who is playing their games, to then aid in optimizing discoverability tactics. Since users are answering questions, it can be valuable to offer something back in return if they choose to reply, such as special access or discount.
- **Impossible Things** developed the *ReBlink* experience for consumers to engage with art through augmented reality, at location-based venues such as art galleries. For location-based interactive experiences, some physical monitoring of how users are reacting to on-site discoverability tactics can help to assess and revise on-location discoverability tactics, such as posters or video ads on screens. For example, if a greater percent of passers-by are seen to try the experience after seeing an on-site video or simply a poster that shows what they are missing out on if an app is not downloaded, it becomes clear that it is worth it to invest in those discoverability tactics for more locations.

Identifying New Markets

Insights can be leveraged to identify new markets for expanding the sales of IDM. Knowing what hardware has high usage, interest in genres overall, and sales of English games in non-English markets can help with deciding which regions to expand to. At a basic level, ensuring that there is support for sales tracking in key regions can help to uncover new regions for potential growth opportunities by localizing games. The following are two success stories of how Ontario IDM studios identified the opportunity to focus on expanding into new markets:

- **13am Games** leveraged the insight that portable gaming is incredibly popular in Japan, and the Nintendo Switch was therefore in high usage. The studio made the decision to support *Runbow* in Japan, which resulted in its success there.
- **Pop Sandbox** noticed that *LOUD on Planet X!* was doing well in Japan, even though the game was in English. They then translated it into Japanese to help to support the expansion into this region.

When the decision is made to expand into new markets, **discoverability tactics must be customized and tested for each market.** When expanding into unfamiliar markets, taking time to develop a relationship with a local publisher that can successfully support discoverability can help with smooth expansion. For example, **Stitch Media** plans to grow the success of *Terrorarium* in South America with a distributor partner who will also offer promotion support.



Recommendations

- It is imperative that studios receive support in the area of insights. This can come in various forms from organizations supporting IDM companies:
 - Best-practice training, tools and templates to aid in the development of skill sets in tracking and reacting to the right insights, at each phase of the product life cycle.
 - Forming relationships with top industry research companies in order to offer special rates to members in order for them to be able to secure key insights to aid in funding decisions. Examples may include SuperData or Greenlight Insights.
 - Forming relationships with the strategic partners outlined in "Strategic Relationships to Support Discoverability" section to gather and share relevant insights. This will be explored further below.
 - Guidance on the minimum forms and sources of research in order to qualify for funding, from funding bodies.
 - Development of a tracking tool by funders to be able to more easily spot relevant trends in consumer feedback in testing, through to the results of specific marketing and communications tactics on specific platforms. These insights can then be shared back with the industry, or simply funded projects, to establish benchmarks and learnings.
- Studios must find solutions to garner valuable insights, within budget. With limited stretch in budget, the following can be done without a significant change to resources:
 - Refer to support organizations, reputable industry press and partner resources for insights that may already exist in articles, and reports from sources such as Statista, The ESA, Interactive Ontario, Ontario Creates, The Canada Media Fund, and more.
 - When doing sample tests, ensure that they are with the right target audience, and the objectives of each test are defined upfront, to know the optimal ways to execute.
 - Develop in-house tracking tools to populate and react to the relevant insights required.
 - Track and test ongoing, as audiences and what resonates with them, can change.
 - Hire a consultant or agency to help to develop a plan of action for insights gathering at each phase of the product life cycle for each product, and to train appropriate members of the team.
- Insights that cannot be acquired accurately with the solutions mentioned above are those tied to the actual store platforms. While some mobile platforms offer rich insights such as where consumers who downloaded an app came from, other store platforms offer significantly less, which makes optimizing discoverability efforts much more challenging. Until this changes, relationships with store platforms to gain insights on relevant trends where possible, can help. Strategic relationships are explored further in the next section.



Strategic Relationships to Support Discoverability

Strategic Relationships to Support Discoverability

Especially in a highly competitive industry, strategic relationships can be more valuable to help to break through the clutter and ensure impactful discoverability, than having significantly larger budgets for discoverability.

This section covers key strategic relationships to form and nurture, to aid in discoverability. These may include relationships with:

- ✓ Hardware companies;
- ✓ Store platforms;
- ✓ Publishers;
- ✓ IP Owners;
- ✓ Licensees; and,
- ✓ Other mutually beneficial collaborators.

Hardware Companies

Hardware companies find value in ensuring there are engaging IDM experiences developed for their hardware, as this incentivizes consumers to choose their hardware over other options. Growing these relationships is essential to provide studios with an understanding of what new hardware is coming out, the key features to support, and how to develop for it.

Relationships can also help provide access to financial support from hardware providers, in exchange for exclusivity or an exclusive window of time. Often, the studio content being funded helps to showcase the special features of the hardware. For example, **Felix & Paul Studios** developed a strong relationship with Facebook's Oculus Team to capture financial support in exchange for an exclusive window. And, this relationship also garnered them strong marketing support to support discoverability.

Often, hardware providers also control store platforms for IDM content. Relationships can also support the ability to get better store placement for improved discoverability at the moment of purchase. For example, **13am Games** secured a strong relationship with Nintendo for *Runbow*, and the game was well promoted, helping to lead to over 1.9 million downloads.



Store Platforms

While some hardware providers also operate the IDM stores for their hardware, there are many stand-alone store platforms, as well as platforms that are the go-to source for free-to-play games. Relationships with the appropriate platforms are key for discoverability, for those that sell their experiences on store platforms, as opposed to directly on their own websites for example. While often these platforms are relatively turn key and easy for experiences to be launched on them with no direct contact, **the exposure of an experience can be increased on these platforms with the right relationships.**

Often, store platforms do not allow for studios to buy ads on them. Feature experiences are curated by the store's team. By engaging store platforms with the experiences early on, and getting their insights on what would be valuable for them to see in order to provide it with increased exposure, studios can secure greater exposure on the platforms where target consumers are naturally going for new experiences. These are examples of how Ontario IDM studios harness the value of strong store platform relationships:

- **4L Games** develops and maintains strong relationships with the leading app stores where their games are sold. For example, sharing their communications and launch plans with the team at Apple in advance of any promotion has helped contribute to strong on-platform promotion. In fact, their debut title FRACTER launched as a Best New Game and was featured as the Game of the Day in 132 countries on the App Store.
- **Capybara** connects with major store platforms at the early stage of development, to identify where time-limited exclusivity deals may exist in exchange for

strong exposure. They have secured a deal like this with Microsoft, with more in the works. They also leverage their relationships to gain valuable insights to inform decisions such as pricing and launch timing, to best position their games for their audiences.

- **Gameloft** has an in-house group of leaders that focus on developing relationships with store platform leads, to secure valuable placement such as home page features. However, they have learned that featuring alone is not enough. Often, if a game does not have high awareness overall based on other discoverability tactics, consumers will be less inclined to click on marketing creative featured on the home page.

Most store platforms offer limited consumer insights. Therefore, relationships can help studios get **more valuable insights** around the consumer behavior on their platforms, which can inform studios on which platforms are most likely to have the ideal target audiences, through to what creative may resonate best.

It is important to note that store platforms also offer various subscription models, especially as consumer groups within the broader entertainment industry are more used to the subscription model. As the number of subscription offerings for interactive experiences grow, these platforms need games to engage more consumers. Therefore, **first-mover studios can receive more placement and support** from these platforms. It is not only the newest game releases that can go onto these platforms. Games that have been released to other stores can be ported over to help them find new consumers. For example, **DrinkBox Studios** was among the first group of studios to launch on Xbox Game Pass and they received valuable exposure from the added support.

Publishers

Publishers are, in essence, a way to outsource support that can help improve discoverability for IDM products. Publishers can be experts in discoverability, but an added benefit is that they can help get an IDM experience to market faster. The core benefit of using a publisher is especially useful for studios that have limited resources. Even when some studios choose to self-publish experiences to retain more of the share of revenue, in order to break into markets that are less familiar, publisher relationships may be secured for those specific foreign markets.

The best publishers for discoverability have built-in audiences and a strong reputation with hardware, store platforms and even press and influencers. But not all do, and not all publisher relationships have been successful for IDM companies in Ontario. Also, having a large fan base is not as helpful if the fan base is not the target audience of the new experience being published. Because of this, publishers often curate to a certain audience.

Publisher deal terms vary by publisher and experience. The relationships can include upfront funding in the game development, but this is not always the case. **DrinkBox Studios** received funding from a previously existing publisher fund from Sony for *Guacamelee*, which, paired with other funding, helped to develop the game for PlayStation 3 and PlayStation Vita. In addition to financial support, this relationship with Sony helped to secure strong discoverability support, including a full week takeover on the store platform, social media, PR and more.

IP Owners

There are many benefits to developing strategic relationships with IP owners. While there are often costs associated with using others' IP, this section refers to how these relationships can support discoverability, including engaging an existing fan base, gaining valuable audience insights, and direct and indirect discoverability support.

Developing a relationship with an owner of a known IP provides the benefit of being able to **engage an existing audience of fans**. **Uken** identified the universal awareness of game shows, allowing for easy onboarding for many consumers as they ultimately understood the concept of the games. By collaborating with gameshow IP *Who Wants To Be A Millionaire?* and *Jeopardy!*, Uken was able to leverage the existing audience from these shows to great success.

IP owners often have rich **insights into their core audience**, many of which could be useful in developing an impactful discoverability plan. **Gameloft** works with top IP owners such as Lego and Disney, who have rich consumer insights. It is important to know that these insights alone are not enough. Gameloft invests in other tactics to learn about their optimal consumers for the new games themselves.

Developing an experience with an existing IP may also offer **more turnkey discoverability support** arranged by the IP owner. For example, **Uken** also benefited from marketing collaborations such as mentions about the game in the *Jeopardy!* network show, digital ads, and integration into the *Jeopardy!* newsletter. Another example of this is with **DEEP inc.** They collaborated with ARTE and developed VR content called *Polar Sea 360°* to coincide with ARTE's linear documentary. ARTE offered strong, integrated support of the VR content in conjunction with the linear content. For example, the VR content was promoted on TV, in magazines

and on ARTE's website. And, PR efforts were strong, even ensuring that press could sample the VR content at press-junkets. On top of this all, some of the footage captured in VR was featured in the linear content because VR was able to capture shots that would have been difficult to create using a regular camera, thereby further promoting the benefit of discovering the VR content.

IP can directly support discoverability of an experience, as highlighted above. And, it can indirectly help to support discoverability. For example, **when a major IP has other products being promoted in market, it generally can have a positive effect on awareness and excitement around the IP**, helping increase consumer engagement with discoverability tactics by the IDM experience. **Gameloft** learned that Disney would be doing heavy promotion for the Beauty and the Beast movie. So, they ensured that they integrated and featured the story's princess Belle in the *Disney Princess Majestic Quest* game and marketing materials, which resulted in a strong increase in game engagement.

While IP is often associated with existing stories, it **can also be associated with talent**, such as artists, who can offer similar benefits to relationships with story-based IP. **Pop Sandbox's** *LOUD on Planet X!* reaped the rewards of association with 14 recording artists, such as Tegan and Sara, Lights, Metric, Shad, and more. The artists engaged their fans with the experience on their own platforms to drive discoverability, and they even helped to rally fans around some crowd funding.

Additionally, licensing deals for IP can be cost-prohibitive for many studios. However, studios can uncover **open IP** that has the benefits of audience awareness, without high costs. **Impossible Things** created AR tied to famous works of art that did not have to be licensed, with their *ReBlink* experience.

Extending Discoverability with Licensee Support

Many Ontario IDM studios are developing their own IP. Opportunity exists to extend its value with partners that are not IDM companies. **The more touch points an IP has, the larger an IP's audience can be, which can in turn help with the discoverability of the IDM experience.**

For example, **Relish Interactive's** *Weirdwood Manor* was launched as an interactive story experience for tablets, but it is now being scripted for TV. Once launched, this will expose the IP that first launched in 2015 to new audiences.

In addition to increased exposure, **the more touch points an IP has, the more opportunities there are to gain valuable consumer insights.** For example, **Sinking Ship** develops TV and interactive content for their IP, with partners such as PBS. PBS shares insights throughout the process, including on which creative assets may perform best to aid in discoverability, such as for *Odd Squad* season 2 creative promoting the game.

When IDM content is part of a larger package of content such as tied to a film or TV series, sometimes the IDM content is not considered a priority to promote. Often the IDM content is free and a way to promote the other content. To help to gain promotion of the IDM content, it can be helpful to **develop promotional assets as a part of the package**, such as digital ads or short TV spots, with inputs from the broadcaster, for example, for them to then use.

Other Collaborators for Discoverability

By securing insights around the consumer groups that are most likely to engage with an IDM experience, those **insights can help to generate ideas for collaborative relationships to support discoverability**, from cross-promotions with other brands, to launching IDM content with a partner that is not a traditional store platform, for an exclusive window.

A simple example of a cross-promotion can be with another game, where platforms promote each others' experiences by offering up free in-game ad space. It can also mean identifying possible relationships with brands that are in other categories. For example, **SHG Studios** identified that their browser-based *MMO Star Pirates* engaged an audience segment that also enjoyed sci fi and web comic content online. The PVP webcomic had a blog that promoted the game. A single post from the blog generated thousands of interested players who played the game and joined the community. They named themselves 'Panda Claws', to rally around their favourite webcomic and play together.

Recommendations

- Studios are still competing with many other companies for these relationships, but when secured, they can have a great impact on discoverability. It is recommended that specific levels of support are included in any deal terms.
- In order to develop these relationships, it is important for studios and their support organizations to meet with potential partners and strengthen relationship-building opportunities. It is also important to ensure that pitches and project updates all clearly tie back to what they have communicated they are looking for either directly, or in press or event speaking engagements shared publicly. Having insights to prove engagement with a game concept can also help conversations move forward.
- Studios should not assume that all publishers are experts in discoverability. It is recommended that organizations such as the Canada Media Fund, Ontario Creates or Interactive Ontario provide assessment tools and resources to aid in the selection process, should going with a publisher be the route that studios would like to pursue.
- Support organizations can also help to develop relationships with hardware providers, store platforms, publishers and more, to consolidate and distribute key insights to the industry, and make fitting connections based on potential partner needs.



Spending to Drive Discoverability

Spending to Drive Discoverability

There is a large variance in spending to support discoverability among Ontario IDM studios. Paired with a limited number of resources to use insights to plan, assess and react to the performance of discoverability tactics, lower budgets to support discoverability resources creates a challenge for many Ontario studios' tactics to drive strong return on investment (ROI).

This section highlights trends and opportunities with regards to spending to support discoverability. This includes:

- ✓ Typical spending;
- ✓ Budget allocation;
- ✓ Funding sources.

Typical Spending

Most studios interviewed have limited spending for discoverability – both on internal resources, and on outside spending on creative development, consultants or paid opportunities. Most small studios, and some medium studios have no dedicated staff on discoverability. Additionally, as outlined later in this section, many of these studios rely on upfront funding.

Ontario Creates has found that the average IDM projects that they support have overall budget averages of \$52,520 for discoverability, with the intent for this budget to be spent over six months, over the period leading up to launch, and to provide support for a few months post launch. And, **The Canada Media Fund (CMF)** has found that discoverability campaigns that they support have ranged from \$2,000 to approximately \$50,000, based on insights from Convergent TV projects in the past. Experimental projects require the producer to budget marketing with the production budget at a rate of 25% -50% of categories of the budget that account for Production team Labour and Equipment & Materials, with overall project budgets that vary dramatically in size.

The studios interviewed for this report identified that their spending varied, but the typical estimated spend was approximately \$30,000 total for internal and external costs to support discoverability for an IDM experience.

When cost estimates from studios interviewed were above this typical spend, it was due to small and medium studios spending on higher-cost discoverability tied to travel and having booths at trade shows, or large studios with 20 or more full time employees spending significantly higher amounts on discoverability resources and advertising overall. For example, one of the large studios interviewed invests between \$1-2 million a year on all of their in-house staff dedicated to discoverability efforts for their games.

Often, the smaller budgets are used to test different tactics based on the knowledge available in-house, but the returns are not always clear due to the lack of in-house discoverability staff. The trend was also identified that production budgets can go higher than planned and other budgets such as discoverability budgets often were cut to compensate for this. Additionally, the limited funds are spent upfront and if they are not working well, projects stop getting supported within a few months from launch as there is no proven ROI or funds coming in to support ongoing discoverability. While larger companies such as **Gameloft** also see the value of strong support at launch, they know that experiences must be supported after launch in order to be discovered by the right consumers. They rely on dedicated teams for discoverability for each game to maintain its success by consistently uncovering valuable insights, building communities, securing discoverability support via partners, arranging game events, promoting updates, and more.

It is important to mention that higher budgets are not necessarily the only solution needed to support discoverability. In one case, even with a budget that was significantly above the average spend of a few hundred thousand dollars, the experience did not perform well. It is not just about spending – successful discoverability initiatives combine the right product, insights, resources, relationships, tracking, and ongoing support.

Typical Budget Allocation

Ontario Creates, The CMF and studios each identified similar trends around the types of expenditures that studios are including in their discoverability budgets. The typical expenditures include:

- Developing a trailer and other creative assets;
- Community development support;
- PR agency support;
- Ad buys such as on social media and search platforms;
- Conference attendance and booth presence; and,
- Influencer payments.

Overall for small and medium studios, budgets are spread thin and, generally, there is not a clear sense of which tactics have worked the best. This is based on the limited analytics being performed to decide on the right tactics, to optimize campaign spending, and to do post-game analysis. Funding bodies do receive updates on discoverability expenditures, but the insights on how well each specific tactic performed are often limited. The lack of a formal or easily accessible tracking system creates a bottleneck to using such insights to inform future strategies or fund decisions.

Funding Sources Impact on Discoverability

Funding sources for Ontario IDM experiences range from government-supported investments and grants, to support from partners such as publishers or hardware providers. A very limited number of the studios interviewed were able to develop their initial offering without funding sources such as these. It is valuable to consider how funding sources can help, or hinder, discoverability.

Not all funding sources are able to make decisions around support as speedily as needed. It is important to be able to move fast to get IDM products with high market potential to market and some funding processes can delay the launch since there are set windows where applications can be made and funding can be received. Some studios are able to develop experiences significantly faster than set funder timelines. For example, Uken built *Who Wants To Be A Millionaire?* in three months.

When a studio collaborates with a publisher to gain support in discoverability or other benefits, once the publisher and, if applicable, the funder and the online store platform take a percent of revenue, even less is left for the studios, making it more challenging to pay off costs, reducing funds available for things including future discoverability efforts. Therefore, if an IDM studio secures support from a publisher, it is recommended that the level of discoverability support is specified when possible in publisher agreements.

Government-funded resources have the opportunity to increase their positive impact on studio profitability. Currently, there are no dedicated in-house discoverability experts or best practice resources available for fund staff, jury members or studios being funded.

Crowdfunding is another way to get funding for an IDM project, including discoverability. Crowdfunding may help to develop an audience for the experience at an early stage, and this audience will be more engaged with supporting discoverability efforts when the experience is available. While crowd funding is easier with an existing fan base around certain elements such as an IP or talent in the experience, substantial efforts are still needed to ensure the crowd funding opportunity is discovered.

Recommendations

- For studios that have discoverability budgets on the lower end of the scale, heavier emphasis on having the right insights and relationships to support discoverability as outlined in the sections above, is key.
- To make the investments as beneficial as possible for funders and studios, it is a valuable investment for funders to develop a solution that improves the tracking of discoverability tactics used, and the capture of the right insights for each tactic. This solution can then help to inform future funding decisions and empower fund staff and jury members to provide discoverability guidance for fund investments.
- Further to capturing and leveraging easy-to-access insights, as IDM projects vary, not all insights will be applicable to each project. Therefore, the ROI of discoverability efforts can be dramatically increased if discoverability experts such as consultants and agencies were hired or outsourced during certain phases of the development cycle, beginning at the project development phase. While full-time support is difficult to budget for, outsourced expertise can help to maximize returns.
- While the typical spending on discoverability for an experience is relatively low for a majority of the IDM studios in Ontario, it is estimated that there are over 900³ companies in the province. While production cycles mean that not all companies will have a new experience in market each year, it can be assumed that a large number will, resulting in a large pooled sum of funds being spent on discoverability. It is recommended that an organization that supports this industry explore ways to negotiate options for preferred rates or support on retainer with industry experts who perform various discoverability tactics.

³ Source: Measuring Success: The Impact of the Interactive Digital Media Sector in Ontario (May, 2019)



Marketing and Communications Tactics Being Used

Marketing and Communications Tactics Being Used

Those interviewed for this report highlighted a range of marketing and communications tactics used to help to drive discoverability. These subsections highlight these tactics, thoughts on best practices for using them, as well as challenges and opportunities. The tactics featured include:

- ✓ Ensuring that all messaging in communications is clear and consistent, and tied back to key insights;
- ✓ Refining messaging and creative for each target audience;
- ✓ Developing creative that clearly illustrates what the IDM experience entails;
- ✓ Identifying the right campaign timing;
- ✓ Community building;
- ✓ PR with press and influencers;
- ✓ Media buys;
- ✓ Deploying special offers, updates and in-experience events;
- ✓ Search engine optimization; and,
- ✓ Award applications.

The right tactics take time and money to develop, and often the financial and in-house resources do not exist for smaller studios, increasing the challenge of being able to break through the clutter of other experiences vying for the same consumers' attention.

Clear Messaging and Creative Assets Based on Insights

It is essential to have messaging that quickly conveys what the experience is about and what makes it different, to engage target audiences. While marketing creative can support multiple messages, it is important to **simplify messaging and prioritize the most important points** so that they come across clearly. For example, **Archiact** has had success with ensuring messaging is focused on the core benefit of their VR experiences which often is tied to a clear point of difference. Their game, *FREEDIVER: Triton Down*, allows users to dive and swim in a fully immersive experience. The tagline of 'Don't Forget to Breathe' conveys the unique experience and excitement of the game, clearly.

While clear messaging is essential to support discoverability, it is especially important when conveying a unique experience to consumers who are not regular users of the type of experience being marketed. For some IDM, the interactive experience is completely new. This is often the case for VR experiences in out-of-home venues. Therefore, it becomes even more important to focus on what consumers can step into, and not simply on the fact that VR is available for purchase, for example.

Creative and In-Experience Elements for Unique Target Audiences

The right message and creative for one audience, may not be the optimal option for another. To increase the impact of creative, it can be **refined for each core target group**, while ensuring that the messages all stay true to the core element of the experience, and the right group sees the right creative. An example of this is localizing

creative and in-game experiences for key target regions. **Uken** has had success engaging with consumers around the world, and they customize creative to resonate with their key regions which include countries like the United States, Canada, Australia, United Kingdom, Germany, Japan and more. They also localize questions in their games that are game-show based to further engage their audiences.

Showcasing What the IDM Experience Entails

In addition to having the right clear messaging for audiences, leveraging creative materials that **showcase exactly what the experience is like** helps to engage consumers, and can further convince a potential consumer that the experience is worth an investment of their time and money. This is one reason why trailer development is often a major cost for studios.

In addition to trailers, showing game play on social media channels or influencers' channels is becoming increasingly important for discoverability. For *Star Pirates*, **SHG Studios** promoted a video series of a player's video journal of her game progress on YouTube.

For location-based experiences, this is equally valuable to incentivize the ticket purchase. **Impossible Things** included a video preview to showcase to gallery visitors what they would miss if they did not download *ReBlink* augmented reality experience.

Campaign Timing

As mentioned above, discoverability campaign budgets are often heavier near launch. **Gameloft** has identified that the **cost per user acquired is lowest at launch** when the most significant support is happening and their games are new and generating the most excitement in the community, news and more. However, they do **invest in discoverability post-launch in order to continue to engage the right audiences, and monetize their experiences.**

Beyond when major campaign support happens during the lifecycle of an IDM product, taking the first step of identifying the right time for a product to launch is essential to help to ensure discoverability tactics are not lost. The right launch date can be projected based on an understanding of when other experiences may launch, especially those targeting the same consumer group, but not limited to them. For example, if a AAA game is set to launch on the same platform, it is very likely that it will be harder to break through the clutter if launching an indie game at the same time. Insights on when games are launching can come from news monitoring, and relationships with store platforms. If a game is tied to an existing IP, a good time to launch can be when that IP will be top-of-mind for consumers such as at the same time as a film release.

Community Building

Community building is a popular way for studios to build and retain their audiences both leading up to and post-launch of an experience. It can happen both online and offline. As mentioned in the section on insights above, it is also a way to get insights about creative through to actual game feedback, to help to further improve the return on investment of discoverability efforts.

Online community building includes communities on social media, store and in-game platforms. The right place to focus on building an online community depends on the target audience. For example, Mixer, Twitch and YouTube may be good platforms to use to engage communities for gameplay that is long and entertaining to watch. As another example, Discord may be a good platform to engage niche communities with a game concept that a studio would like feedback for early on.

When developing social media platforms for the game, studios are most successful when they **select the platforms that the target audience is most likely to engage with.** Each social media platform takes time to manage, so it is important to focus on the ones that matter most to the target audience. Their engagement will help to drive organic views of the content by their network.

Engagement on store platforms where consumers can interact and post reviews is equally, if not more important. These are often seen at the final point where consumers decide to purchase, or not purchase an experience. Therefore, engaging and actively responding to consumer comments is essential.

In-game community development, where applicable, is important for user retention. While user retention is not directly a form of discoverability, it is important because it helps support a positive community which in turn helps with positive word of mouth by existing players, to their network.

Ontario IDM studios see high value in community development. For example, **SHG Studios** has found that having multiple layers of community development has proven to be helpful in engaging and re-engaging players. They are especially important because **SHG Studios** has uncovered the insight that their games are valued because they offer both

fun and a social network for players. There are player-led social activities along with **SHG Studios** team members who play the game and interact with others with simple actions such as congratulating them on hitting certain levels.

As with any tactic, it is important to assess the return on investment for each specific experience. Community development can be costly, but leveraging engaged fans to complement paid community development leaders can be impactful and cost effective. **Gameloft** invests in multiple discoverability team members and they have a dedicated game community manager that oversees all social media networks, through to in-game news sections and live stream events with gameplay and trivia. **Ubisoft** also invests heavily in community development as part of its player-centric approach to engaging its customers. The studio has a team dedicated to community development through engagement and content creation and supports a Star Player program across all its brands to reward the most engaged community with special access to events and content, and high visibility in the game communities.

Offline community building happens through events and conferences. While a handful of studios have attended events and conferences that attract their target consumer audiences with the intent to help with the discoverability of an experience, there has been limited success on consumer discoverability. These events are expensive due to travel costs and booth space. Some studios also have created events of their own, but the costs are high and returns are not clear.

However, these events and conferences can be valuable to develop strategic relationships earlier on during the product development with publishers, store platforms and hardware partners. This stage is also one where products in development can be tested with attendees through casual demo opportunities near the conference venue, without necessarily requiring expensive booth space, if the events

have large numbers of the target audience attending. And, when a studio has a target audience that are comprised of businesses, and not consumers, attending the right events to promote an interactive experience during a presentation, has been successful, such as for **Impossible Things** and *ReBlink* – attending conferences for galleries has helped to give their AR experience for galleries and other venues great exposure.

Public Relations - Press

As with all consumer targeting for discoverability tactics, **the right press needs to be targeted** to maximize the return on discoverability. It is important to build and maintain relationships with the right press, which can vary by experience launched. Because the right press targets vary by project, **Gameloft** has a small in-house Team and choose to outsource PR based on specific needs by game and region, so that the right audience sees coverage.

Many studios employ PR agencies, based on their expertise and existing press relationships, however this can be expensive. For those studios that choose to not employ a PR expert or agency, opportunity exists to develop relationships with the press that their target audience is most engaged with, saving significant costs if done successfully. These **relationships are valuable** since press often receive many pitches for coverage, and even highly engaging pitches and experiences can be ignored. Some studios interviewed have done this successfully, such as **Archiact** and **Impossible Things**. Impossible Things used their connections and developed new ones to help to secure over 300 stories including Fast Company, BBC Canada and more. The team drove success through creating custom pitches for each major target, and many additional press and online sites picked up news from these major sources. In addition, press coverage can dramatically help with SEO and organic search online.

If press relationships do not yet exist with the right targets, **having insights to prove that an experience will generate strong views of press coverage** can help. Press are in the business of ensuring strong viewership for their content, to engage readers and sell ad space. For example, if a game trailer has strong views, that can help to get the attention of press when pitching a story. Offering an engaging **exclusive story** to the right press can also help to generate more interest from them. **Drinkbox** did this successfully by securing a one-day exclusive with IGN for *Mutant Blobs Attack*, and they received home page coverage from this major outlet.

Additionally, **Veria.ca** highlights that an easy way to understand which press may be most valuable to connect with is to **identify who covered similar titles previously**. This can be a good first step in developing a targeted media list.

Public Relations - Influencers

While paid influencer promotion is not a form of public relations, unpaid influencer relationship development is. Paid relationships fall under media buying tactics, however it is important to note in this report that they can be costly and the return on investment was not able to be confirmed by any of the studios interviewed. This could be because the paid influencer content could be seen as inauthentic to its core target audience. Or it could be because often the mass followers of these paid influencers are engaged, but only a portion of them are within the core target audience of an experience.

When it comes to developing unpaid influencer relationships, **understanding the influencers that personally would be most engaged with the IDM experience** is key. Like with press, offering insights about the draw of an experience, through to exclusivities, can also help. Taking time to understand what the influencer's audience wants is also very important when pitching ideas to influencers. Several Ontario IDM studios have

had success with this. For example:

- **Archiact** has had success developing relationships with influencers by taking the time to know what they like, and engaging the right ones.
- **SHG Studios** has had success with influencers by identifying the right ones beyond those that are traditional gaming influencers. Influencers in the web comic space had a positive impact on game discoverability.

Media Buys

While typical discoverability budgets are small, paid advertising is a part of many plans. However, with the challenges around the lack of the ability to invest in discoverability efforts from capturing the right insights, to planning and optimizing campaigns, it has not always been clear whether the typically small paid media buys have worked, or not.

Stitch Media highlights the importance of not just relying on strong organic campaigns, because they will not reach a large enough audience. For example, their paid media campaign for interactive children's books *Together Tales* was developed to rapidly raise awareness and sales across North America. Strategic media buys can help to **ensure that a strong enough number of the right consumers see the right creative**, to then discover the experiences. While all discoverability tactics, including media buy tactics, vary by project, Facebook, Twitter and the Google ad network have been useful.

It is important to note that while most IDM studios in Ontario specifically have limited budgets, as outlined in the previous section, larger studios do employ major spends, resulting in the ability to engage with and learn from a larger amount of consumers, contributing to the challenge that smaller studios have to break through the clutter as they are often advertising on similar platforms.

Special Offers, Updates and In-Experience Events

Once a game has been released, updates such as special offers and new in-experience events create new news that can capture the attention of consumers that may be aware of the experience but not yet purchased it, through to offer the opportunity to gain additional press coverage if the news is significant enough. Major sales, updates and more can also generate additional support from store platforms and other strategic partners, such as exposure on their home page, newsletter and social media platforms. It is important to develop the plan along with them and not assume that coverage will be received when the new news is near ready to launch.

SPECIAL OFFERS are a simple way to generate increased interest in an IDM experience. Store platforms often have store-wide sales that can help to increase the discoverability of participating IDM products. Often, the store platform will provide strong support for those sales, driving more audience members to check out the offerings. However, special individual offers outside of major platform sales have also proven to be successful to engage and re-engage consumers. For example, **SHG Studios** has offered some players discounts to come back to play, or referral offers to engaged players, for them to support the discoverability of the game with their network.

SPECIAL EVENTS are another way to generate interest in and attention around an IDM experience. Events can vary, but here are two successful examples from Ontario IDM studios:

- **Uken** creates events with special competitions and content updates that sync to their partner show IP and also

what is happening in the world. This keeps their games relevant and engaging to their players, which is critical to the success of trivia games. To achieve this, **Uken** has built robust content delivery and live operations tools. These tools allow their product managers and game designers to have direct control over their games, and they make the update process much more seamless. When an IDM product is in development, it is beneficial to consider how in-game events and updates can occur.

- **SHG Studios** has created a unique offering for their games in the past that has allowed for fans to pay to play the game again, but in a new environment, for a limited time. This content, *Ascension*, allowed the players to interact in the main game socially, while reliving the popular characteristics of the early game, with new storylines in alternate play space such as another solar system or space station.

Even simple **patch updates** and communication about them can help support discoverability with possible consumers often reading the most recent updates when browsing social media or a store page. Clearly positioning the updates in a manner that highlights why they make the experience even better, beyond simply saying something was updated, is highly beneficial.

Search Engine Optimization

Search engines continue to be one of the most popular ways that consumers find out about new content and experiences. If consumers are searching for new games for a certain platform or genre, for example, they often will do this search via search engines, and not only on store platforms. **Veria.ca** offers agency services, including supporting search engine optimization. They shared that in essence search engines go far beyond Google and Bing to include YouTube, Amazon,

Facebook and any site or app with a search box, or an AI-powered assistant. While there are many ways to optimize for search engine, [Veria.ca](#) shared the following best practices:

- **BE SEARCHER FRIENDLY.** Search engine business models are about providing the best and most relevant search results and user experience. For instance, they do not want to drive traffic to websites that are full of typos, take a long time to load or are not mobile friendly, since most of our searches happen on mobile devices these days. Doing well in search requires that studios also provide the best possible user experience across their entire digital footprint.
- **KNOW THE SEARCH LANGUAGE ECOSYSTEM.** People search using words and phrases, and there are tools you can use to learn what these words and phrases are, such as Google Ads Keyword Planner, WordStream or SEMrush. Performing keyword research can help studios to get a better understanding of who their audience is, how they think and what they care about. This is a critically important SEO first step. It can be used to inform content strategy, to gain insights on where audiences are spending their time and attention, and to attract a highly relevant target audience.
- **USE KEYWORDS STRATEGICALLY.** Once that search language ecosystem is better understood, writing visible content with pages focused on a single topic as much as possible, can help with optimization. Placing keywords and phrases in places that are often assigned more value, such as titles and headers, descriptions and tags, can also help. It is important though to always ensure that the language is still natural sounding and easy-to-read for those that find the page.
- **LEVERAGE STRUCTURED DATA.** The big search engines have created a standardized structured data protocol that is found at Schema.org. For many pieces of information in a studio's online footprint, this kind of code markup can help search engines better understand what they are offering and potentially have this content appear directly in the search result page itself.

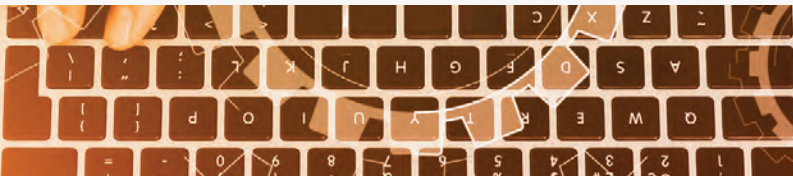
Award Applications

Award wins can help gain press coverage, and also help with the impact of marketing creative. For example, when [Felix & Paul Studios](#) launched advertising creative highlighting that the virtual reality documentary *Travelling While Black* was nominated for an Emmy Award, the click-through rate increased versus the previous creative.

Since awards may have costly application or nomination fees, and take time to apply for, it is important to **identify which ones matter most** to the experience's target audiences. When a nomination or award is received, it is valuable to not assume press will be aware of it, and an **outreach to press** could prove valuable.

Recommendations

- In order to develop impactful marketing and communications tactics, it is vital for studios to plan ahead and take the steps to capture the right insights about the right target audience and messaging and where they learn about new IDM products, through to having the right relationships to leverage to develop marketing and communications efforts at limited costs.
- It is important for studios that do not have in-house expertise to gain training or find resources that can support the development of the strategy. Some execution can be done in house with the right strategy and steps in place.





Conclusion

Ontario IDM companies develop engaging interactive experiences for global audiences. Increasing the impact of discoverability efforts is imperative to drive the success of studios, and industry growth. Overall, the recommendations outlined in this report call attention to opportunities related to what studios can do to monetize their experiences with impactful discoverability efforts, as well as what industry support organizations can do.

While many studios have small team sizes and limited time and budgets, taking action to ensure that the right skill sets, relationships, and ongoing tracking and improvements to discoverability efforts are actioned on, is essential. This will not only increase the return on investment on discoverability tactics, but also the return on investment on the IDM products themselves.

Industry support organizations can, in tandem, help to accelerate growth through the development of further education, tools and resources for studios, increased tracking and reporting of discoverability tactics impact by government-supported funds, and increased strategic relationships with industry partners and research resources by industry support organizations.

Appendix



13AM Games is an independent game studio focusing on bold 2D action and multiplayer games. We are based in Toronto and we come from a wide variety of backgrounds- film, television, product design, computer sciences, etc -all united over our love of games.



4L Games Ltd. is an indie developer studio incubated at Guru Studio in the heart of downtown Toronto. The team is comprised of artists, designers and game developers who share a passion for exploring the creative possibilities of interactive storytelling. FRACTER's Lead Artist San Suryavanshi served as Art Director on the Oscar nominated film *The Breadwinner*, and the game is also Executive Produced by Guru Studio's President and Executive Creative Director Frank Falcone.

Guru Studio is a creative-driven entertainment company renowned for creating, developing and producing internationally acclaimed and highly successful content for all ages.



Archiact is an award-winning virtual and augmented reality studio creating interactive experiences that immerse the world in wonder. They are one of the world's largest and longest-standing immersive reality studios, with headquarters in the VR tech hub of Vancouver, Canada. Since 2013, they have released multiple premium titles across the industry's leading PC, console and mobile platforms, such as *Evasion*, *Waddle Home*, and VR Game of the Year finalist *FREEDIVER: Triton Down*.



At **Blot Interactive** we love to transform imagination into reality. Blot Interactive began in 2012 and since our doors opened, we have shaken up the definition of the word 'game'. We appeal to all kinds of players and consumers by crafting powerful, fun and interactive experiences that spread across various devices and platforms. Our projects range from single player mobile to multiplayer VR. Blot Interactive is dedicated to training and supporting women and other diverse developers at achieving their career interests in game development.


Canada Media Fund
Fonds des médias du Canada

Canada Media Fund (CMF) fosters, develops, finances and promotes the production of Canadian content and applications for all audiovisual media platforms. The CMF guides Canadian content towards a competitive global environment by fostering industry innovation, rewarding success, enabling a diversity of voice and promoting access to content through public and private sector partnerships. The CMF receives financial contributions from the Government of Canada and Canada's cable, satellite and IPTV distributors. Please visit cmf-fmc.ca.



Founded in 2003 in Toronto, **Capybara Games** (aka "CAPY") is an award winning, independent game development studio. Starting out in the early days of mobile gaming, Capy helped spearhead the indie games movement and has become known for mobile, PC, and console favorites such as Superbrothers: Sword & Sworcery EP, Might & Magic: Clash of Heroes, Super Time Force Ultra, Critter Crunch, and BELOW. Their latest release is the acclaimed puzzle-battler Grindstone which was launched in partnership with Apple Arcade and received numerous awards nominations and best-of-the-year mentions.



DEEP Inc. is a multi-platform production company that specializes in the creation of innovative transmedia experiences, games and 360 documentary filmmaking focusing on a strong human interest subjects. DEEP Inc. focuses on creating the next generation of interactive content experiences with 360 video and in the realm of Virtual Reality. Now, DEEP Inc. is focused on creating software tools that will push the envelope for producing and distributing interactive 360 video experiences.

Liquid Cinema Inc. is a studio dedicated to exploring and defining the evolving language of immersive storytelling online, in VR, and most recently in AR and XR. Led by multiple Emmy Award-winning filmmaker and innovator Thomas Wallner, Liquid Cinema has been at the frontier of new media technologies, producing both award-winning multiplatform content as well as developing software tools for the 360 video and VR industries.

Liquid Cinema provides creators with authoring tools, a multilingual CMS and video players that tie in with Vimeo and Adobe Premiere Pro. Features such as 'Forced Perspective' and 'Switching' use Liquid Cinema's underlying patented technology to give back control to filmmakers, adding vital pieces of immersive grammar to the vocabulary. Liquid's video players perform live-rendered events including text, graphics, hotspots, and multi branching, which are customizable to each playback platform or device in a desktop authoring tool. Creators can now focus completely on shaping the experience they wish to create without having to write a single line of code or worrying about building and maintaining expensive applications.

With a workflow that can accommodate complex, multi language projects, across an array of platforms both traditional (2D) and immersive (VR), Liquid Cinema is there for the small independent artists as well as large enterprises. Our clients including news agencies, schools and broadcasters. www.liquidcinemavr.com



Drinkbox is an independent Toronto-based video game developer. We're a pretty small team who makes the sort of games that we want to play, and, hopefully, a few other people like what we do.



Felix & Paul
STUDIOS

Felix & Paul Studios is an EMMY® Award-winning immersive entertainment studio, creating unparalleled virtual reality, augmented reality and mixed reality experiences for audiences worldwide. The studio combines technological innovation with a unique, pioneering and in-depth approach to the new art of XR storytelling—creating groundbreaking original immersive experiences (Traveling While Black, MIYUBI, Nomads series, Strangers, The Confessional, Space Explorers series); awe-inspiring productions with existing franchises (Jurassic World, Cirque du Soleil, Fox Searchlight's Wild and Isle of Dogs); and collaborations with world-renowned organizations, leaders and performers (NASA, SpaceX, President Barack Obama and Michelle

Obama, LeBron James, President Bill Clinton, Eminem, Wes Anderson, Brie Larson, Jeff Goldblum, Bill Murray and many others). Felix & Paul Studios is the world's only full spectrum immersive entertainment studio, showcasing end-to-end creative capabilities, technological know-how and proprietary tools all within one company. The studio's platform includes industry leading 3D 360° camera systems, production/post-production software and processes for cinematic and real time interactive projects, as well as spatial audio capture, design and processing through its Headspace Studio division. Headquartered in Montreal, Canada with offices in Los Angeles, CA, Felix & Paul Studios has a highly experienced team of over 60 immersive media specialists and is backed by leading venture capital funds and institutional investors.



Gameloft

Leader in the development and publishing of mobile games, Gameloft® has established itself as one of the top innovators in its field since 2000. Gameloft creates games for all digital platforms, two of which are featured in the "Top 10 Games by All-Time Worldwide Downloads" from App Annie. Gameloft operates its own established franchises such as Asphalt®, Order & Chaos, Modern Combat and Dungeon Hunter and also partners with major rights holders including Universal, Illumination Entertainment, Disney®, Marvel®, Hasbro®, Fox Digital Entertainment, Mattel® and Ferrari®. Gameloft distributes its games in over 100 countries and employs 4,600 people worldwide.

Every month, 114 million unique users can be reached by advertisers in Gameloft games with Gameloft Advertising Solutions, a leading B2B offering dedicated to brands and agencies. Gameloft is a Vivendi company.

All trademarks referenced above are owned by their respective trademark owners.



Hollywood Suite owns and operates four exclusive HD channels featuring the iconic movies that defined the 70s, 80s, 90s and 2000s, plus essential Hollywood classics from the Golden Age, always uncut and commercial-free. With hundreds of movies every month on four HD channels, Hollywood Suite On Demand, the Hollywood Suite GO app and hsgo.ca, Hollywood Suite provides an unparalleled value to consumers.



Impossible Things is an award-winning creative technology company founded by Alex Mayhew and Ian Kelso. Based in Toronto, Ontario, Impossible Things specializes in mixed-reality storytelling combining cutting-edge software tools with their own brand of imaginative and innovative techniques offering audiences magical new ways to experience the world around them.



The **Independent Production Fund (IPF)**

was established in 1991 by Maclean Hunter Limited with capital endowments of \$29.2 million and has since become independent of any parent company. The annual revenues generated by the endowment and recoupment on investments constitute the funds at the Board's disposal each year for the Web Drama Program. The Fund is "certified" by the CRTC as an independent production fund, eligible to receive BDU (Broadcast Distribution Undertaking) contributions.

In 2018, Cogeco Communications allocated its annual BDU contributions to the IPF to establish the IPF's Cogeco TV Production Program.

The IPF is incorporated federally as a corporation without share capital and has been granted charitable status. The Board of Directors which represents the industry makes all funding decisions. The operations of the Fund are administered by offices in Toronto and Montreal.

INNOVATE BY DAY

Innovate By Day is a leading strategic marketing and digital content studio. Our enthusiasm for fandoms and desire to connect directly with audiences drives our work. Under the guidance of Chief Strategist Deb Day, we transform your goals and objectives into multifaceted marketing strategies and campaigns that tie directly to your objectives and ROI.

We apply our core values - Listen, Engage, Respond to all that we do. We focus on reaching, engaging and retaining audiences where they are, in real time. We navigate the ever-changing digital landscape through our well established relationships with digital media platforms, broadcasters, media and influencers. We build thriving audiences who become the greatest advocates for your company, brand, organization or project.

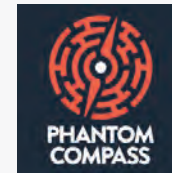
● C·CU·PIED

OCCUPIED is a full-service VR/AR/XR production house located in Toronto, Canada. Fixed on pushing the limits of immersive technology, Occupied has proven itself as one of the most innovative XR production houses in the world. Over the past 5 years Occupied has developed their own custom pipelines that combine the disciplines of Photogrammetry, Videogrammetry, Game Design, App Development, and Cinematic 360° Filmmaking.



Ontario Creates is a provincial agency that facilitates economic development, investment and collaboration in Ontario's creative industries including the music, book, magazine, film, television and interactive digital media sectors.

Funding for this study was provided by Ontario Creates. Any opinions, findings, conclusions or recommendations expressed in this material are those of the author and do not necessarily reflect the views of Ontario Creates or the Government of Ontario. The Government of Ontario and its agencies are in no way bound by the recommendations contained in this document.



Phantom Compass is an award-winning game development studio managed by industry veterans. Founded in 2008, Phantom Compass is best known for its acclaimed pinball role-playing game "Rollers of The Realm." The Toronto/Niagara studio creates original products for all major technology platforms and provides production services to clients in the entertainment, education and marketing industries.



Pop Sandbox an award-winning multimedia production company owned and operated by Alex Jansen. A boutique operation centered on innovative storytelling across platforms, Pop Sandbox drives original projects from concept through production to market. Pop Sandbox brings together a culturally and gender diverse group of top practitioners from a variety of disciplines in a creative environment that fosters innovation in both content and form, resulting in a strong track record of developing groundbreaking non-fiction properties.

Pop Sandbox has been prominently showcased at SXSW, the Cannes Film Festival, Games for Change, NXNE Interactive, the International Documentary Festival Amsterdam, Indiecade East and PAX East among many others.



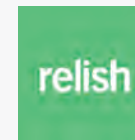
Red Meat Games is a professional software studio who's been crafting all kinds of digital products over the past 6 years. From mobile applications to Augmented and Virtual Reality to console videogames, this studio has been learning, growing and pushing ourselves to create and innovate.

With contract work for reputable clients like Canadian Tire and the Canadian government we've proven that we can harness our talented artists, developers and testers to deliver functional and fitting digital solutions to fit our client's needs.

With our game development we've been on the cutting

edge of emerging gaming trends like augmented reality and virtual reality, having shipped two full VR game releases as well as various Augmented Reality mobile applications, including our most ambitious title: 2018's award-winning horror VR game Bring to Light.

Whatever the challenge, Red Meat Games is the studio that will step up and tackle it. With a talented, tight-knit team we push each other and ourselves to give every project our all.



Relish partners with leading brands to create engaging digital content that generates awesome results. We make great partners because our studio is staffed with extensive experience and talent capable of designing digital solutions.

Our team is senior, talented, nimble, and efficient. We are digital strategists who look to both the past and the future to identify the greatest paths to success for our clients. We are designers who strive to innovate, yet understand the importance of the big picture and know how to meet client goals and deadlines. We are developers who find beauty in code, and explain it to the uninitiated in plain English.

Established in 2007 by co-founders Paul Pattison and Sacha Raposo, Relish has amassed a growing and award-winning portfolio of websites, games, mobile apps, and digital experiences.

With a decade of experience and a production team of over 60 developers, designers, animators, and problem-solvers, we are capable of taking on projects of any size. Our headquarters is in Toronto, with additional offices in Los Angeles, Vancouver, Ottawa, and an animation pipeline in San José, Costa Rica that allow us to easily support a global client base.

Relish focuses on creating high impact, interactive experiences and applications for web and mobile platforms.



Founded in 2008, **SHG Studios** is an successful independent video game developer based in Hamilton, ON. Winners of numerous awards, we create and manage our own casual, social games including www.starpirates.net, www.spybattle.com and the mobile game *Zombie Moon*.

At SHG, players come for the games, and stay for the community.



Sinking Ship Entertainment is an award-winning production, distribution and interactive company specializing in family and kids' live action and CGI blended content. Since opening its doors in 2004, Sinking Ship has produced over 500 hours of content, and through their globally recognized in-house distribution division, has

sold to over 200 countries internationally. In 2019 they set their sights on growth and launched a new animation series division. The company has rapidly earned a global reputation for high quality, groundbreaking original series and companion interactive experiences. Overall, Sinking Ship has won 17 Daytime Emmy® Awards and a variety of other international awards including Canadian Screen Awards, Youth Media Alliance Awards, Fan Chile Awards, Parents Choice Awards, the Shaw Rocket Prize, and the Prix Jeunesse International. In addition to production, Sinking Ship operates a cutting edge VFX and Interactive Studio, creating multi-platform digital experiences and interactive content for audiences around the world. The Toronto-based company is home to over 175 shipmates.



STITCH MEDIA

Stitch Media is an interactive production company focused on building innovative digital experiences and meaningful audience engagement with new technology. We create story and game experiences that evolve with the times. Our projects span web, mobile and games that push the boundaries of what's possible. Our work has been recognized nationally by the Digi Awards, Applied Arts Magazine, the Canadian Screen Awards and internationally by UNESCO's World Summit. Our team has worked with Disney, Microsoft, FOX, Discovery, CBC, Bell and consulted for the Smithsonian Institute and the Canadian Museum of Human Rights.

TELEFILM CANADA

Telefilm Canada is dedicated to the cultural, commercial and industrial success of Canada's audiovisual industry. Through funding and promotion programs, Telefilm supports dynamic companies and creative talent at home and around the world. Telefilm also makes recommendations regarding the certification of audiovisual coproduction treaties to the Minister of Canadian Heritage, and administers the programs of the Canada Media Fund. Launched in 2012, the Talent Fund accepts private donations which principally support emerging talent. Visit telefilm.ca and follow us on Twitter at twitter.com/telefilm_canada and on Facebook at facebook.com/telefilmcanada



Ubisoft is a leading creator, publisher and distributor of interactive entertainment and services, with a rich portfolio of world-renowned brands, including Assassin's Creed, Far Cry, For Honor, Just Dance, Watch Dogs, Tom Clancy's video game series including Ghost Recon, Rainbow Six and The Division. The teams throughout Ubisoft's worldwide network of studios and business offices are committed to delivering original and memorable gaming experiences across all popular platforms, including consoles, mobile phones, tablets and PCs. For the 2018-19 fiscal year, Ubisoft generated net bookings of €2,029 million. To learn more, please visit www.ubisoftgroup.com.

UKEN GAMES

Founded in 2009, **UKEN Games** is one of the world's leading mobile game studios. We build and publish top-grossing games that have consistently grown to millions of users who love and enjoy our games every day."

Veria.ca

**Annelise Larson, Digital Strategist & Mentor,
Veria.ca & StorypreneursUnite.com**

Annelise comes from a background as an independent filmmaker, with training at such prestigious institutions as the Canadian Film Centre, UBC and Banff Centre for the Arts. Since 1995 she has been working in the field of digital marketing. She works extensively with government organizations, educational institutions, creative industry associations and media production companies in North America & Europe. Her focus is helping creatives and storytellers use the digital opportunity to define, find, attract and engage their audiences and work toward strategic and sustainable business models.