

Research on the Marketing Mechanism of Female-Oriented Gaming Industry: A Case Study Based on Paper Games

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Abstract: In recent years, women's awareness of independence and self-reliance has been constantly improving, and their consumption ability has been continuously enhanced, which has driven the prosperity of female-oriented game industry. In the face of accelerated competition, how to connect players through emotional marketing, how to form brand loyalty and competitive barriers through emotional resonance, is of practical significance for optimizing the company's own branding and even promoting the positive development of the entire gaming industry. The emotional marketing model of a successful brand obtained in this study is as follows, selecting segmented markets, driving user emotions as the core, satisfying user psychology as the ultimate goal, and finally transforming emotional marketing as a promotional tool into a deeper level of user psychological identity stimulation strategy, in order to build long-term stickiness and brand loyalty. This research underscores the transformative potential of emotion-driven strategies in fostering sustainable consumer relationships, offering a blueprint not only for the gaming sector but also for industries seeking to leverage psychological engagement in an era where authentic connection increasingly dictates market success. By prioritizing emotional resonance, brands can transcend transactional dynamics to cultivate enduring cultural and economic value.

1 INTRODUCTION

With the awakening of female subjectivity and the rapid development of the "She Economy", female-oriented game market has become an important niche track in the gaming industry (Li, 2022). Recently, various categories such as dating, dressing up, and female growth have emerged, not only meeting the entertainment needs of female players, but also building unique stickiness through emotional storytelling, community operation, and other methods.

The popularity of mobile Internet has promoted the vigorous development of the gaming industry. Among them, female-oriented games are increasingly prominent in the entire gaming market, forming a rapidly expanding segmentation. According to statistics, from 2015 to 2019, the number of female players in Chinese game market increased from 230 million to 300 million, accounting for 46.2% of the total number, nearly half. At the same time, in the last few years, the size of the female-oriented game

market in China has continued to expand, reaching 95.8 billion yuan by 2023, with an annual growth rate of 11%, and their share in the overall gaming market has also increased from 19% in 2018 to 32% in 2023, indicating a very promising future. However, most of the games currently leading the list come from giants, or experienced manufacturers specializing in female-oriented games, leaving little room for emerging small companies. Even for large ones that have already accumulated a certain number of users, how to extend brand lifespan, continuously attract and retain target users, and how to enhance user loyalty through emotional connections are still key issues to occupy a favorable position in competition (Gao, 2021). Furthermore, the current audiences of female-oriented games are still mainly concentrated in East Asia, represented by China, Japan, and South Korea, that is, countries and regions with similar cultural patterns centered around Japan, the origin country of the Otome Game (A kind of love simulation game targeting young women) industry, while Western countries such as Europe and America have fewer

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users and poorer market performance (Zhang, 2024). For manufacturers targeting the Western market, facing the reality of significant cultural differences and the pessimistic development of Eastern models, how to combine their products with Western elements and capture the emotional needs of female players in Western countries also needs further consideration.

Based on the summary of current literature, existing research has focused on the user characteristics, market size, and cultural influence of female-oriented games. Some scholars have explored the relevant content of game design and marketing strategies. However, current research mainly focuses on game content itself, and the analysis of how marketing mechanisms shape user emotional resonance and enhance brand value is still relatively limited, especially lacking a systematic summary of marketing practices of leading enterprises. In view of this, this study takes the Paper Games as a case study and adopts the process tracing method to conduct research. Firstly, the development process and operational situation of the Paper Games are reconstructed. Then, the focus is on how it constructs long-term user loyalty and competitive barriers through precise market segmentation, brand building, and emotional marketing strategies. Finally, the marketing mechanism is summarized in order to provide reference and guidance for the future development of female-oriented gaming industry and to look forward to the future research direction of its marketing.

2 CASE INTRODUCTION

Paper Games was established in August 2013 and is a game company primarily focused on female-oriented game creation. The current company has two main product lines, the *Nikki Series* and the *Love Series*. The *Nikki Series* includes *Nikki UP2U-A Dressing Story*, *Nikki UP2U-World Traveller*, *Miracle Nikki*, *Shining Nikki*, and *Infinity Nikki*. The *Love Series* includes *Love and Producer* and *Love and Deep Space*. And there are also two ongoing games, *The Perceiver* and *Ballad of Antara*. The company's mission and development goal is to focus on gaming IP and continue to make efforts in multiple fields such as animation, movies and derivatives, creating new interactive entertainment experiences on a global scale. It has been proven that the operating strategy of Paper Games is very successful, and its games have performed outstandingly on the female-oriented gaming list and even in the entire mobile gaming market. Taking the *Love Series* as an

example, the first month's revenue of *Love and Deep Space*, which was launched on January 18, 2024, reached about 500 million yuan. Just one week after its launch, it ranked fifth on the IOS best-seller list (Chen, & Zhang, 2024, Xu, & Wu, 01-29-2024), the third-party platform estimated that the annual revenue will be close to 6 billion yuan. Even the old work, *Love and Producer*, which has been in operation for about eight years, still has an annual revenue of over 100 million yuan and was once nominated for the "2021 Top Ten Annual National IP Selection Activity" (Li, 2022). The new game in the *Nikki Series*, *Infinity Nikki*, is the first game developed using Unreal Engine 5 and logged into the mobile platform. Within 6 hours of pre-download, it topped the free list in 34 countries and regions as well as the game category list in 108 countries and regions (Xu, & Wu, December 9, 2024). Along with other games in the *Nikki Series*, it contributed more than one billion yuan in revenue to the company in 2024.

3 TARGET USER AND POSITIONING OF PAPER GAMES

3.1 User Gender

The main target users of Paper Games are women. The *Nikki Series* and the *Love Series* games under its umbrella have a "female-oriented" tag in app stores, and rank in the female-oriented game list when assessing the revenue.

Taking *Love and Producer* (one of the *Love Series* Otome games) and *Shining Nikki* (one of the *Nikki Series* dress-up games) as examples, in order to make further profiling of Paper's users. Li Siyu (2022) from Guangdong University of Finance & Economics conducted a questionnaire survey on players of *Love and Producer* in December 2021 and March 2022. Among the 307 valid questionnaires collected in the two surveys, female players accounted for 98.68%, while male players accounted for only 1.32%. Li Wenting (2023) from East China Normal University issued an interview invitation to players of *Shining Nikki* from June to December 2022. Among the 20 selected interviewees, 17 were women, accounting for 85.00%, and only 3 were men, accounting for 15.00%. (The user profiles in sections 3.2-3.4 are still mainly based on the research of Li Siyu and Li Wenting).

3.2 User Age

Among the 307 valid questionnaires surveyed by Li Siyu (2022) on *Love and Producer*, players aged 18-25 accounted for the vast majority, with a percentage of 71.05%. A survey report released by Aurora Mobile in 2018 showed that among the players of *Love and Producer*, more than 90% are under the age of 30, and the vast majority aged 20-29 accounted for 75%, mainly students and white-collar workers. In addition, through statistics on Li Wenting's interviews with 20 players of *Shining Nikki* in 2023, it is known that 18 of them are in the age range of 18-25 years old and mainly work as college students or have just started working. Based on the above information, the user age of Paper Games is mainly distributed in the 18-30 age group, and their professions are mostly high school students, college students, and young office workers.

3.3 User Geographic Location

Among the 307 *Love and Producer* player survey questionnaires collected by Li Siyu (2022), Guangdong Province, Shanghai City, and Jiangsu Province were the top three in terms of player distribution. According to a survey conducted by Aurora Mobile within one year after the official launch of the game, the top ten geographical distribution of players are in terms of Shanghai, Beijing, Guangzhou, Wuhan, Chengdu, Nanjing, Chongqing, Tianjin, Hangzhou, and Fuzhou. Meanwhile, through the interview results of Li Wenting with 20 players of *Shining Nikki* in 2023, it was found that the most concentrated geographical location of these player are large coastal provinces and cities such as Guangdong, Jiangsu, Zhejiang, and Shandong, as well as developed inland provinces and cities such as Henan and Sichuan. That means, the users of Paper Games are mainly distributed in first and second tier cities.

3.4 User Income Situation

Miao Shengguang (2023) from Nanjing University of the Arts conducted a survey of 1346 players among Chinese female-oriented games in February 2023, and found that the highest number of people with per capita disposable monthly income in the range of 1000-4000 yuan was over 55%. Li Siyu (2022) found through statistical analysis of 307 valid questionnaires collected from *Love and Producer* that the number of players with consumption amounts between 1000-5000 yuan is the highest. Besides, the

author (a fourth year college student) conducted interviews with Paper's players in her social circle as well as combined the salary situation on recruitment website, and calculated that the average disposable monthly income of Paper's users is mostly in the range of 1500-3000 yuan (after tax reduction). The characteristic of this type of user is that they have a certain degree of independent economic ability, but cannot afford high consumption. Therefore, they tend to recharge small products such as monthly cards (ranging from a few yuan to tens of yuan) in games and consume them multiple times in a row, rather than recharging large products at once.

3.5 Target User Positioning Method

The target users of Paper Games are mainly positioned by capturing their psychological and emotional needs.

Based on the characteristic profile and summary of the target users of Paper Games in sections 3.1-3.4, it can be concluded that their target users are young women with certain economic independence in first and second tier cities. For girls in this age group, their desire for beautiful appearance and loyal romantic relationships is relatively strong. The founder of the company, Yao Runhao, seized this characteristic and successively created the *Nikki Series* focusing on beauty and the *Love Series* focusing on romance, which became popular overnight (Zhang, 2021). Although Yao Runhao believed in his early interviews that his success was due to luck, it was more due to his keen insight into market gaps and seizing opportunities, which gave him the chance to lead the less developed Chinese female-oriented gaming market more than a decade ago, and maintain a leading position in the long-term competition through his first mover advantage.

4 MARKETING ANALYSIS OF PAPER GAMES

4.1 Social Media Marketing

4.1.1 APP Boot Animation and Trending Topic Promotions

Taking games launched after 2015 (when various popular social media apps were fully operational) as an example, *Love and Producer* (2017), *Love and Deep Space* (2024), *Shining Nikki* (2019), and *Infinity Nikki* (2024), all of which are under the umbrella of

Paper Games, have conducted boot animation promotions for social apps represented by Sina Weibo. Due to the fact that the main audience for Paper Games is young women aged 18-30, who are also the main users of social apps, daily boot animation can effectively attract the attention of potential players. Unlike lengthy traditional persuasive advertisements or other functional introduction advertisements, Paper's advertisements mainly adopt the concise poster style of exquisite character portraits and eye-catching romantic lines in the game. Even without any promotional language, it can effectively utilize young women's inner longing for a perfect relationship that is "harmless compared to reality" and their need for respect and attention (Liu, 2024), attract them to download the game to experience, and even establish long-term stickiness.

4.1.2 Interactive Marketing

Taking Sina Weibo as an example, the official account of Paper Games often posts "forwarding this post, and you will get a chance to win monthly cards through the lottery", "sending tokens to all players after reaching a certain number of comments", and activities such as inviting new players to join and receiving welfare packages. These interactive approaches can effectively utilize the social needs of female players, using them as a medium to spread widely in their friend circles and communities, thereby establishing a strong social circle among people with similar interests, making players feel approved, recognized, and loved, further consolidating their sense of identity and belonging in the community, and forming brand loyalty (Chen, 2024).

4.2 LED Screens Advertising

Paper Games will place advertisements on LED screens in densely populated areas such as the centers and commercial districts of first and second tier cities. These advertisements are usually characterized by exquisite visuals and attractive copy, which can quickly attract the attention of passersby. These locations located in downtown areas usually attract a large number of tourists from all over the country and even the world every day, and such advertisements on LED screens can rely on large and gorgeous graphics and short but accurate promotional slogans to leave a deep impression on them, thereby promoting the game to all over the world.

4.3 Co-Branding Cooperation

Paper's games are not only enthusiastic about collaborating with physical brands (such as *Love and Producer* and Burger King jointly launching packages with peripherals), but also enthusiastic about collaborating with cultural IPs from all walks of life (such as *Shining Nikki* and Yoneyama Mai jointly launching limited edition sets within the game). Whether it is physical products like fast food, milk tea, cosmetics, or well-known cultural IPs like Disney and *Empresses in the Palace*, they are highly sought after and loved by young people, especially young women, which is in line with the company's positioning of targeting young women. What's more, Paper's games have also collaborated with DUNHUANG INSPIRATION, Yue Opera, and others for promotion. In today's era where traditional culture is increasingly valued, the strategy of Paper Games has successfully broken the zone of its games.

4.4 Peripheral Products and Doujin Competitions

The online direct-sale store "Paper Presented" operated by Paper Games sells peripheral products such as acryl stands and badges for its various games that are loved by young people. And Paper Games often holds Doujin (It means the re-creation of existing works) competitions, the award-winning works not only receive generous prizes, but also have the opportunity to be made into merchandises for further promotion. This firmly grasps the social and self actualization needs of young people, especially young women. For example, if a girl player purchases a badge in Paper's online store, she is likely to pin it onto an itabag (It means a bag full of anime character badges and dolls) and bring it to school or company, which will attract the attention of her classmates or colleagues to the game characters and form a social circle centered around the game. The prize money and promotion of winning works in Doujin competitions such as short article creation and painting creation can greatly stimulate the creative desire of young women with literary and painting talents. After they create satisfactory works, they can increase the exposure of their works by posting them on social media or interacting with Paper's official accounts, gaining more attention from people who have similar hobbies and even attracting outsiders, thereby enhancing their self-worth and self-esteem (Miao, 2023).

5 MARKETING MEDIA SELECTION UNDER GENDER PREFERENCE DIFFERENCES

According to a report released by Forbes in 2010, female users often account for a larger proportion than male users on social media platforms, especially those focused on life sharing and emotional communication. Another survey on the differences in social media usage preferences between genders shows that compared to male users who pay more attention to independent expression and information gathering when using social media, and have a weaker tendency to choose text or image information, women tend to be more concerned about finding social identity and establishing intimate relationships, and especially like to post pictures and photos related to themselves. Based on this, the author analyzes the marketing media selection strategy adopted by Paper Games, in terms of online media selection, according to the report on the age and gender distribution of China's major social apps released by the third-party platform, the current apps dominated by young female users mainly include Sina Weibo, Rednote, Tiktok and LOFTER. The characteristics of these apps are to support the publication of a large number of image-based posts, with the main interactive content being life experiences or emotional records. At the same time, they support similar users to gather together for real-time interaction or establish communities for communication. The social media promotion of Paper Games is also mainly aimed at these platforms. For the short video platforms, taking Tiktok as an example, Paper Games has made continuous efforts in this marketing channel in recent years, such as the release of the video creation task for the characters' birthday in *Love and Deep Space*, watching the *Shining Nikki* live broadcast of the Spring Festival and receive welfare packages. On the one hand, the characteristic of this type of short video platform is its proficiency in algorithm recommendations and topic challenges. It can mobilize more users to participate and promote through task posting, meeting the needs of young women who crave interaction and friendship. On the other hand, compared to static images and text, short videos have more memorable features in terms of sound and animation. Nowadays, where young people face high life pressure, fast pace, and lack of time to focus on reading long texts, the promotion method of subtly implanting sound and animation into users' minds has a powerful effect.

When selecting physical media, compared to male-oriented game and general game companies, Paper Games pay more attention to the placement of mall advertisements and LED screens outside the walls of downtown buildings. The main reasons for selecting such media are not only the direct visual impact and the fact that women pay more attention to image information, but also the high activity geographical location of the target users. Compared to men, young women are more inclined to go shopping with friends at the above-mentioned locations. Advertising placement in these places can attract the interest of target and potential target users on a large scale, improve promotional efficiency, and further expand influence through "Take a selfie with these game characters and post it" activities on the Internet. Moreover, Paper Games also focuses on the brand collaboration of its products. Based on the collaboration of commonly used props for women's social activities such as milk tea, beauty and snacks (while men's social activities do not tend to use these products), it particularly emphasizes the collaboration with well-known cultural IPs, intangible cultural heritage skills, and historical relics. This type of linkage can effectively enhance the reputation and raise the level of Paper's products, apply traditional elements to the game itself, improve the beauty and connotation of the graphics, and enhance the cultural literacy and inner superiority of its users in today's focus on promoting traditional culture. It enables users to meet the emotional needs of improving their own taste and gaining attention from others in the process of making friends, and in turn, it affects the brand and makes users become more loyal.

6 CONCLUSIONS

In today's environment where consumers increasingly value personalized needs and psychological satisfaction, emotional marketing has become one of the core strategies for the success of modern brands and has attracted more and more attention from brand owners. By summarizing the case of Paper Games, it can be seen that the emotional marketing of a successful brand mainly includes the following three characteristics.

Firstly, brands should focus on segmented markets. Brands provide tailored products and services for specific consumer groups through precise market positioning. For example, female players prefer exquisite graphic design and gentle and loyal game characters. By understanding and meeting this demand, Paper Games creates emotionally resonant

consumer experiences, thereby forming strong brand loyalty.

Secondly, brands shall prioritize emotional stimulation as their core driving force. By providing consumers with products and services that align with their inner needs, brands aim to stimulate emotional resonance and cultivate long-term consumption habits and loyalty.

Thirdly, brands must make satisfying the psychology needs of users their ultimate goal. Through precise emotional marketing strategies, brands can create a positive and comfortable consumption environment for users, thereby enhancing user satisfaction and brand loyalty, and achieving long-term market competitiveness. At this point, emotional marketing is not only a promotional tool, but also a core strategy that can stimulate deep psychological identification.

The significance of this study, from theoretical perspective, which can expand the application of emotional marketing theory in the female-oriented game market, deepen the research on the relationship between market segmentation and brand building, and provide targeted marketing mechanism analysis for women to the gaming industry. From practical perspective, this study can provide marketing strategy recommendations for optimizing brand building and strengthening user emotional connections for female-oriented game manufacturers, in order to enhance user stickiness and promote the sustainable development of female-oriented gaming industry.

The limitation of this study is the lack of in-depth market research and intuitive data. In future research, it looks forward to conducting offline interviews or questionnaire surveys to gain a deeper understanding of user psychology and highlight the heterogeneous attributes of different types of female players, in order to further explore how companies can adopt different strategies to meet the needs of different types of users.

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