GAMING & ENTERTAINMENT SUPPORT · PHILIPPINES

# Player one: the executive economics of gaming & entertainment support outsourcing to the Philippines.

An analysis of player-lifetime economics, trust-and-safety operations, VIP and payments support, launch-day surge machinery, and vendor-selection discipline for studios, publishers, and entertainment platforms sourcing in the Philippines.

AUTHORS

**John Maczynski** — Chief Executive Officer
**Ralf Ellspermann** — Chief Strategy Officer

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# Contents



ABOUT THIS SERIES

This series prices the operations behind industries, one volume at a time, from the engagement records of a quarter century of buyer-side advisory in the Philippine market. Gaming closes the entertainment arc the series opened with travel and retail: businesses whose customers judge them in real time, at all hours, in public — and whose operations either keep pace or make headlines.

THE PITON-GLOBAL LEADERSHIP TEAM

# About the authors

**John Maczynski**
Chief Executive Officer

Consumer brands with passionate, vocal customers dominated John's thirty-plus years of running outsourced operations for corporate America — the closest analogue an earlier era offered to a player base. He learned there what gaming executives know instinctively: the audience grades

**Ralf Ellspermann**
Chief Strategy Officer

Gaming floors are among the most recent additions to Ralf's twenty-plus-year Manila portfolio and, by his own account, among the most demanding — player-support and trust-and-safety operations where volume spikes on a patch note and quality is judged by a community with screenshots. His floor-every interaction in public, and the operation either earns the community's trust or trends for the wrong reasons. Every PITON-Global engagement runs under his personal lead, scoping through certified launch.

j.maczynski@piton-global.com
+1 402-598-8740

level census of which providers genuinely run this work anchors the volume; the series' provider intelligence and benchmark models remain his standing charge.

r.ellspermann@piton-global.com
Manila, Philippines

PITON Global

**ABOUT PITON-GLOBAL**

In a market where every provider claims every capability, PITON-Global's quarter century of Manila residence functions as the buyer's lie detector. The firm — repeatedly decorated by its industry — works exclusively on the purchasing side: translating requirements into evidence tests, collapsing a thousand-plus-provider field to the handful who pass them, running RFPs that are competitions rather than ceremonies, and staying embedded until the program performs. Tripadvisor, TSYS, Garmin, HealthPartners, Yetipay, Workrise, and Norman Disney & Young have all built Philippine operations through the firm.

SECTION 01

# Executive summary

| -63% | <2 hrs | -4 pts | 5.6× |
|---|---|---|---|
| Blended fully-loaded cost vs. US onshore | First response, 24/7 (vs. ~24 hrs baseline) | SLA drop through launch surges (vs. -20 to -35) | First-year ROI, reconstructed publisher case (Section 6) |

Games are the only consumer product whose customers occupy it — live in it, form communities in it, and spend in it nightly. That intimacy makes the support operation part of the product itself: a locked account is a friend missing from tonight's raid, a failed purchase is a whale reconsidering a habit, an unmoderated lobby is a headline waiting. And the whole apparatus is judged at player speed — by people who screenshot, post, and review-bomb before a business-hours desk has read the ticket.

The Philippine market is gaming's natural operations partner for reasons beyond rate: a young, game-literate workforce that speaks player natively; the moderation heritage and wellness machinery WP-48 documented; and the surge mechanics this series has priced for retail drops and travel disruptions, retuned for patch days. Five findings frame the volume:

1 **Support is LTV defense.** In free-to-play economics, a resolved payment issue for a spending player defends more revenue than a marketing campaign creates. The desk that answers in two hours instead of tomorrow is a retention instrument wearing a cost-center badge — the series' oldest pattern, at its purest.

2 **The VIP queue is a revenue floor.** The top 2% of spenders generate the majority of F2P revenue and expect service to match. Named-team VIP desks with resolution authority hold whale churn measurably below general-population rates — Section 6 prices the effect.

3 **Launch day is the stress test — and it is scheduled.** A title launch or season drop triples ticket volume on a date the roadmap chose months earlier. Surge waves certified in advance, patch-note-synchronized macros, and a war-room cadence hold SLAs within 4 points; unprepared desks lose 20 to 35 and the launch narrative with them.

4 **Trust and safety is brand insurance with a human cost.** Community moderation done well keeps the game playable and the publisher out of the news; done carelessly, it burns out the people doing it. WP-48's wellness diligence — exposure budgets, rotation, clinical support — is pass/fail here too.

5 **Player fluency is screenable.** Of 1,000+ Philippine operations, PITON-Global's mapping confirms genuine gaming practices — live publisher programs, T&S machinery with wellness infrastructure, launch references that verify — at roughly twenty-five. A desk that doesn't speak player is spotted by the community in a week.

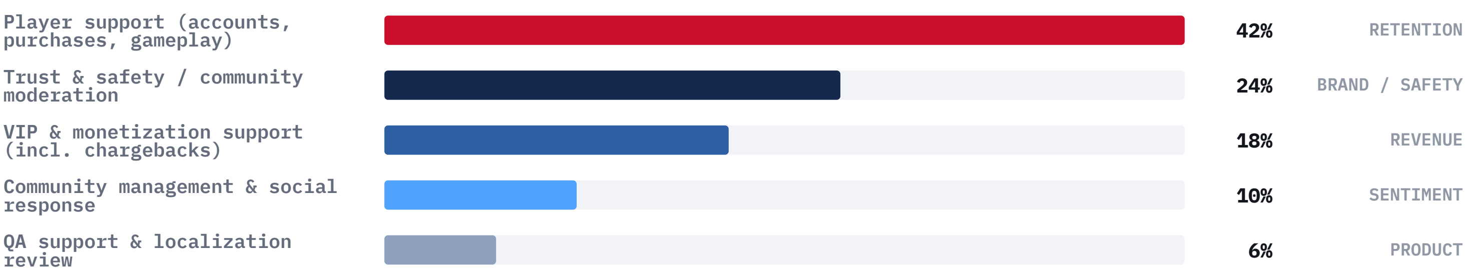
The intended reader leads player experience, community, operations, or finance at a studio, publisher, mobile-F2P company, or streaming platform. Sections 2–4 supply the evidence; sections 5–7, the method and the proof.

SECTION 02

# The LTV defense: player economics and the work that moves

Figure 1 maps the outsourced gaming work mix — each family tagged to the revenue mechanism it defends.

FIG. 1 — OUTSOURCED GAMING WORK MIX, TAGGED TO THE REVENUE IT DEFENDS (ENGAGEMENT BASE 2024–26)




Source: PITON-Global gaming and entertainment engagement base, 2024–26 — studios, mobile publishers, and streaming platforms.

The revenue tags discipline the design. **Player support** is retention work: in a market where reacquiring a churned player costs multiples of keeping one, response time is the metric — a locked account answered in two hours is a session saved tonight. **VIP and monetization support** is revenue work: named teams, resolution authority written to the dollar (WP-18's matrices, in gaming currency), and chargeback defense that documents purchase context well enough to win 62% of representments. **Trust and safety** is insurance work, judged on policy accuracy and — a lesson the industry learned expensively — on how it treats the people who do it.

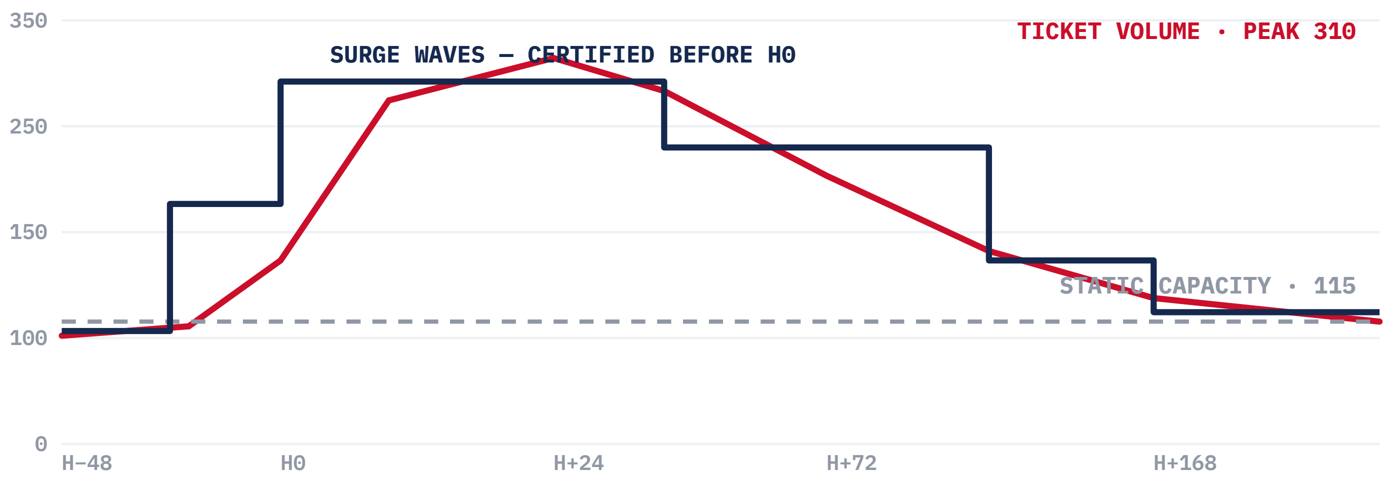
The AI reset reads familiarly, with a gaming accent: bots deflect the FAQ tier and auto-moderation catches the obvious violations, leaving humans the appeals, the gray-zone lobby calls, the whale who wants a person, and the exploit report that needs escalating before it trends. Judgment on deadlines, again — the residual this series keeps finding, priced here at player speed.

SECTION 03

# Launch day: the 48 hours that judge the year

Figure 2 reconstructs a title launch as a support event — the volume curve and the machinery that keeps SLAs standing through it.

FIG. 2 — LAUNCH WEEK: TICKET VOLUME VS. HANDLING CAPACITY (INDEXED, LAUNCH = HOUR 0)




Composite title launch, PITON-Global gaming engagements 2024–26. Surge mechanics: cross-trained waves certified in from H−48, patch-note-synchronized macros, war-room cadence with the publisher's live-ops team.

The blue line's shape is the whole discipline: capacity steps up *before* the spike, because the spike was on the roadmap. Vetted providers treat the content calendar the way WP-76's providers treat the trading calendar — an operating document, with surge waves certified against the new content before it ships, known-issue macros drafted from the patch notes, and a war room that pipes ticket-driver telemetry to the live-ops team hourly. On launch day the support desk is the studio's earliest instrumentation: it sees the broken quest, the failing payment SKU, and the exploit chatter before the dashboards agree.

The same machinery covers the calendar's quieter events — season drops, esports weekends, creator collabs — and the uninvited ones: an exploit outbreak or a server incident runs on the outage playbook WP-73 documented, with proactive in-game messaging carrying the known-issue load. A launch held at −4 SLA points is not lucky; it is rehearsed, and Step 5's reference calls exist to separate the providers who have actually done it from those with a slide about it.

SECTION 04

## Cost and performance: role-band economics and top-tier

# benchmarks

**TABLE 1 — FULLY-LOADED COST PER PRODUCTIVE HOUR BY ROLE BAND (US$, 2026)**

US ONSHORE / HR    MANILA VETTED / HR

| | US | MANILA | |
|---|---|---|---|
| Player support specialist (omnichannel, game-fluent) | $27.80 | $10.40 | −63% |
| Trust & safety moderator (wellness-supported) | $28.90 | $10.90 | −62% |
| VIP / payments specialist (authority-bearing) | $32.80 | $12.20 | −63% |
| **Blended 65-seat publisher program** | $29.60 | $11.00 | −63% |

Basis: PITON-Global gaming engagement pricing 2025–26; fully loaded and net of shrinkage, as defined in Methodology & notes. 24/7 coverage and launch-surge seats at flat rates, active periods only.

**TABLE 2 — GAMING OPERATING BENCHMARKS, VETTED VS. BASELINE (2025–26)**

| METRIC | VETTED TOP TIER | BASELINE | EXECUTIVE READING |
|---|---|---|---|
| **First response time (median, 24/7)** | <2 hrs | ~24 hrs | Tonight's session, saved |
| **Player CSAT / FCR** | 91 / 76% | ~80 / 58% | The community's grade |
| **Launch-surge SLA retention** | −4 pts | −20 to −35 | The scheduled stress test, passed |
| **VIP-queue churn vs. general spenders** | −35% | parity | The revenue floor, held |
| **Chargeback defense win rate** | 62% | ~44% | Purchase context, documented |
| **Moderation policy accuracy / attrition** | 96% / 22–30% | ~90% / 50%+ | Wellness machinery, measurable |

Source: PITON-Global gaming engagement data 2025–26; baseline = client pre-engagement and onshore/commodity-offshore averages.

Behind the column, the series machinery plus two gaming-specific engines: **game fluency as a hiring gate** — vetted floors staff players, test genre literacy at recruitment, and run the title internally before certification, because a desk that has never touched the game is exposed by the community within days; and **content-calendar synchronization** — patch notes reach the floor before players, macros and known-issue trees ship with each release, and the T&S policy tree versions in lockstep with the game's own rules. Both are Step 3 and Step 5 diligence items; neither appears on a rate card.

SECTION 05

# Sourcing discipline: the 7-Step Vendor Vetting Framework, applied to gaming

Gaming's discriminating diligence artifact is the launch story a reference will actually confirm — hour-by-hour SLA data from a real title launch, not a case-study PDF. The funnel below is representative of a mid-market publisher search.

FIG. 3 — THE 7-STEP FRAMEWORK AS A GAMING FUNNEL

| | STEP | WHAT IT ELIMINATES IN A GAMING SEARCH | FIELD REMAINING |
|---|---|---|---|
| 1 | **Requirements definition** | Genre-blind scopes: fixes titles and platforms, volumes by queue, the content calendar with surge multiples, VIP authority, T&S policy ownership and wellness standards | 1,000+ |
| 2 | **Market mapping** | Providers without 24/7 delivery or gaming-capable floors in the required scale band | ~85 |
| 3 | **Capability screening** | CX floors with a controller logo: live publisher programs, game-fluency hiring gates, T&S machinery, launch exports — evidenced | ~25 |
| 4 | **Compliance, security & wellness audit** | Weak account-data and payment controls (SOC 2 on the unit, least-privilege admin tooling) — and hollow moderator-wellness programs, inspected in person | ~15 |
| 5 | **Operational diligence** | Launch stories that fail reference checks; policy accuracy that fails sampling; attrition that churns game knowledge every season | 6–10 |
| 6 | **Competitive RFP & negotiation** | Flat quotes hiding surge premiums; finalists bid the content calendar — core rates, surge waves, SLA credits that hold on launch day | 2–3 |
| 7 | **Transition & launch governance** | Going live untested: PITON-Global stays embedded buyer-side through the program's first title launch or season drop, then hands over | 1 |

Field-remaining counts represent a mid-market publisher search (30–100 seats), PITON-Global engagements 2024–26.

The guarantees, nineteenth statement: **vendor neutrality** — no capacity sold, no placement economics, the launch export outranking the studio tour; **right-sizing** — a 65-seat publisher program inside a hyperscale BPO queues behind platform giants, while the framework surfaces gaming specialists for whom your content calendar becomes the floor's own season. Six to ten best-qualified providers, within 48–72 hours, free to the buyer, competing through a fully transparent, fair, comprehensive, and highly competitive RFP.

SECTION 06 · ANONYMIZED CASE STUDY

# Saving the whales: a 65-seat mobile-publisher program, reconstructed

Engagement GM-030 is a US mobile-F2P publisher — three live titles, roughly 40 million monthly active users — whose support operation had been sized for a smaller company: 24-hour first response on a player base that plays at midnight, a VIP segment handled by whoever picked up the ticket, season launches that buried the queue for a week, and a moderation program run through a generalist vendor with no wellness machinery and 60% moderator attrition. Identifying details are anonymized under NDA.

**SELECTION (WEEKS 0–8)**

Requirements fixed a 65-seat, 24/7 scope — 36 player support, 17 trust & safety with contractual wellness standards, 12 VIP and payments with dollar-defined authority — across the publisher's helpdesk and moderation stacks, with the season calendar and surge multiples written into the RFP. Mapping yielded 81 claimants; gaming-practice screening left 23; the security-and-wellness audit left 14. Launch-export diligence produced a shortlist of 7. A Manila gaming specialist won at $11.00 per productive hour, with response-time, launch-SLA, and VIP-retention credits.

**TRANSITION (WEEKS 9–24)**

Player support certified in title by title — agents played each game to internal proficiency gates before touching its queue. The VIP desk launched in week 12 as a named team with resolution authority; the T&S transition moved moderation onto policy trees versioned with the game and wellness machinery the old vendor never had. The program's first season drop — 2.9× ticket volume for five days — ran at −4 SLA points on pre-certified surge waves. PITON-Global chaired buyer-side governance through the drop, then handed over on documented criteria in month 7.

**TABLE 3 — GM-030 FIRST-YEAR VALUE BUILD-UP (US$)**

| VALUE COMPONENT | YEAR 1 | BASIS |
|---|---|---|
| Labor & overhead arbitrage (two vendors consolidated) | $2.27M | 122k productive hrs × ($29.60 − $11.00) |
| VIP retention lift (whale churn −33% vs. trailing cohorts) | $0.42M | Retained spender LTV at margin, cohort-matched, conservatively factored |
| Launch protection (two season drops held at −4 pts) | $0.27M | Refund-and-churn deltas vs. prior launches, margin basis |
| Chargeback recovery (win rate 43%→61%) | $0.19M | Incremental representments won × average recovered value |
| **Gross value created** | **$3.15M** | |
| Less: engagement & transition costs | ($0.56M) | Transition, proficiency gates, policy-tree and wellness build, governance overlay; advisory fee $0 (provider-paid model) |
| **Net value ÷ cost = first-year ROI** | 5.6× | $3.15M ÷ $0.56M |

Figures rounded; retention, launch, and recovery effects conservatively factored. Method in Methodology & notes.

Seventy-two percent arbitrage, twenty-eight percent operational value — the series law, nineteenth confirmation, with every operational line tracing to selection: the whale retention to a named desk with real authority, the launch protection to surge waves certified before the drop, the chargeback recovery to purchase-context documentation most bidders never staffed. The VP of Player Experience, at handover: "Our players can tell the difference. That's the only KPI that was ever going to matter."

SECTION 07

# The executive playbook: governance for the first 180 days

Gaming programs are sequenced backward from the next big drop: everything before it is preparation, everything after is tuning. The governance below assumes that clock — client in command throughout.

**DAYS 0–30**

**Contract the calendar, gate the fluency**

Write the content calendar, surge multiples, and launch SLAs into the contract with credits that bite on drop day. Set game-proficiency gates for every queue and VIP authority to the dollar. Where moderation is in scope, put wellness standards in the contract with audit rights — not the appendix.

**DAYS 30–90**

**Certify by title, sync with live-ops**

Take queues live title by title behind proficiency and QA gates. Join the desk to the release train — patch notes before players, macros in the same sprint — and stand up the weekly ticket-driver loop feeding live-ops and product. Launch the VIP desk as a named team, introduced to its players.

**DAYS 90–180**

**Rehearse the drop, then read the telemetry**

Run a full surge drill against a real event before the season's biggest one; hold the retro within a week. With SLAs stable, point governance at demand itself: top ticket drivers to product, exploit-chatter escalation paths, deflection tuning. Certify steady state; hand over on dated criteria; keep the quarterly wellness audit standing.

**THE FIVE FAILURE MODES WE ARE HIRED TO PREVENT**

Staffing a player base with a desk that doesn't play · treating whales like tickets instead of accounts · discovering the surge premium on launch morning · buying moderation without wellness machinery and inheriting its attrition · measuring the desk on handle time while LTV walks. All five are settled at selection and design.

Games are judged by their worst hour — the launch that buckled, the whale who left unanswered, the lobby that made the news. The Philippine market staffs against those hours natively: game-literate, around the clock, surge-rehearsed, at 63% below onshore cost, with the wellness machinery the industry's hardest work demands. Twenty-five providers genuinely qualify; a thousand will bid. The method is the series' constant — the calendar contracted, the fluency gated, the launch exports read, a fully transparent, fair, comprehensive, and highly competitive RFP — and it is how player one stays playing.

METHODOLOGY & NOTES

## How the numbers were built

**Operating benchmarks** (first response, CSAT, FCR, launch SLA retention, VIP churn deltas, chargeback win rates, moderation accuracy, attrition) derive from PITON-Global gaming engagements active 2025–26, measured on helpdesk, moderation, and payments platforms, validated in client governance. Baselines combine client pre-engagement data with onshore and commodity-offshore averages.

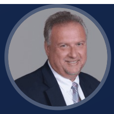
**Cost figures** are fully loaded — wages, benefits and statutory charges, facilities, technology and security stack, management and QA overhead, wellness programs where moderation is in scope, attrition-driven recruiting and ramp — net of shrinkage, at flat rates across 24/7 coverage; surge seats price for active periods. US baselines reflect Tier-2 metro support labor; Manila figures reflect 2025–26 engagement pricing.

**The case study** (GM-030) is anonymized under NDA; MAU, titles, and platform details are generalized, figures rounded. Value factors are conservative: VIP retention counts cohort-matched LTV at margin; launch protection counts measured refund and churn deltas against the publisher's own prior events; chargeback recovery counts incremental representments won. ROI = net first-year value ÷ all engagement-related client costs. PITON-Global's advisory fee is provider-paid and appears at $0 in the client cost base; neutrality safeguards are documented at piton-global.com.

**Market context** draws on IBPAP reporting and PITON-Global's proprietary provider mapping (1,000+ operations; gaming capabilities re-verified July 2026). Estimates and projections are PITON-Global analysis and should be cited as such.

**Which gaming-support providers belong on your shortlist?**

j.maczynski@piton-global.com



Thirty minutes with John will tell you. Free to buyers, strictly vendor-neutral — a launch-tested shortlist within two to three business days.

+1 402-598-8740