

Descriptive analysis of video game production through crowdfunding in Spain

Análisis descriptivo del desarrollo de videojuegos mediante campañas de *crowdfunding* en España

Análise descritiva do desenvolvimento de videogames através de campanhas de crowdfunding na Espanha

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ABSTRACT | The main objective of this paper is to offer a general radiography of the use of crowdfunding platforms for the development of videogames in Spain. Through a quantitative and qualitative analysis, and using the case study of the Kickstarter and Verkami platforms, we studied a total of 171 projects published between 2013 and 2017. The data obtained reveals that 24% of the campaigns managed to reach their funding goal. On average, the development teams are made up of just four people, raising €12,210 and getting the support of 366 patrons or sponsors (almost 38 euros per user). If we compare the collection of successful campaigns with their financing objectives, it can be noted that the collection exceeded the initial goal by almost 4%. 31% of the cases analyzed are driven by just one person. Of these individual projects, only 11.32% achieved their funding goal. The success rate of campaigns started by teams made up of two or more members is 28.4%, reaching a total funding of €1,517,821. As the main conclusion, we highlight that independent projects and crowdfunding filled a gap that the industry ignored for a while. However, large companies are finally beginning to absorb many of these initiatives to cover this market segment.

KEYWORDS: crowdfunding; video games; independent production; mainstream; digital distribution.

HOW TO CITE

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RESUMEN | *El objetivo principal de este artículo consiste en ofrecer una radiografía general del uso de las plataformas de crowdfunding para el desarrollo de videojuegos en España. Mediante un análisis cuantitativo y cualitativo —mediante el estudio de casos de las plataformas Kickstarter y Verkami—, se estudió un total de 171 proyectos publicados entre los años 2013 y 2017. Los datos obtenidos revelan que el 24% de las campañas consiguieron alcanzar la meta de financiación. En términos medios, los equipos de desarrollo se componen por tan solo cuatro personas, recaudando 12.210€ y consiguiendo el respaldo de 366 mecenas o patrocinadores (casi 38 euros por usuario). Si comparamos la recaudación de las campañas de éxito con sus objetivos de financiación, se puede observar que la recaudación ha superado en casi un 4% la meta inicial. El 31% de los casos analizados están impulsados por solo una persona. De estos proyectos individuales, solamente el 11,32% consiguió su meta de financiación. Por su parte, el porcentaje de éxito de las campañas iniciadas por equipos compuestos por dos o más miembros es de 28,4%, alcanzando una financiación total de 1.517.821 euros. Como principal conclusión destacamos que los proyectos independientes y el crowdfunding cubrieron un hueco que la industria obvió durante un tiempo. No obstante, las grandes empresas finalmente comienzan a absorber muchas de estas iniciativas para cubrir este segmento del mercado.*

PALABRAS CLAVE: *crowdfunding; videojuegos; producción independiente; generalista; distribución digital.*

RESUMO | O principal objetivo deste artigo é oferecer uma imagem geral da utilização de plataformas de crowdfunding (financiamento coletivo) para o desenvolvimento de videogames na Espanha. Com base numa análise quantitativa e qualitativa —através de estudo de casos das plataformas Kickstarter e Verkami— foram estudados um total de 171 projetos publicados entre 2013 e 2017. Os dados obtidos revelaram que o 24% das campanhas conseguiram atingir a meta de financiamento. Em média, as equipes de desenvolvimento são compostas por apenas quatro pessoas, arrecadando 12.210 euros e obtendo o apoio de 366 mecenas ou patrocinadores (quase 38 euros por usuário). Se compararmos a coleta de campanhas bem-sucedidas com suas metas de financiamento, pode-se ver que a coleta superou a meta inicial em quase 4%. Dos casos analisados, 31% são conduzidos por apenas uma pessoa. Desses projetos individuais, apenas 11,32% conseguiram atingir sua meta de financiamento. Por outro lado, a porcentagem de sucesso das campanhas iniciadas por equipes compostas por dois ou mais membros é de 28,4%, atingindo um financiamento total de 1.517.821 euros. A principal conclusão é que os projetos independentes e o crowdfunding preencheram uma lacuna que a indústria vinha perdendo há algum tempo. No entanto, as grandes empresas estão finalmente começando a incorporar muitas dessas iniciativas para cobrir este segmento do mercado.

PALAVRAS-CHAVE: *crowdfunding; video games; produção independente; generalista; distribuição digital.*

INTRODUCTION

The impact of digital distribution and the high penetration of mobile devices in the videogame industry –and in the cultural industries in general– are probably the most important aspects of its transformation in recent years. Undoubtedly, it supposes a context full of opportunities and challenges for the industrial structures and corporate strategies of the actors involved in this business.

In countries such as Spain, these two aspects are directly linked to the exponential growth in the number of companies dedicated to the production of videogames and other related services. This creates a potentially more accessible environment for small independent companies, away from big publishing corporations and media groups; this is confirmed if we look at the latest data published by DEV (2020) in the *Libro blanco del desarrollo español de videojuegos 2019* (2019 White Paper on Spanish Videogame Development), which shows that 75% of Spanish companies have less than ten employees.

Therefore, the videogame production industry in Spain presents a widely polarized scenario, made up mainly of micro-companies. According to DEV (2020), 61% of companies have a turnover of less than 200,000 euros per year, which shows the fragility of a large part of the Spanish business area. In fact, it is the large companies that drive the industry's growth in Spain, with a few concentrating almost 50% of the total turnover, which confirms a trend that occurs in most international markets.

Likewise, DEV's report highlights the significant imbalance between what our audiences consume and what our companies turn over (DEV, 2020). In other words, 65% of the income of the Spanish industry comes from foreign markets, which is why Spanish companies use their activity mainly for export, specially to the Asian market. Consequently, it is an increasingly diversified business, with development for third parties (product outsourcing) and the sale of services being some of the alternatives to traditional software trading.

Nevertheless, and despite the break with certain traditions of this industry that the current digital distribution implied, an oligopolistic model is still preserved, fundamentally controlled by a few hardware manufacturers and a handful of multinational publishers and developers (Planells, 2015); all of this, in addition, in an industrial structure characterized by vertical integration, in which these large corporations hold control of the different phases of production, distribution, and marketing (Rodríguez & Pestano, 2012). Thus, small businesses continue to face serious difficulties in accessing financing and marketing resources. In fact, they tend to adopt subordinate positions to the large publishers, which provide said resources and access to distribution channels in exchange for the full exploitation of intellectual property.

The consequence is a hierarchical structure that produces a homogenization of genres and game mechanics to merge a wide range of experiences in a single product and thus reach a market as wide as possible. Thus, certain developments –especially focused on a specific genre or mechanic– that offer complex narratives and that target specific or experienced videogame audiences (also known as niche games), are perceived as excessively risky proposals for a video game market in which consumption is subject to multiple variants (Gilbert, 2017).

This work proposes to offer a radiography of the use of patronage or crowdfunding platforms for the development of videogames in Spain, focusing on the case study of two of these platforms (Kickstarter and Verkami) and on 171 projects published in them between 2013 and 2017. The following sections present, first, the theoretical background on the relationship between crowdfunding and independent videogame production, and then detail the study's objectives and methodology. Finally, we will provide an account of the results, a discussion, and conclusions.

RELATIONSHIP BETWEEN CROWDFUNDING AND INDEPENDENT VIDEOGAME PRODUCTION

Nowadays, independently produced games find crowdfunding and digital software markets –or digital stores– a very attractive and accessible way of financing and of potential distribution. This new context has encouraged many companies and individuals to undertake projects and, thanks to them, occupy a space in the industry. However, these digital stores constitute, in turn, a highly competitive field and are therefore saturated with content, thus for modest developers and companies it can be difficult that users get to see their productions.

The high competitiveness, the nature of the mobile support, and the reduction in development costs (thanks to a much more accessible technology) promote a business model, in many cases, supported by advertising or small payments made within games (micropayments).

Nevertheless, these features –which could define the current state of the sector (digital distribution and reduction of development costs), and which are highlighted on many occasions as some of the great virtues of this time– are also conceived as mechanisms of hegemony, in a Gramscian sense, by big companies. These mega corporations assume and develop elements and expressions typical of those actors that are alternative to the mainstream current. Thus, according to Planells (2015), and based on the ideas of De Jong (2013), these alternative or independent (indies) actors are integrated into the market system that prevails in the videogame industry. Therefore, these facilities for (digital) distribution

and development or production belong, according to this critical perspective, to a process in which the alternative is transformed into one more genre, in a way of labeling certain products as creative and alternative.

Although the description of a game as *independent* is somewhat ambiguous and changing, large corporations use certain general features to create a brand around them, encouraging their distribution through digital catalogs and, in some cases, also in physical editions for the conventional sale in stores. We could say that they have come to constitute a genre, although the conventions regarding these are highly unpredictable over time (De Jong, 2013).

Pérez (2016), citing Parker (2013), highlights how the current situation of independent production legitimation is due to a series of previous circumstances. The most striking, and the first of these circumstances, refers to the “necessary emergence of a series of prestigious works within the mainstream current and the consequent recognition of their authors as artists both by the public and by the specialized press” (Pérez, 2016, p. 9).

The crowdfunding phenomenon could also be included around this conceptualization; it emerges, at least in its essence, as an apparent model of resistance to the hegemonic structure. However, it is seen as an idyllic setting, a result of the democratization of the means of production. Smith (2015) analyzes the relationships established between the developers of a game and the user community that supports them through a crowdfunding campaign, highlighting their differences with the traditional processes dependent on publishing companies and hardware manufacturers, who establish a very limited framework of relationship with the potential players. Crowdfunding allows a more direct and fluid communication process with users highly interested in the project, and who establish forms of relationship that go beyond the mere financial contribution.

Many others see crowdfunding as a form of marketing, as it uses the virtues of collective participation as a means of mimesis or adaptation to the new communication and involvement needs (regarding a brand, for example) of potential audiences or clients (Whitla, 2009). However, a successful crowdfunding campaign can pave the way through complementary products and services even before the launch of the main product. For example, the campaign for the development of the Ouya video console helped many developers to produce a game base for their digital store, thus generating attractiveness or value for the moment of its launch (Mollick, 2014).

Similarly, a crowdfunding campaign could serve to sound out the interest of certain users. In fact, Paykacheva (2014) defines three marketing objectives

around crowdfunding: research, promotion, and engagement. A campaign of this type allows “measuring the public interest in a certain product or service, as the online fund-raising services allow seeing the potential customers supporting the campaign and willing to spread the message even further” (Paykacheva, 2014, p. 3).

In these cases, we would be referring to more general crowdsourcing strategies, coinciding with the approach of Estellés and González (2012), who distinguish crowdfunding as a subtype or category of crowdsourcing. Thus, from a broader perspective in which an institution or company poses a problem to an interconnected community, the ideas that said community raises (individually, in a group, or combined in the form of a contest) will serve as a solution and may be, subsequently, mass produced by the institution for its own benefit (Brabham, 2008).

As for crowdfunding, specifically, the problem lies in financing, so that the economic link between the institution and patrons (users) will articulate the process of relationships and rewards. According to Mollick (2014), these relationships can be defined based on four general situations: a first in which the user resembles a philanthropist, who contributes to the project without expecting anything in return (situation related to humanitarian or social initiatives, for example); a second scenario is the one in which the money invested by users is made in the form of a loan or credit; a third situation –and probably the most common of all– is based on rewards, which can be very varied depending on the amount contributed. However, the pre-sale system prevails, in which a fixed price range is defined and where patrons act as customers who will receive the product once its development is completed. Finally, the fourth scenario considers users as investors, participating in the profits of the initiative.

The fact that crowdfunding campaigns can serve marketing efforts, or that the money collected is received in advance without acquiring obligations beyond the promoters’ promises, sometimes gives rise to suspicions and doubts about the true motivation for a campaign of this nature among the user community.

If, in addition, some controversial antecedents are considered regarding crowdfunding expectations, the shadow of fraud emerges as a major concern among users. Nevertheless, Mollick (2014) was able to verify that these situations are practically non-existent on these platforms. Their main problem lies in their limited capacity to adapt their plans and objectives to the circumstances without raising such suspicions and disappointments among patrons. Budgets are established based on very early estimates, which in successful cases –in which the initial amount can even be exceeded by far– could be a relative problem, especially when it comes to meeting deadlines. On other occasions, this success entails a remodeling of the project’s complexity and scope, resulting in delays

(also due to its dependence on other companies and agents) and in the alteration of the product initial definition.

One of the most paradigmatic success stories was that of Tim Schafer (creator of *Day of the Tentacle*, among other games) and his company Double Fine Adventure for the development of a graphic adventure that they finally called *Broken Age*. The crowdfunding campaign turned out to be one of the most successful on Kickstarter for the development of a videogame, raising more than three million dollars in a month, with an initial goal of only 400,000 dollars (300,000 for the development of the game and the rest for the production of a documentary about it).

Due to the campaign's success, Schafer and his team decided to resize the project, raising the level of production. However, costs skyrocketed, and Double Fine Adventure was forced to seek extra funding to complete the project. To prevent being financed by a publisher, which would betray the trust of many patrons, and with the idea of avoiding another crowdfunding campaign, they decided to launch the game in two parts. Sales of the first part of Steam to the public (for those who did not contribute to the campaign) would serve to finance the launch of the second part.

These decisions resulted into numerous criticisms from many patrons considering, first, that the amount initially obtained was sufficient for what was proposed and, secondly, because the reconsideration of the project forced its launch to be delayed by three years. There were also people disappointed with the outcome of the game (excessively short duration, bad puzzles, and a hasty end in the second part), questioning the management of the money obtained in Kickstarter (Gilbert, 2017).

From a qualitative analysis, Planells (2015) studied some crowdfunding campaigns for the development of videogames (among them that of Tim Schafer), concluding that the discourses around crowdfunding defend it as a necessary liberation process in pursuit of innovation. Liberation of the creator from the publisher, portraying the latter as an intermediary whose sole objective is to generate sufficient profits based on a certain risk.

Therefore, the user is referred to as the epicenter of an alternative but powerful system, insofar as it has publics involved and interested in the creation and development of new proposals, although paradoxically the projects financed this way are generally based on themes and elements familiar to such audiences. To make this message even more attractive, it is personified in prestigious historical developers -e.g., Tim Schafer- and the retro phenomenon as a reflection of the nostalgic (or postmodern nostalgia, according to Planells), very present in the

current independent production, other studies have highlighted (Márquez, 2016; González & Conca, 2016; Gilbert, 2017).

All these causes direct the videogame world towards a situation of continuous growth in both production and consumption. The game (the software) remains as the catalyst for such consumption, of course, but the ways in which it is used and, consequently, the gaming experiences it provides, have multiplied significantly: this is clear by the analysis of videogames in these financing platforms.

OBJECTIVES AND METHODOLOGY

To the previously defined industrial and creative context, we must add the practical non-existence of academic research that establishes a current state of affairs regarding independent videogames in Spain and its financing from virtual platforms of collective contribution. In this regard, the general objective of this study consists of defining a general radiography of the use of patronage or crowdfunding platforms for the development of videogames in Spain. These platforms are based on financial contributions from users in exchange for certain rewards, which is why in this study other crowdfunding websites dedicated to investments, loans or donations are discarded, which in many cases are made directly to companies instead of to projects.

The research focuses on the study of Spanish projects that seek a form of financing in these platforms, either as an initial impulse or as a complementary resource to other funding sources. In the first place, we have prepared a quantitative study to analyze values such as the campaigns' degree of success, the economic amounts received compared to those requested, the number of members of the development teams, the number of users who have endorsed these initiatives, and the average of their contributions.

Kickstarter and Verkami were used for the selection of the sample, as they are the most relevant from the point of view of the number of projects they host at an international and national level, respectively. The searches were conducted through the specific category of videogames, using a filter on Kickstarter to show only the cases located in Spain. The sample consists exclusively of projects whose funding campaign has ended, discarding those cases that have been canceled by their authors before the end date. In Kickstarter, data has been collected from a total of 154 projects, while in Verkami there are 17, during a period of five years (2013 to 2017). This means 171 videogame development projects, which constitute the studied sample. The analysis period responds to the limitations of the data offered by the platforms in terms of completed and canceled campaigns.

Another objective was to conduct a case study of the most significant projects thanks to the information published by secondary sources, both academic, journalistic, and institutional.

RESULTS

Quantitative analysis

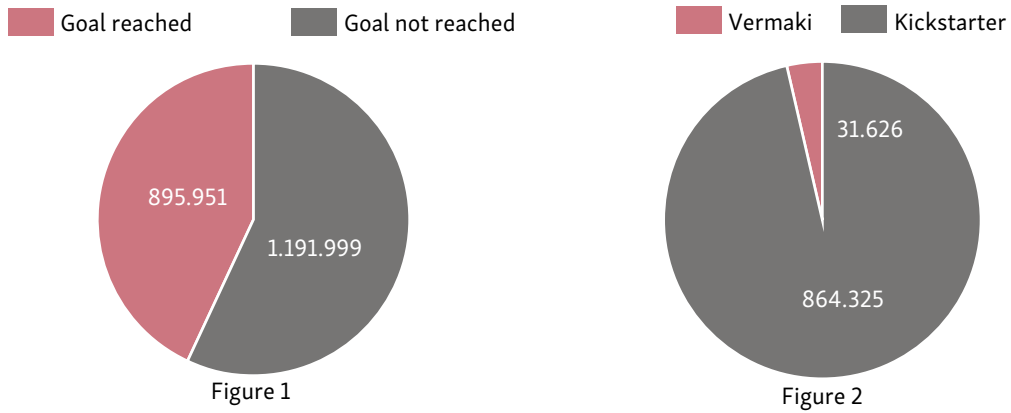
Of the 171 projects analyzed, a total collection of 2,087,950 euros was registered, which represents an average of 12,210 euros per project. The values by platforms are 2,046,807 on Kickstarter and 41,143 on Verkami (13,291 and 2,420 on average per campaign, respectively).

However, neither Kickstarter nor Verkami transfer the money raised to those projects that do not achieve the funding goal at the end of the campaign, which usually lasts about 30 or 31 days on average. Therefore, the achievement of the initial collection objective will be an essential requirement for obtaining the funds. In fact, if we add the financing objectives or goals set for all the campaigns that constitute the study sample, we obtain a total of 4,694,707 million euros that the entrepreneurs initially request from potential patrons, which represents 55.52 % more than what was finally collected.

Of the total sample under study, 41 cases managed to reach and even exceed the initial funding goal (36 on Kickstarter and five on Verkami), which represents a success rate of 24% (23.4% and 29.4% for Kickstarter and Verkami, respectively). Therefore, if we analyze the figures obtained only by the successful campaigns, i.e., those that achieve the funding goal, we observe that they have reached a total of 895,951 euros (see figure 1), the real collection figure for the study sample (21,852 euros on average per project), which represents 43% of the total collected.

As expected, it is on Kickstarter where almost all the collection of successful campaigns is (figure 2). Specifically, it is 96% of the 895,951 euros registered for the entire sample (864,325 euros, which is an average of 24,009 euros per campaign). Verkami, with a significantly lower number of projects, has a total of 31,626 euros for the cases that achieved their funding objective (6,325 euros on average).

Therefore, if we compare the collection of successful campaigns with their financing objectives, we see that it has exceeded the initial goal by almost 4%. Table 1 contains the ten projects –of the 41 that achieved their financial goal– ranked according to the funding received. The first, Blasphemous –which we will delve into below– has broken all Kickstarter collection records, at the end of the study period, for a Spanish game (from May 23 to June 21, 2017), exceeding the initial target of 50,000 euros by more than 600%. Consequently, it is also the project that has the largest number of patrons.



Figures 1 and 2. Distribution of total collection (left) and distribution of collection only for successful campaigns (right)

Source: Own elaboration.

Project	Funding received	Goal	Patrons	Average contribution
Blasphemous	333,246	50,000	9869	34
Narita Boy	160,946	120,000	5012	32
Paradise Lost	144,960	70,000	5953	24
Moonlighter	134,276	40,000	5229	26
Ancient Cities	125,365	100,000	2963	42
AR-K The Great Scape	101,564	100,000	879	116
Harem Protagonist	62,701	8000	1805	35
Candle	52,359	40,000	1653	32
Crossing Souls	51,983	45,000	1752	30
Dead Synchronicity	51,501	45,000	1606	32

Table 1. The ten projects with the highest funding

Source: Own elaboration.

Nevertheless, this is not the case with a higher average contribution per patron. In that variable stands out a project that finally did not achieve its financing objective by just a little (31,734 for a target of 42,000 euros), Formula Wincars, in which 205 patrons contributed 155 euros on average during the 28-days Kickstarter campaign.

The rest of the projects obtained similar values (excluding from these first ten AR-K the great scape, with 116 euros per patron), coinciding with the average of the entire sample (37.75 euros). In terms of patrons or sponsors, 62,157 have financially supported the 171 projects analyzed in this study, which represents an average of 366 patrons per project.

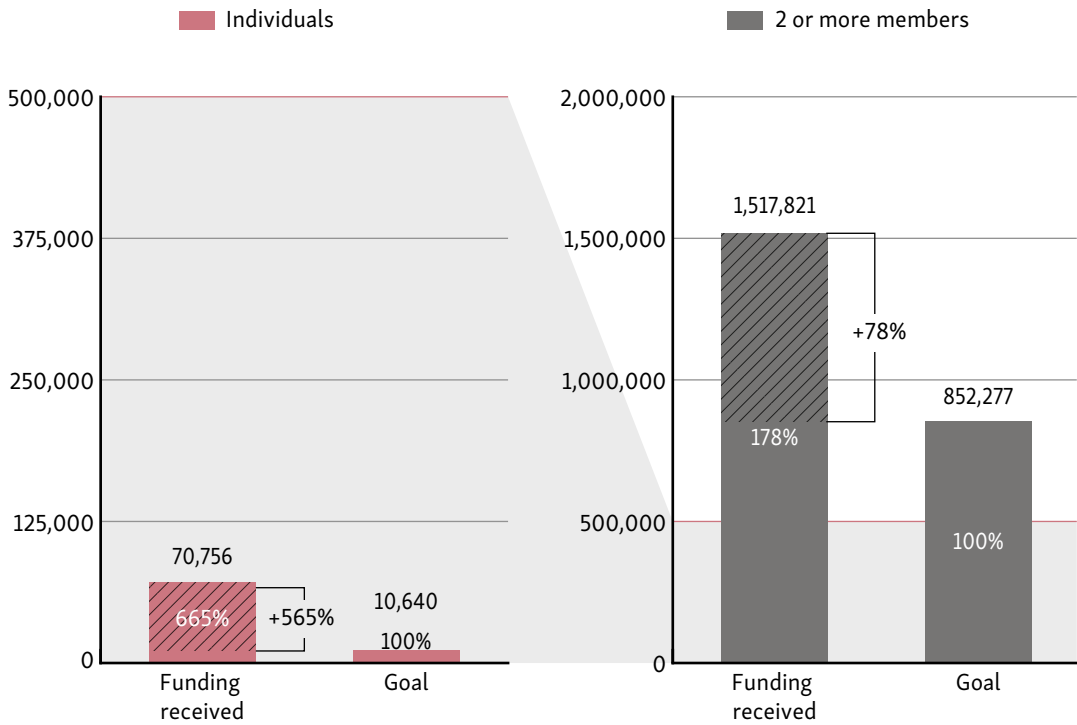


Figure 3

Figure 4

Figures 3 and 4. Comparison between funding received and the initial objective of campaigns that achieve the funding goal

Source: Own elaboration.

Another interesting piece of information is the number of people who are behind the projects that seek financing through crowdfunding. On average, each project is made up of only four members, which shows its small size. Analyzed individually, we observe that the maximum registered for the study sample is thirty members, while a significant proportion of individual initiatives stands out. The latter is usually quite common among the projects to be financed. If we only analyze the data of all those projects promoted by only one person, there are significant values, especially if we compare them with the projects developed by two or more people. Of the total of cases studied, 53 (31%) are driven by just one person, 102 (60%) are made up of two or more members, and of the remaining cases (9%) the number of team members is unknown due to lack of information.

Of the total number of individual projects, only six achieved their funding goal (11.32%), with a total collection of 70,756 euros for a total goal of 10,640, which represents 665% of the initial objective (figure 3). The success rate of campaigns started by teams made up of two or more members is 28.4% (29 cases), reaching a total funding of 1,517,821 euros for the total goal of 852,277 euros, i.e., 178% (figure 4).

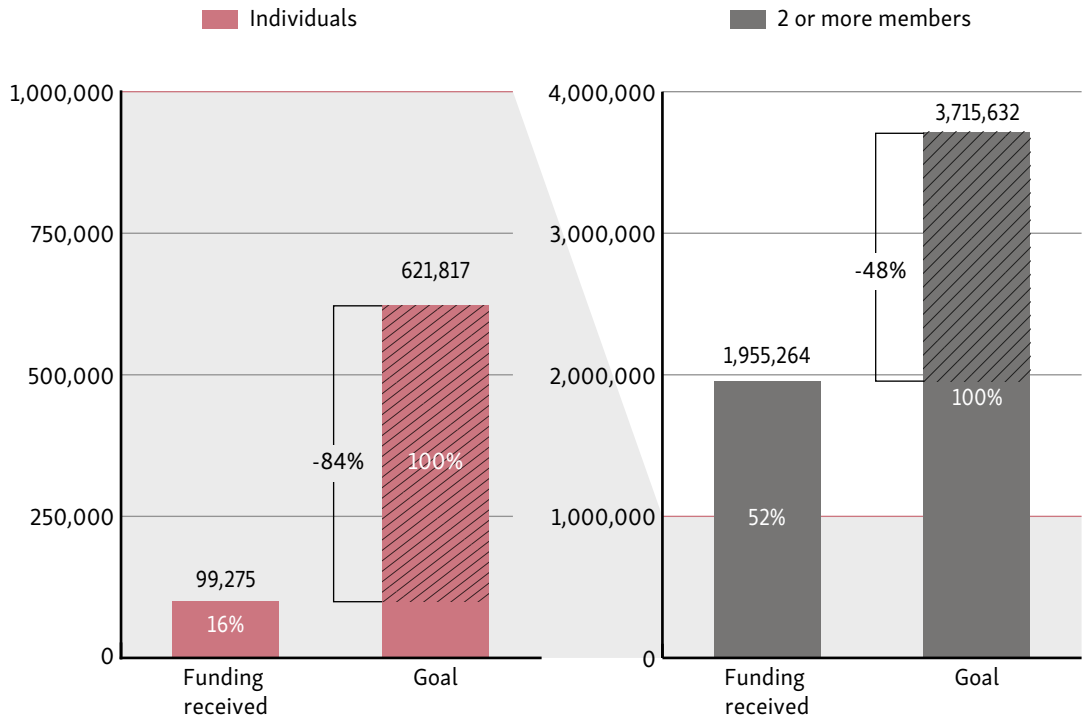


Figure 5

Figure 6

Figures 5 and 6. Comparison between funding received and initial goal for all projects (including successes and failures)

Source: Own elaboration.

If we consider all the cases (successes and failures in achieving the financing objective), we observe how the individual projects reach a total of 99,275 euros of funding (1873 on average) for a total goal of 621,817 euros (11,732 on average), i.e., only 16% of the requested amount (figure 5). For projects with two or more members, the total funding obtained amounts to 1,955,264 euros (19,169 on average) for a total goal of 3,715,632 euros (36,427 on average), which means 52.6% of the objectives established at the beginning of the campaigns (figure 6).

Finally, we made a record of the cities from where the projects were promoted and a count of those videogames that, in addition to being developed for computers (the usual platform for these projects), have ended up being released for desktop or portable consoles, regardless of whether they reached the funding goal or not.

In total, 38 cities were registered, with Madrid, Barcelona and Valencia being the most relevant, as might be expected. These three cities account for 57% of crowdfunding campaigns with 41 (24%), 34 (20%) and 22 (13%) cases, respectively (97 cases in total). After them, Seville (9), Granada (8), Malaga (7), Palma de Mallorca (5) and La Coruña (4) add up to 19%.

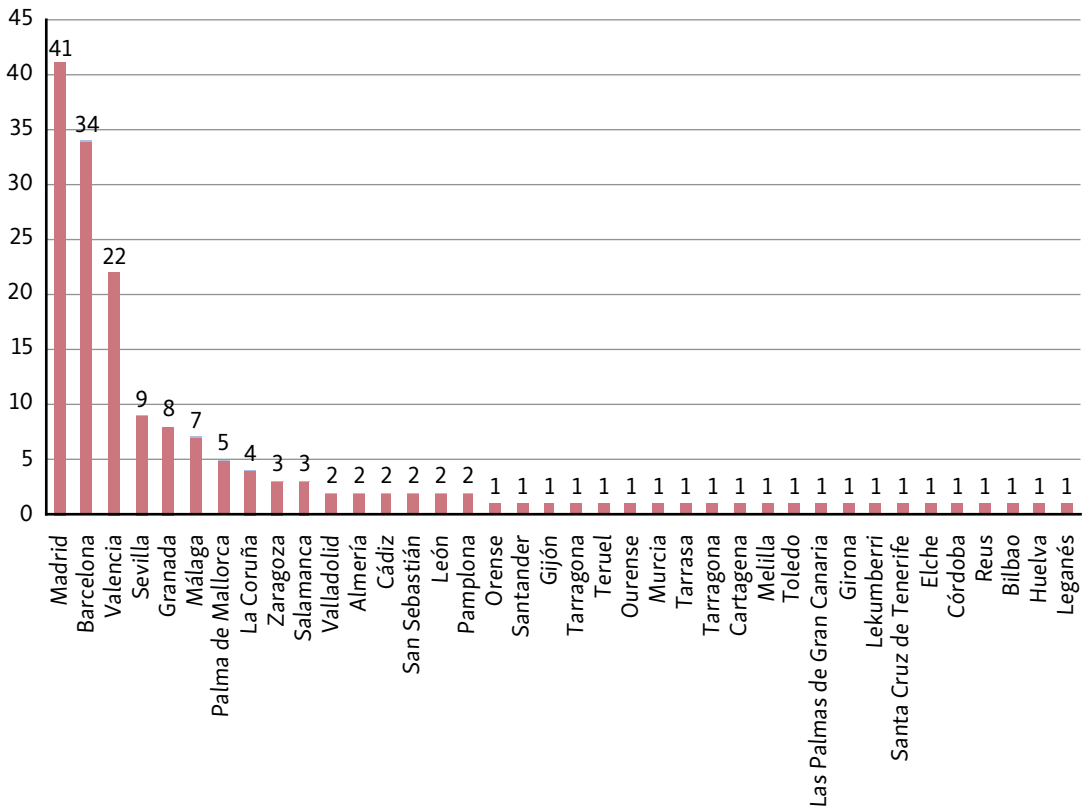


Figure 7. Number of campaigns grouped by cities of origin

Source: Own elaboration.

In other words, only eight cities account for almost 80% of the projects studied. Finally, 13.4% of the sample (23 projects), having failed or not in their crowdfunding campaigns, managed to complete the development of their videogames and edit them for desktop or portable consoles. Of the 22 projects launched on consoles (in addition to the usual digital distribution platforms for PC, such as Steam, for example), only six (3.5% of the total sample) saw their crowdfunding campaigns fail.

Case study

For the cases analysis, we will study those projects that, due to their social, cultural, and media impact (mainly in specialized media), as well as other features that make them peculiar, are paradigmatic and will allow us to achieve a better understanding of this type of projects. Many will coincide with the most funded campaigns in the sample, but this is not a sine qua non requirement. Such is the case of the campaign on Kickstarter launched by The Game Kitchen, a studio based in Seville, for the development of the game Blasphemous. The campaign reached 333,246 euros (which was a record at the time for a Spanish game), far exceeding the initial goal of 50,000 euros, in just one month.

Blasphemous is also one of the projects that must be analyzed due to its wide success, with a recognition of both the public and the critic. It was selected as the best national development of 2019 by the Spanish Association of Videogames (AEVI, by its Spanish acronym), best independent game in the 2019 edition of Fun & Serious (Del Pozo, 2020), and had many other awards and merits (at its launch in the Steam platform, it quickly ranked among the best-selling games) that make it an essential game in the current Spanish scene. According to statements by its own creators, a possible key to the success of the project lies in its aesthetic: inspired on the one hand by the culture and iconography of the Andalusian capital, but also by Goya's black paintings and other classic references of the Spanish culture. In addition to the use of pixel-art, so widely used in recent years by independent productions, another aspect that makes it attractive to patrons is that it refers to the classic games of arcade games or arcade rooms, thus using nostalgia.

The protagonist of this story is a penitent who will fight to defeat evil in an apocalyptic world, called Orthodoxia, in which, as we can read on the Kickstarter page, "religion is of the utmost importance in the eyes of the populace, superstition runs amok, and churches outnumber people two to one" (Blasphemous..., 2017).

Within this dark universe, a non-linear platform action game is developed, which means that the player will have the option of freely wandering around the different levels that comprise it. Here is the next key to the success of this project: its gameplay based on fast-paced melee combat, which challenges all the player's abilities and is reminiscent of the most frenetic and agile arcade games of this genre.

Likewise, both the iconography of Blasphemous and the difficulty in completing its levels refer to other works such as Bloodborne or the Dark Souls saga (with other references such as Castlevania, Metroid or Shadow of the Beast), both developed by the famous Japanese studio FromSoftware, which stands out precisely for returning the mainstream game (best-selling games capable of reaching large audiences) to the essence of the games of the 80s and 90s, consisting of its ability to propose big challenges to players (Lucas, 2017) .

The success of the crowdfunding campaign allowed The Game Kitchen to reach an agreement with British publisher Team Seventeen to adapt Blasphemous to other systems such as PS4, Xbox One, and Nintendo Switch (Barea, 2020). At the end of 2019, the game was released for all platforms, after two years since the publication of the campaign on Kickstarter (The game kitchen ..., 2017), and many months of work and promotion on social networks. In fact, in January 2017 the game was announced in such relevant media as IGN España (González, 2017), in which the possibility of starting a microfinance campaign on Kickstarter was already noted. This previous effort has undoubtedly contributed to the success of the campaign, but the acceptance

it has had in countries such as the United States and the United Kingdom (the first and third countries with the largest number of patrons, respectively) is also worth highlighting. Consequently, their markets have responded as expected, being the most important in terms of sales after the Spanish one.

In these countries, this interpretation of certain symbols of Andalusian culture and folklore –specific and local– has been well accepted, which demonstrate that the videogame is one of the creative industries in which cultural differences less obvious. An industry that was born in an era in which globalization was in full expansion, hence the genres and mechanics of videogames were developed for an increasingly international market. Perhaps the Japanese industry has traditionally been the most peculiar, but Western production is undoubtedly a direct heir to the ideas coming from Japan in the 1980s, when the American company Atari (and its business model) collapsed and the videogame industry resurfaced to the beat of Japanese companies (Izushi & Aoyama, 2006; Levis, 1997).

Another similar case is that of *Narita Boy*, a game produced by Studio Koba, a company that started in 2016 in Tokyo and later moved to Spain, specifically Barcelona, to begin the Kickstarter campaign for this project from that city. *Narita Boy* also bets on pixel-art for the development of its graphics, showing hardly any differences regarding *Blasphemous*, both in genre (platforms and action) and in game mechanics (Parrilla, 2017). This proposal, which is expected for the year 2020 (Rasera, 2020), far exceeded the initially proposed budget of 120,000 euros. According to information published on the study's official website (<http://studiokoba.com>), after 34 days of campaigning on Kickstarter, more than 160,000 euros were reached thanks to the support of 5012 patrons. As Edu Fornieles, the studio director, points out in an interview published in March 2017 (Delgado, 2017), the game alludes to the nostalgia of videogame lovers, not only in its aesthetics, but also in its relationship with important eighties popular culture references, science fiction films of that period, VHS aesthetics, and numerous nods to the technology of the moment (Ríos, 2019; Topolsky, 2017). *Narita Boy* or *Blasphemous* represent continuous references to the culture of these decades (to American culture, to be more precise), which is a constant in crowdfunding proposals for videogames, and is also beginning to become generally visible in other areas of the cultural industry. However, the appeal of these independent projects goes beyond the purely aesthetic. The games combine multiple mechanics (fighting, puzzles, exploration) with a deep and engaging narrative, which makes them extremely interesting products not only for the generations of the 80s or 90s, but also for later generations interested in different proposals. Likewise, for distribution platforms, they constitute an offer that increases the attractiveness of their services and exploits the capabilities of online distribution.

In *Narita Boy*, as well as in *Crossing Souls*, another success story of Spanish crowdfunding, elements of role-playing game (RPG), are integrated into the development of the characters and the adventure (Sucasas, 2018), even if the latter differs from *Narita* in style, based more on the classic RPG rather than in action platformer games. Therefore, the exploration of the scenarios and the narrative qualities of the videogame is favored.

From the hand of the American publisher Devolver Digital –noted for promoting highly successful independent developments such as *Hotline Miami*– comes *Crossing Souls*, developed by Fourattic, available for download on PS4 and PC since February 2018. In its last attempt to keep the company afloat, Fourattic's managers decided to share the *Crossing Souls* project on social networks, and that is how the American publisher learned about the project and promoted it from the beginning of its Kickstarter campaign (Ortega, 2018).

Crossing Souls is another example that puts crowdfunding to the test as a means of raising money, no doubt, but especially to explore acceptance of the game among the community it is targeting. From there, it finally managed to develop an agreement with a publisher or distributor to promote the game in the digital PC market, first, to later market it in digital console stores.

To these cases we can add *Dead Synchronicity*, *Paradise Lost*, *Noahmund*, *Moonlighter*, *Deiland*, *Nogalious*, *Caveman Warriors*, *Super Red-Hot Hero*, *A Hole New World*, *A Rite From The Stars*, *Anima: Gate of Memories*, *Red Goddess*, *Candel*, *Jet-Paco*, *Nijajar*, *Super Uwol*, and *Mega Cherii* (these last four games edited for classic consoles such as NES and Mega Drive) as examples of the success that derives in productions that reach the console market that, even though less massive than smartphone or the PC, registers a higher spending per player.

However, there are also projects that, having failed in their financing objective in these crowdfunding platforms, are able to finalize the developments and launch the videogames in other ways, both on digital distribution platforms and in physical editions (usually for consoles). In fact, although these are exceptional cases in our study, the six projects that, without achieving the funding goal, managed to launch their videogames on next-generation consoles, are the least relevant. This is the case of *Timothy vs The Aliens*, developed by Wild Sphere, which failed in its Kickstarter campaign, but achieved recognition in Sony Spain contests within the PS Talents initiatives, thus managing to continue its development under Sony's supervision.

Song of Horror, from Madrid's Protocol Games, also failed in its campaign, but was launched for console with the support of the Spanish publisher BadLand Games. Lince Works failed on Kickstarter with its *Twin Souls (The Path of Shadows)* project,

but continued with the development to finally publish it on PS4 under the name *Aragami*. *Twin Souls* was the result of the final master's project of some students who, determined to extend the project beyond academic limits, and after several awards at festivals and competitions, reached the goal of seeing their game edited for the most important next generation console of the moment (Manjón, 2016).

The case of *Necrococosmos*, developed by the Adromeda Project with the support of BadLand Games (Ortega, 2017), is striking since it narrowly failed in its Kickstarter campaign (it reached 31,498 euros for a target of 45,000), but its acceptance by the user community and the media support was a good launchpad for its next project, *Kharon's Crypt*, which did reach the funding goal.

Nevertheless, for most of the cases studied, not achieving the funding goal means the end of the project. Maybe temporarily, maybe permanently. In any case, it has been observed that many of the campaigns analyzed are the first and last for their creators, a fact that is especially seen in projects undertaken by a single person.

DISCUSSION AND CONCLUSIONS

Independent or indie projects are filling a gap, through crowdfunding, that the industry seems to overlook and that are mostly games of small length and duration that appeal to nostalgia or visual aesthetics far from the mainstream commercial currents. In addition, the decrease in price of technology allows the cheaper development of these types of games, which appeal to the classics of the 80s and 90s. Therefore, the good reception of these projects confirms the theory of cultural hegemony, i.e., large companies finally begin to absorb many of these initiatives to cover a market segment aimed at more demanding or experienced players. This also responds to an expanding digital market with the ability to reach large and very diverse audiences. Hence, for manufacturers and publishers it is increasingly important to generate a catalog of games capable of satisfying previously neglected market niches.

As with other cultural industries, such as film or television, the growth of digital distribution brings, in turn, an emergence of business models such as long-tail. This business model promotes niche products due to the enhancement of economies of scale that allow online and digital distribution. Likewise, it is a way of concentrating very varied audiences around the same service, i.e., more experienced audiences who seek different or unusual experiences, compared to others that essentially consume the most mainstream products. Of course, we cannot polarize the audience, but rather understand that between one extreme and the other there are users interested in multiple options and proposals.

In this vein, the high competitiveness, the nature of the mobile support, and the reduction of development costs drive alternative marketing formulas to the videogame's traditional editorial logic (based on the direct sale of copies). Thus, many companies promote advertising and micropayments (small transactions carried out within the dynamics of the game) as new ways of financing. This diversification of the videogame, in terms of its commercialization or monetization routes, directs the industry towards a scenario that we could define as Game-as-a-Service, which reveals the detriment of editorial formulas for the benefit of a service offer (Vaudour & Heinze, 2020), i.e., to displace the sale of copies of a product by subscribing to a series of services. The free-to-play model is paradigmatic of this logic change, which promotes micropayments as a means of monetization.

However, based on the data provided by this study, most of the projects studied follow the traditional logic, i.e., the sale of copies in the digital or physical market (retail). Regarding the latter, few cases conclude the adventure of independent development in the game's physical edition.

On the other hand, 24% of the cases that constitute the study sample managed to reach the initial funding goal. A percentage that we think is relatively high considering the saturation and competitiveness of the market they are targeting. In fact, according to the White Paper on Spanish Videogame Development (DEV, 2020), crowdfunding accounts for only a small percentage of the financing of Spanish studios (5%). The main sources of funding continue to be the economic means of the company's partners, financial and banking entities, and State aids, which leads us to confirm the use of crowdfunding more as a market survey, a means of promotion, or a formula to generate advance sales.

Nevertheless, we also observe a big difficulty in meeting the promised objectives (launch date, game length and duration, graphical result, etc.) depending on the amount of money initially proposed, which leads to project cancellations or to major conflicts with patrons. In most of the cases studied, the launch or achievement deadlines for the different development stages are not achieved, raising suspicions and protests from users. This difficulty has to do with the fact that most successful projects are conducted by a small number of members. Each project is composed on average of only four members, which shows its limited size, in line with its size and independent production objectives. However, it is worth noting a significant proportion of individual initiatives, of which only six achieved their funding goal (just over 11% of all individual projects). This leads us to confirm that the origin of the projects is significant: it is not surprising that those originating in Madrid, Barcelona, and Valencia are the most relevant and numerous. These three cities account for 57% of crowdfunding campaigns,

with 41 (24%), 34 (20%) and 22 (13%) cases, respectively, which shows the high polarization of these campaigns, agreeing with the data provided by DEV regarding the Spanish videogame industry, and which contradicts the fact that it is a global practice, confirming the high polarization of the developer industry in Spain's two major industrial and financial centers.

In most of the cases analyzed, the development studio is made up of young enthusiasts, with or without previous experience in videogame development but who, in any case, undertake a project highly personal, for the first time, and independently. A significant percentage of the sample (31%) is made up of individual projects, which further accentuates the independent nature of the projects. In none of the cases analyzed is there a recognizable and popular author from the videogame industry that can be used as an attractive name for potential patrons, something that is observed with some frequency –although we cannot confirm that it is a common practice– and that it is widely effective.

Among all the production analyzed, *Blasphemous* stands out significantly, exceeding the initial target of 50,000 euros by more than 600%. Consequently, it is also the project with the highest number of patrons (9869) in the sample under study, and in which each patron contributed 155 euros on average during the 28 days of their Kickstarter campaign.

From the qualitative point of view, and as previously discussed, the concept of genre is debatable in contemporary creations, a question that is enhanced if we look at the nature of independent productions, certainly the main line of the productions that constitute the study sample. In the sample, narrations with visual structures and resources that appeal to nostalgia and are part of the self-referentiality of the medium itself predominate, as in the aforementioned non-linear platform action game *Blasphemous*. Evidently, the recipients of this type of work are an expert audience with a knowledge about the history of the medium. We must consider that it remains as a matter of discussion and subsequent analysis to what extent this trend is maintained or modified in subsequent periods.

Relevant cases in the sample such as *Narita Boy* or *Blasphemous* represent continuous references to popular culture of past decades, which is a constant in crowdfunding proposals for videogames, also beginning to become generally visible in other areas of the cultural industry.

Crossing Souls is another example of success in which role-playing game elements are integrated to enhance the development of the characters and the adventure, also considering the exploration of the scenarios and the narrative qualities of the videogame. In the previous cases, their success ultimately results

in commercialization through a publisher or distributor that promotes the game to other markets, such as the console.

An interesting aspect to consider in future research is to what extent, both quantitatively and in terms of the content of the videogames themselves, these independent products that have obtained funding or interest from the community are somehow incorporated into commercial production. Equally relevant in the future may be to contrast these data with other from European and Latin American countries, to establish whether and to what extent they are global or local dynamics. To do so, methods such as econometrics could help to deepen the analysis of crowdfunding as a financing formula.

Likewise, the study approach could be extended to new variables that shed more light on the contribution to the success of crowdfunding campaigns, such as the platforms used, the marketing strategies, or the organizational variables.

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