2023 LARP Players Survey

ANALYTICS & INSIGHTS REPORT

PUBLISHED BY SILVER LINING STRATEGY, JANUARY 2024

Please note: This report assumes the reader is familiar with the general language, concepts and terms used in live-action role-playing and has a background as a player, storyteller, or owner.

Introduction

In October 2023, a consumer survey was launched with the purpose of collecting data on player preferences in larp. The goal of the study was to give market insights into player decision-making behaviors such as:

- Why players choose to larp
- Innovations players want to see
- What causes players to stop larping
- Monthly and yearly spending
- Frequency of attendance
- Genre preferences vs availability

Thank you for participating

As larping is predominately volunteer driven, this survey was conducted as a grassroots effort to benefit the community. This report is intended to provide larp owners and storytellers with considerations to think through as they design for their player bases.

A tremendous amount of credit and thanks is due to all the players who participated in the survey and with those who shared it with their communities. Similarly, thank you to all the owners and storytellers who reviewed and provided feedback in the drafting stage.

Larping becomes better every time people like you jump in to assist.

The opportunity for someone to run a larp for an enthusiastic and willing player base is high

- Many game owners are creative storytellers who must quickly develop a business background to run events for players.
- This study was created as a resource to fill in gaps in knowledge at an industry level and provide considerations for designers as they think about the player experience.
- This report may not be relevant to all players, especially those with decades of experience running successful events already.
- Future reporting with trended results are planned and may provide the insights that pertain to your interests.

The first wave of the survey was intended to gauge interest, test receptiveness of players, and capture baseline data

Method

- ~6-minute on-line survey, shared via social media
- The survey was fielded from October 2023 – December 2023
- 335 responses received across 14 countries

Segmentation

- Current player (attended an event in the last 18 months)
- Former player (last event attended was over 18 months ago)
- Prospective player (interested in larp, haven't attended an event)
- People with no interest in larp*

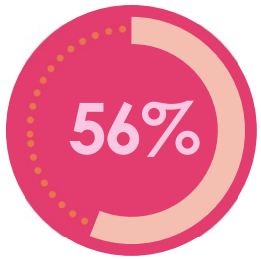
Privacy

- Under 18: excluded via screeners
- Age: captured in ranges
- Email addresses: not captured
- Basic, non-identifying demographics (no confidential information requested)

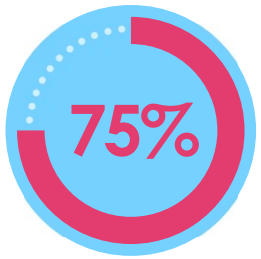
Total n=335, Current Players, n=283, Former Players, n=45, Prospective Players, n=7. *Note: *no respondents were captured in this segment; it has been excluded from reporting.*

Executive Summary

Players are willing to put in hours of travel time for events, but word of mouth marketing limits their awareness of all the games they have access to



Of players identified as **Female**, **Non-Binary** or **'Other'** *(i.e., Trans, Gender non-conforming, Genderfluid, Genderqueer)*



Of players prefer a **live-combat aspect** to their larp, ranging from lightest-touch to full contact

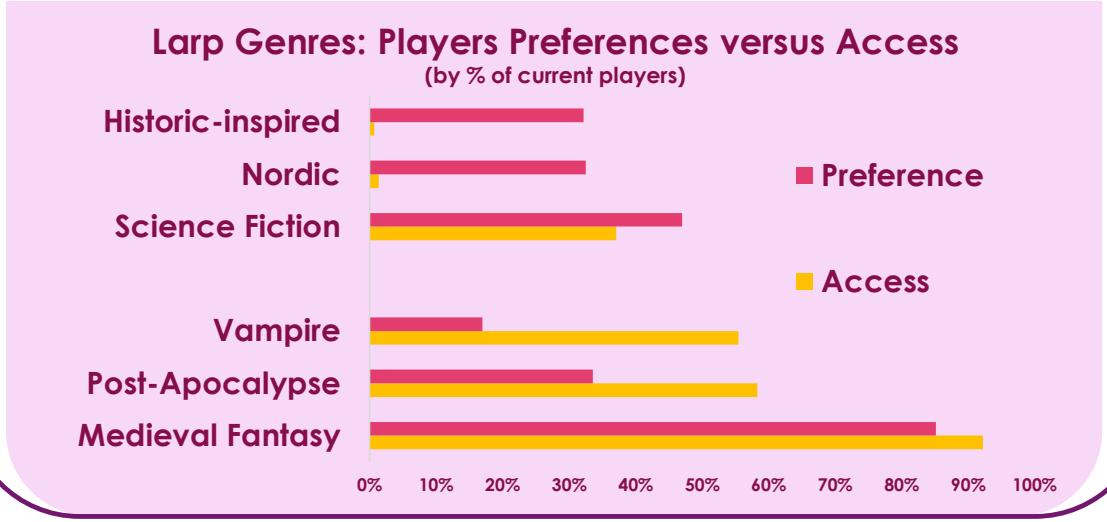
Of current players **attend events monthly** and **28%** are **traveling 5+ hours to events**

Of players were **introduced to larp** via **word of mouth** by someone in their social circle.

Total n=335, Current Players, n=283, Former Players, n=45, Prospective Players, n=7

Only 17% of current players are looking for medieval fantasy games exclusively

Medieval fantasy larps are the most preferred genre; **92%** of players can find one. **Science-Fiction**, **Nordic**, and **Historic** larps **have high demand**, but players have low access to them.



Primary drivers indicated when asked, **"Why do you larp?"**

35% of current players expressed a **need for innovation in the Experience**, including: '**Breaking the mold from current mechanics**', '**fun vs. playing to win**', and '**access to new genre's**'

Total n=335, Current Players, n=283, Former Players, n=45, Prospective Players, n=7

If an easy to join game that doesn't require a large time commitment presented itself, 44% of former players would be interested in playing

76% of former players were **playing at least 1 x month**

36% were spending **$100 - $200 dollars** in an avg. month

38% were traveling **2-3 hours** to events

Players aged 35-44 years are at the **highest risk of leaving**

Top 3 Reasons Players Left Larping
Lack of value vs. money
Lack of access to a game
Lack of Covid-19 pre-cautions

- Considering how much time and investment they used to devote to larping, former players **might be hesitant** to try a new game, especially if it isn't differentiated or rules light. **Family-friendly** or **non-campaign style** larps could help overcome barriers to play.

Total n=335, Current Players, n=283, Former Players, n=45, Prospective Players, n=7

In the first wave, the data captured for prospective players wasn't significant enough for a segmentation analysis.

A total of 7 prospective players took the survey in Wave 1.

- 5 were from the Northeast Region of the US
- All 7 indicated a plethora of genres of interest – they are excited for any story
- They ranged from 25 – 64 years of age
- 4 expect to travel 3+ hours to their first event

Total n=335, Current Players, n=283, Former Players, n=45, Prospective Players, n=7

Accessibility is an on-going challenge for certain players; they want to join but feel left out of game design decisions.

Covid-19

If your game requires confirmation of covid vaccinations, make sure that policy is posted somewhere accessible. The players that need to see those policies will appreciate the clarity. The need for covid-19 pre-cautions was one of the top 3 reasons a player had to stop attending events.

Health Impairments

Players with health conditions or impairments don't feel like they're included in game design and would love to be able to participate without it being a hassle.

On-line Larping

There are all types of players who are unable to attend larps in-person, regardless of design. There is a desire and opportunity for live events that take place in on-line forums that allow players to RP and socialize with others from home.

Standardization in language and an open-source rules system would help reduce the silo's American players exist in.

'***Boffer*** *larping' isn't a universal term.*

No one can agree on what to call a larp that has an element of live combat. Don't assume someone hearing the word "boffer" has the same operational definition you do. Open-ended responses captured a variety of definitions, the most common being:

- A game that only allows handmade weapons.
- A game that uses a padded weapon (handmade, latex, foam, etc.).
- A style of larping with combat only, no RP.

For this survey, 'boffer larping' refers to any larp with a live-combat aspect.

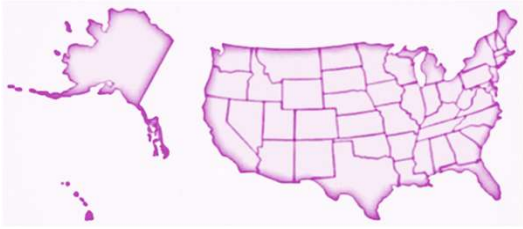
Demographics

Reponses skewed heavily towards the Northeast region of the US. As the first wave was a proof of interest, subsequent surveys will be focus on building out more data globally

Continental Breakout

Countries: Australia, Austria, Canada, Czech Republic, Finland, Germany, Ireland, Italy, Japan, New Zealand, Scandinavia, The Netherlands, United Kingdom, United States

US Regional Breakout



Northeast	71%
Midwest	9%
Southeast	9%
West	8%
Southwest	2%

Total n=335. Asia, n=1, Europe, n=34, North America, n=293, Oceania, n=6. US Regional Total n=286

Around 56% of players identified as Female, Non-Binary, or Other*. The younger age ranges not only have more players, but they also tend to have a greater diversity in gender identity

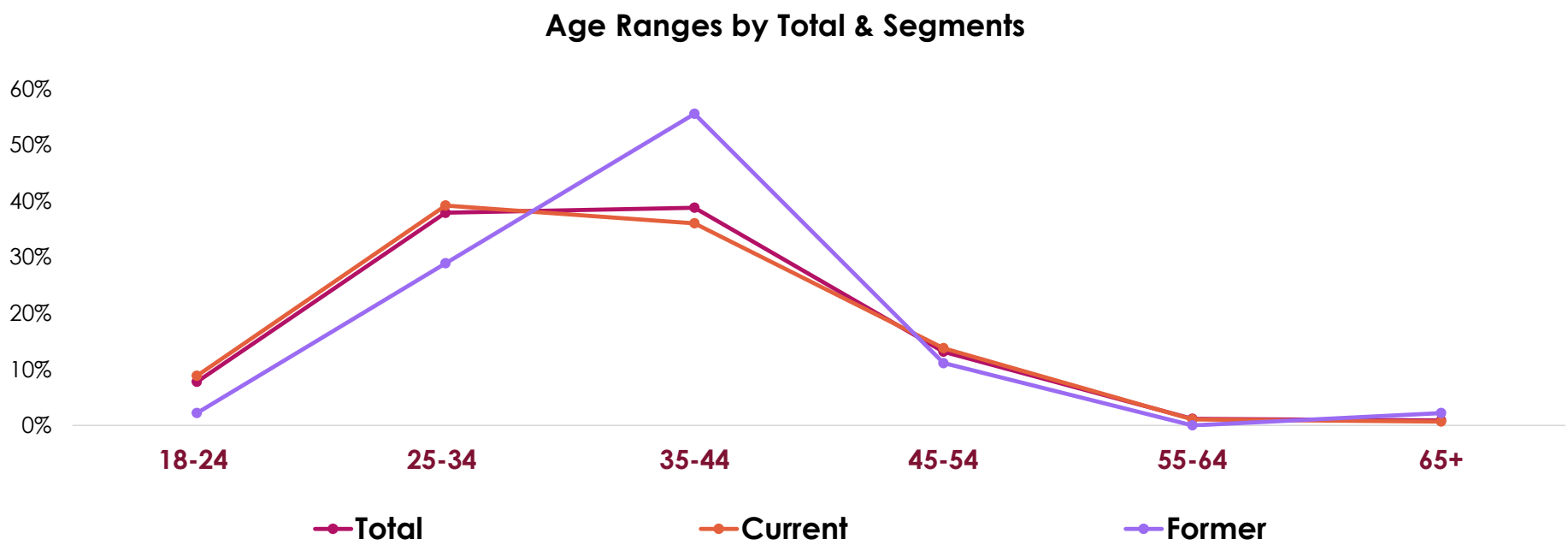
Gender Demographics Chart by Age Ranges

(by Percentage and Count)

Age Range	Percentage of Male	Count of Male	Percentage of Female	Count of Female	Percentage of Non-Binary or Other*	Count of Non-Binary or Other*
18-24	38%	10	23%	6	38%	10
25-34	35%	45	34%	43	31%	39
35-44	43%	56	33%	43	24%	31
45-54	66%	29	25%	11	9%	4
55-64	100%	4	0%	0	0%	0
65+	67%	2	33%	1	0%	0
Prefer not to say	0%	0	0%	1	0%	0
Total	44%	146	31%	105	25%	84

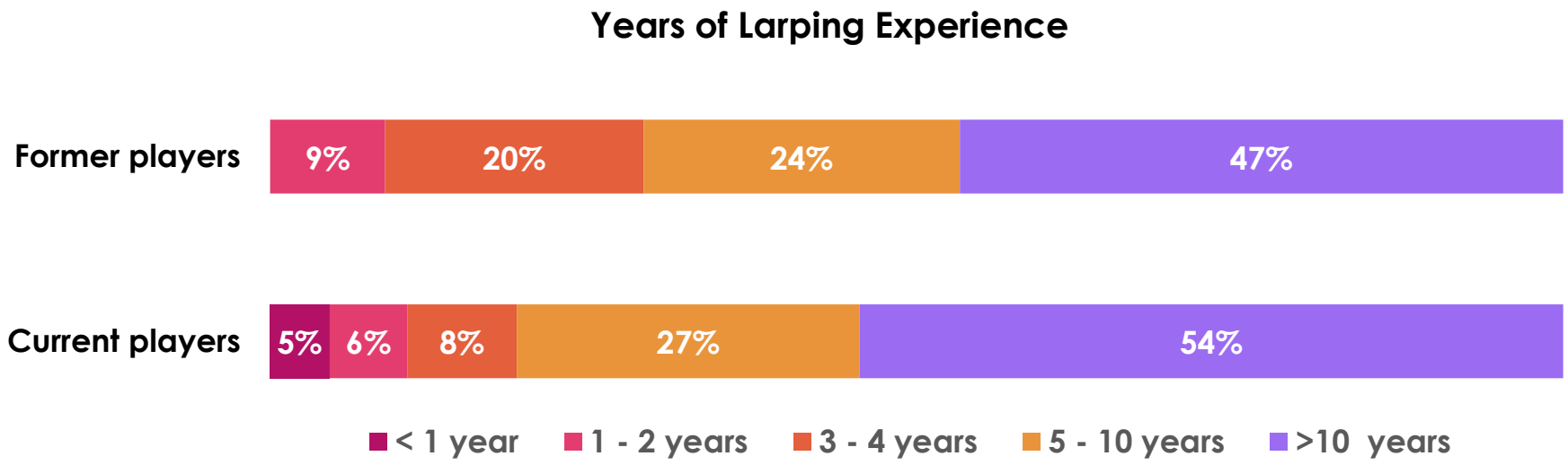
Total n=335. *Other responses included: *Trans, Gender non-conforming, Genderfluid, Genderqueer, Questioning/Unsure*

There is a perception among former players that games are designed with a younger generation in mind versus being designed for all-ages



Total n=328, Current Players, n=283, Former Players, n=45

Most players in this sample would be considered experts in the hobby



Total n=328, Current Players, n=283, Former Players, n=45

Players are social with a high level of connectivity; 78% are introduced to larping by a family member, friend, or acquaintance in their social circle.

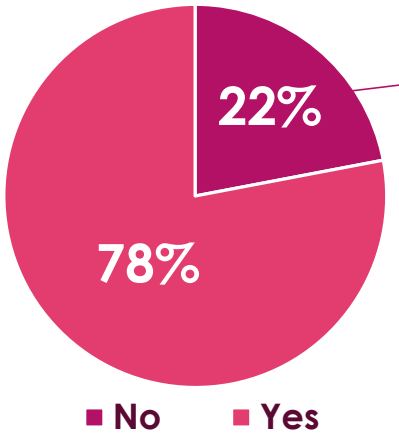
Make sure players have what they need to share your game with others.

Word of mouth	**71%**
Online (Web search, social media)	10%
Convention	4%
Family, Friends, Tabletop Group	**4%**
Game store	4%
College	**3%**

Total n=335, Current Players, n=283, Former Players, n=45, Prospective Players, n=7

Interactive experiences are a great place to find new players as attendee's share similar interests.

Would You Attend an Interactive Experience?



For the international respondents, **31%** said they wouldn't consider attending an interactive experience.

Examples:

- ❑ Renaissance Faire's
- ❑ Haunted houses
- ❑ Murder mysteries
- ❑ Escape rooms
- ❑ Dinner theater
- ❑ Improv groups

Total n=335. United States; n = 286, ex-United States: n= 49

Segmentation Analysis

CURRENT PLAYERS

FORMER PLAYERS

The survey was designed for segmentation. After demographic questions, respondents would see questions that would pertain to their segment.

Current players

- **I'm a current larper (have attended a game or an event in the last 18 months)**

Former players

- **I'm a former larper (haven't attended an event in over 18 months)**

Potential players

- **I have never larped before, but I have interest in doing so in the future**

Note: There wasn't a large enough sample to create an analysis for this group in Wave 1

Total n=335, Current Players, n=283, Former Players, n=45, Prospective Players, n=7

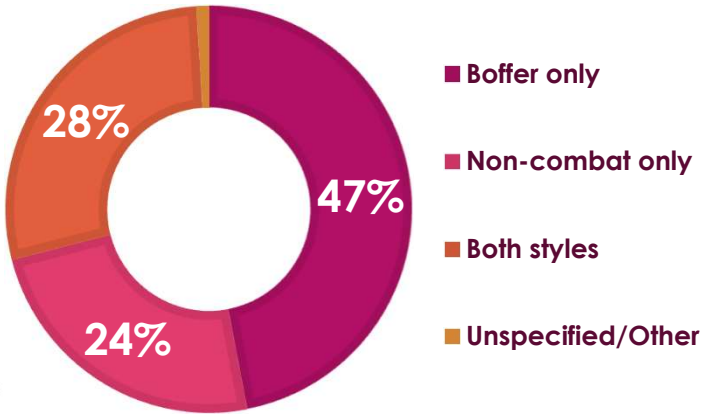
Segmentation Analysis

CURRENT PLAYERS

FORMER PLAYERS

Players who trust staff are more interested in experimenting and more likely to recommend your game to others

Preference on Style of Play



The open-ended responses for this question highlighted the need for a universal definition for the term "boffer larping". For this survey, it means any larp with a live-combat aspect.

Top 5 Innovation Themes Current Players Desire		
Experience	65	Breaking the mold from current mechanics, fun vs playing to win, experimenting with new genre's
Community	60	Inclusivity, engagement with the players, communication
Ease of play	54	Rules light, less campaign style larps, simple mechanics, less rules updates, use of technology
Storytelling	38	Immersion, fostering connections, developing new ways of delivering plot to players
Accessibility, Diversity, Safety	24	Removing barriers to play, creating ways for players who can't attend live to interact with the game, addressing "broken stairs"

Current Players, n=283. Innovation open-ended: n=216

Medieval fantasy, post-apocalypse and vampire larps are oversaturated – access is outweighing player preference

Count of Genres Players Would Prefer to Play	
Medieval Fantasy	241
Science Fiction	133
Post-apocalypse	95
Nordic	92
Historic-inspired	91
Vampire	48
Western	67
Steampunk	66
Pirate	55
Cthulhu	40
Horror	83

Count of Genres Players Have Access To	
Medieval Fantasy	298
Post-apocalypse	165
Vampire	157
Science Fiction	105
Horror	97
Western	86
Steampunk	81
Cthulhu	47
Pirate	45
Nordic	4
Historic-inspired	2

'Other' genres mentioned:

- **Modern day**
- **Non-medieval fantasy**
- **Magical kids**
- **Supernatural mystery**

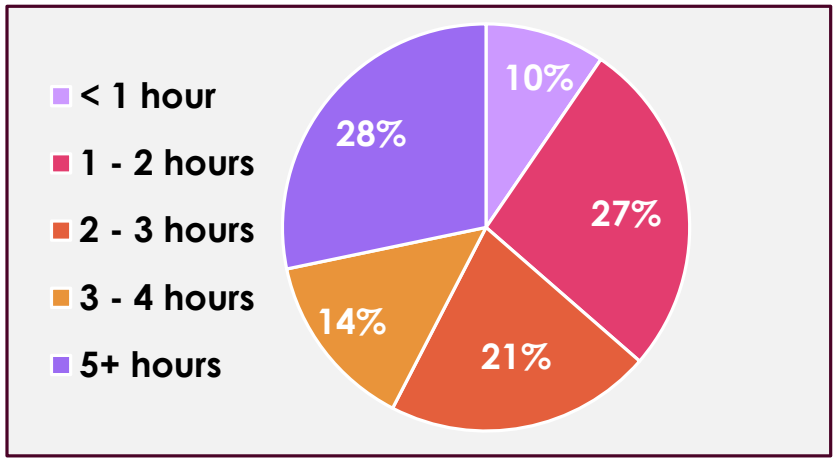
People admire games that foster player creativity; genre is irrelevant for most if the game is fun

Current Players, n=283

Aggregately, current players are more likely to play a few games a year versus monthly

Larping Frequency of Current Players	
I play infrequently, maybe once or twice a year	9%
I tend to play a handful of games in a year	49%
I play one game each month	20%
I play in multiple games each month	19%
Other	3%

Estimated Hours Spent Traveling to Events



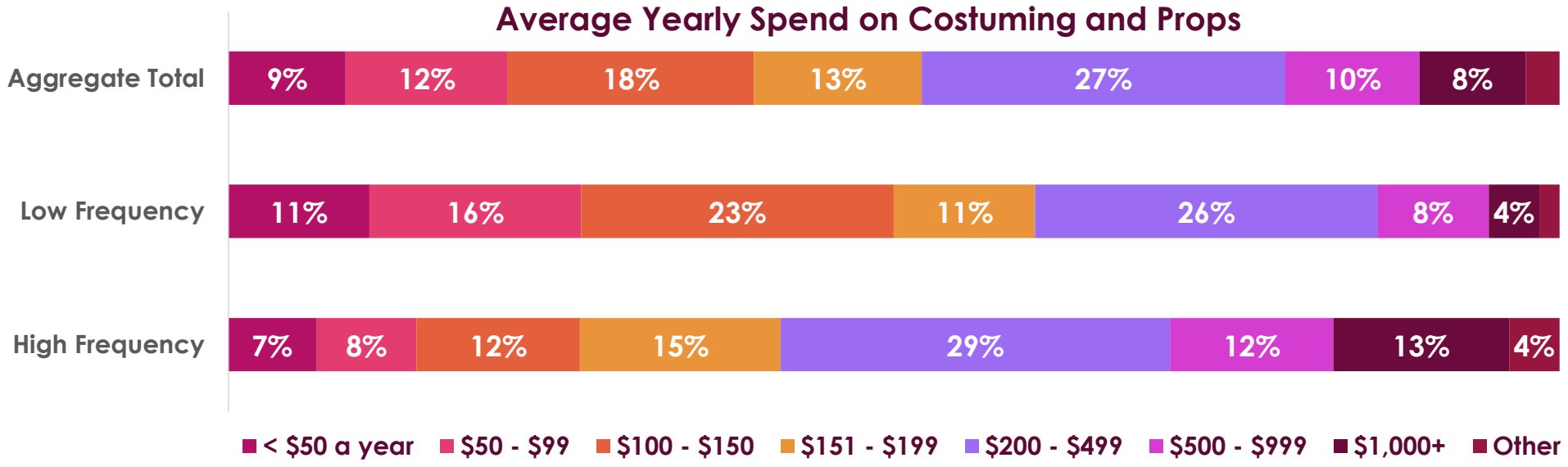
Current Players, n=283.

In the US, players in campaign-style games might not be the right audience for experiential games, and vice versa

Average monthly spending (USD) / Avg travel for events	High Frequency* - 1 or > events per month						Low Frequency - 5 or < events per year					
	<1 hour	1-2 hours	2-3 hours	3-4 hours	5+ hours	Total	<1 hour	1-2 hours	2-3 hours	3-4 hours	5+ hours	Total
<$50	6%	3%	0%	1%	0%	10%	4%	5%	4%	4%	8%	24%
$50-$99	4%	9%	7%	2%	1%	23%	2%	11%	8%	2%	5%	28%
$100-$150	2%	6%	5%	0%	10%	23%	0%	8%	4%	4%	4%	19%
$151-$199	1%	6%	9%	2%	4%	22%	1%	3%	2%	3%	3%	11%
$200-$499	1%	3%	3%	3%	10%	20%	0%	2%	2%	3%	4%	11%
$500-$999	0%	0%	1%	1%	0%	2%	0%	0%	0%	0%	3%	3%
$1,000 +	0%	0%	0%	0%	0%	0%	1%	1%	0%	0%	2%	4%
Total	14%	27%	25%	9%	25%	100%	7%	30%	19%	16%	28%	100%

US Current Players, n=232. High Frequency, n=100 (also included players who play 10+ games a year but may experience lulls due to seasonality of events offered), Low Frequency, n=132

Players enjoy curating the perfect look for their characters; as retailers realize the opportunity that exists in this market, more options will become available



US Current Players, n=238. Prices listed are USD. Callouts for values less then 4% have been removed from the chart.

Only 1 of the 12 most common reasons people choose to larp has anything to do with the plot

Most Common Reasons Current Players are Larping

Themes	# of times mentioned	Themes	# of times mentioned
Role-playing	90	Creative Release/Outlet	19
Socialization	81	Costuming/Crafting	18
Storytelling	72	Exercise/Being Outdoors	17
Escapism	67	Boffer Combat	12
Fun	61	Collaboration	6
Community	39	Queer Safety	3

Current Players, n=247.

Segmentation Analysis

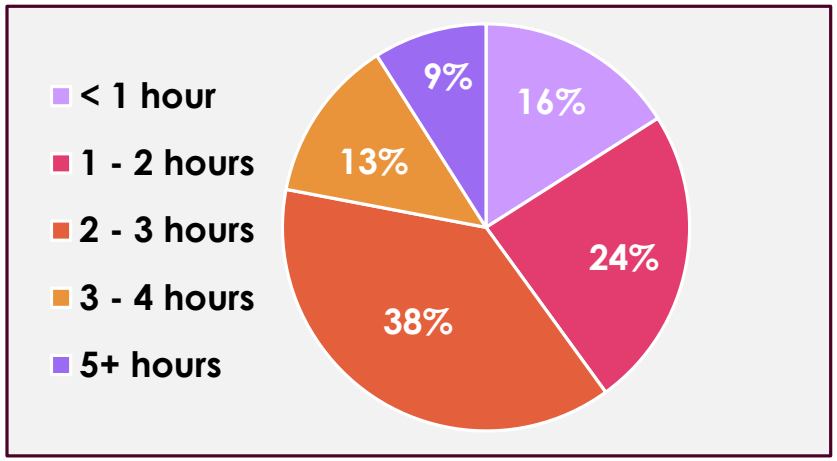
CURRENT PLAYERS

FORMER PLAYERS

Former players were playing at a high frequency when they were attending

Larping Frequency of Former Players	
I played infrequently, maybe once or twice a year	7%
I tended to play a handful of games in a year	16%
I played one game each month	44%
I played in multiple games each month	31%
Other: Whenever I could find one in my area! There need to be more please	2%

Estimated Hours Spent Traveling to Events

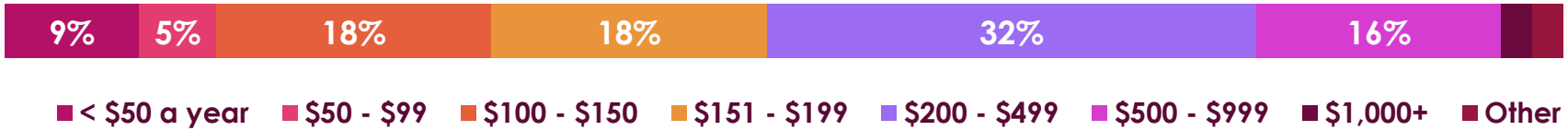


Former Players, n=45.

Former players had similar spending trends as current players

Average Monthly Spend on Attending Events*

Average Yearly Spend on Costuming and Props*



Former Players, n=45. *Please note: No data cuts by frequency available due to size of former player sample.

Many former players indicated they'd like to re-engage with larp, but certain objections would need to be overcome

What Would Bring them Back
Changes to the game environment, community or player engagement
Ease of play, less time commitment
Address safety & access issues; covid-19 pre-cautions, facilities with ease of access, design for mobility
Local game opens near me
Value for money

One challenge with re-engaging former players is if their social group also stopped playing, they may be hesitant to join a new one.

The new player experience is more than a check-in prior to game; it starts the moment someone hears about your game

Pre-game Prep

How much time do you want players to invest in prepping for your game? This includes character creation, rules and lore reading, filling out any on-boarding paperwork, etc.

Usefulness

Are there barriers in your design that stop new players from getting involved in any aspects of fun? How many events do you want it to take before a base level character can feel useful in your game?

User Experience

What does the new player experience journey map look like for your game? Does it add value or is it a chore that can be taken care of before the event? Is your new player process a barrier to entry?

Tracking the health of your player base can help you understand any weakness in your process

Retention

What is your rate of retention for players? Do you have a system for collecting that data and reviewing feedback? Are there any trends in drop off?

Bias

Do you have an enthusiasm bias towards certain players at your game that may influence how you're designing? Do players all get equal opportunity and how do they communicate when they're not?

User Experience

When your players are talking to new people about your game, what are they saying? Does that align with how you feel about your game?

Players have a spectrum of identity; gender normative lore and rules leaves folx wondering where they fit in

Queer safety

Several players reported that they played larp because it gave them a sense of queer safety. If you haven't thought of that topic in your game design, it's something incredibly important to evaluate and discuss.

Escapism

Non-binary or gender inclusive language reduces anxiety as well and lets players know you're actively listening and creating with them in mind. Gender normative language reduces the ability to achieve escapism, a top reason for why people larp.

Inclusivity

Within the survey, **25%** of people reported identifying with genders other than Male or Female. Writing gender specific rules risks alienating a significant portion of your player base.

Running a Larp as a Business

Rules light games will appeal to a broader audience.

Staff should be fully vetted to ensure a safe environment.

Find event spaces that have **good facilities** or **offers you dates to run outside of holidays.**

Build out a sales funnel and a dynamic marketing campaign to overcome word of mouth marketing limitations

8 – 10 hours of quiet time at boffer larps appeals to a broader audience (players want their sleep).

Be intentional about who you're writing your game for and **communicate that clearly.**

Occasionally test a starting level character to gain perspective on what the player experience is like.

Running a Larp for the Community

Experiment with new genre's - work with your player base to see what they're interested in trying.

Engagement is key; players want to know that they're valued for more than just their entry fee.

Be a player. Many owners answered the survey that they're **unable to think like a player anymore** – that likely shows in your design.

Look for ways to **reduce operational workload**, i.e., simplify on-boarding tasks, disseminate information through videos vs text, eliminate the need for check-in lines, etc.

Offer a variety of ways for players to volunteer, many have skills they'd love to use to lighten the load and NPC-only options reduce accessibility.

Exploitation in larp happens, but it's avoidable. Many global respondents commentated on the lack of non-profit or community-driven games in the US.

Examples of exploitation practices to avoid

Anyone getting paid by the game **should not also have a player character** (this is a conflict of interest).

Paying some staff - but game play or operations are driven by volunteer labor. **If your game has volunteer requirements or collects donations**, money should be going back into the game & community.

Ignoring the need for safety in your larp, like **not securing the requisite insurance** for the type of event you're running.

Larp designs that have uneven power matrix's negatively impact players and create detractors to larp overall.

You've read the data, now what?

Conclusion	Call to Action (CTA)
• Wave 1 of the survey was successful as a proof of concept, but more work is needed to strengthen the data set and provide additional data cuts.	• If you found this data helpful, share the next survey link. • Send feedback on what you want to see next.
• Players have more options than ever, but the predominance of word-of-mouth marketing is limiting their ability to find new games.	• Use multiple channels to get your marketing seen and look for in-person opportunities to introduce your game to people. • Develop a sales funnel to refine your approach.
• Players want to be heard and want to know they matter.	• Make it a point to talk to players outside your social circle – avoid the echo chamber.
• Gender normative language in rules sets is antiquated, un-creative, and off-putting.	• Revise your rulebook to provide non-binary options or remove gender normative language all-together.

Looking for more information like this?

Interested in learning more about market research and other topics in larping?

Subscribe to my newsletter on Ghost for weekly topics and to get notified when new research opportunities are available - https://silver-lining-strategy-insights.ghost.io/

Want to talk further or have a research need? Email me at – silverliningstrategyllc@gmail.com