



IRDETO GLOBAL GAMING SURVEY:
THE LAST CHECKPOINT FOR CHEATING



GAME OVER

INTRODUCTION

The gaming market has exploded in recent years. This is largely driven by the growth in connected devices that allow consumers to play games anywhere and at any time. Even if you're not a console owner, let's face it, most of us have played a game on our smartphone, tablet or laptop at some point over the last few years. Whether it was the app or Facebook-driven phenomenon of the mid to late 2000s (Farmville, Candy Crush Saga, Angry Birds, etc.) or the more in-depth RPGs that fans wait months or years for the latest installment, we all have our favorites. Many games today are online multiplayer games pitting competitors around the globe against each other. This has led to the online gaming market being estimated to be worth \$116B in 2018. As with any multi-billion-dollar market, within the online multiplayer game space there are those that are looking to game the system. Hackers in multiplayer games may look to manipulate and distort data/code to gain an advantage over other gamers. Cheating in this way can have a big impact on these online multiplayer games, for both the publisher and other players. Therefore, the importance of securing these games against cheating cannot be underestimated.

The Irdeto Global Gaming Survey examines the frequency of cheating in online multiplayer games, the impact on the experience of other players, the importance of securing games against this practice and how it would impact decisions to play the game or purchase in-game content. The research was conducted online by YouGov from February 27, 2018 to March 14, 2018 and surveyed 9,436 adults, of which 5911 were gamers (aged 18+) in six countries, including China, Germany, Japan, South Korea, UK and US. Key findings from the survey include:

- **MANY GAMERS HAVE BEEN NEGATIVELY IMPACTED BY CHEATING AND WANT IT TO STOP.** The survey found that 60% of online gamers feel they have had their multiplayer gaming experience negatively impacted by other players cheating on multiple occasions (33% sometimes, 18% often) with 8% saying their experience is always negatively impacted. Subsequently, 76% of total gamers felt that it was important that multiplayer games online are secured against other players gaining an unfair advantage through cheating. This awareness of cheating means that the enjoyment of a game for many players has been negatively impacted, potentially influencing their future use.
- **THE IMPACT OF CHEATING IN MULTIPLAYER ONLINE GAMES DOESN'T ONLY HIT OTHER PLAYERS.** It also has the potential to dilute the value of the game and impact revenue streams for the publisher. The survey results found that 77% of online gamers would be likely to stop playing a multiplayer game online if they thought other players were cheating to gain an unfair advantage. In addition, 48% of online gamers also said that they would buy less in-game content as a result of cheating. This suggests a clear effect on revenues for game publishers if they do not adequately protect online multiplayer games from cheating
- **GIVEN THE NEGATIVE IMPACT OF CHEATING ON BOTH PLAYERS AND PUBLISHERS OF ONLINE MULTIPLAYER GAMES, IT APPEARS THAT MORE CAN CERTAINLY BE DONE TO SECURE THESE GAMES AGAINST CHEATING.** The survey found that while 57% of multiplayer gamers say they have never used third-party tools to cheat in multiplayer games online, 12% of gamers admitted to regularly doing this (3% always and 9% often). This figure fluctuates from country to country, but the actions that publishers need to take to protect their customers and secure future revenue streams are consistent.



GAME OVER

PLAYER 1 IS WAITING
(NOT CHEATING)

There may be a perception among players who cheat that the impact of their actions is negligible, but it appears that this is not the case. The global survey indicates that cheating has a resounding impact on other players. Staggeringly, only 12% of online multiplayer gamers say that they have never had their multiplayer gaming experience negatively impacted by other players cheating. This figure is even lower in the APAC region, with very few players managing to completely avoid the impact of cheating on their own experience. Only 3% of respondents in China and 6% in South Korea have never seen a negative effect on their own gaming experience due to others cheating.

In fact, gamers in China were most likely to state that their multiplayer gaming experience negatively impacted by other players cheating, with 76% saying this has happened on multiple occasions (42% sometimes, 24% often, 10% always). South Korea is the next highest at 68% (40% sometimes, 22% often, 6% always). UK gamers indicated that they are the least likely to have their multiplayer gaming experience negatively impacted by other players cheating, with only 41% saying this had happened on a regular basis (23% sometimes, 12% often, 6% always).

Unsurprisingly, millennials are most aware of the impact of cheating, with 12% of 18 to 24-year-olds globally stated that they always see an effect and only 7% of this age group stated that they never were impacted by other players cheating. These findings suggest that whichever platform consumers are using to play online games, the consequences of other players cheating are pronounced and likely to the detriment of other players.

Country	How often, if at all, do you think your multiplayer gaming experience is negatively impacted by other players cheating? (Please select the option that best applies)					
	Base: Country gamers online who play multiplayer games					
	<i>Net Answer: Always</i>	<i>Net Answer: Often</i>	<i>Net Answer: Sometimes</i>	<i>Net Answer: Rarely</i>	<i>Net Answer: Never</i>	<i>Net Answer: Don't know</i>
Global	8%	18%	33%	20%	12%	9%
China	10%	24%	42%	17%	3%	3%
Germany	6%	12%	25%	18%	23%	16%
Japan	10%	15%	29%	25%	12%	8%
South Korea	6%	22%	40%	21%	6%	5%
UK	6%	12%	23%	19%	22%	17%
US	10%	13%	25%	18%	19%	15%

It's clear that many consumers see cheating in online multiplayer games as a problem. But what about the solution? Given the sheer volume of those who have had a negative experience due to cheating on a regular basis, it is perhaps unsurprising that the survey finds that 76% of gamers globally feel that it's important that multiplayer games online are secured against other players gaining an unfair advantage through cheating. There is also a clear correlation between the low response rates to "never impacted by cheating" in APAC and the high response rates to the importance of securing games against cheating. In China and South Korea, consumers feel most strongly about securing multiplayer games online against other players gaining an unfair advantage through cheating, with 85% of respondents in China and 88% in South Korea feeling this is important. Consumers in the US and UK felt least strongly about this with only 69% in both countries stating that it is important. However, in South Korea, only 31% feel that this is a very important issue, as opposed to a global average of 39%.

Country	How important, if at all, is it to you that multiplayer games online are secured against other players gaining an unfair advantage through cheating?				
	Base: All Country Gamers				
	<i>Net Answer: Very important</i>	<i>Net Answer: Fairly important</i>	<i>Net Answer: Not very important</i>	<i>Net Answer: Not important at all</i>	<i>Net Answer: Don't know</i>
Global	39%	37%	10%	6%	8%
China	47%	39%	9%	2%	3%
Germany	43%	28%	11%	7%	10%
Japan	29%	42%	15%	7%	6%
South Korea	31%	57%	10%	2%	1%
UK	42%	27%	7%	8%	16%
US	43%	26%	9%	10%	11%



GAME OVER

GAME OVER FOR ONLINE GAMING REVENUES?

Securing online games against cheating is clearly an important issue in the eyes of consumers. The impact that cheating has on players' future use of any game is the marker for the impact that this practice has on the publisher. The survey found that 77% of online gamers would be likely to stop playing a multiplayer game online if they thought other players were cheating to gain an unfair advantage. Perhaps surprisingly, it is the US (37%) and UK (33%) that saw the highest 'very likely' response to this question by online gamers. This potentially suggests that with the lower levels of experience of cheating in these countries, they have less tolerance for it, while in other countries where cheating is more common it will not stop them playing the game.

Country	How likely, if at all, would you be to stop playing a multiplayer game online if you thought other players were cheating to gain an unfair advantage?				
	Base: Gamers online who play multiplayer games				
	<i>Net Answer: Very likely</i>	<i>Net Answer: Fairly likely</i>	<i>Net Answer: Not very likely</i>	<i>Net Answer: Not likely at all</i>	<i>Net Answer: Don't know</i>
Global	29%	48%	15%	4%	5%
China	25%	56%	16%	2%	1%
Germany	30%	36%	17%	8%	8%
Japan	26%	49%	16%	2%	7%
South Korea	27%	59%	11%	1%	1%
UK	33%	39%	12%	6%	10%
US	37%	32%	15%	7%	8%

Interestingly, the survey also found that in China, South Korea and Japan, where cheating is deemed to be particularly prominent, some gamers seem to have accepted this fact and are presumably willing to spend money to beat the cheaters in a game. 18% of online gamers in China and 17% in both South Korea and Japan say that they would buy more in-game content if they knew other gamers were cheating. However, the negative impact of cheating on consumer spending on in-game content is far greater with 48% of online gamers overall saying that they would buy less in-game content if they knew other gamers were cheating in a multiplayer online game. UK gamers (57%) are the most likely to buy less in-game content if they know other gamers were cheating, with gamers in the US (42%) and Japan (43%) least likely for cheating to lead them to buy less in game content.

Country	Which, ONE, if any, of the following would best describe what you would do if you knew other gamers were cheating in a multiplayer online game?			
	Base: Gamers online who play multiplayer games			
	<i>Net Answer: I would buy more in-game content as a result of this</i>	<i>Net Answer: I would buy the same amount of in-game content as a result of this</i>	<i>Net Answer: I would buy less in-game content as a result of this</i>	<i>Net Answer: Don't know</i>
Global	14%	24%	48%	14%
China	18%	22%	51%	8%
Germany	8%	22%	45%	25%
Japan	17%	29%	43%	11%
South Korea	17%	31%	48%	4%
UK	2%	16%	57%	24%
US	14%	19%	42%	24%

These findings suggest that cheating in online multiplayer games dilutes the value of the game. This could result in both lower spending on in-game content and in consumers choosing to play other games that are more secure instead. Either way, this eliminates potential revenue for the publisher, even before you consider the fact that cheating can also be used to manipulate or bypass in-game micro-transactions. Failure to adequately protect online multiplayer games from cheating should therefore not be an option for publishers.



GAME OVER

IF YOU CAN'T BEAT THEM,
JOIN THEM?

Despite the negative experiences that many gamers are having and the subsequent impact on the industry, cheating is still rife in multiplayer online games. The survey indicates that some gamers put their experience and desire to win before all else. While 57% of multiplayer gamers globally say they have never used third-party tools to cheat in multiplayer games online, a substantial proportion of 12% (4% always, 8% sometimes) admit to using instruments such as modified game files and hardware tools regularly to cheat. The survey also found that gamers in the 25 to 34 years-old age group are the most likely to cheat, with 5% always and 11% sometimes using third party cheat tools.

There is also a clear country-specific correlation between the number of gamers that have their gaming experiences negatively impacted on a regular basis, and the levels of cheating by gamers in those countries. For example, in China, only 43% of gamers have never used third-party tools to cheat in multiplayer games online. This figure is at 50% in South Korea. As with the proportions of those who would buy additional in-game content in the face of cheating, these findings suggest that there appears to be an 'if you can't beat them, join them' attitude among gamers in these countries and they will take action to fight back against cheaters, even if that means cheating themselves. On the flipside of this, UK gamers are the least likely to cheat with only 3% (1% always, 2% often) of gamers admitting to using third-party tools to cheat and 78% of UK gamers saying they have never cheated in multiplayer games online.

Country	How often, if at all, do you use third-party tools to cheat in multiplayer games online? (Please select the option that best applies)						
	Base: Gamers online who play multiplayer games						
	<i>Net Answer: Always</i>	<i>Net Answer: Often</i>	<i>Net Answer: Sometimes</i>	<i>Net Answer: Rarely</i>	<i>Net Answer: Never</i>	<i>Net Answer: Don't know</i>	<i>Net Answer: Prefer not to say</i>
Global	3%	9%	13%	12%	57%	5%	1%
China	5%	16%	20%	14%	43%	2%	0%
Germany	3%	5%	10%	7%	66%	5%	4%
Japan	3%	11%	10%	6%	59%	10%	0%
South Korea	1%	7%	15%	20%	50%	6%	0%
UK	1%	2%	8%	6%	78%	5%	0%
US	5%	6%	11%	9%	63%	5%	2%

These results clearly indicate that cheating in online multiplayer games is an ongoing problem and the global nature of these games means that it doesn't matter where the cheating is taking place, as it has the potential to negatively impact other gamers globally. It is therefore important for games publishers to secure their games against cheating to ensure a great experience for gamers all over the world who want to play by the rules, and subsequently securing their own future revenues.



GAME OVER

NEGATIVE EXPERIENCES AND VULNERABILITIES,
DO YOU WISH TO CONTINUE?

According to Statista, there will be 2.73 billion gamers worldwide by 2021. This means that even a small percentage of cheating gamers can have a big effect on other players and publishers, even when you consider that not all these gamers will necessarily be online players. However, aside from a negative experience, there can be ramifications in terms of security vulnerabilities. A recent report by Gamma Data Corporation, cited by South China Morning Post in an article on the scale of cheating in online games, found 50.3% of gamers were hacked or had been sold plugins in 2017. With consumers across the globe clearly feeling there is not enough security against cheating and malicious plugins in gaming, it is crucial for publishers to address these concerns.

Another consideration must be the eSports market. Juniper Research predicts that consumption of eSports and streamed games will drive USD3.5 billion in revenue by 2021 and with increasing interest in this market and large prizes on offer in eSports events, cheating could have huge ramifications. Indeed, the fact that securing these games against cheating is important in the eyes of consumers, means that developers should take note, due to the actions players will take as a result of their negative experiences.

It is therefore crucial for game publishers to implement security strategies which prevent hackers in multiplayer games from manipulating and distorting data/code to gain an advantage over other gamers or bypass in-game transactions. With this protection in place, it will ensure that legitimate gamers get the best possible experience and revenue streams are not eliminated. The brands that put the protections in place that gamers want will surely prevail in an increasingly competitive online gaming sector.

METHODOLOGY

The survey was commissioned by Irdeto and conducted online from February 27, 2018 to March 14, 2018 by YouGov Plc. with 9,436 adults (aged 18+), of which 5911 were gamers in six countries. The countries surveyed were: China, Germany, Japan, South Korea, UK and US. Figures have been weighted appropriately to be representative of adults in each country (e.g. nationally representative, urban representative, or online representative). The overall 'global' figures have been given an even weighting for each country to produce an 'average' value.

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