

Boutique Indie: Annapurna Interactive and Contemporary Independent Game

Development

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The Game Awards are one of the most prominent awards shows in mainstream gaming culture, celebrating fan-beloved and commercially successful games each December. In 2018, the Mobile Game category included *PlayerUnknown's Battlegrounds* and *Fortnite: Battle Royale*, two wildly popular multiplayer action games, but neither won. Seemingly against all odds and much to the consternation of some gamers, they lost to *Florence*, a quiet, emotionally resonant game about a romantic relationship, published by a relatively new but already influential actor in the field of independent games, Annapurna Interactive (Patange, 2018). This apparent upset is symptomatic of broader changes in the industry and culture of digital games, in which indie games, once considered a marginal phenomenon, “not only compete with established ‘AAA’ hegemony but also converge with the latter in hybrid configurations and reciprocal dependencies” (de Peuter and Young 2019, 2).

Annapurna Interactive is a branch of the independent film company Annapurna Pictures, dedicated to financing and publishing “personal, emotional, and original games that push the boundaries of interactive content and encourage artists to bring new visions to the medium” (Annapurna Pictures, 2016). Although the entry of a Hollywood company into the game industry is nothing new (Brookey, 2010), there is something unique about Annapurna’s approach. Rather than expanding on existing franchises and intellectual properties as is the norm, they publish original games by independent developers in an eclectic variety of genres. Through their well-financed operations,

meticulous curatorial and promotional strategies, and distinctive branding, I contend that Annapurna Interactive is fostering a conception of games as a legitimate cultural form that challenges conventional cultural categories and imagined audiences. At the same time, they are deeply embedded in the cultural and economic processes that structure indie game development and the game industry at large.

To develop these arguments, I adopt a media industry studies approach based on critical discourse analysis of popular press and industry-oriented coverage in both film and game venues, promotional paratexts, and popular/critical reception. My analysis is supplemented by in-depth, semi-structured interviews with two game developers who have partnered with Annapurna: Erik is an experienced developer whose game has been released, and emerging developer Todd's game is currently in development. To maintain confidentiality, interviewees are referred to by pseudonyms. After a brief overview of the current state of indie game publishing and indie film production, I will examine Annapurna Interactive in three aspects: first, their operations and game developer partnerships; second, their curatorial style and brand persona; and finally their imagined audience and position in the wider game industry ecosystem.

Indie games and Indiewood

The game industry has traditionally been dominated by a small number of powerful publishers and hardware manufacturers (Kerr 2016, 44). The popularization and discursive construction of 'indie games' in the mid-2000s can be seen in part as a narrative of emancipation from the publisher-centric model and its perceived creative limitations, barriers to entry, and high costs to developers (Ruffino, 2013). However, this narrative belies the increasing power of digital distribution

platforms over all modes of game development, many of which are still controlled by the same handful of major corporations, as well as the “second shift” of work traditionally performed by publishers now demanded of already overworked developers (Whitson, Simon, and Parker, 2018; Tyni, 2017). Cultural and economic intermediaries of various kinds continue to be crucially important in indie game development – including, ironically, a new breed of indie publishers.

John Vanderhoef has documented the rise of “a new generation of born-digital, indie friendly publishers” like Devolver Digital, Raw Fury, and Good Shepherd Entertainment, as well as successful indie developers like Chucklefish and Double Fine who extend publishing services to other developers (2016, 22; 2020a; 2020b). These indie publishing endeavors offer similar forms of financial and promotional support to traditional publishers, but with more equitable deals and fewer strings attached, notably granting developers greater creative autonomy and allowing them to retain intellectual property rights (Vanderhoef 2016, 198). Indie publishers, alongside indie-oriented divisions of larger publishers and platforms, now play a central role in commercial indie game development, and are seen as highly desirable, even essential, to drive discoverability and capture an audience in an oversaturated attention economy (Kuchera, 2014; Sinclair, 2014; Wiltshire, 2017). Brendan Keogh conceptualizes these ebbs and flows of industry power as successive waves of formalization, informalization, and re-formalization, as new modes of independent game production open up new creative and/or economic possibility spaces which are then formalized and incorporated back into the established game industry (Keogh, 2019a).

American indie film is a key antecedent to the idea of indie games. Annapurna Pictures is an independent film production, financing, and distribution company founded in 2011 by Megan

Ellison, the daughter of billionaire Oracle co-founder Larry Ellison (Lyons 2016, 54). Thanks to significant financial backing and close partnerships with powerful Hollywood institutions, Annapurna has built a reputation for “sophisticated, high-quality films” by well-established auteur directors that “might otherwise be deemed risky by contemporary Hollywood studios” (Annapurna Pictures quoted in Lyons 2016, 54). Ellison has also been an outspoken advocate for filmmakers marginalized due to their gender, race, sexual orientation, and/or politics (Sims, 2019). Annapurna Pictures’ catalogue includes Paul Thomas Anderson’s *The Master* (2012), Kathryn Bigelow’s *Zero Dark Thirty* (2012), Spike Jonze’s *Her* (2013), the Coen Brothers’ *The Ballad of Buster Scruggs* (2018), Barry Jenkins’ *If Beale Street Could Talk* (2018), Boots Riley’s *Sorry to Bother You* (2018), and Olivia Wilde’s *Booksmart* (2019). As this laundry list of high-profile filmmakers and critically-acclaimed, award-courting films indicates, Annapurna Pictures markets itself as a “home for auteurs and edgy fare” (Siegel, 2019) and occupies the cultural-economic middle ground between popular blockbusters and esoteric art films.

Annapurna Pictures can be situated as part of the “Indiewood” phenomenon of pseudo-independent film production and distribution presaged in the late 1980s by ambitious indie studios like Miramax and popularized via the Sundance Film Festival (Perren, 2012). This phenomenon encompasses not only financially independent productions, but also “boutique” divisions of major studios specializing in indie-style mid-budget features (Tzioumakis 2012, 7). As Alisa Perren argues, the popularization of indie film can be situated as part of a larger corporate restructuring of media industries in the 1990s that emphasized the production of niche media products for narrow targeted demographics as a complement (rather than alternative) to big-budget blockbusters targeting a mass audience (Perren 2012, 6). Indiewood films attempt to marry the

edgy, hip, or “smart” aesthetics and themes associated with low-budget indie movies with the bigger budgets and aggressive promotion necessary to reach a wider audience (Sconce, 2002).

The incorporation of independent film into the logics of global entertainment conglomerates parallels the mainstreaming and formalization of indie games described above, with indie aesthetics and modes of production now occupying a prominent, rather than marginal or oppositional position, in both industries. Annapurna Pictures has had considerable critical and commercial success with their high-end Indiewood model (Lyons 2016, 57–58), making Ellison a powerful presence in Hollywood and allowing the company to expand their operations beyond film into other cultural industries including television, theatre, and most recently games.

Operations and developer partnerships

Annapurna spent years behind the scenes building a team, courting indie developers, and laying groundwork before officially announcing the Interactive branch and their initial slate of games at the end of 2016 (Cieply and Barnes, 2011; Favis, 2018; McWhertor, 2016; Spangler, 2016). Annapurna staffed their new initiative with two executives from their film division, producer Neale Hemrajani and technologist James Masi, and hired a team of seasoned game industry veterans. The majority were poached from various branches of Sony, including Deborah Mars, James Masi, Hector Sanchez, Nathan Gary, and Jeff Legaspi, all of whom had worked closely with indie developers to bring their titles to PlayStation (Spangler, 2016; Siegel, 2016; Favis 2018, 17), helping Sony cultivate a reputation for “helping creative, inspirational games come to market” by securing platform-exclusive indie content (Vanderhoef 2016, 189, 192). Jenova Chen, the creative director of thatgamecompany, a previously Sony-backed indie studio responsible for the critically-

acclaimed artgames *Flower* and *Journey*, is also credited as an advisor and “scout” for Annapurna Interactive (Martens, 2019).

Working closely with the larger company, Annapurna’s Interactive division was well-positioned to leverage established networks and personal relationships with high-profile indie developers (Favis 2018, 16–17). The familiar faces on the team also acted as assurance to prospective partners that this as of yet unannounced new publisher was serious about supporting indies. According to Erik, “They have a lot of experience working with indies and understanding what indies want, and aspire to, and maybe what some of their weakness are and how they can help out,” which he says was an important factor for his team. All of this is very much in keeping with Annapurna Pictures’ film production strategy of tapping established talent and industry networks to mitigate the potential risk of edgier or less marketable projects.

In addition to poaching staff, Annapurna Interactive was also able to take on promising projects that had previously been in production with Sony. Their first published game was *What Remains of Edith Finch* (2017), a narrative exploration game made up of magical-realist vignettes. *Edith Finch* began as a Sony-backed project developed by Los Angeles-based studio Giant Sparrow, who had previously developed *The Unfinished Swan*, a critically praised and award-winning narrative exploration game that was also co-developed and published by Sony. Annapurna made a deal with Sony to acquired the game after the executives who had been shepherding it left for Annapurna, effectively taking the entire production and development team with them (Giant Sparrow 2017). Similarly, *Katamari Damacy* creator Keita Takahashi’s surreal puzzle game *Wattam* (2019) and A44’s moody fantasy action-adventure game *Ashen* (2018) were ‘rescued’ by

Annapurna several years after Sony and Microsoft respectively withdrew their support (Favis 2018, 24; Seamus, 2018). Annapurna has further taken advantage of their team's connections to secure the rights to re-issue iconic indie titles to new platforms, including thatgamecompany's formerly PlayStation exclusive *Flower* and *Journey*, as well as *Kentucky Route Zero* and *Gone Home*.

Annapurna's second original game, *Gorogoa* (2017), is an enigmatic hand-drawn puzzle game of sliding tiles and optical illusions by developer Jason Roberts. *Gorogoa* has less obvious pedigree, but enjoyed significant attention and acclaim in the indie scene over its lengthy development process, including multiple high-profile indie game awards (Reichert, 2018). The game also received funding from Indie Fund, an powerful intermediary in its own right made up of a cabal of successful indie developers dedicated to investing in promising projects (Kohler, 2017; Sandoval, 2017). Although *Edith Finch* and *Gorogoa* can be seen as creatively risk-taking, their trajectories and the circumstances of Annapurna's acquisition of both titles reflects a careful, even conservative move to secure their position in a new industry. This strategy has paid off, with both games receiving superlative accolades and awards, firmly establishing the Annapurna's reputation as an exciting new publisher.

Subsequent releases have followed a similar pattern of partnering with developers based on proven track records and/or vetting by other indie cultural intermediaries. *Florence* (2018) is a narrative game for mobile devices that uses graphic novel inspired illustrations and simple metaphorical puzzles to tell the story of a relationship. *Florence* was developed by Mountains, an Australian studio founded by Ken Wong, a game industry veteran and lead designer of the celebrated mobile

puzzle game *Monument Valley* by Ustwo. Likewise, Ben Esposito, developer of the quirky physics-based puzzle game *Donut County* (2018), is a longtime participant in the L.A. indie/experimental game scene centered on the Glitch City collective, and worked on both *The Unfinished Swan* and *Edith Finch* (Greiving, 2019). *Donut County* had been exhibited in different versions at showcases and festivals since 2012, catching the attention of journalists as well as Indie Fund, who invested in an early iteration of the game (Shanley, 2018). Like their predecessors, *Florence* and *Donut County* were warmly received and institutionally recognized with numerous nominations and awards.

Annapurna's most recent game as of this writing is *Outer Wilds*, a time-bending space exploration game featuring a quirky miniature galaxy that exemplifies of the company's shrewd approach to developer partnerships. Originally conceived by a student team in 2012, over the years *Outer Wilds* received considerable attention within the indie scene in its earlier versions, even winning the prestigious Independent Game Festival Grand Prize in 2015. Based on this positive reception, the whole development team was hired by Hollywood actor-producer Masi Oka to develop the game for his newly-formed game company Mobius Digital (Shanley, 2019). *Outer Wilds* was also successfully crowdfunded on Fig, a platform that grants backers financial shares in the projects they support, before Annapurna bought the rights to the game in 2018, yielding a significant return on investment for Fig backers (Hall, 2018). The game was finally released in 2019 to significant acclaim, with many critics hailing it as one of the best games of the year (Walker, 2019; Schreier, 2019).

Annapurna's growing roster includes new games from a who's-who of award-winning indie luminaries like Sam Barlow (*Her Story*), Heart Machine (*Hyper Light Drifter*), and Fullbright (*Gone Home*), among others. Other upcoming releases, such as Giant Enemy Crab's *Due Process* and Beethoven & Dinosaur's *The Artful Escape*, are relative newcomers to the game industry, but both received institutional support and funding from organizations like Indie MEGABOOTH, Indie Fund, and Epic Games' Unreal Dev Grant before being picked up by Annapurna. Annapurna has also aligned strategically with distributors such as the Epic Games Store (Grayson, 2018; Hall, 2019) and the Apple Arcade subscription service (D. Smith, 2019), lending their cultural cachet in exchange for prominent platform visibility.

A clear pattern emerges in Annapurna's partnerships: virtually without exception, their selections have been well-groomed by other cultural and economic intermediaries in the game industry. In Erik's case, Annapurna's offer was based almost entirely on reputation — he indicates that Annapurna was interested in backing his team even before they had decided what their first game would be. This suggests a high degree of confidence on Annapurna's part in their ability to successfully market any game by a proven developer. As Erik puts it, Annapurna's strength lies in their ability to “spot creatives that are at the right point in their career and figure out how to support them.” In other words, they are ‘picking winners’ by working with developers already poised for creative and commercial success. Annapurna's highly selective approach distinguishes them from other kinds of indie intermediaries like Indie MEGABOOTH or IndieCade that actively seek out and foster untested talent (Parker, Whitson, and Simon, 2018).

Cultural intermediaries are often overlooked, but play a crucial role in what Liz McFall describes as the “contextual interdependencies between products, producers and consumers” (McFall 2014, 2). McFall conceptualizes success in cultural industries as a non-linear process of “[f]orging more and more relationships in an expanding network” between a cultural object and the wide variety of human and non-human actors that value and mediate its existence (2014, 5). Annapurna seems to innately understand that “the sheer length of the chain of associations” (McFall 2014, 5) orbiting a game or developer marks their potential as much as any inherent quality. As in their film division, where they “take ‘creative chances’ but only with ‘filmmakers in the top rank’” (Lyons 2016, 57–58), Annapurna Interactive is not so much incubating new developers, as ‘accelerating’ developers that are already well on their way by furnishing them with more substantial budgets and, crucially, marketing and promoting them a much wider potential audience.

Developer support

Above all, what indie developers lack is funding, which publishers grant in exchange for a percentage of the final game’s revenues. In Erik’s words, “I like being paid a salary [and] I like my teammates to be paid a salary,” rather than dealing with the risk and precarity of freelancing or self-funded projects (Ruffino, 2013; Tyni, 2017). Thanks to its cross-media operations, Annapurna is extremely well financed, and can offer greater financial support than other actors in the indie space, ultimately enabling more polished and ambitious projects. For Todd’s forthcoming game, other indie publishers and sources of funding like Indie Fund or Kickstarter did not seem sufficient: “the amount of money needed was not something that they were at the time able to handle.” Other developers similarly leverage publisher resources to enable grander ambitions, larger development teams, and/or higher production values (Shanley, 2019; Flessner, 2018). Taking

full advantage of Annapurna's Hollywood connections, *Telling Lies* (2019) features ten hours of high-quality video featuring professional actors and sets (Favis 2018, 20), and *Sayonara Wild Hearts* (2019) added narration from rapper-actress Queen Latifah late in development (Cryer 2019). Annapurna stands out to developers because they strike the right balance between deep pockets, industry experience and connections, and alignment with indie values.

Beyond funding, Annapurna offers the full range of support expected of a publisher, which could be summarized as everything other than making the game. Dealing with digital distributors, porting to different platforms, and quality assurance, all crucial but grueling parts of the development process, are taken on by the publisher. In terms of promotion, Annapurna's carefully crafted brand aesthetic and well-oiled promotional machine are key advantages. Fortyseven Communications, a firm contracted by Annapurna, handles public relations and press on behalf of developers, which Erik describes as a huge weight off his team's shoulders: "I think a lot of indies really underestimate how much energy and time PR takes if you want to do it properly [...] They just entirely took that off our hands." Likewise, exhibiting at conventions like E3, PAX, and GDC is a key part of the commercial game development cycle, but is a huge commitment of time and energy for developers (Parker, Whitson, and Simon, 2018). Annapurna is able to coordinate the logistics of professional booths, attractive branding, merch, and other necessary resources to ensure a successful showing. All of this encourages developers to focus more of their energy on the game itself, reinscribing traditional notions of creativity unfettered by mundane concerns (Whitson, Simon, and Parker, 2018). As Erik succinctly puts it, "I would rather spend my time focusing on the product and letting Annapurna figure out how to deliver it to the world." In other words, financial dependence affords creative independence.

Creative autonomy

In spite of the offloading of a wide range of tasks and ‘worry work’ to the publisher, this is not seen by developers as a ceding of control. As James Lyons notes, Annapurna Pictures’ wider financing, production, and promotional strategy is primarily expressed in terms of the creative autonomy and control that are central to indie cinema’s claim to artistic and cultural legitimacy (Lyons 2016, 58). This is closely related to Annapurna’s commitment to auteurism; just as their film division deals primarily with established auteur directors “with recognizable interests and aesthetics” (Reichert, 2018), Annapurna Interactive strongly emphasizes their commitment to supporting the creative vision of their developers (Annapurna Pictures, 2016). *Game Informer* magazine explicitly sets Annapurna apart from industry conventions, saying that they “handle things differently than big publishers by putting faith in the little guy, fostering lasting relationships with developers, and respecting an artist’s vision” (Favis 2018, 16). Developers likewise repeatedly emphasize the company’s commitment to indie creators.

According to developers, business and creative decisions are informed by Annapurna’s extensive industry experience and knowledge, but ultimately rest in the hands of developers: Annapurna provides guidance “without meddling with the work itself” (Favis 2018, 18). Erik highlights the publisher’s flexibility and patience with the artistic process: “They've learned that you can't just make a schedule and follow it exactly. Things will go wrong, and things have to kind of go off the plan. That's how you make amazing games.” For Todd’s in-development game, “There are probably a handful of features that we think are really important that wouldn't have made it into any sort of release.” Annapurna’s support afforded Todd’s team space and time to take more

creative risks, whereas other publishing or funding arrangements might have required them to lock in a more conventional design earlier in the process. This creative freedom and flexibility is possible in part because Annapurna’s developer partners are already well-vetted to offset risk, as noted above.

A recurring theme in developer comments is Annapurna as an alternative to the real or imagined evils of traditional publishers, echoing the “emancipatory” origin stories of contemporary indie games (Ruffino, 2013). Todd contrasts Annapurna’s “creators first” approach against a more commercially calculating approach; based on his experience, “they care about games, and they want to make things that matter [...] they're not viewing us as a product to make money out of. It doesn't feel like that at all. It genuinely feels like they care about what we're making.” Numerous other developers share this view of Annapurna as “a breath of fresh air” (Shanley, 2018) and “refreshingly happy to defer to the creatives” compared to the “exhausting formalities” of traditional publishers (Clayton, 2019). *Ashen* creative lead Derek Bradley takes this to its logical conclusion: “it feels like talking to another developer and not a publisher” (Favis 2018, 17), and Erik similarly recalls that “the word ‘publisher’ was not on the table for many, many months. It was just like, here's a group of people who are able to help creatives like myself realize their vision.” In this discursive framing, familiar from other forms of indie culture, Annapurna is set apart from the stifling or exploitative practices of the traditional mainstream industry as a more authentic, autonomous alternative (Hesmondhalgh, 1999; Newman, 2017).

Aesthetics and indie authenticity

As Lyons argues, the perception of impeccable taste is a key factor in the success of Annapurna Pictures – the ability to ‘pick a winner’ is closely tied to Megan Ellison’s social and cultural capital (2016, 59). In its brief existence, Annapurna Interactive has already cultivated a parallel reputation in the field of games. The enthusiast press has actively contributed to an image of the company as a prestigious seal of quality, dubbing Annapurna “the most exciting publisher around” (Wen, 2018) and a “person of the year for 2018” (Batchelor, 2018). In an effusive preview of the anime-inspired rhythm/racing game *Sayonara Wild Hearts*, *VentureBeat* declares that the game is so creative that “naturally, Annapurna Interactive is the publisher for the game,” a telling quote that clearly indicates an emergent brand persona (Takahashi, 2019). Even though Annapurna’s partner developers work separately, they are linked through promotion, branding, and exhibition, and journalists and critics further help construct Annapurna as a marker of quality by grouping together different developers together for interviews and other publicity events and identifying connections between their work (gameslice, 2017). Annapurna’s body of published work shares a constellation of common features that are articulated across the paratextual promotion and reception of their work. Taken together, these features signify authenticity as a form of distinction.

In Michael Z. Newman’s conception, authenticity is a contingent value constructed in specific sociocultural contexts and closely linked to the power dynamics and social relations (2017, 30). Jesper Juul builds on Newman’s theorization to examine the curation of “indie style” at festivals and awards showcases like IndieCade and the Independent Games Festival, which can also be located in the practices of indie publishers (2014; 2019). Juul conceptualizes the dominant (though by no means universal) style in contemporary indie games as “high-tech low-tech authenticity,” using digital technology to emulate or re-work low-tech or low-fidelity representational modes

and visual styles. In this context, the hyperrealism associated with AAA production becomes a marker of impersonal inauthenticity, while quirky, bespoke aesthetic choices signal greater immediacy, authenticity, and honesty based on their divergence from the dominant norm (Juul 2014, 3). This extends beyond the text to the paratextual construction of an intimate, deeply personal interconnections between developers, games, and players (Ruffino 2018, 54; Banet-Weiser 2012, 14).

The trendy “low poly” 3D style popularized by games like *Kentucky Route Zero* exemplifies this style and is strongly associated with Annapurna Interactive’s titles, including *Donut County*, *Ashen*, *Wattam*, *Sayonara Wild Hearts*, *The Pathless* (2020), and *Solar Ash Kingdom* (forthcoming). *Gorogoa* and *Florence* are both explicitly inspired by comics and graphic novels, featuring hand-drawn images that suggest a personal touch. *Edith Finch* and *Outer Wilds*’ quirky, physically impossible spaces are seemingly cobbled together from available materials and densely cluttered with the detritus of past lives. The iconic look and feel of these games visually distinguishes them from mainstream photorealism, and positions them as the product of a singular artistic vision (even as, in some cases, they are made by fairly large teams). Music also plays a key role, and many of Annapurna’s releases feature meditative musical scores designed to deepen the player’s emotional experience, such as *Florence*’s use of interwoven classical leitmotifs and *Outer Wilds*’ wistful juxtaposition of sci-fi and folksy acoustic instruments. In the same manner that “hi-tech low-fi” visuals act as markers of authenticity and artistry against hyperrealism and spectacle, these musical textures stand in stark contrast to the standard epic orchestral scores associated with AAA blockbusters.

The curatorial aesthetic described above is reinforced and filtered through Annapurna's carefully managed brand persona, which extends not only to marketing, but to other official paratextual materials as well. In keeping with their appeals to indie cultural legitimacy, Annapurna sells vinyl soundtracks, enamel pins, vintage-inspired t-shirts, and other trendy tie-in merchandise for many of their games, as well as deluxe "special edition" physical releases of select titles complete with bonus features (McCall, 2017). This merchandise likely does not generate significant revenue, but instead serves to reinforce the cultural status of the games and foster fan investment in the Annapurna brand. The irreverent and gaming/meme culture savvy official Twitter account @A_i provides another venue for articulating the overarching brand that connects their body of work, while simultaneously highlighting the publisher's claim to indie authenticity and hailing a carefully imagined audience.

Hailing a crossover audience

Examining Annapurna Interactive's operations, partnerships, curation, and branding helps contextualize their unique relationship to established target demographics and cultural categories. By presenting under one banner an eclectic assortment of auteur-driven titles across a wide range of genres, Annapurna challenges the simplistic and frequently deconstructed 'hardcore' versus 'casual' binary that persists in discursively shaping the industry and culture of games (Shaw, 2014; Chess, 2017). By the same token, its status as a very prominent, well-financed media company that chooses to specialize in smaller, idiosyncratic indie titles that might otherwise be considered niche complicates similarly problematic assumptions about a binary opposition between 'indie' and 'mainstream' (Vanderhoef, 2016). Annapurna Interactive's initial press release makes this

central to their mission, emphasizing that the games they publish will “bring memorable experiences to all players, whether experienced or first-time gamers” (Annapurna Pictures, 2016).

I want to tentatively situate Annapurna in the conceptual category of “noncore games” proposed by Shira Chess and Chris Paul. In their words, “Noncore is a term meant to include casual as well as indie games. By breaking this wall, we hope it will allow for a more expansive treatment of the complex and nuanced styles of gaming that no longer fits into the hardcore/casual paradigm” (Chess and Paul 2019, 10). This hypothetical noncore audience contrasts against other, more exclusive, conceptions of indie games. As Vanderhoef argues, Devolver Digital’s transgressive “punk” aesthetic is still firmly situated within hegemonic, masculinized gamer culture (Vanderhoef, 2020a), limiting their ability to “instill the importance of the medium on novices and outsiders” (Chess and Paul 2019, 10). While Annapurna’s games have strong appeal within indie game scenes, their comparatively robust production values and promotional budgets are able to reach the wider gaming audience as well, as evidenced by the positive reception of their titles in the mainstream gaming press and at general industry awards shows.

Beyond these established target audiences, however, Annapurna also appeals to people who “do not fit into the mold the industry has set up” (Chess and Paul 2019, 10), who play games but do not identify as gamers for a wide variety of reasons (Shaw, 2013), or are not active game players at all. Erik says that the opportunity to make games for an untapped audience of “ordinary people” rather than “gamers” is part of what drew him to Annapurna, and this goal of “bridging the gap between gamers and non-gamers” is shared by other Annapurna developers (Valentine, 2019). This orientation is not completely unique; the co-founders of the IndieCade festival sought to reach

beyond gaming culture to “connect with a public we thought had interest in this content” (Sam Roberts quoted in Juul 2019, 92). However, Annapurna’s profile and substantial resources have granted it higher visibility, broader reach, and greater commercial success.

Edith Finch, *Florence*, *Gorogoa*, and *Donut County* in particular are accessible not only in their easy-to-learn controls, but also in their peaceful, decidedly un-game-like audiovisual style and user interfaces, and in their exploration of themes and subject matter like romance, mortality, and gentrification not commonly associated with games. Simogo, developers of *Sayonara Wild Hearts*, make this central to their design ethos: “Why are we actively pushing people out of this amazing thing we love? Why can’t there be amazing looking 3D games that aren’t operated by 12 buttons and 2 sticks simultaneously?” (Flesser, 2018). *Ashen*, *Outer Wilds*, and the forthcoming *Due Process*, while more grounded in conventional genres, control schemes, and modes of play, nevertheless distinguish themselves against expectations via tone, audiovisual style, and theme. As Chess observes, games like these invite a strong affective response from non-gamers in part because they challenge preconceptions about what games as a cultural form “are capable of being” (Chess, 2020).

By de-emphasizing hegemonic gamer tropes in favor of a broader range of noncore influences and touchstones, the burgeoning Annapurna Interactive oeuvre has achieved popular commercial success and cultural prestige both within and outside of gaming culture. This suggests that, not unlike graphic novels (Beaty and Woo, 2016, 11), unconventional, creative, and/or personal games can, in the right circumstances, connect with a crossover commercial audience.

The rise of mid-budget boutique indie games

At the same time, those right circumstances reflect Annapurna's unique position at the intersection of multiple cultural industries and audiences, and their savvy interventions in well-established circuits of cultural and economic value in the game industry, not to mention their substantial economic power. Like Annapurna Pictures, Annapurna Interactive publishes games tailor-made to win prestigious awards, and brokers those accolades into economic rewards, a strategy that has already solidified their status in the game industry. Even if their game division is not revenue-generating (Siegel, 2018), they are likely able to convert cultural capital into economic capital in the bigger picture by bolstering their cross-media brand, or by trading their prestige to other industry actors as in the case of their partnerships with Epic and Apple. Annapurna's games and the audience they hail may be noncore, but their cultural-economic position in the cultural industries is decidedly central.

As noted above, Annapurna is discursively positioned in opposition to the inauthentic mainstream, but by no means does the company reject the game industry. Rather, Annapurna seems intent on occupying the space between major AAA 'games as a service' titles and craftily monetized mobile apps, profitably co-existing with them in much the same way that award-courting Indiewood pictures attempt to position themselves between franchise monoliths and international art cinema (Tzioumakis 2012, 14). Erik even distances himself from the term indie, and expresses pride that his games have competed for mainstream awards against AAA games rather than indie-specific awards. This is representative of indie games' more general shift from margin to center in the game industry since their initial popularization in the mid-2000s (Vanderhoef, 2016). In the last decade, the industry has witnessed the formalization of a middle tier of polished, moderately budgeted

indie and indie-style games that are bigger than traditional low-budget indies but smaller than AAA productions, combining features of both modes of production and finding prominent placement on digital distribution platforms. Indie publishers and funders, whether independent themselves or boutique labels of industry giants, are key actors in the development of new “hybrid configurations and reciprocal dependencies” as Greig de Peuter and Chris Young so evocatively put it (2019, 2).

This growing middle category, sometimes half-jokingly referred to as “single/double-A” or “triple-I” games, takes up considerable cultural space. Even as it expands mainstream conceptions of what is possible in games, it simultaneously pushes less well-financed and/or more radically experimental game-makers and game-making practices that lack the backing of powerful intermediaries further to the margins (Ruberg, 2019; Whitson, 2019; Lawhead, 2019; thecatamites, 2019). In many ways, the phenomenon of commercial indie games has been enmeshed from the beginning in what Brendan Keogh calls the “aggressively formalized” logics of the game industry, and has only become more so over the years (2019a); perhaps the construction of a crossover market for mid-budget indie-style games is the logical outcome of this process.

Conclusion

Among others, I have argued that to understand the cultural-economic ecosystem of indie games it is crucial to look beyond the activities of game developers alone (Parker, Whitson, and Simon, 2018), and indeed beyond the game industry proper (Keogh, 2019b). The emergence of Annapurna Interactive as an influential game industry intermediary is emblematic of broader shifts, as cultural industries open up and diversify in significant ways while simultaneously consolidating power and

prestige around a gradually shrinking number of corporate and independent actors. Similar concerns resonate in the contemporary film industry, with trade papers debating whether franchise blockbusters, streaming platforms, and media conglomeration are squeezing out indie dramas and comedies completely (Galloway, 2019), or if audiences tired of endless seriality will seek out new kinds of stories (Pamela, 2019). Many midsize indie film studios have not fared well in this uncertain environment, and Annapurna Pictures has weathered a number of underwhelming releases in recent years, as well as financial woes and rumors of behind-the-scenes turmoil (Siegel, 2019; Sims, 2019; Donnelly, 2019). In response to concerns about the future of the company in August 2019, @A_i simply tweeted an animated GIF with the caption “WE GOOD” (@A_i, 2019); nevertheless, it remains to be seen if the cultural-economic middle ground of boutique indie game publishing will hold.

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