

# ADOPTING NEW SOLUTIONS: CLOUD GAMING & MORE

## GAMERS' POV

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## ADOPTING NEW SOLUTIONS: GAMERS' POV

The gaming industry is evolving rapidly, driven by technological advancements and changing consumer demands. One of the key areas of focus in this dynamic landscape is the adoption of new solutions, such as cloud gaming. This market research of the 80 Level Research Team aims to explore the various aspects of future development in the gaming industry, specifically focusing on changing game consumer preferences.

USING THE VOICE OF GAMERS, THE 80 LEVEL RESEARCH TEAM REPORTED ON THE FOLLOWING TOPICS

### MARKET POTENTIAL AND GROWTH PROJECTION

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### INFRASTRUCTURE & GAMERS' READINESS FOR NEW SOLUTIONS

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**Key Benefitors:** *Cloud Gaming, Payments, Shared*

**Research Materials:** *google sheets (distributions, graphs, models), .sav database analysis on [google drive](#).*

# MARKET POTENTIAL AND GROWTH PROJECTION

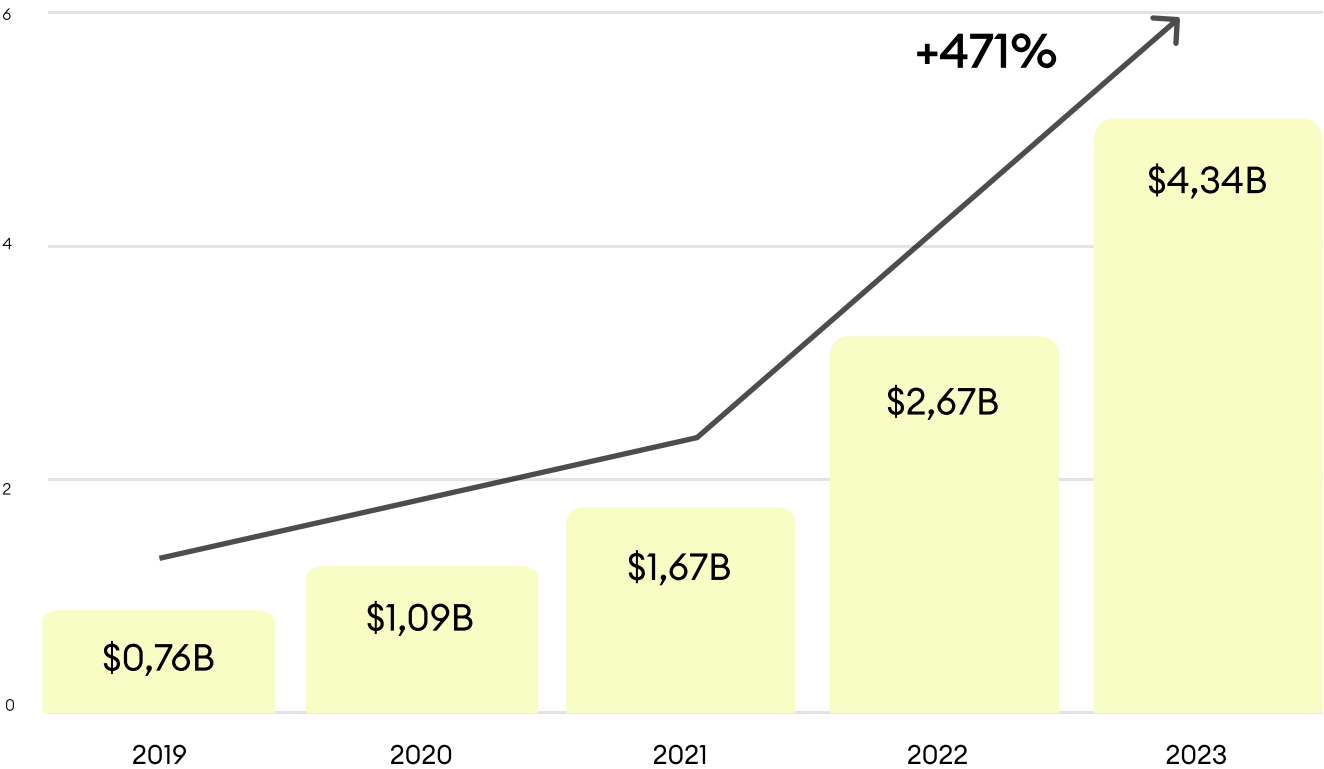
The demand for this research arises from the growing interest and investment in innovative gaming solutions. The global games market will generate revenues of \$187.7 billion, with year-on-year growth of +2.6% (Source: NewZoo), industry stakeholders are keen to understand the market dynamics, emerging trends, and player preferences to make informed business decisions.

the global games market will generate revenues of  
source: NewZoo

**\$187.7 billion**  
by 2026

Cloud gaming is a promising technology for both game developers and players. In 2021, the cloud gaming market generated \$1.67 billion and is likely to rise to \$4.34 billion in 2023 (Source: Statista). Industry experts also predict that more than 2.5 billion gamers will use cloud gaming in 2024.

## CLOUD GAMING REVENUE



\*source: Statista

With the rise of cloud gaming capabilities, there is a need to explore the advantages, disadvantages, and consumers' readiness to pay and play games before downloading them.

However, it is vital to remember that despite the booming trend of cloud gaming, many providers struggle financially due to the high user acquisition costs (based on [80 Level Research on Cloud gaming with qualitative approach](#)). Google Stadia's downfall sparked debates on the future of cloud gaming. To address these challenges, the 80 Level Research team has studied gamer preferences in cloud gaming.

## INFRASTRUCTURE AND GAMERS' READINESS FOR NEW SOLUTIONS

This report results from a survey conducted by the 80 Level Research Team. The survey included a sample size of **700 gamers** who are part of the 80 Level Research Panel, ensuring a knowledgeable participant base:



The average age of the participants is 32 years, offering insights into the preferences and behaviors of a relatively diverse age group. Regarding gender distribution, the survey utilized a snowball sampling technique, resulting in a male representation of 86%, a female representation of 12%, and a non-binary representation of 2%.



The income distribution of the respondents indicates that 44% have an average income in their countries, 19% have less than average income, and 30% have an income higher than the average in their countries. This data provides a comprehensive understanding of the surveyed gamers' economic backgrounds and potential purchasing power.

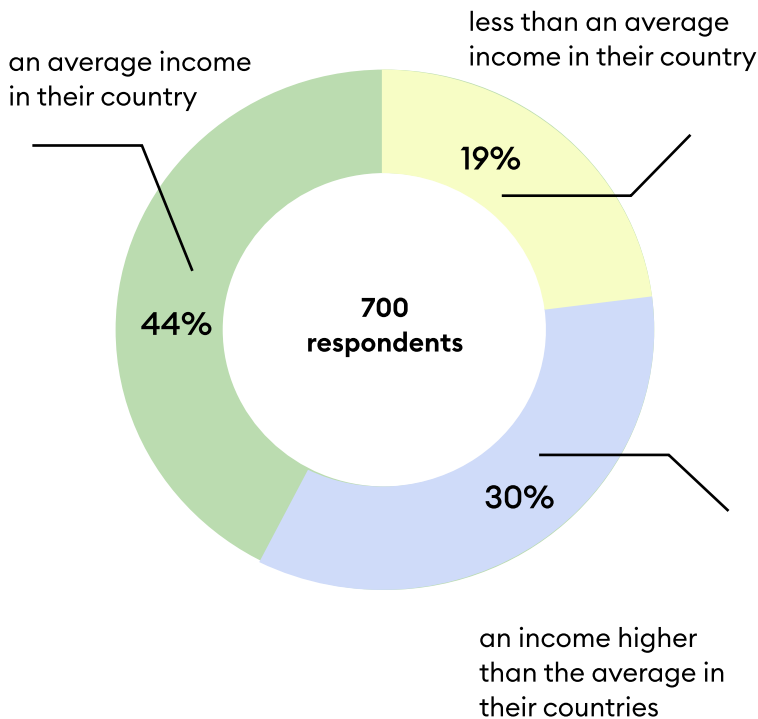


The average number of hours played per week was 15, indicating a significant investment of time in gaming activities.



Importantly, the survey received responses from diverse countries, with most participants residing in regions with a high density of 5G coverage. The top countries providing responses include the USA (24%), Canada (5%), Italy (5%), India (5%), Brazil (4%), the UK (4%), Germany (3%), Spain (3%), Poland (3%), Hungary (3%), Turkey (3%), Russia (3%), France (2%), Australia (2%), Greece (2%), etc.

## RESPONDENTS OVERVIEW



### AGE

18-79 years

**average age: 32 years**

### HOURS PLAYING

average hours  
played per week - 15

### GENDER

86% men

12% women

2% non-binary

### OCCUPATION

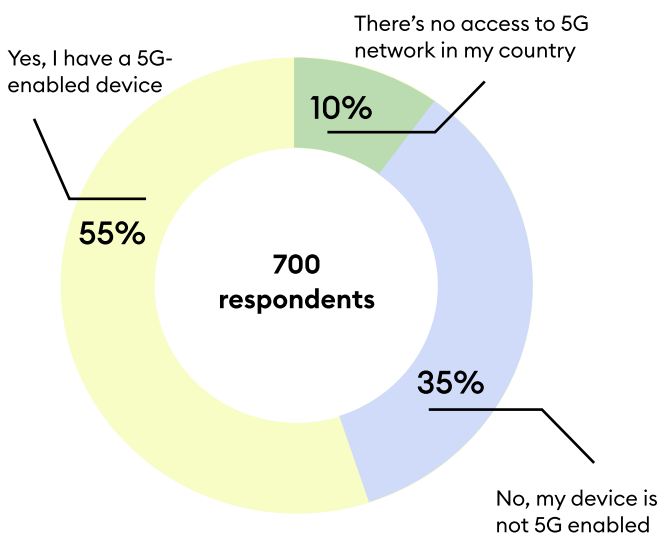
25% Video games

22% Entertainment

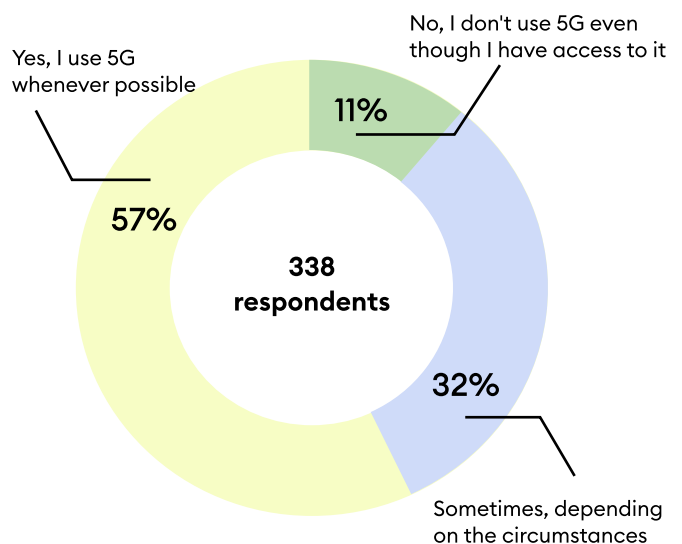
20% Engineering

But before diving deeper into new solutions, let's look at how ready people feel for these solutions regarding technology and infrastructure. More than half of respondents not only have a 5G-enabled device (55%), but the majority are actively using 5G networks (57% use 5G whenever possible, and 32% use it sometimes, depending on the circumstances).

## ACCESS TO 5G

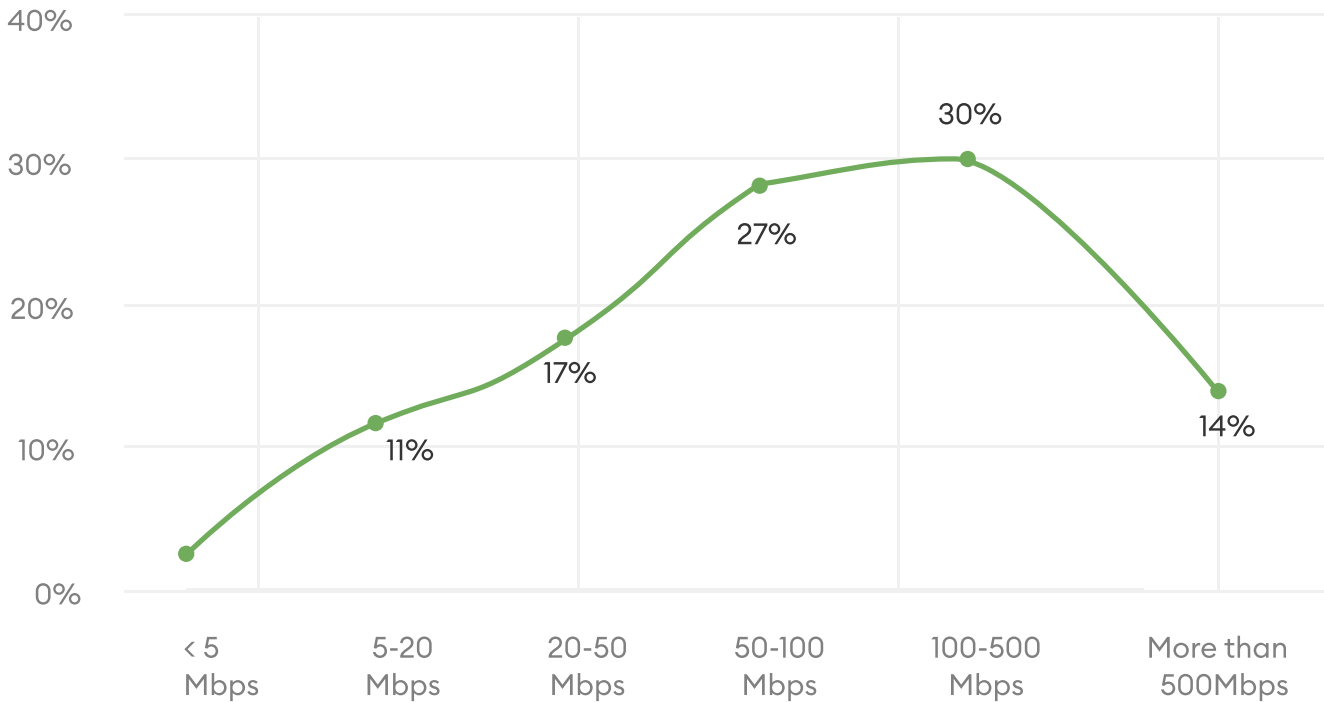


## USING 5G



Only 10% of people cannot access 5G in their country. Most respondents have high-speed internet (71% with a speed of 50 Mbps and higher). It is safe to say that the time for new solutions has come, and people need infrastructure.

## WHAT IS YOUR AVERAGE INTERNET CONNECTION SPEED?



High ownership of PCs (Desktop or Laptop) at 91% suggests that the vast majority of gamers already have the necessary hardware infrastructure to support cloud gaming solutions. The high ownership of Android smartphones at 57% & iPhones at 29% (86% total) indicates that a significant proportion of gamers have access to mobile gaming and suggests they may be open to cloud gaming solutions that are accessible on their smartphones.

We also noted that the ownership of Nintendo Switch/Switch Lite (34%) and Sony PlayStation 4/4 Slim/4 Pro (31%) suggests a significant interest in console gaming. Gamers who own these consoles may have existing preferences for traditional gaming experiences, which may negatively impact their readiness to adopt cloud-based gaming solutions.

## HARDWARE OWNERSHIP

PC	91%
Android Smartphone	57%
Nintendo Switch/Lite	34%
Sony PlayStation 4	31%
iPhone	29%
iPad	22%
PlayStation 5	21%
VR/AR Headset	20%
Android tablet	16%
Mac	14%
Xbox Series X / Xbox Series S	13%
Xbox One / One S / One X	10%
Steam Deck	5%

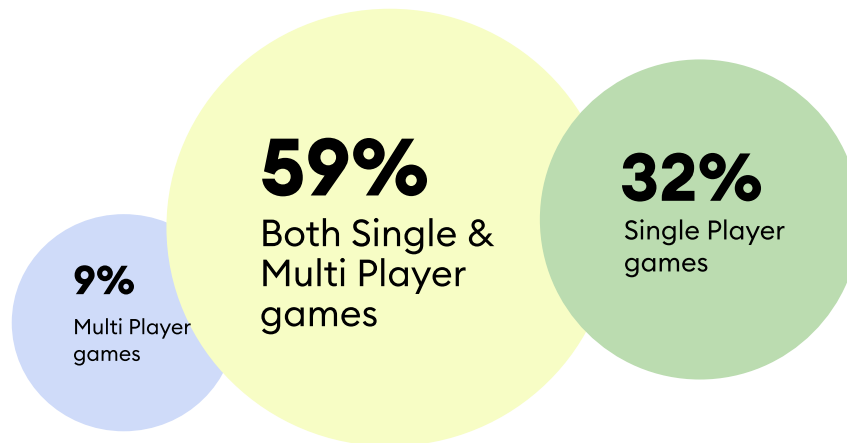
Overall, the data above reflects that respondents with high ownership of PCs, smartphones, and consoles, demonstrate a certain level of readiness to explore cloud gaming solutions. However, the willingness to embrace cloud gaming will depend on internet connectivity, availability of cloud-based gaming services, and individual preferences for gaming experiences, which we'll cover in the following sections.

## GAMERS' CHOICES ABOUT GENRES, TYPES OF GAMES PLAYED, AND PAYMENT MODELS

Understanding gamer preferences and their engagement with emerging features is crucial for developers, marketers, and other industry experts. In this chapter, we delve into the insights gathered in 80 Level's 2023 survey of gamers. Our findings reveal that 32% of gamers enjoy playing solo in single-player games, while only 9% exclusively play multiplayer games. 59% of gamers embrace both, seamlessly switching between immersive solo adventures and multiplayer battles.

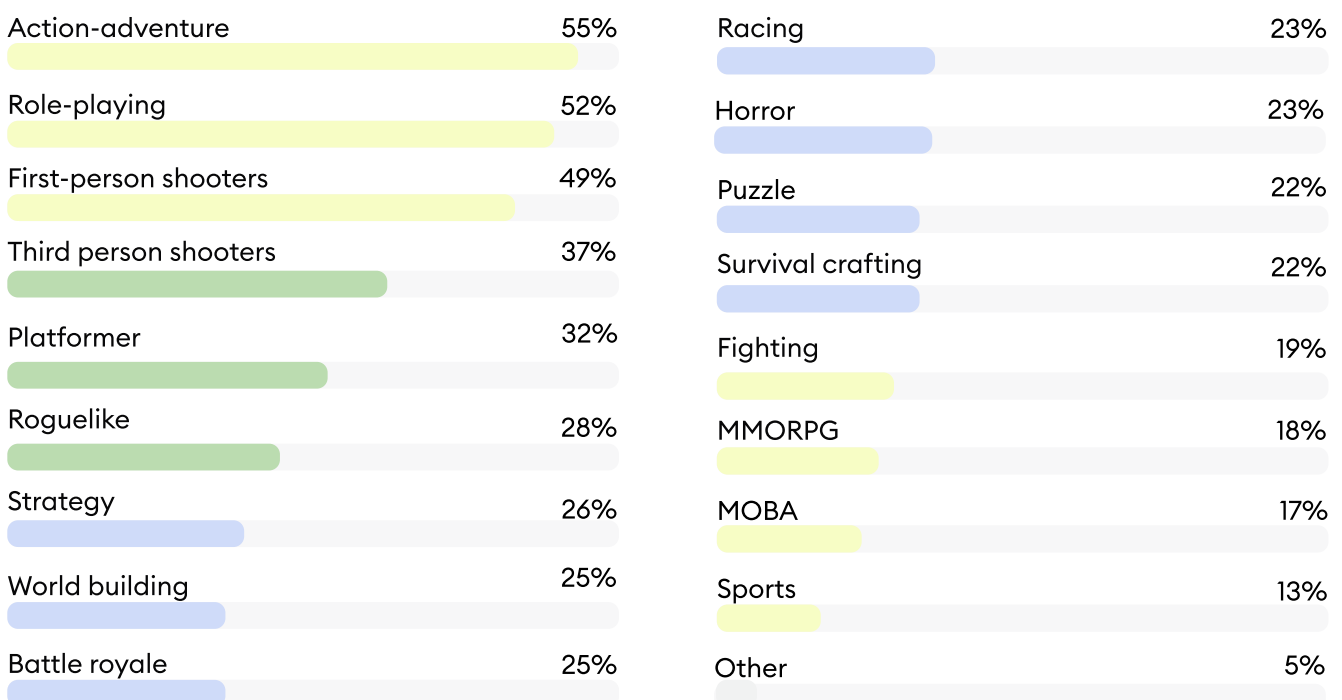


## SINGLE PLAYER/MULTIPLAYER



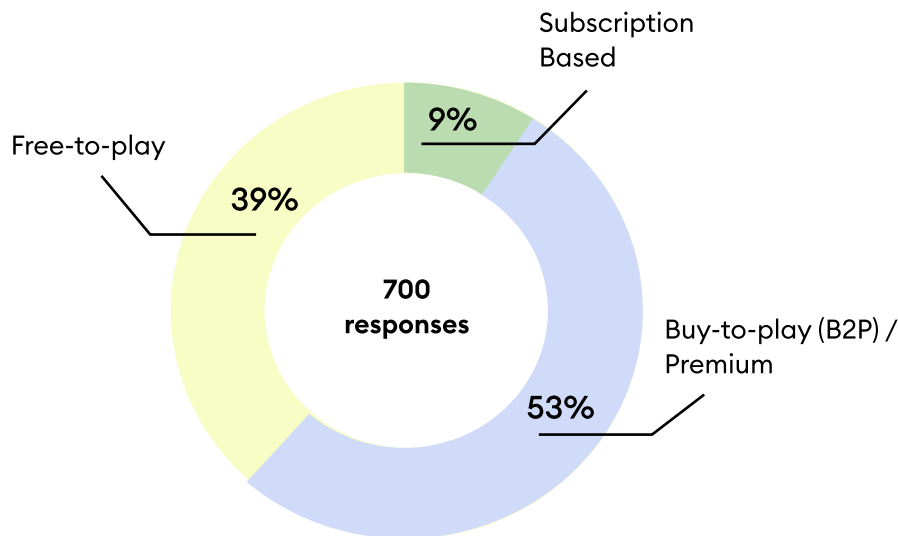
- More than half of respondents (55%) embark on journeys in action-adventure Games like Hogwarts Legacy, The Last of Us, and Atomic Heart. Meanwhile, role-playing games have 52% of gamers hooked in their narratives. First-person Shooters are in the top 3 genres, with a staggering half of the gamers immersing in their thrilling titles.
- Not far behind, are dynamic third person shooters, captivating 37% of gamers. Another third part of gamers (32%) choose to play platformer games.
- A fourth of gamers surveyed are fans of the following genres: strategy, battle royale, and world building games.
- 1 out of 5 gamers prefer the following genres: racing, horror, puzzle, and survival crafting.
- MMORPGs captivate 18% of gamers. MOBA games – including the iconic League of Legends and DOTA 2 – ignite the competitive spirit of 17% of gamers. Whereas, fighting and sports games have strong support of 19% and 13%, respectively.

## GAME GENRES





Regarding game types, 39% of gamers lean towards Free-to-Play (F2P), while 53% prefer Buy-to-Play (B2P) or Premium games. Additionally, 9% of gamers opt for subscription-based gaming – a small risk for businesses trying to launch Cloud Gaming products.



## How much money have gamers spent on video games during the past 12 months?

Our findings reveal that the average money spent is 471 USD. While this number may seem modest to some, it represents a more prudent approach to financial choices made by gamers when managing their gaming budgets, and possible bigger challenges for marketers and business developers who sell their products to customers directly.



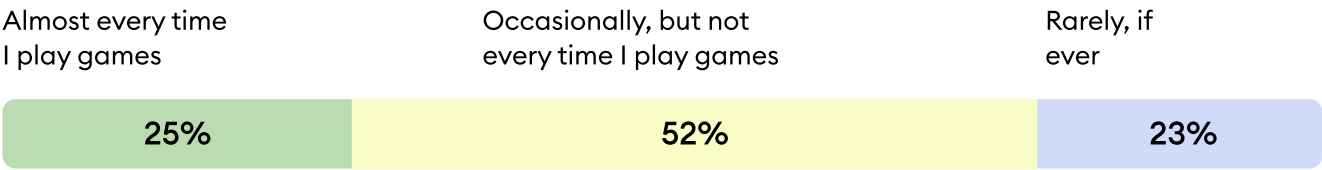
is the amount that gamers have spent on video game in the past 12 months, on average

\*according to 80 Level 2023 Research on adopting new solutions

## GAMERS' WILLINGNESS TO TRY REMOTE PLAY AND PLAY BEFORE DOWNLOADING

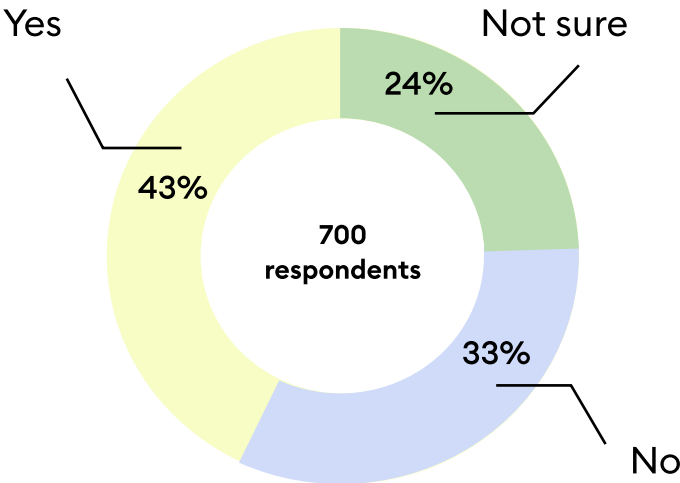
Based on the data, it can be observed that a quarter of gamers play with other people almost every time. In half of the cases, gamers play with others occasionally, but not every time. And, in 23% of cases, playing games with others rarely or never occurs. These findings highlight the importance of remote play features, enabling players to engage in multiplayer experiences.

HOW OFTEN DO YOU PLAY GAMES WITH OTHER PEOPLE?



A fascinating narrative unfolds within the vast gaming landscape as we delve into gamers' preferences regarding remote play features. A notable 43% express a genuine curiosity and enthusiasm for utilizing remote play as a powerful tool for learning from mentors or friends who have achieved mastery at higher levels. In contrast, 33% stand firm in their preference for independent gaming experiences. And one-fourth of gamers surveyed were uncertain about their interest in remote play.

INTEREST IN USING REMOTE PLAY FEATURE  
TO LEARN FROM A MENTOR OF A HIGHER LEVEL?



A fascinating narrative unfolds within the vast gaming landscape as we delve into gamers' preferences regarding remote play features. A notable 43% express a genuine curiosity and enthusiasm for utilizing remote play as a powerful tool for learning from mentors or friends who have achieved mastery at higher levels. In contrast, 33% stand firm in their preference for independent gaming experiences. And one-fourth of gamers surveyed were uncertain about their interest in remote play.

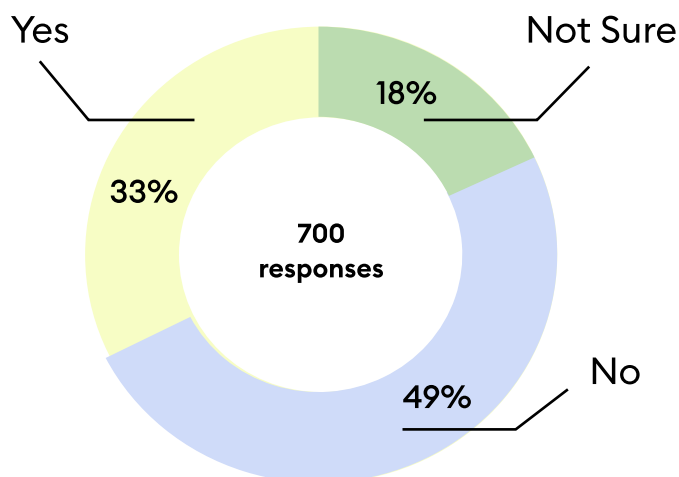
INTEREST ON A SCALE = 6 (1 TO 10)



Gaming's play-before-downloading feature allows gamers to start playing a game without downloading and installing it. It provides a quick and seamless experience by enabling users to instantly access a portion of the game while the remaining content downloads in the background.

Only a third of respondents consider having the option to play a game without downloading it as important, while almost half of respondents do not find it important. This response indicates that there is a significant portion of the market that may not prioritize play before download feature; however, it is important to consider the fact that play-before-downloading is a relatively new feature without a great number of quality executions. As such, a large number of "uninterested" people may, in reality, indicate a lesser positive experience.

## IMPORTANCE OF HAVING THE OPTION TO PLAY A GAME WITHOUT DOWNLOADING



## KEY BENEFITS OF PLAY-BEFORE-DOWNLOADING

Among the respondents who find the feature important, the majority (76%) recognize the benefit of saving time and reducing wait time associated with downloading. Additionally, more than half of respondents (56%) appreciate the opportunity to try out a game before committing to a full download, purchase, or subscription. The response implies that previewing games and making informed decisions is of value to gamers. Other notable benefits include saving storage space on devices (54%) and the opportunity to demo games that they may never have tried otherwise (40%). These advantages contribute to the overall appeal of the play-before-downloading feature.

## THE BENEFITS OF HAVING THE OPTION TO PLAY A GAME WITHOUT DOWNLOADING IT

It saves time and reduces the wait time associated with downloading	76%
It allows trying out a game before committing to a full download, purchase, or subscription	56%
It saves storage space on my device	54%
It provides a convenient and fast way to preview various games	48%
It allows me to demo games that I may never have tried otherwise	40%

While a significant portion of respondents may not prioritize the play-before-downloading feature, a sizable market segment still finds it important.

We believe that the information presented in this report will help game developers tailor their offerings to better align with gamer preferences and enable stakeholders to make informed decisions regarding the prioritization, integration, and optimization of remote play and play before downloading features in future game development ventures.

## ADVANTAGES AND LIMITATIONS OF CLOUD GAMING

This section will focus on gamers' readiness to embrace the transformative power of Cloud Gaming. The factors influencing gamers' preparedness for cloud-based gaming solutions are central for this work as they relate to the following hypotheses:

- Familiarity with Cloud Gaming on specific hardware & readiness to try it on other devices
- The willingness of gamers to pay for subscription-based models
- Gamers' recognition of various cloud service providers
- Advantages and disadvantages of Cloud Gaming as perceived by the gaming community
- Interest in Play-Before-Downloading feature

Companies can prioritize device compatibility and marketing strategies for different customer segments. For example, **desktop computers and laptops are the most popular choices for Cloud Gaming, with a significant percentage of users already trying (41%) and a desire to try them (28%).** Mobile devices also look promising, as many users have tried (32%) them or are interested in trying (a fourth of all respondents) Cloud Gaming.

However, it appears gamers are less interested in Cloud Gaming on tablets, smart TVs, gaming consoles, and virtual reality headsets:

- 42% of respondents do not want to try Cloud Gaming on a tablet
- 47% of respondents do not want to try Cloud Gaming on a smart TV

## CLOUD GAMING EXPERIENCE ON DIFFERENT DEVICES

	HAVE ALREADY TRIED	WOULD LIKE TO TRY	DO NOT WANT TO TRY	DIFFICULT TO SAY
Desktop computer	41%	28%	24%	7%
Laptop	35%	26%	30%	8%
Mobile device	32%	24%	37%	7%
Tablet	18%	27%	42%	13%
Smart TV	10%	32%	47%	11%
Gaming console	24%	31%	33%	11%
VR headset	9%	39%	38%	14%

To firmly grasp the Cloud Gaming audience, decision-makers should have a closer look at those Cloud Gaming providers/services which are already active in the market; not only to learn how to use their experience, but to consider possible collaborations, partnerships, and acquisitions.

### High Familiarity

These services have established a strong presence in the market and are likely considered reputable and trustworthy by consumers:

- Nvidia GeForce Now: This gaming heavyweight has caught the attention of 73% of gamers. It's a well-known and highly recognized cloud gaming service.
- Xbox Game Pass Ultimate just slightly behind Nvidia, with 71% of gamers familiar with it.
- PlayStation Now: Sony's cloud gaming service has made its mark with 64% of gamers.

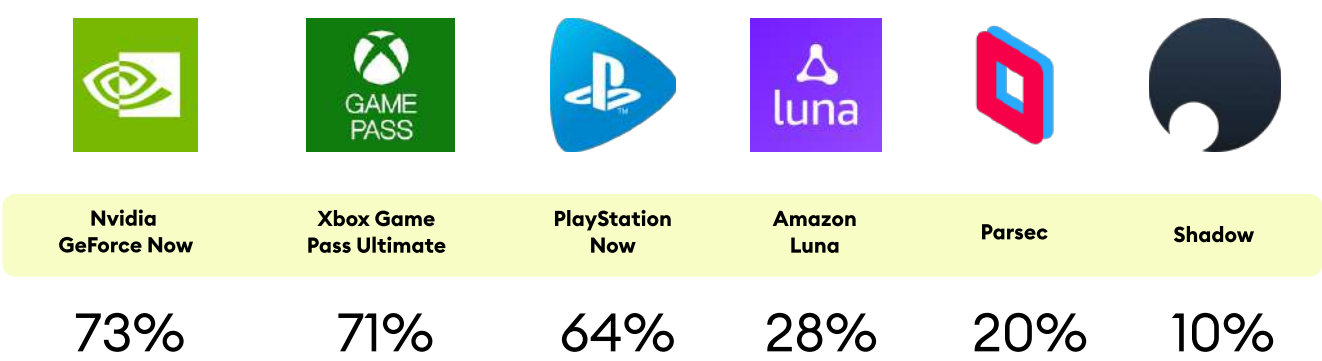
### Moderate Familiarity

- Amazon Luna: This rising star has caught the attention of a quarter of gamers, revealing a mid-range level of familiarity and potential for growth.
- Shadow: The cloud gaming phantom, known by 10% of gamers, holds promise for those seeking an alternative cloud gaming experience.

### Low Familiarity:

Parsec, Vortex, LiquidSky, and Rainway have relatively low familiarity percentages (ranging from 2% to 4%), leaving room for increased visibility in the future.

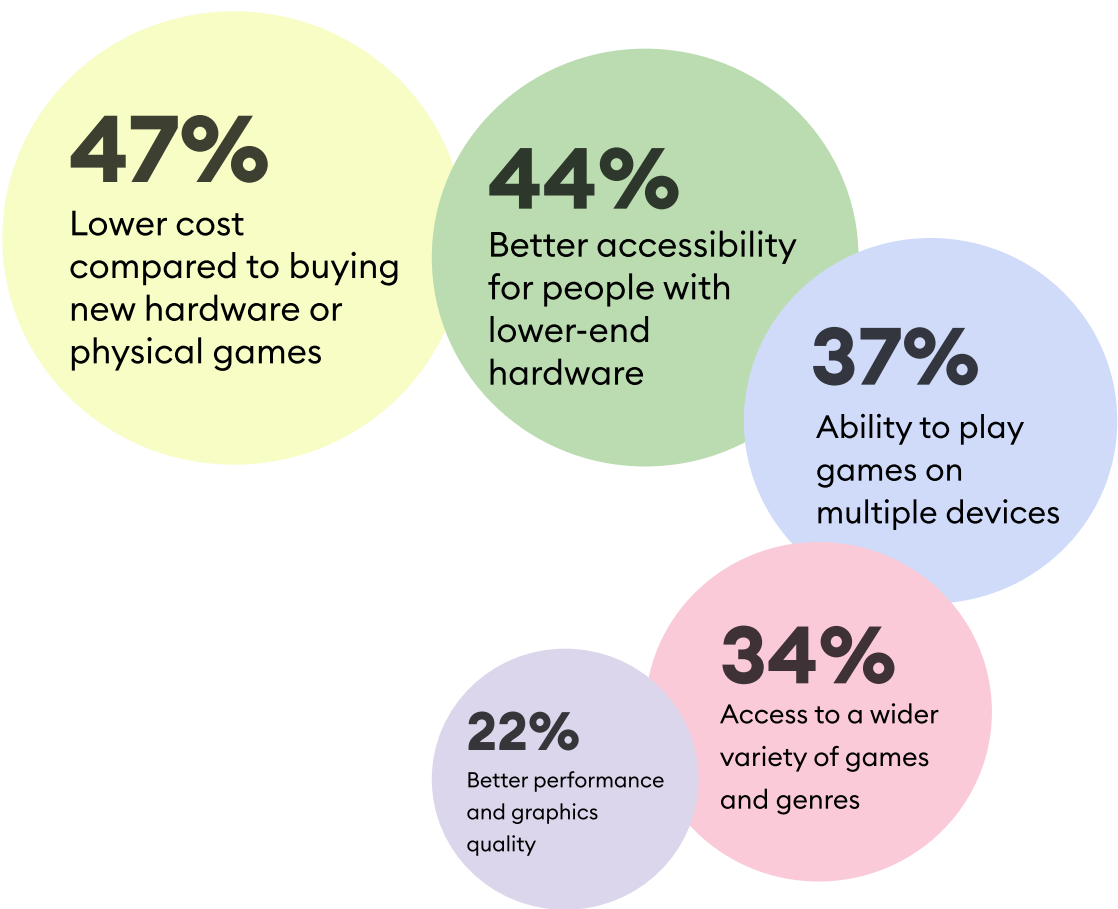
CLOUD SERVICES - BRAND RECOGNITION



The next set of insights provides a comprehensive understanding of the advantages of cloud gaming:

- Half of the responses emphasized “lower cost than buying new hardware or physical games” as one of the biggest advantages of cloud gaming, eliminating the need for expensive gaming hardware or purchasing physical game copies.
- Better accessibility for people with hardware devices of a lower price (44%.) Cloud gaming allows users with lower-end hardware to enjoy high-quality gaming experiences by leveraging the power of remote servers.
- Cloud gaming provides the flexibility to play games seamlessly across various devices, allowing users to switch between platforms without losing progress. 37% of respondents agree with this statement.
- Access to a wider variety of games and genres seems relevant to a third of gamers surveyed.
- Better performance and graphics quality is something a fifth of respondents found significant when choosing the advantages of cloud gaming computing.

ADVANTAGES OF CLOUD GAMING



Understanding the advantages and limitations of Cloud Gaming allows businesses to develop strategies that address potential challenges while leveraging the unique benefits it offers to cater to the evolving needs of gamers.

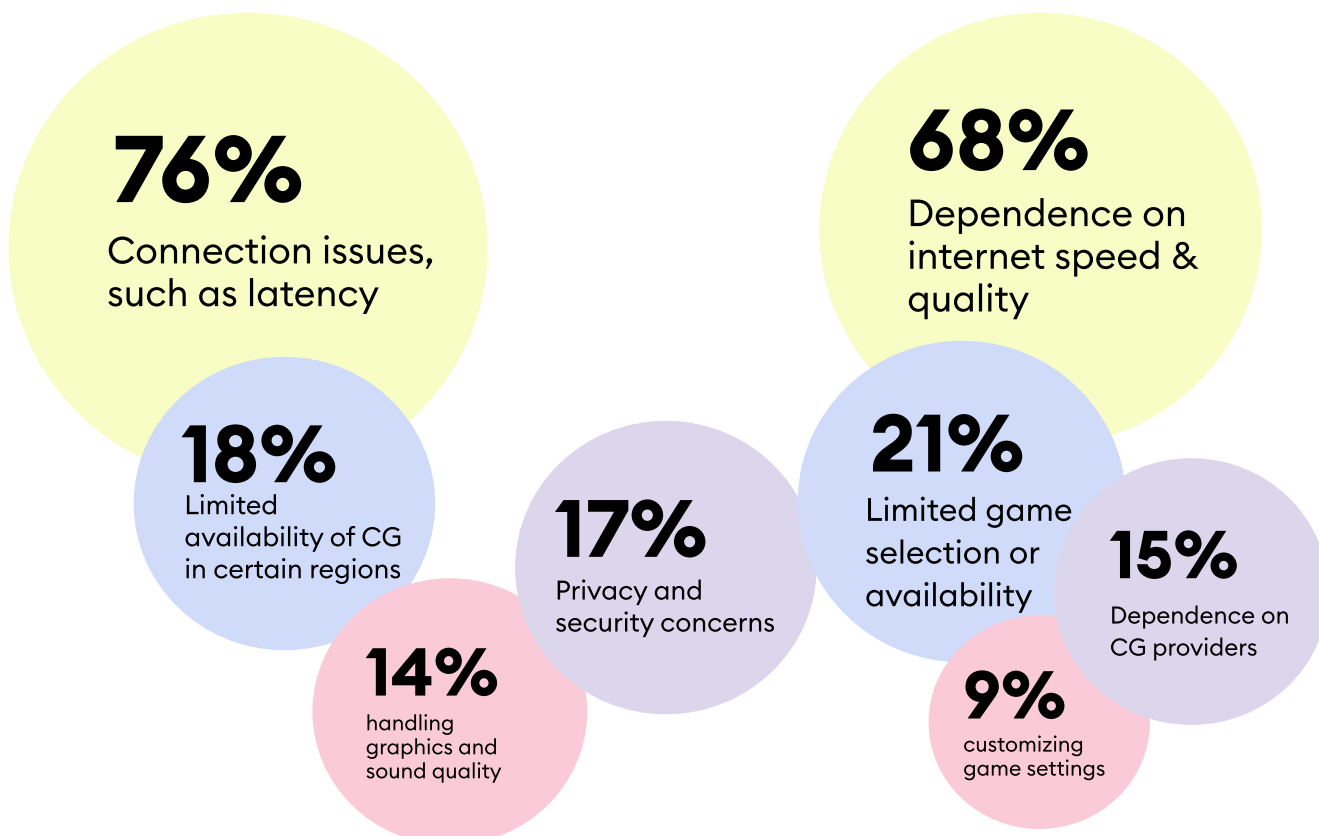
**The 2 most dominant limitations of Cloud Gaming for the majority of gamers include the following:**

- Cloud Gaming may be affected by latency or delays, which can impact the real-time responsiveness of gameplay. This is a Cloud Gaming limitation that the majority of gamers (76%) point out.
- The quality of the gaming experience in Cloud Gaming relies heavily on stable and high-speed internet connections, making it less suitable for areas with limited or inconsistent internet access. 68% of gamers consider it a Cloud Gaming disadvantage.

**There were other limitations of Cloud Gaming that still bother gamers — though to a lesser degree:**

- Limited game selection or availability is relevant to 21% of respondents.
- Limited availability of cloud gaming in certain geographic regions applies to a fifth of the responses.
- Storing personal data on cloud gaming platforms raises privacy and security concerns for 17% of gamers, requiring robust measures to protect user information from potential breaches.
- In 1 out of 7 cases, the dependence on cloud gaming providers will likely stop gamers from choosing Cloud Gaming services or subscriptions.
- 14% of gamers see Cloud Gaming limitations in streaming high-definition graphics and sound in real time.
- The least of players' Cloud Gaming concerns is the ability to customize game settings or controls. Only 9% find it concerning.

## DISADVANTAGES OF CLOUD GAMING





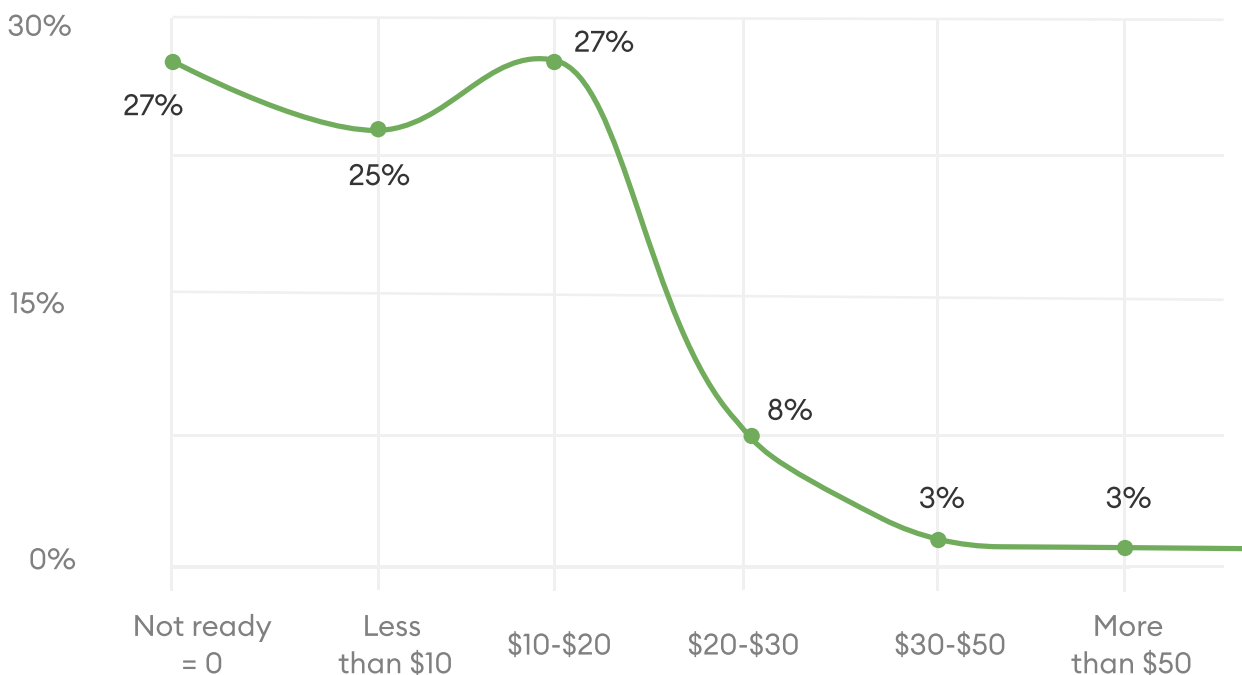
## PRICING: AWARENESS AND EXPECTATIONS

Related to the question concerning any company wanting to invest in and benefit from Cloud Gaming solutions, here are some insights drawn from gamers' readiness to spend on Cloud Gaming. **A significant portion (27%) of respondents are not yet ready to pay for a Cloud Gaming service**, indicating a need for education and awareness-building regarding the value and benefits of Cloud Gaming to encourage potential customers to consider paying. **34% of respondents are willing to spend between \$10 and \$30 monthly on Cloud Gaming**. This suggests that pricing models within this range can potentially attract a substantial customer base.

### Market Growth Potential:

- The data indicates a sizable market segment (1/4) willing to spend less than \$10 monthly on cloud gaming. Targeting these customers with affordable pricing plans may help attract and retain a significant user base.
- With only 3% of respondents willing to spend more than \$50 per month, **Xsolla should carefully assess the viability and scalability of premium pricing models and consider whether additional value or exclusive offerings would be necessary to attract customers in this price range.**

### WHAT'S THE MAXIMUM THAT YOU'RE WILLING TO SPEND ON CLOUD GAMING SERVICE PER MONTH?

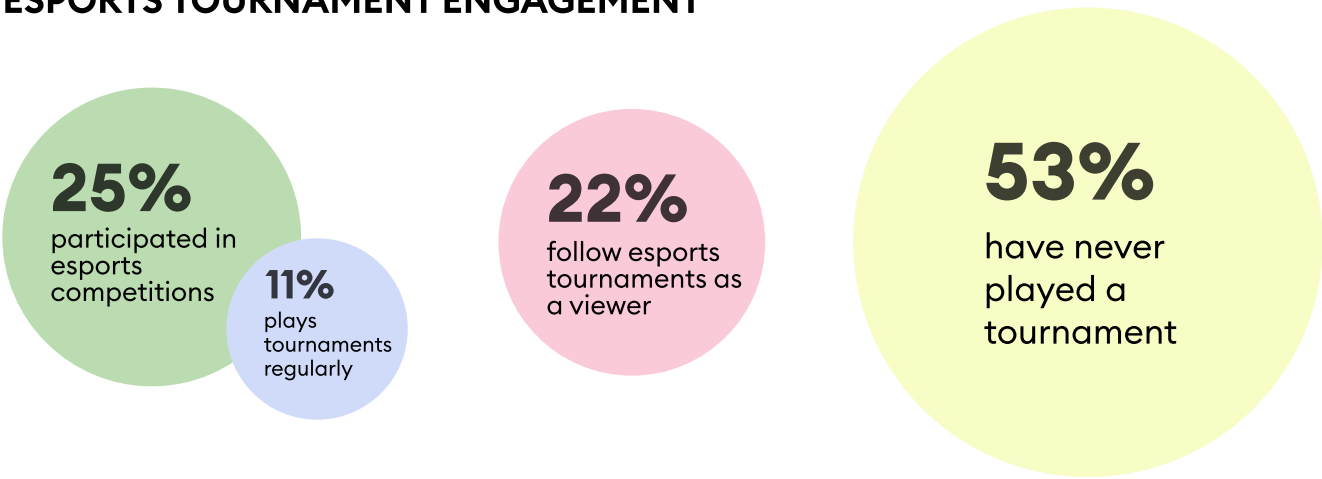


# PARTICIPATION IN ESPORTS TOURNAMENTS IN THE CLOUD

In this chapter, we will explore Cloud Gaming’s potential to broaden the base of esports participants – a hot subject among industry experts. We will evaluate player readiness to participate in esports activities and use cloud technology.

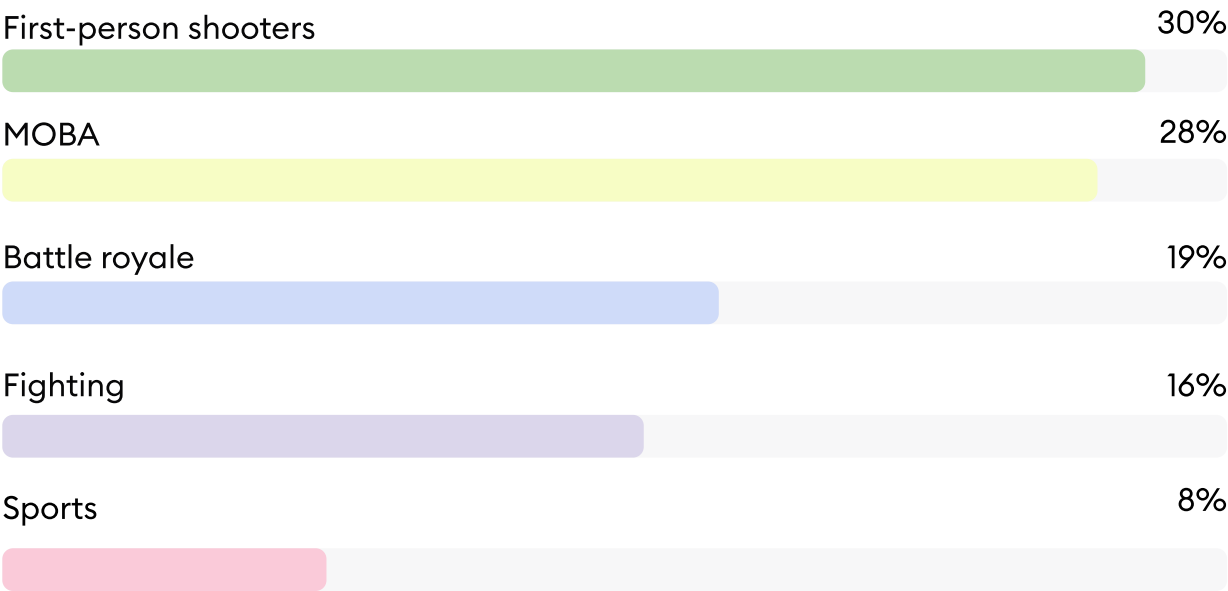
The survey data indicates that a quarter of respondents have competed in esports contests, whereas a smaller fraction (11%) participates in these tournaments regularly. As for the spectators, 22% of the respondents regularly enjoy watching these esports competitions. A significant percentage (53%) reveals that they have never engaged this type of gaming activity.

## ESPORTS TOURNAMENT ENGAGEMENT



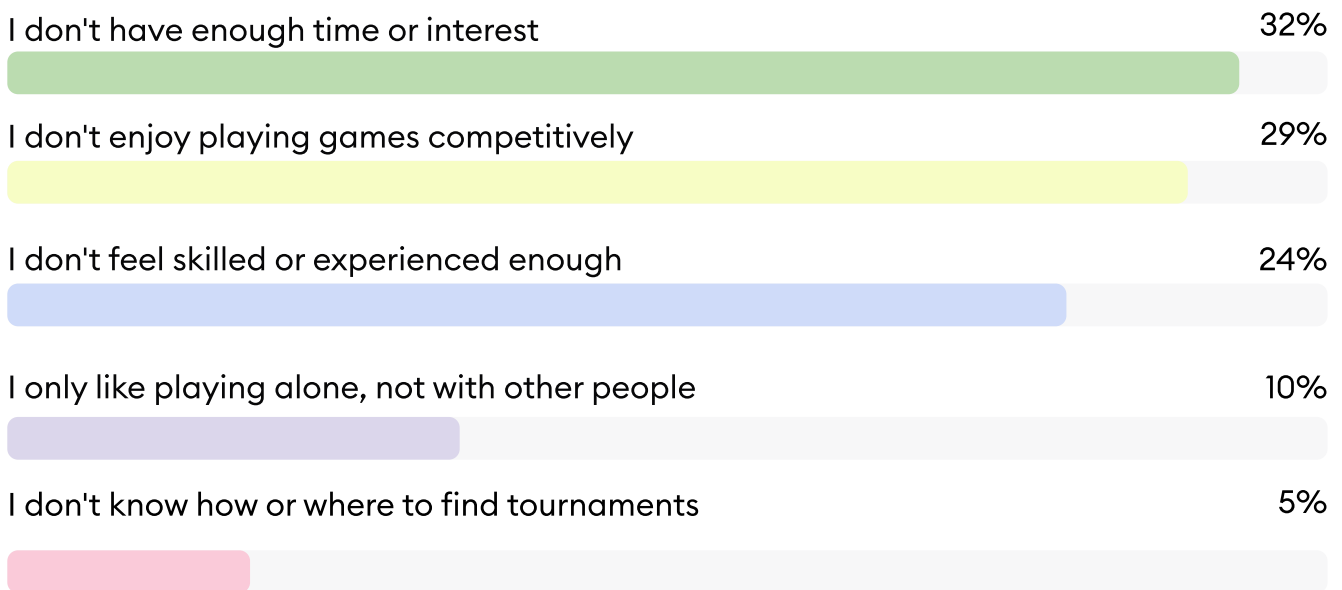
Among the respondents, First-Person Shooters and MOBA emerged as the most favored genres in esports games, capturing 30% and 28%, respectively. Not far behind in the popularity stakes are Battle Royale games with 19%, Fighting games at 16%, and Sports games at 8%.

## TOP GENRES TO PLAY COMPETITIVELY OR WATCHING



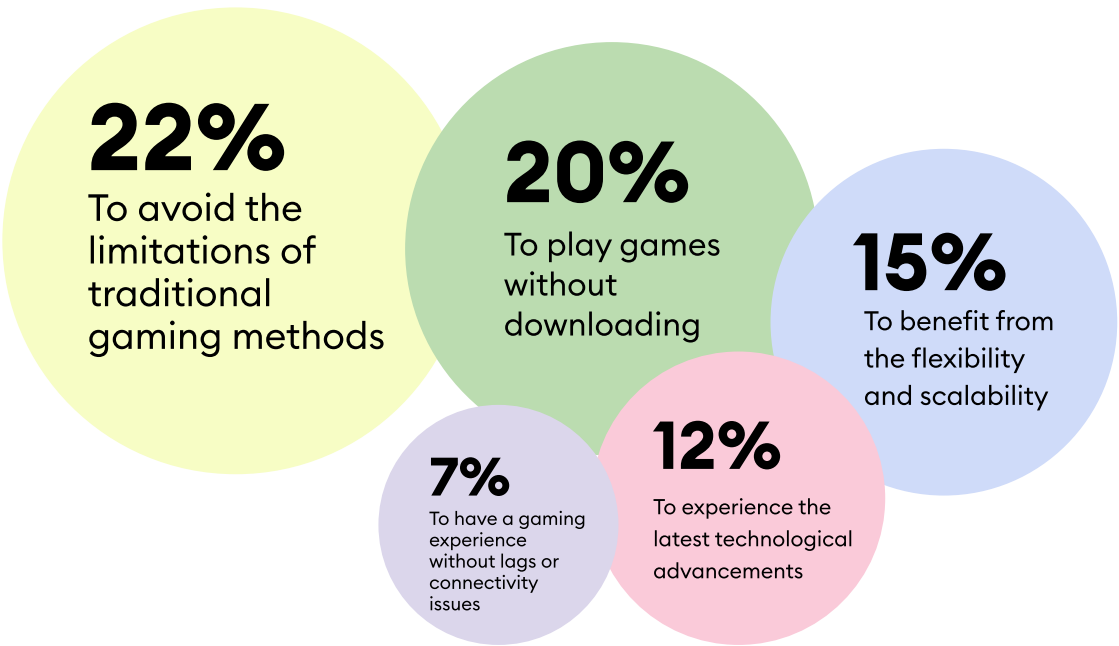
Here are the reasons why respondents refrain from participating in eSports competitions. 32% of people don't have enough time or interest. 29% of the respondents cited lack of enjoyment from competitive play. A quarter of respondents feel they need more skills to compete at an elevated level. Other reasons include 10% of respondents who wish to refrain from playing collaboratively with others and a small percentage (5%) who need to be made aware of how and where to engage in competitive gaming.

## REASONS FOR NOT PARTICIPATING IN ESPORTS TOURNAMENTS



- The primary reason 22% of respondents are drawn to tournament in Cloud Gaming, is to bypass the constraints inherent in traditional gaming methods, such as location-dependency or hardware compatibility.
- 20% of the respondents noted the convenience of playing games without downloading them, as a compelling feature of Cloud Gaming.
- Flexibility and scalability of Cloud Gaming services drew a 15% positive response.
- Experiencing the latest technological advancements in the gaming industry was the draw for 12% of respondents.
- The desire for a seamless, uninterrupted gaming experience free from concerns of lag or connectivity issues drew a scant response.

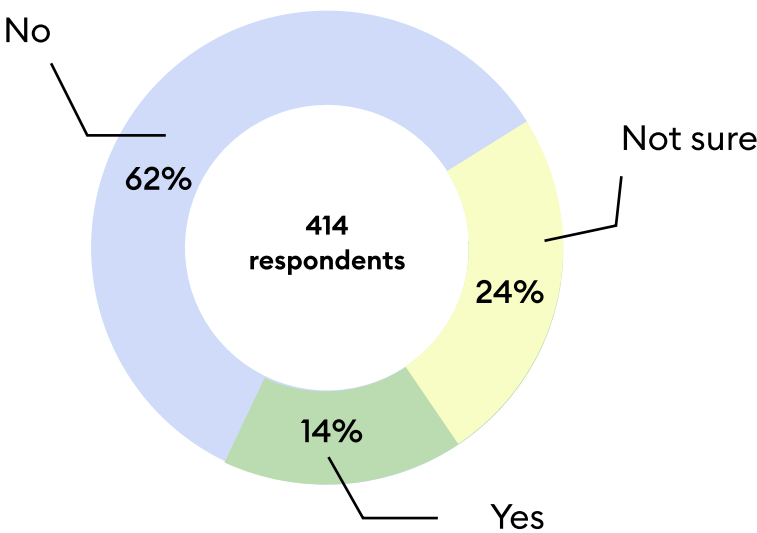
REASONS FOR TAKING PART IN TOURNAMENTS IN THE CLOUD



The presence of a 5G connection appears to be a significant factor in promoting interest in E-sports tournament participation. 62% of respondents indicated that it wouldn't make them more inclined to participate.

14% of respondents indicated that a reliable 5G connection could prompt them to participate in tournaments via cloud gaming. Currently less engaged and not competitively active, this group could be enticed to try esports with improved infrastructure. Additionally, the quarter of respondents who remain uncertain could be attracted by effective solutions and well-targeted marketing campaigns.

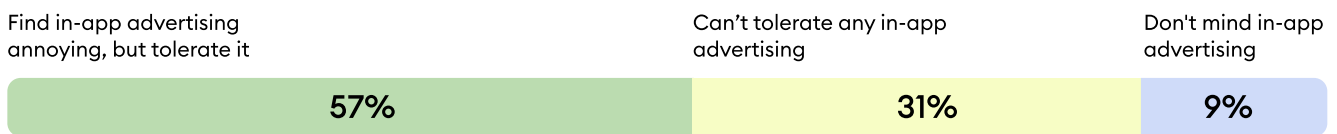
WOULD YOU JOIN E-SPORT TOURNAMENTS WITH RELIABLE CLOUD GAMING AND STABLE 5G?



## MORE ADS FOR MORE REWARDS

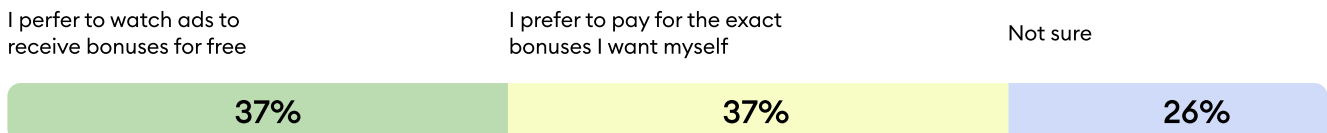
We will now explore what survey participants think about different types of advertisements and whether they want to see more game ads to get rewards. The majority of respondents (66%) acknowledge in-app advertising as a viable revenue generation method for developers. Within this group, 57% admit finding in-app ads irritating, yet show tolerance towards them. A tiny segment, (9%) of respondents, have no objection to in-app advertising and, conversely, 31% of respondents exhibit zero tolerance for any form of in-app advertising, choosing to steer clear of apps that incorporate it.

### TOLERANCE FOR IN-APP ADVERTISING



The data shows respondents are ambivalent about watching ads for in-game bonuses and extra time during cloud gaming. The votes are divided: 37% prefer to pay for the specific bonuses they want, while the same proportion are willing to watch ads to get these bonuses for free. Meanwhile, a quarter of gamers are undecided.

### ARE YOU WILLING TO WATCH ADS TO RECEIVE BONUSES?

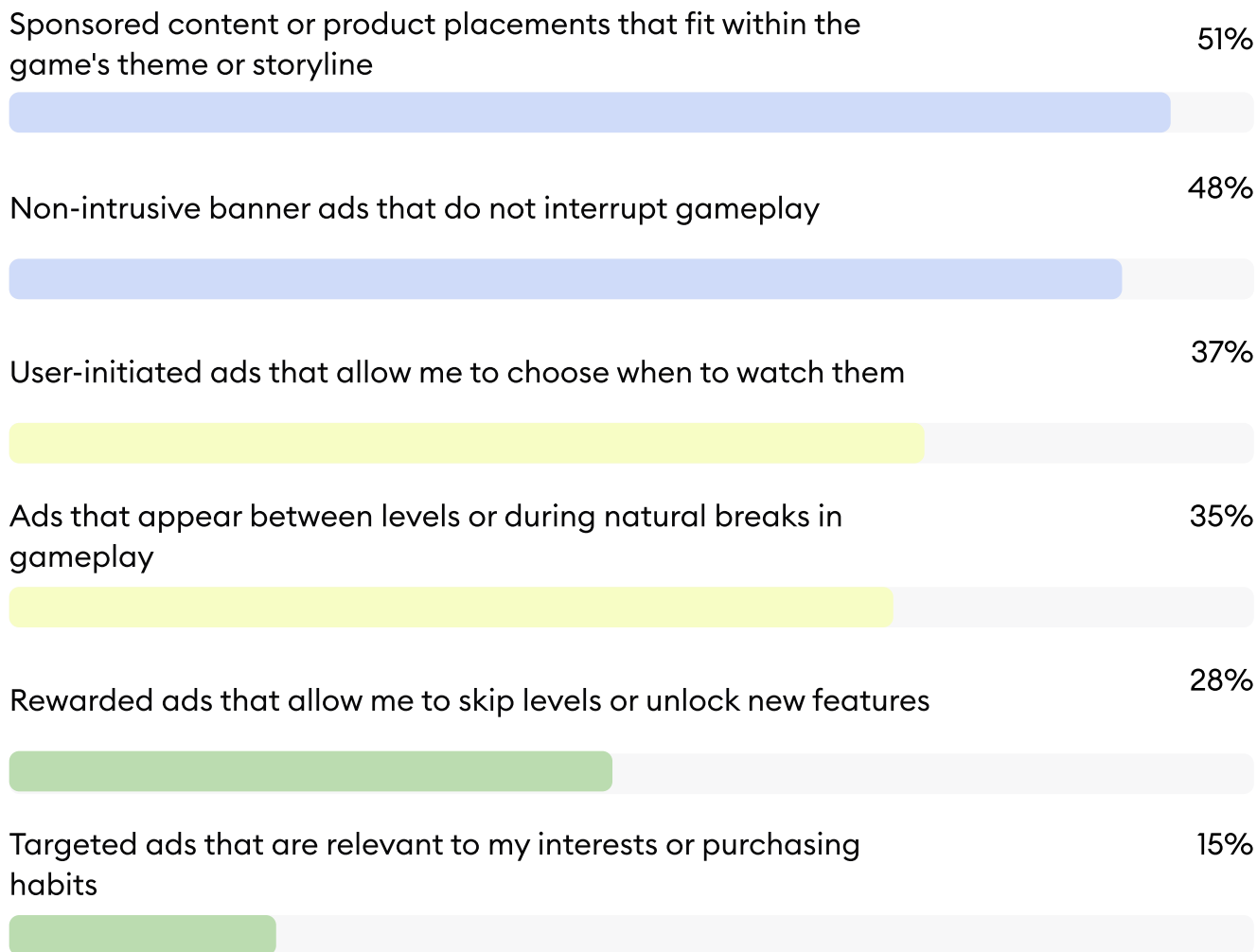


Among the respondents, the most acceptable advertising approach is one that minimally disrupts gameplay. Half of gamers accept sponsored content or product placements that seamlessly blend with the game's theme or storyline. Non-intrusive banner ads that do not interrupt the gaming experience are favored by almost the same number of respondents (48%).

37% of those surveyed find user-initiated ads, where players choose when to watch them, acceptable. Similarly, 35% of respondents tolerate ads that appear between levels or during natural breaks in gameplay.

More intrusive forms of advertising are less favored: only one out of 3 respondents can tolerate rewarded ads that let players skip levels or unlock features. Targeted ads based on players' interests or purchasing habits, which may be viewed as an invasion of personal space, are the least popular, with only a 15% acceptance rate among respondents.

## ACCEPTABLE ADS



## Here is a summary of what respondents consider unacceptable advertisement formats:

### Pop-up ads

Many respondents expressed dissatisfaction with pop-up ads that appear during gameplay, interrupting the experience and causing them annoyance.

### Unskippable ads

gamers find ads that cannot be skipped and disrupt the game's flow frustrating.

“Ads that appear every level and I can’t skip them... even more annoying if they last for a long time” /  
“When they make you watch 5 seconds before pressing the cross, and then it takes you to the next part of the ad which you have to wait 5 seconds again”

**Banner ads that obstruct the UI**

Several participants mentioned their dislike for banner ads that block screen space, making it difficult to navigate the game.

“Ads which take a whole screen at the moment when I’m playing”

**Forced ads or ads that must be viewed**

respondents are annoyed with mandatory ads that must be watched to continue.

“forced ad watching of any kind. The moment I don't have a choice, I say no and uninstall”

**Full-screen ads**

the dissatisfaction with full-screen ads interrupt gameplay, taking away from the immersive experience.

**Repetitive ads**

Respondents mentioned their frustration with repeatedly seeing the same ad.

“Repeating the same more twice in one sitting” / “Sliding in over gameplay and/or declined interest repeatedly insisting”

**Ads that appear during breaks or idle moments****Misleading or deceptive ads**

Some players dislike misleading or deceptive ads in terms of content or functionality.

“Anything mandatory, unskippable, misleading, concurrent with gameplay” / “misleading ads, discriminatory”

**Sexual or explicit content ads****Political or discriminatory ads****UNACCEPTABLE ADVERTISEMENT**

Banner ads that obstruct the UI

Full-screen

Unstoppable ads that interrupt  
gameplay

Repetitive

Political or discriminatory

Forced ads or ads that must be  
viewed

Misleading or deceptive

Ads that appear during breaks  
or idle moments

Sexual or explicit content

Pop-ups



## References

1. [Statista: Cloud Gaming - Worldwide](#)
2. [80 Level: Cloud Playtesting](#)
3. [Newzoo: 2023 Global Games Market Report](#)

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