

A person with a blue braid is shown from the back, wearing a headset with glowing orange and red lights. The background is a bokeh of colorful lights in shades of blue, purple, and orange.

# For The GAME

Data fusion sheds a  
new light on players

**dentsu**

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# The Ascent of Gaming, a **Unique Opportunity** for Brands

For many of us, whether new, veterans, casual or enthusiasts, gaming has become an extension of our world, a virtual destination where we express ourselves, socialise within communities, and chase our passions.

Therefore, it should not come as a surprise that gaming has turned into a mass medium commanding large audiences and driving colossal revenues: 3.5b people are predicted to be gamers by 2025, generating more than US\$225b in revenue.<sup>1</sup>

For brands, gaming is a massive opportunity that can no longer be ignored. As the definition of gamers moves away from stereotypes and gaming goes mainstream, brands must genuinely understand their audiences' gaming habits today if they are to thrive in and beyond the gaming arena tomorrow.

Dentsu has worked with innovative brands and developers since the gaming industry's infancy. Today, we continue our 35+ year gaming legacy started in Japan with significant investments in global research to know gamers better than anyone else and help brands capture gaming's explosive audience growth.

After conducting unprecedented research on in-game audience attention earlier this year, we now unveil the fusion of consumer panel data from dentsu Consumer Connection System (CCS) with gaming data from GWI across 21 markets.

This data fusion provides invaluable information to brands seeking to connect more authentically with gamers, and sheds light on critical facets such as attitudes and behaviours, media consumption, purchases, and participation in esports.

In this new report, *For the Game*, we build upon these troves of data to explore the gaming culture and how brands can develop a presence that truly resonates with gaming audiences and communities.

Using a new-to-market approach, we show that motivation-based segmentation is the most relevant and effective way for brands to really understand gamers and gain powerful creative and media planning insights.

We demonstrate through tangible measurement that gaming is a prime environment for brands looking to drive audience attention.

We also examine the importance of taking incremental steps to build a consistent brand presence in the gaming world – both over time and across environments – through a constant focus on added value, authenticity, and proximity with gamers. Whether your brand is at the beginning of its gaming journey, has already met some success, or is now well versed and wants to go above and beyond, the actionable insights, inspiring examples, and practical recommendations curated by gaming experts across dentsu will help you thrive in the gaming space.

Let's play!

**Peter Huijboom**  
Global CEO

Media &  
Global Clients,  
dentsu international



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## INTRODUCTION

# Building Actionable Intelligence for Today's Gaming World



## The evolution of gaming

When *Pong*, often quoted as the first commercially successful video game, was released in 1972, it would have been difficult to imagine the technical revolution it would open for the entertainment industry. Fifty years later, the one-pixel ball has turned into hyperrealistic worlds, the up-and-down controller has morphed into virtual reality headsets, and cloud gaming has replaced the bulky arcade console. Looking ahead, gaming arguably offers the best glimpse into the immersive experiences the metaverse promises, and with it, the future of connectivity. Fueled by an ever-growing community of virtual reality (VR) developers and the wider availability of 5G, popular intellectual properties (IPs) will pave the way for mainstream adoption of virtual experiences, both within and beyond gameplay.

Most importantly, gaming has significantly shaped global culture. Characters such

as Mario, Sonic, and Pikachu are now transgenerational, universal icons. Entire fandoms have emerged around games with their own sets of codes, vernacular, and star influencers. Today, the gaming imprint in global culture is so prevalent that gaming franchises have become some of the hottest properties for video streaming platforms looking to attract their huge audiences.

Gaming has also given rise to a colossal industry that constantly reinvents its commercial model. The industry has opened to lucrative subscriptions and has embraced free-to-play models that amass huge profits through micro-transactions. This fertile ground is leading to a growing wave of concentration and diversification dynamics that will undoubtedly have a massive impact on both the gaming experience and business opportunities in the next few years. In the first months of 2022 alone, roughly US\$80b deals were announced, including Microsoft's purchase of Activision-Blizzard,<sup>2</sup> Sony's acquisition of Bungie,<sup>3</sup> and Take-Two's merger with Zynga.<sup>4</sup>





## INTRODUCTION

Building Actionable Intelligence  
for Today's Gaming World



## A massive opportunity for brands

The gaming opportunity is not limited to endemic brands such as game publishers. As more people play, gaming environments become new prized advertising spaces. The in-game advertising market (i.e., ads inserted directly within games) is expected to grow at a compound annual growth rate of 16% between 2021 and 2025.<sup>5</sup> But advertising is only the tip of the iceberg. Commerce, esports sponsorship, partnership with influencers, real-life and virtual merchandising, in-platform branded experience... the possibilities are limitless.

In that context, developing an authentic presence is the sine qua non condition of success for non-endemic brands. As they flock to gaming, they must fully understand what makes it unique and carefully focus on the value they can add to the experience to be accepted and resonate with audiences.

A brand's first step is to look past the clichés and develop a genuine understanding of gamers. It is not about simply looking at what people play at a given time and adding a line on a marketing plan. It is about thoroughly understanding their motivations, their communities, their lifestyles, the media they consume, and their expectations of brands.

## INTRODUCTION

### Building Actionable Intelligence for Today's Gaming World

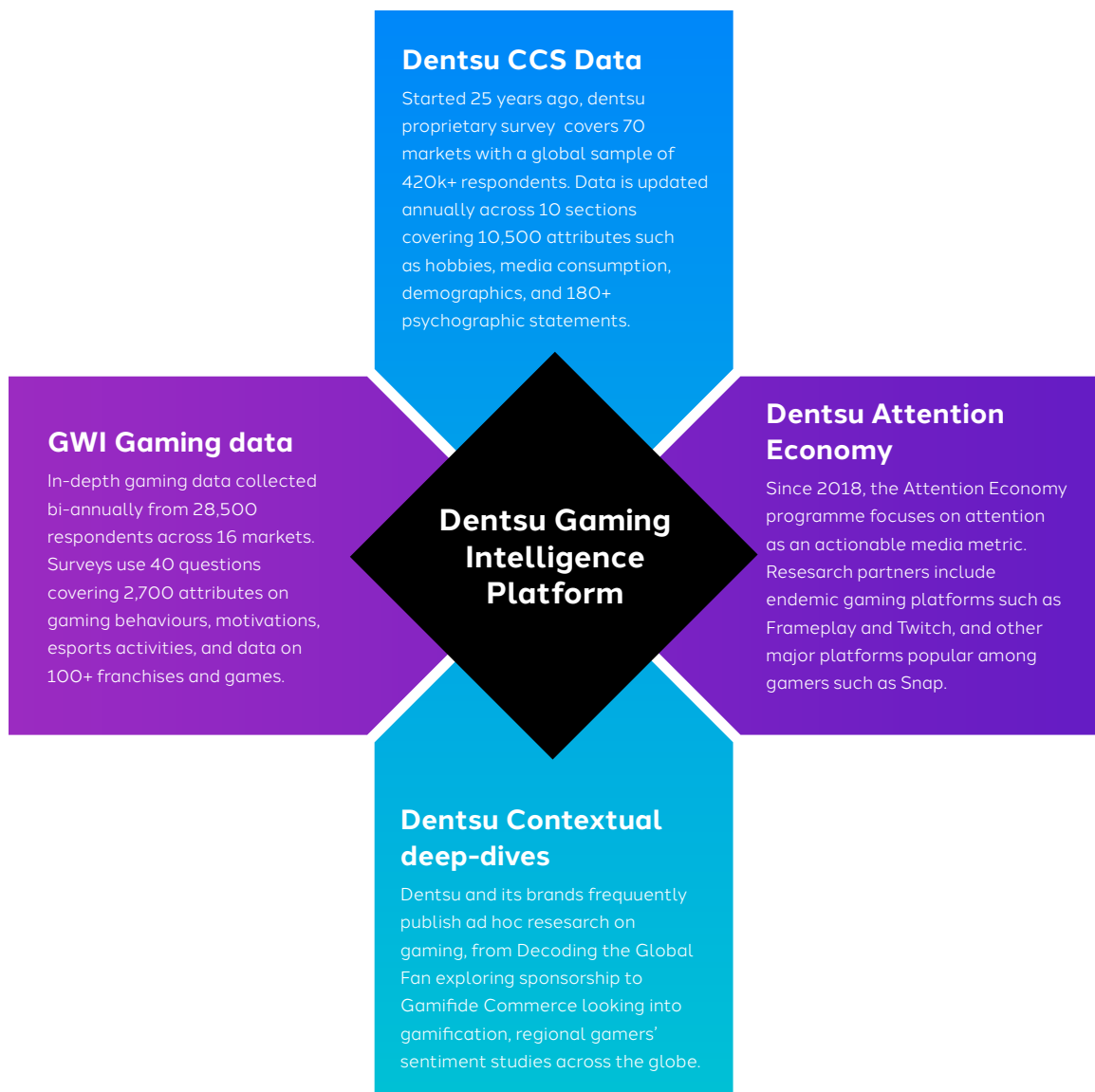


## Building actionable gaming intelligence

At dentsu, we place consumer intelligence at the heart of everything we do. We invest in gaming-specific research with a focus on building truly actionable insights, bringing the best data sources together through tool integration.

We have fused dentsu CCS panel data with GWI gaming data across 21 markets. This means brands can now access high-fidelity portraits of gamers that encompass lifestyle and media attitudes and behaviours (e.g., shopping routines, passions and hobbies, TV consumption) as well as granular gaming habits (e.g., specific genres and games played, in-game purchases, gaming sessions lengths, motivations). This fusion opens a new depth of insights directly available for strategy, planning, and activation to connect more effectively with gamers.

We have also included gaming in our Attention Economy programme, one of the largest studies dedicated to proving the value of attention as a media effectiveness metric, which led to the definition of CPMs based on an effective attentive second, and to the creation of an algorithm capable of optimising toward high attention display or video inventory in real time. Additionally, we continually develop ad hoc topical and regional research on gaming, such as deep dives on sponsorship and gamification.





## INTRODUCTION

Building Actionable Intelligence  
for Today's Gaming World



### What we examine in this report

In this report, we leverage our unique intelligence to share insights into gaming audiences and help brands navigate the gaming space.

P1

In Part 1, *The Rise of the Gaming Culture*, we use a global proprietary gamer segmentation to understand the variety of gaming behaviours and fandoms, discuss the role of diversity, equity, and inclusion, and observe how the gaming culture intersects with - and shapes - global culture.



P2

In Part 2, *The Place of Brands in the Gaming Economy*, we explore the added value imperative for brands aiming to thrive in the gaming world before examining how they can effectively connect with gamers across the gaming spectrum, from in-game presence to real-life events and commerce.







## PART 1

# The Rise of the Gaming Culture

In this first part, *The Rise of the Gaming Culture*, we start by exploring the prevalence and variety of gaming behaviours before discussing how gaming communities thrive and what it means for diversity, equity, and inclusion, and then we delve into how the gaming culture and the broader global culture influence one another.

As we examine these influences to understand how they translate in people's daily lives, we use a proprietary consumer segmentation built upon the fusion of dentsu CCS consumer data and GWI gaming data.



## 1.1



## Everybody Plays – On Their Own Terms

Playing is a fundamental human activity. We play from birth on as a way of understanding the world, to learn new skills, and to enjoy our time with friends. Games have evolved from physical forms like sports, cards, and board games to digital media, where gaming is now a popular activity on devices and screens. This explosion of gaming genres and ways to play has led to an always-increasing variety of gaming behaviours.

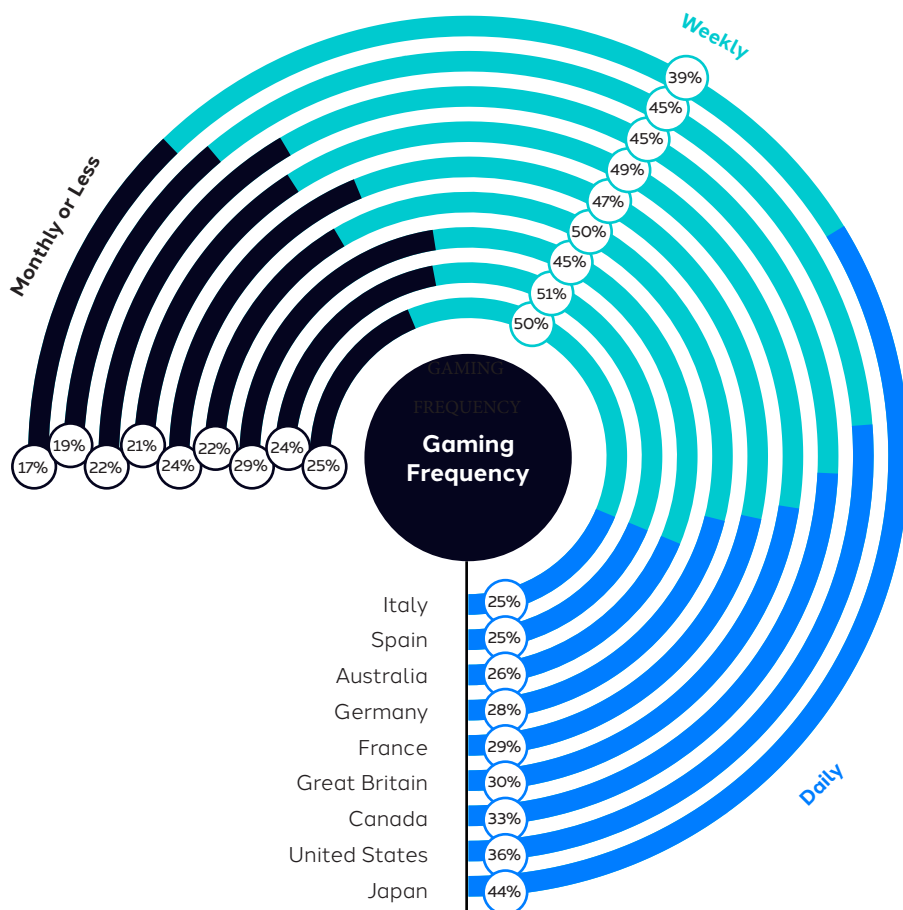
### GAMING, A PREVALENT BEHAVIOUR...

In the last two years, gaming has become an even more pervasive activity because of the lifestyle changes caused by the pandemic.

Across the nine markets used in our segmentation, CCSxGWI data shows that 34% of gamers play daily and 46% play weekly.

People from all generations have the habit. Among Gen Z gamers, 37% play daily and 47% weekly, while among Millennials, the levels are 34% and 49% respectively. Among Gen X gamers, 33% play daily and 45% weekly, while for Baby Boomers, the numbers are 35% and 39% accordingly.

But more importantly, what CCSxGWI data shows is that gamers are multi-faceted people and not a homogenous group.





*It is time to focus on what matters the most: the **motivations of gamers**, their **reasons for playing** or becoming part of the **gaming community**.*

1.1



## Everybody Plays – On Their Own Terms

### ... YET REMARKABLY DIVERSE

Games cover a huge spectrum, from casual mobile games like Wordle to immersive virtual worlds like Roblox, and all points in between. Gaming even includes watching other people play, as the success of platforms like Twitch demonstrates.

Because gaming is so diverse, the players are also incredibly diverse. Yet, most of the existing gaming segmentations done across the industry have led to groups identified simply by device used or categories of games played.

It is time to focus on what matters the most: the motivations of gamers, their reasons for playing or becoming part of the gaming community.

At dentsu, we believe motivation-based segmentation is the best and most effective to enable brands to identify relevant groups of gamers that consistently translate in every market and provide powerful creative and media planning insights.

Using the fusion of dentsu CCS panel and GWI gaming data (CCSxGWI) across nine markets encompassing all regions (Australia, Canada, France, Germany, Great Britain, Italy, Japan, Spain, United States), and investigating dimensions such as interest in gaming and intensity of practice, we identified six gaming segments each with different motivations behind why they play, gaming behaviours, and media usages.

This is completely new to the market and unique to dentsu.





1.1



## Everybody Plays – On Their Own Terms

For the

# WIN



5% of gamers

“I always compete with others”

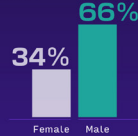
48%

INTEREST IN GAMING  
HIGH INTEREST HIGH FREQUENCY

AGE GROUP  
under

20

GENDER



SPEND



DEVICES



- ▶ Multi-device player
- ▶ With newest gadgets
- ▶ Almost a 5th own a VR

TOP GENRES

Multiplayer  
Online Battle Arena

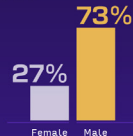
Shooter

Massively  
Multiplayer Online

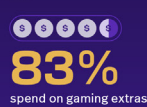
**MOTIVATION: Play to fuel their competitive streak and keep up with their friends.**

Their play driven by their competitive streak as well as their social life and peers. Basically, they play to stay in the loop, keep up with their peers and latest trends.

GENDER



SPEND



DEVICES



- ▶ Multi-device player
- ▶ Just under half playing on their PC

TOP GENRES

Multiplayer  
Online Battle Arena

Beat'em Up

Japanese RPG/Anime

INTEREST IN GAMING  
HIGH INTEREST HIGH FREQUENCY

AGE GROUP  
between

20  
and 29

For the

# HYPE



17% of gamers

“I know the latest trends before most of my friends”

48%

For the

# IMMERSION



16% of gamers

“I have a very active imagination”

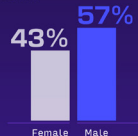
63%

INTEREST IN GAMING  
HIGH INTEREST HIGH FREQUENCY

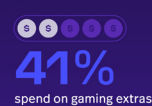
AGE GROUP  
between

30  
and 39

GENDER



SPEND



DEVICES



- ▶ Majority are console gamers
- ▶ A quarter play on handheld console

TOP GENRES

First Person  
Shooters

Action/Adventure

Action RPG

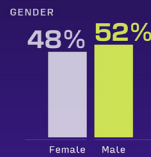
1.1



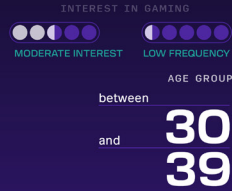
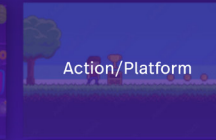
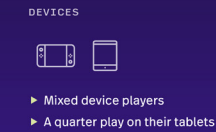
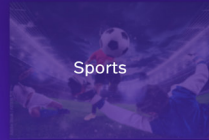
## Everybody Plays – On Their Own Terms

### MOTIVATION: Play as an alternative to Netflix – to keep in touch with friends and family.

They play to keep people together, be it family, partner or close friends. Parents also find a way to reconnect with kids. Gaming as an alternative to Netflix.



TOP GENRES

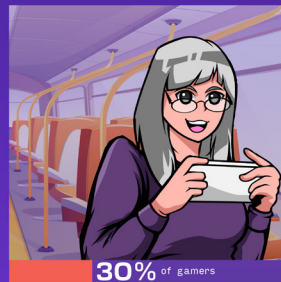


### For the PARTY

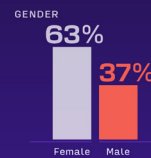
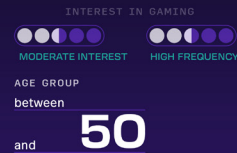


“I do a lot of entertaining at home”  
52%

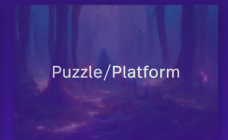
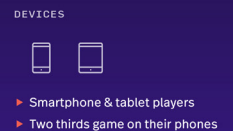
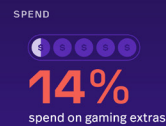
### For the DOWNTIME



“I never seem to have enough time”  
47%



TOP GENRES

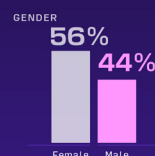


### MOTIVATION: Play to cocoon and be left alone in their sphere from time to time.

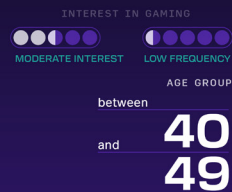
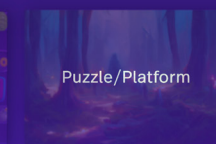
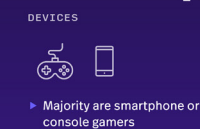
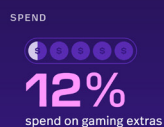
Their life revolves around household and family. Playing is easier than social, it's a way to cocoon and be left alone in their sphere. They play to disconnect and take a breath.

### MOTIVATION: Play as a relaxing hobby to fight mundane routines.

They play as an alternative form of hobby and to relax. Gaming helps them fight their routine and boredom in a different and new way. A way to revamp their spare time.



TOP GENRES



### For the REVIVE



“I am always on the look out for new exciting things to do”  
52%



## 1.2



## The Boom of Gaming Fandom

In recent years, the evolution from physical game copies to online ecosystems has made gaming an even more widely shared activity. Today, gamers form vibrant communities and fandoms, enabled by technology platforms.

### **PARTICIPATION SETS GAMING COMMUNITIES APART**

The participatory nature of gaming, as a player, a viewer, or in any other way, is a key attraction for people to get into gaming and join fandoms.

In a recent dentsu Consumer Navigator report, 40% of U.S. consumers stated that they take part in gaming to belong to a community, whereas only 22% and 12%, respectively, said the same of TV and audio-based media like radio. Similarly, 35% said that they game to socialise with friends and family, while 29% said the same about watching TV and only 8% said so about listening to audio-based media.<sup>6</sup>

As shown on the opposite page, peer dynamics are important for gamers, with 63% of the gamers of the *For the Hype* segment going to friends for their gaming information and content, and almost one quarter (23%) blogging, vlogging or writing critiques about the games they play.

As people gather into gaming communities, new codes, languages, folklore, and celebrities emerge. The most popular streamer on Twitch currently has more than 18M followers, a number comparable with that of the followers of the President of the United States' Instagram account.<sup>7</sup> For brands, this shows how much potential gaming as a medium holds in granting advocacy, cultural status, and mass-appeal to content embraced by the community.



For brands, the **fandom space** is an exciting and potentially profitable one – if they can create new forms of reward and access for these highly engaged communities.

1.2



## The Boom of Gaming Fandom

### TECHNOLOGY TAKES GAMING FANDOMS TO NEW HEIGHTS

Platforms such as Discord, Reddit and Facebook Groups enable gaming fandoms to multiply and gather at such a pace that it has become a dominant form of online culture.

Games like *Fortnite* bring fandoms together to not just play the game, but also to socialise and acquire skins and collectibles tied to their favourite movies or sports teams to represent their chosen fandoms and sub-cultures. This game's success illustrates the rise of a new form of social experiences dedicated to fandom culture.

For brands, the fandom space is an exciting and potentially profitable one – if they can create new forms of reward and access for these highly engaged communities.



### A GROWING SOCIAL PHENOMENON

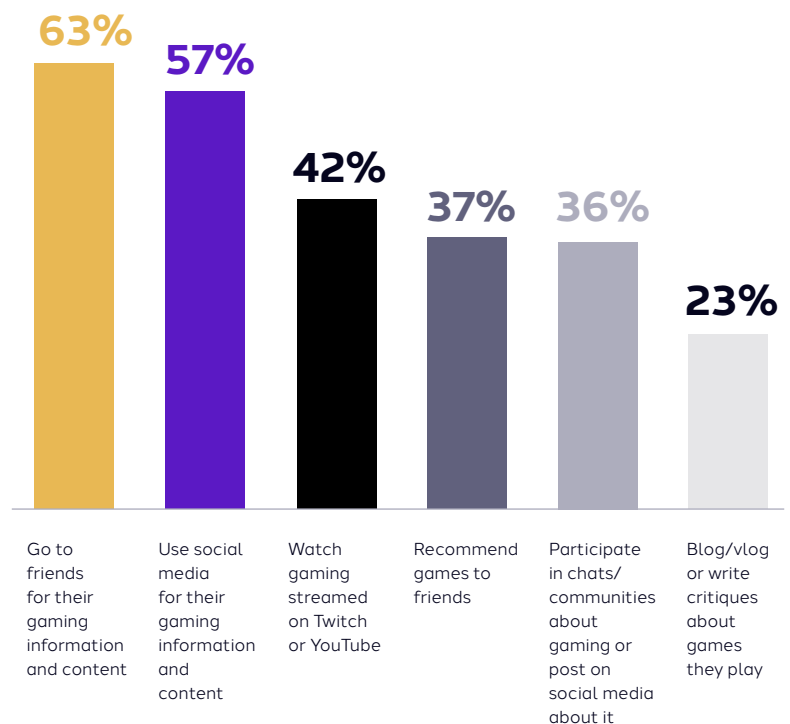
As game streaming becomes an established form of media consumption, platforms aim to encourage and sustain this behaviour by supporting the gaming community. For instance, Facebook unique proposition is manifest in their community of 350M active members of gaming groups, delivering a more holistic, community-based experience for streamers through the dedicated Gaming space in the Facebook app.

Social platforms play a pivotal role in the gaming world: they have a significant role in community building, by democratizing fans' access to talent and connecting the creator community that eventually customizes gaming experiences through its 'modding' (modifying gaming worlds with new content).





The *For the Hype* segment best expresses the idea of fandom within gaming. Gamers in this segment not only play but also love to share their enthusiasm with others including in online forums, social media, messaging, and blogs. They love to watch others streaming the games they love to play when they are not playing themselves. In addition to strong online activity they cultivate an online identity, and almost half prefer online to in-person interactions.



## CASE STUDY

### Creating Buzz and Community Engagement: Benetton Island on Animal Crossing

The global fashion brand United Colors of Benetton debuted in the world of online gaming and presented a virtual collection specifically designed for the beloved Nintendo video game *Animal Crossing: New Horizons*.

Created by the Italian dentsu gaming team in collaboration with Azalona, an Italian gamer with more than 150,000 Twitch followers, Benetton Island is a destination in the game users can discover by walking

around and creating different looks with virtual renditions of the brand's iconic garments.

Working with Azalona, the brand created a virtual collection of ten outfits consisting of some of its most iconic pieces. Then, to further engage with its players and customers, dentsu gaming created an extension on *Animal Crossing* to enable users to choose and wear the virtual outfits, walk a virtual runway in the rainbow showroom, and share it on their social channels.

Finally, to drive traffic to the island, Benetton shared access codes via print articles, social media, and popular Italian influencers. The experience supported seven languages and 600+ Dream Codes were downloaded (versus a 100 market average), showing the potential and power of the gaming fandom platform.



## SPOTLIGHT

# The Journey Towards EQUITY AND INCLUSION



In the past, the gaming community has been at the epicenter of the controversy around negative online behaviours, such as the #GamerGate online harassment campaign that started in 2014. Back then, some went even as far as to maintain that sexism and misogyny are intrinsic to gaming culture.<sup>8</sup>

In fact, as an interactive medium that now connects players in very distant geographical locations, gaming holds great potential as an agent of progress and inclusivity and it can play the role of a catalyst for people to start seeing *otherness* in less divisive ways thanks to cross-cultural interactions and exchanges. The industry appears to have accepted its responsibility to create safe spaces and limit harmful user behaviours: in late 2020, Microsoft, Nintendo, and Sony partnered to promote responsible gaming.<sup>9</sup>



Today, gaming is the playground where brands are piloting the interactions that will be opened up to communities with the emergence of the metaverse, the layer of next-gen experiences enabled by Web3 technologies. In order for this future to live up to its promise of democratisation, the world of gaming needs to embrace change now: address systemic issues and embed different perspectives and diverse voices among decision makers, as well as invest to reduce the digital divide.

**Christena Pyle,**  
Chief Equity Officer,  
Americas dentsu international



## SPOTLIGHT

### The Journey Towards Equity and Inclusion

In many ways gaming has been at the forefront of progress: Electronic Arts' *The Sims* allowed full, equal same-sex marriages as early as 2009 and it now has lifted all gender restrictions to allow for more representative, inclusive and realistic gameplay.<sup>10</sup> The virtualisation of identities and freedom of expression that underpin the immersive experiences offered by some open world videogames today offer players new ways and environments for exploration and experimentation that weren't available for prior generations. Similarly, gaming can open up new forms of accessibility and learning for people with disabilities.



There is still a long way to go to make gaming a fully diverse and inclusive space. According to the International Game Developers Association (IGDA),<sup>11</sup> 61% of game developers globally are men while just 30% are women, and 8% non-binary, gender fluid, genderqueer or two-spirited. When it comes to race and ethnicity, just 4% of developers identify as Black, African American, African or Afro-Caribbean, while 67% identify as White, Caucasian or European. Whether and how soon this distance will be traveled is up to endemic and non-endemic brands' openness to welcome different perspectives and support companies that promote diversity and inclusion.



## CASE STUDY

### Championing inclusion for *Moving Out*

In a landscape where thousands of games are released each year, there have been just a handful that feature any wheelchair-bound characters, and even fewer that make them playable characters.

By including accessibility early in the building process of its game *Moving Out*, dentsu gaming's studio SMG was able to not only widen the game's audience and sell more than 1M copies, but also contribute to rising accessibility standards in gaming. For people with disabilities to

be able to enjoy playing the game, SMG removed as many barriers as possible, for instance, by allowing players to remap the controls and adjust difficulty. These built-in options allow those who previously may have been unable to play to finish the game.

SMG also increased representation for people in wheelchairs by making every playable character in the game able to be played in a wheelchair, even down to creating custom dance moves that rival those of the able-bodied characters.

It is these combined efforts that go towards making online gaming a more accessible and accepting form of entertainment where players compete as equals regardless of their physical abilities.



## More Than Just About Gaming

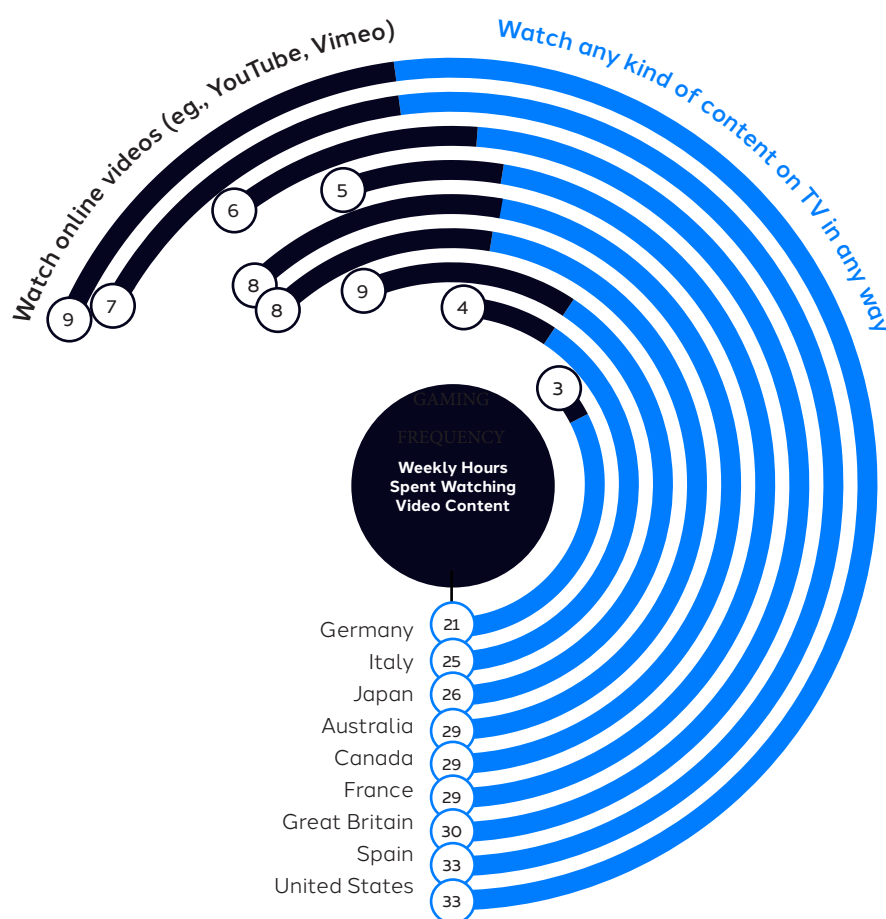
The stereotype that gamers just sit at home and play 20 hours of League of Legends a day is still prevalent from both outside and within the community, hence the insult “*Go and touch grass*” often hurled in post-game chat. But gamers do not live solely for gaming, they are often disproportionately passionate about other activities, and they are big consumers of all sorts of media.

### GAMERS ARE VERY CONNECTED TO GLOBAL CULTURE

Gamers spend a considerable amount of time consuming media. Across our set of nine markets used for the segmentation and represented on the opposite graph, CCSxGWI data shows that, in a typical week, gamers watch TV (including linear TV and on demand TV) for 29 hours, use the internet on any device for 27 hours, use social media sites or apps for 8 hours, and watch online videos for 7 hours (vs. 28, 26, 8, and 6 hours respectively for the general population).

With gamers having such a varied entertainment and media diet, many news outlets and publication have incorporated gaming elements into their offering as an *audience stickiness* factor. Prime Gaming,<sup>12</sup> Apple Arcade,<sup>13</sup> and Google Stadia<sup>14</sup> have all launched in the last four years to attract and keep players in each platform’s ecosystem. In January 2022, *The New York Times* acquired the cultural phenomenon *Wordle* for an undisclosed seven-figure price, in March, Netflix purchased a third gaming studio, Boss Fight,<sup>15</sup> and in July,

Spotify, which already offers playlists specifically curated for gaming, bought the music recognition game *Heardle*<sup>16</sup> – the most recent in a buying spree with no sign of slowing down anytime soon.





1.3



### More Than Just About Gaming

## DATA FUSION ENABLES BRANDS TO MAXIMISE RELEVANCE AND VALUE

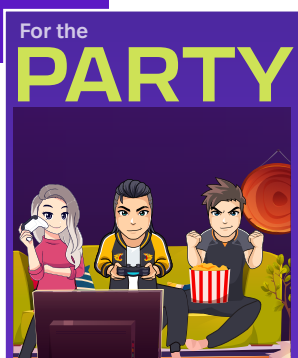
Gamers' large media consumption and the responses from platforms and media networks open many opportunities for brands and increases pressure for them to be consistent across screens, channels, and formats. This is where fusing gaming data and broader behavioural and media data, such as the CCSxGWI fusion, unlocks game-changing intelligence for brands.

For instance, if the trade marketing team strikes a commercial partnership with a game franchise, it can help the media team understand the best channels and publications to reach players of that

specific franchise, the creative team to understand their codes and influences to craft the most relevant messages, and the customer relationship team to find the best mechanics to retain them.

Fused data can also help brands decide on a new partnership with a game platform or publisher. Starting from the media consumption and psychographics of their current or target audiences, brands can evaluate the most relevant partnership opportunities to engage or extend their audiences.

### Segment Focus



The *For the Party* segment are keen gamers who also have many other interests. They enjoy travelling, books and family, and have quite a varied media diet that supports their interests, including social media, TV, and music. However, gaming is very important within this mix. They typically spend more time playing games than watching TV, and often play while they are watching TV!

71%

63%

36%

35%

27%

25%

Use social media sites and apps daily

Regularly watch TV

Listen to streamed digital music

Watch traditional sports regularly

Watch catch-up TV/video on demand or TV/video streamed on demand daily

Go to cinema regularly



## 1.4



## Gaming Permeates Global Culture

With Twitch streamers turned musicians hitting 240 million streams on Spotify,<sup>17</sup> and esports teams such as FaZe Clan, now a company with a market cap above one billion dollars,<sup>18</sup> making the front cover of Sports Illustrated,<sup>19</sup> gamers are not only big consumers of global culture, they also actively shape it.

### **THE GAME INDUSTRY ACCELERATES ON IP GROWTH**

Both the growing influence of gamers and the myriad forms of entertainment at their fingertips have not gone unnoticed by publishers and league owners who are actively working to expand their intellectual property to attract and retain fans.

Crossovers with music, movies, sports, and anime are on the rise, taking game characters, stories, and styles into new realms to grow the cultural relevance of all parties involved. There is also an increasing eagerness to collaborate with brands from outside gaming to add player value. A good example is the *TOYOTA GAZOO Racing GT Cup*, an e-Motorsport event organised by Toyota with the support of One Esports and dentsu, that allows players to compete in *Gran Turismo* using Toyota race cars.<sup>20</sup>





1.4



## Gaming Permeates Global Culture

### ESPORTS RETURN EVEN STRONGER

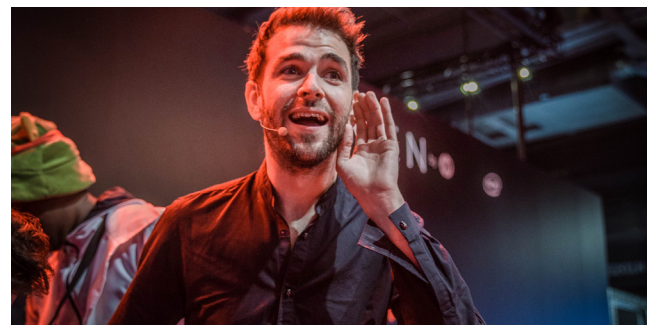
Riot Games' *League of Legends* was watched for more than 660M hours in 2021 – a figure that many traditional sports could hardly imagine.<sup>21</sup> In 2022, with the return of live events, esports is set to further assert its influence over the sports culture.

The big names in the industry are keen to attract more brands by pivoting to a 360-content model, from short reality series to long form documentaries. This opens many opportunities for brands exploring sports partnerships, as 55% of engaged esports fans are receptive to sponsors – meaning they are more likely to view them as an important part of the experience, compared to 37% for traditional sports.<sup>22</sup>

### APPROACHING THE METAVERSE THROUGH CUSTOMER CENTRICITY

As developed in the spotlight on page 37, gaming is the highway to the metaverse. With many brands trying to figure out their approach to the metaverse, and no viable mass segment group to examine, the gaming community serves as the perfect focus audience as they are most likely to form the early majority segment when metaverse technology becomes mainstream.

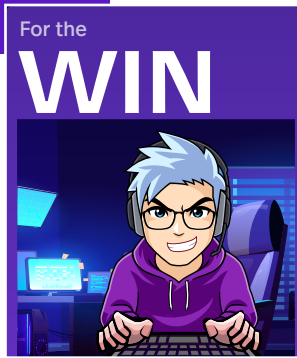
Customer centricity should be the starting point for brands. It encompasses consumers' attitudes and their evergreen metaverse behaviours, including their interest in virtual ownership, desire for brands in the virtual space, and expectations of affordability.



### THE SURGE OF GAMING CONTENT

Gaming's position at the epicenter of present-day entertainment and its role in informing other areas of culture like film and television production with its IP go hand-in-hand with the proliferation and popularity of user-generated content focused on games in platforms like YouTube.

In the first half of 2021 alone, the platform experienced 800 billion gaming-related views and delivered 90 million hours of livestream content, helping creators build their brands by making Live, Video On Demand and Shorts all available through YouTube Gaming.



The *For the Win* segment typifies how gaming is influencing the broader culture. In their gaming, as in other areas of life, gamers in this group are often at the cutting edge of culture, knowing the latest trends before many of their friends, and being more likely to own the new technology, like a VR headset.

55%



Consider themselves an expert when it comes to new technology

51%



Know the latest trends before most of their friends

46%



Say they spend money on luxury products to show their success and status

45%



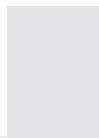
See gaming as a good way to make new friendships

37%



View video games as culturally important

18%



Live stream their own games to



## CASE STUDY

### Crossing the Bridges Across Entertainment Genres: Yo Kai Watch

Gaming franchises are increasingly expanding beyond the console and inspiring an explosion of IP dedicated to other media (television, movies) or monetising fandom across a number of industries (for instance, creating partnerships with retailers for licensed apparel).

Gaming publisher Level 5 wanted to build on the popularity of the initial release of the Yo Kai Watch game release and further expand its fanbase. Dentsu partnered with Level 5 to create the first original animated series based on this game.

Today, Yo Kai Watch is distributed globally in multiple languages and is considered a cultural phenomenon among youths in Japan along with other major titles such as *Pokémon*, *Doraemon* and *Hello Kitty*.





P2

## PART 2

# The Place of Brands in the Gaming Economy

In this second part, *The Place of Brands in the Gaming Economy*, we start by discussing the importance of added value to the gaming experience and community if brands are to truly seize the gaming opportunity. We then discuss how brands can develop a genuine and effective presence that resonates with gamers.

As we explore these topics, we do not stop with in-game only environments but also look at the entire gaming opportunity spectrum, from sponsorship to media to intellectual property development and commerce.



## The Value Imperative

Brands can gain a lot of value from their participation in the gaming economy. However, to find their place in the gaming culture, be accepted by gamers and resonate with them, brands need to focus first on the value *they* bring. Gamers not only judge brands by their products and marketing, but also for their involvement into the gaming experience and community.

### GAMING, A PREMIUM SPACE FOR BRANDS

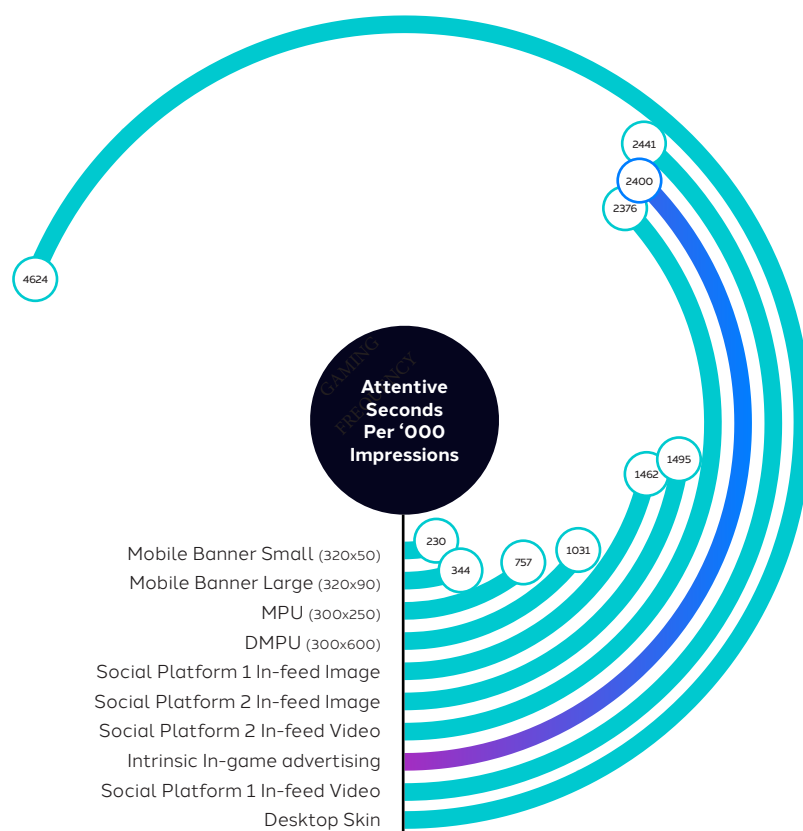
Gaming is one of the biggest white space media opportunities for brands to engage consumers, including younger, hard to reach audiences.

As part of the Attention Economy programme, dentsu has begun spearheading attention measurement research in gaming environments starting with a partnership with Frameplay, an intrinsic advertising platform for video games.

Applying eye tracking technology to an in-game advertising campaign for a leading food brand, the research aimed to measure the attentive seconds per thousand impressions, a composite measure factoring percentage of impressions seen and average viewed time.

As shown on the opposite graph, intrinsic in-game advertising attentive seconds per thousand impressions were similar to social platforms in-feed video ad formats and outperformed social platforms in-feed image ad formats. Only full desktop skin performed significantly better due to the far greater size of the format. Nearly one in five participants were able to recall the brand on a spontaneous level, whilst a third of participants successfully recalled the brand when prompted.

Dentsu will add more robust data points as we add gaming partners and build



the database for the Attention Economy programme.

This progress in measurement offers advertisers concrete evidence of the attention potential of in-game ads as they plan their media investment. This is true beyond media placement as well. Looking at sponsorship, CCSxGWI data shows that almost one in five (18%) of people interested in esports are more likely to buy brands worn by their favourite esports players and teams.



## 2.1



### The Value Imperative

## A BALANCING ACT BASED ON ADDED VALUE AND AUTHENTICITY

CCSxGWI data also shows that people can have conflicting feelings about brands' presence in gaming. On one hand, 26% of respondents declare that it is OK for brands not related to esports to sponsor teams or events. On the other hand, intrusive pop-ups and ads are a major source of frustration for 27% of them.

The inherent passion of gamers compels brands to connect with the community in a meaningful way. Gaming is not a media channel in the traditional sense. To avoid alienating gamers and appearing to be out of touch, insincere or fake, brands should be clear about their intentions to contribute to the community before they consider how they will appear.

One of the most effective ways to provide value to the gaming experience or community is to respond to gamers' motivations and frustrations.

For instance, with 42% of respondents thinking women should be encouraged to play games, brands can sponsor streamers who are women to promote a more diverse and inclusive space. Twenty-three percent of respondents say they feel frustrated when a game becomes too expensive to progress and 18% when game interest declines. Brands can alleviate these frustrations by working with game publishers to add a free extra life, design skins to enhance the experience, or create add-on packs to deliver unique attributes in games. As for avoiding negative perception of ads, brands should not just use TV commercials in games, but instead take the time to adapt creatives to make them true intrinsic in-game formats.



## FOCUSING ON VALUE FUELS STREAMING SUCCESS

The importance of responding to gamers' desire for valuable content is exemplified by the success of Twitch.

Twitch is built to foster interaction and engagement by making viewers part of the experience. More than 50% of its subscribers say they love that it gives them up-close access to skilled gamers or gamers who are playing the same games. This focus on proximity has driven colossal success for Twitch, where at any given moment, 2.5M engaged fans tune into live content.

As the gaming opportunity grows, brands will flock to this space, for better or for worse. The ones who succeed will put value for gamers at the centre of their approach - not as a one-off activation, but as a long-term commitment. By consistently turning up and adding value to the community, brands will build their credibility among gamers. To do so, they must think beyond the current ways to advertise, taking incremental steps to build a cohesive and thorough presence, not only in games, but also in environments that gamers rally around.



## Engaging Gamers Across Environments

If you belong to the school of thought that only endemic brands should advertise in gaming, think again. When was the last time all the commercials you saw on TV were exclusively about selling TVs? The last time all commercials at the half-time of the football game were only about selling footballs?

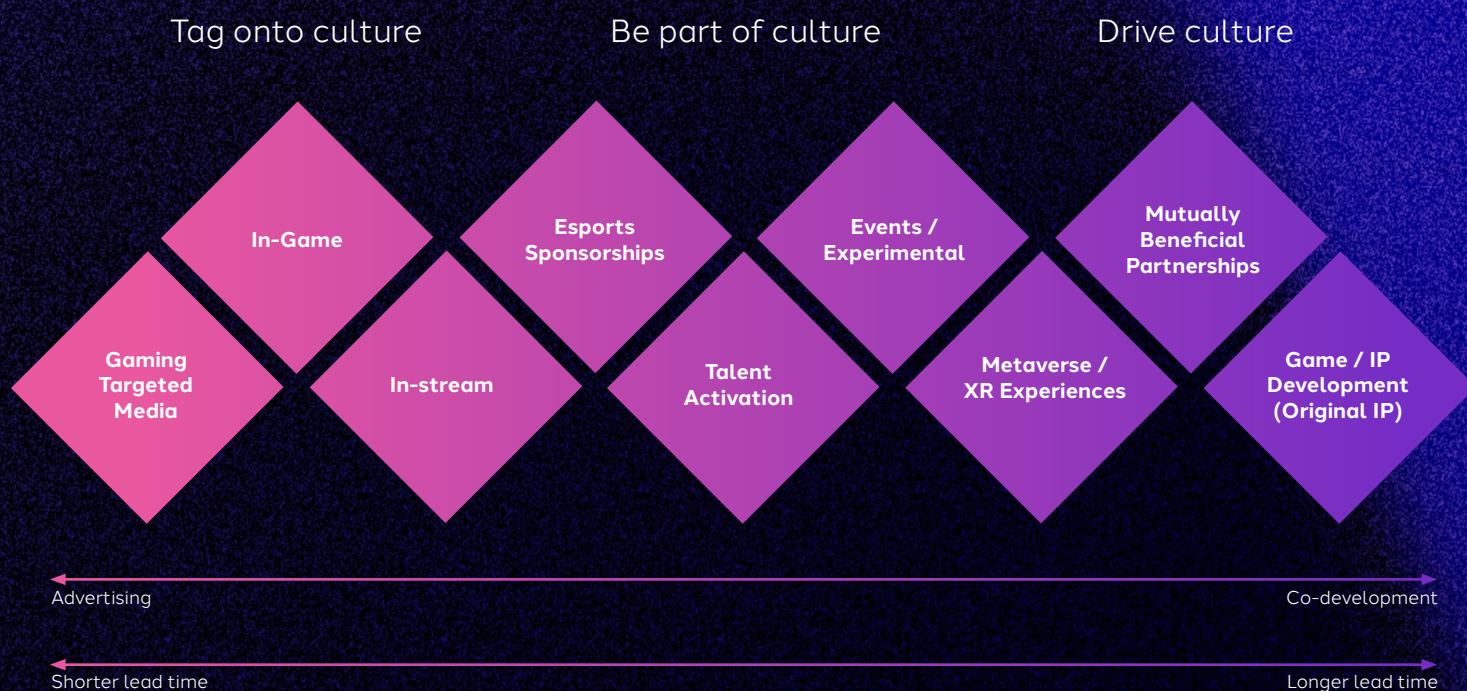
Gaming spaces are not restricted to endemic brands, they also open many marketing opportunities to non-endemic brands.

In the wide spectrum of opportunities, finding the right entry point into gaming is about finding the sweet spot between Brand Fit - alignment with the brand values, target audience, and overall category, Brand Impact - influence on the audience considering reach, in-target accuracy, and prompted interaction; and

Brand Suitability - appropriate context that guarantees brand integrity.

While they come hand-in-hand with different levels of complexity, the different inroads into the gaming world are not meant to be interpreted as 'steps' that need to be completed in sequence. Ultimately, each type of activation depends on your business goals, the needs of your target audience and of the gaming community, and the resources available to you.

In all cases, think of what success looks like before jumping into activation. Having a clear measurement framework, with defined metrics that are suitable for the gaming space, is critical to success in your gaming journey, secure internal buy-in from leadership, and optimisation along the way.





## Engaging Gamers Across Environments

# Tag onto culture



Media is a powerful vector for brands looking to connect with gaming audiences and better align with gaming culture.

Media offers wide scale, from die-hard fans to casual gamers, and data-driven targeting opportunities. It can support a wide array of objectives across owned, earned, and paid channels, from brand awareness lift to performance-based metrics such as conversion and downloads. Media is supported by a burgeoning marketing technology ecosystem with robust solutions from tech giants to gaming specialists. It is also quick to roll out, with metrics benchmarks available and familiar approaches to the ones marketers already know.

Yet, before diving into media, and no matter if you are opting for targeting gaming content, creating an in-game presence or collaborating with talents in-stream, there are key considerations to keep in mind. First, wherever possible, you should activate ad verification tools to control delivery quality. Then, to preserve brand safety, be strict on targeting to respect legal age requirements, and vet publishers' game portfolios to appear only in environments wherein you are comfortable. Finally, use your media investments to support publishers that actively encourage diversity and inclusion, from their developer pool to their communication.

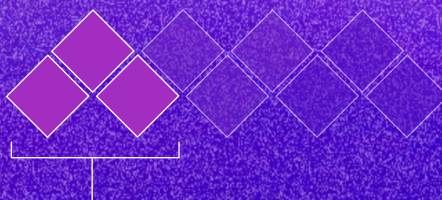
### GAMING-TARGETED MEDIA

## INFORM MEDIA EFFORTS WITH GAMING INTELLIGENCE

For marketers well versed in digital advertising, the quickest way into gaming is contextual media (i.e., static and video placements bought directly or programmatically in gaming-related context). However, its technical simplicity and its proximity to what brands already know should not overshadow the importance of developing a thoughtful approach, driven by a clear understanding of audiences. Intelligence on gamers, such as the CCSxGWI fused data can be easily incorporated into the media strategy and media planning workstreams to quickly turn insights into action.

You can also use audience data to target gamers in non-gaming environments. Although most game publishers and platforms do not offer ID match based on users' gaming credentials for brands to target players outside games, you can still tap into affinity-based audience segments built from watching behaviours on streaming platforms, self-declared gaming interest on social platforms, or self-declared gaming device ownership or playing frequency collected through consumer panels.





## IN-GAME

## DEFINE CLEAR RULES TO AVOID IN-GAME FAUX PAS

In-game advertising (i.e., sponsored elements of the gameplay or static and video placements in the game) done right can add value to a game through increased realism, and value to your brand through enhanced attention levels that rival those of video formats on social platforms. Done wrong, it can damage both the gaming experience and your brand image.

Set yourself for success by having clear rules around how you want to show up within gaming environments. Choose placements that complement the world within the game (e.g., virtual billboards in a stadium, where a user would likely expect advertising to be if it were real life) over interruptive formats – particularly

annoying on mobile screens – that could frustrate gamers by disrupting the gameplay. Keep clear of games overloaded with ads, as your brand could suffer from a negative halo effect caused by other advertisers that blast their ads indiscriminately.

Work alongside game publishers to evaluate whether rewarding players with such incentives as viewing the ad in exchange for an in-game benefit such as an extra life is appropriate for your brand objectives and the players of the specific franchises wherein you want to place media. Activision Blizzard Media found that rewarded videos drive a 96% completion rate, and, combined with rewarded rich media, increase clickthrough rate by more than six times.<sup>23</sup>

## IN-STREAM

## TAILOR YOUR CREATIVES FOR IN-STREAM ADVERTISING

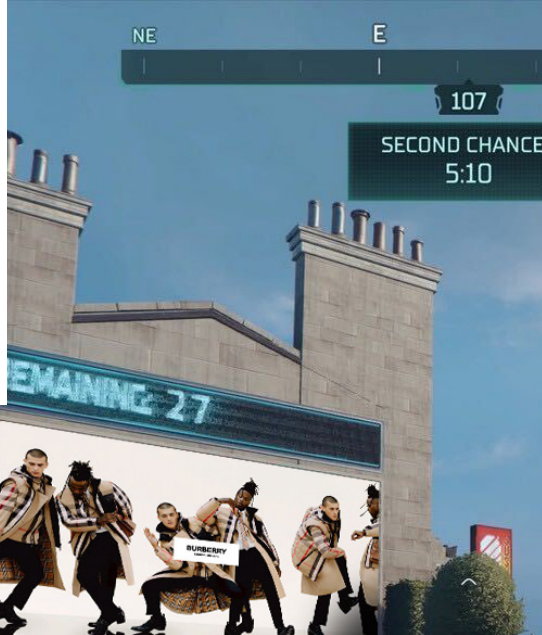
Similar to gaming-targeted media, non-endemic gaming brands are typically familiar with in-stream advertising as part of their media mix.

Successful in-stream integrations add value to the brand, the viewers, and the streamer. They may include a range of interactive assets, such as creative overlays that look native to the stream, custom branded programmes with content creators, contests and giveaways, or supporting media surrounding the stream.

When considering in-stream for your gaming strategy, you can start with pivoting some of your pre-existing spends with trusted partners such as Google, Meta or Amazon into their own gaming verticals and adapting the type of creative you use – in the same way you had to adapt to new formats and behaviours when you stopped using TV ads in social.

Additionally, before partnering with content creators, analyse whether their fanbases are benevolent or toxic and how content creators manage cases of abuse, for instance by looking at chat logs from previous livestreams.





## CASE STUDY

## Winning over gamers over through high quality in-game media placement - Burberry Hyper Scape

Burberry wanted to appear in a new, untapped, and unexpected environment that resonated with their target audience (the Fashion Vanguards). Audience and competitive analysis showed that a rising number of gamers across the world are also luxury fashion shoppers; and Burberry also knew that this audience indexed highly against Hyper Scape as a game to play (validating this activity as a gaming category entry point).

Burberry partnered with dentsu to get front-of-mind to highly engaged users in Hyper Scape, the Battle Royale game set in a futuristic, urban landscape. The brand adapted their real-life Out-of-Home formats with virtual placements at eye level and high impact billboards in the game.

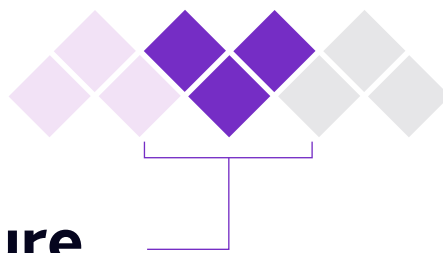
The global campaign impact was measured through eye tracking technology to validate the impact on attention, recall and brand perception. Burberry ads outperformed benchmarks significantly, with ads noticed by more people (97% vs 61%) and viewed for a longer time (2.3s vs 1.4s). Burberry generated 1.8x view time per placement and 2x spontaneous recall vs. standard display as well.





## Engaging Gamers Across Environments

# Be a part of culture



Going deeper into brand integration in the gaming space, brands should consider esports sponsorships, talent activation, and events / experiential campaigns.

Depending on the target audience, these elements of the gaming spectrum may not offer the same reach as pure media-buying tactics, as they do not appeal to all categories of gamers. However, they are particularly relevant for the player segments who are typically the most passionate about gaming, such as esports fans. These select tactics also tap into a sense of belonging embodied by esports teams, gaming influencers, and communal fan experiences during gaming events. This intersection of intense passion and group

dynamics makes these approaches ideal for brands looking to leave their imprints on the gaming communities.

As you explore these opportunities for your brand, you need to be ready to relinquish a certain degree of control, especially on the creative side. Gaming natives know best the codes their communities are ready to accept, and inflexible brand guidelines expose you to risk being perceived as tone-deaf – or worse, to risk receiving backlash. Be thoughtful in how you seek to add value to the gaming experience and communities, and expect to build your presence incrementally over time to earn and reinforce gamers' positive perceptions of your brand.

## ESPORTS SPONSORSHIPS

### FUEL THE ENTHUSIASM AROUND ESPORTS

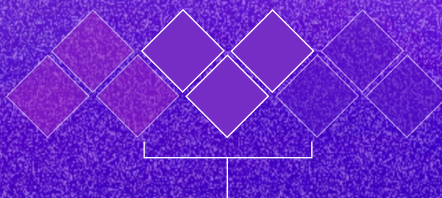
Competitions create important community opportunities for fans to unite under their shared love for esports, and esports sponsorships are a way to show these audiences that you value what they value.

There are multiple paths you can take into esports sponsorships: backing single tournaments, focusing on supporting specific teams or athletes, or sponsoring entire leagues. If you have experience sponsoring traditional sports or entertainment, you could consider expanding into esports. While traditional sports and esports are unique spaces with unique due diligence requirements, many

traditional sports learnings may cross over to give you a head start in esports planning. However, do not forget that ultimately all eyes are on the game, and that brand integration should not hinder the experience for gamers.

As demand for esports sponsorship increases, plan your presence early and respect the seasonality of tournaments. The most sought-after gaming events may not align with your commercial tentpoles, sales pushes, and the holiday season. Also, before diving into the space, reflect on your company's stance on broader societal topics such as responsible gaming practices to get ahead of any controversy that could arise around a franchise you sponsor.



TALENT  
ACTIVATION**BE OPEN WHEN PARTNERING  
WITH GAMING TALENT**

Where gaming is the new social gathering place, high-profile gamers are the true gateways to fandoms for brands.

As you evaluate talent candidates, you should not only consider the right fit for your brand and message, but also how the talent reflects today's wonderfully diverse gaming audience. For instance, some esports teams are all female and may not get the same support from brands as their all male counterparts. Brands choosing to back them can not only get their foot in the esports space, but they can also take a stance on promoting equity.

Then, approach the partnership with a true collaborative mindset and be flexible in your briefing. Product placement, product giveaways, unboxing, promotional codes... there are many ways for talents to promote a brand to their community. Trust them to shed the best light on your brand in a way that will resonate with gamers – even if it means taking liberties with the script. As some esports talents now venture into the broader entertainment and lifestyle space to increase their revenue out of pure competition, consider opportunities to engage with talents beyond livestreams, from activations across their broader social presence to features in your brand's own publications on social channels, to co-development of product limited editions.

EVENTS /  
EXPERIENTIAL**FIND YOUR  
ENTERTAINMENT FACTOR**

Gamers not only judge brands by their products and marketing, but also for their involvement in the overall experience. Knowing accessibility is key to successful adoption, consider building gaming experiences both within and outside the game.

Organising gaming-related events is effective when you want to connect with a wide range of communities. In-game events can obviously help you connect with the fans of the game, but if that event

is a virtual concert of a famous artist, it can also help you connect with fans of that artist from all around the world who could not attend a physical show – thereby generating considerable buzz around your event. Virtual events can even be gateways to real-life gatherings, offering real passes to in-person shows or exclusive brand events.

Keep in mind that gaming audiences consume many other forms of entertainment, which ultimately means that your experience will be fighting for their attention. To win gamers' attention, be clear on your event's entertainment factor.



KFC 宅急送

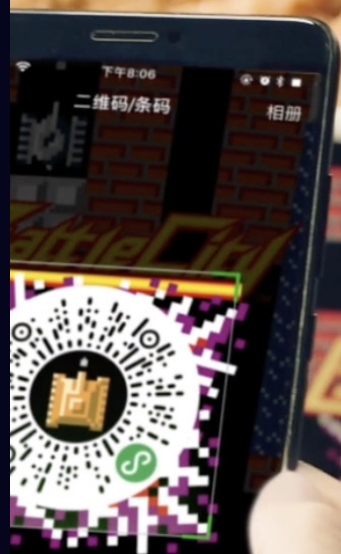
BANDAI  
NAMCO

## CASE STUDY

KFC – Injecting  
'Gaming Mode' into  
Shopping

In today's digital age, it is difficult and costly to get consumers' attention. But mobile games are huge with today's youths who play games and order food in parallel.

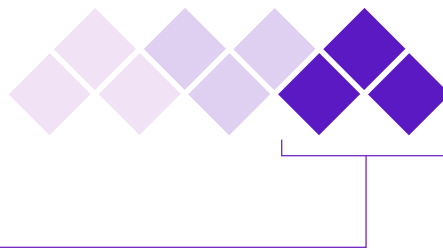
In China, KFC wanted to connect gaming and ordering, transforming players into brand consumers. Dentsu gaming helped KFC introduce Gaming Commerce, bringing retro Bandai Namco videogames to WeChat. The dentsu gaming team connected the experience directly to KFC's delivery system where consumers could get better discounts and coupons based on their game scores. Consumers were also enabled to order KFC directly in the game itself and invite WeChat friends to the game.





## Engaging Gamers Across Environments

# Drive culture



Brands can actively shape gaming culture by designing or co-designing immersive experiences that make the most of innovative technology, their intellectual property, and intellectual properties of third parties renowned in the gaming world.

As you evaluate whether these opportunities can translate into meaningful experiences for users, ask yourself if they tick all three following criteria: instant gratification (i.e., enabling

the users the get what they want or what they need, *now*), entertainment and novelty (i.e., surprising users and making them escape or laugh along the way), and care (i.e., looking after users and the gaming community).

While these experiences require the most lead time and effort, they have the greatest impact on the most passionate gamers.

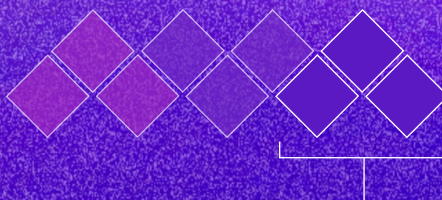
## METaverse / XR EXPERIENCES

### USE TECHNOLOGY TO CREATE MAGICAL EXPERIENCES

Although the metaverse contours are yet to be defined and its full potential yet to be unveiled, open-world gaming platforms are currently the closest approximation to the sort of immersive digital worlds that the metaverse promises. If there is one lesson from the first brand forays in the metaverse, it is that it is an excellent vessel for users to discover new behaviours, such as new ways to interact with products, new ways to visit stores, and new ways to transact. Look for the best ways to stimulate the user discovery of your brand to focus your efforts and resources where they matter the most.

Additionally, use technology to augment real-life consumer experiences through gamification. Gamification is the application of typical elements of gaming such as point scoring, competition with others, or rules of play to other areas – and it is particularly relevant for shopping experiences. For instance, you can incentivise store visits by using augmented reality and location data to create scavenger hunts. You can create a sense of limited supply and exclusivity for a product through product drops that use social mechanisms and disappearing messages. You can drive loyalty through gamers' active participation, such as using certain desired behaviours (e.g., miles run, check-ins at specific places) as currency for brand rewards. From video content where the viewer can influence the plot to virtual challenges the viewer can play from the comfort of a couch, gamification possibilities at your fingertips are limitless.





### MUTUALLY BENEFICIAL PARTNERSHIPS (EXISTING IP)

#### JOIN FORCES BY JOINING INTELLECTUAL PROPERTIES

In many cases, in-app purchases and expansion packs – not advertising – are the primary revenue drivers for game publishers. Still, there are other ways for brands to develop strong in-game presence through mutually beneficial partnerships and joint ventures with publishers.

You can look to associate your IP strength with a game publisher. For instance, through a joint partnership you could explore custom skins, items, levels, and maps that could bring equal value to the player, the publisher, and the brand. The scarcity and one-of-a-kind nature of these

types of partnerships can help incentivise demand for the in-game product as players look to obtain the exclusive (or elusive) add-on content for that game. Your partnership could also allow for on-package and media channel promotion.

These types of integrations can create a true win-win outcome: game developers might benefit from an additional source of revenue and amplification of their user base, and you can develop original brand assets, leveraging the already vast reach of well-known games. These partnerships are very sought after and can be difficult to obtain. To secure a mutually beneficial partnership, clearly explain the added value of your IP to the publisher.

### GAME / IP DEVELOPMENT (ORIGINAL IP)

#### TAKE YOUR BRAND EXPERIENCE TO THE NEXT LEVEL THROUGH ORIGINAL IP

Very experienced brands may start to move away from established gaming franchises to build their original IPs in order to offer the most authentic, and at the same time, controlled experience possible. While most brands have the potential to create their original IPs, there are key considerations to ponder.

First, although developing an original game, creating a TV programme about gaming, or owning a branded channel can seem to be a crowning achievement in the gaming world, such endeavours should never become vanity projects, and *value* must be the ultimate north star.

Then, if you decide to develop a game, take time to consider these crucial aspects. *How will the brand be featured throughout the game, and will the brand experience stop with the game or continue across other brand properties? Will you develop the game in-house or through a studio, and does that studio's team align with your DEI agenda? What will the gameplay experience look like? What is the revenue model for the game? How will you distribute the game, including ensuring compliance with your age requirements and understanding how platform policies may impact game content? And finally, how will you promote the game to make sure it stands out in the myriad of games available to players?*

Address each of these questions before delving into execution to set yourself for success.



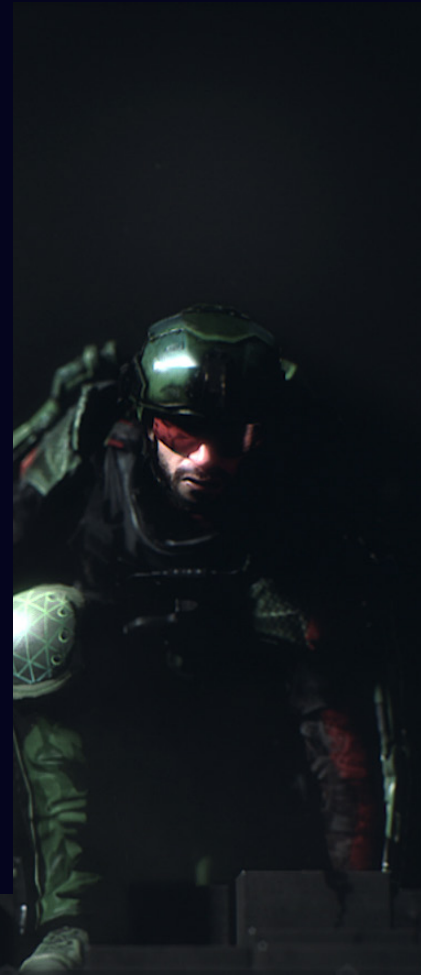


## CASE STUDY

# Extending IP with **Bespoke** Experiences: Mountain Dew's *Call of Duty* - Fuel Up for Battle

To gear up for the much-anticipated release of the next Call of Duty title, Mountain Dew offered gamers the opportunity to earn in-game rewards and exclusive content through special packaging codes. The gamified experience allowed fans to redeem their product codes to unlock in-game features such as exclusive Call of Duty gear, double-XP and rapid supply points.

Activision Blizzard trusted dentsu to build upon existing Call of Duty IP a master interface complete with a customisable soldier that greeted fans upon code redemption. As part of a wider campaign, a series of exclusive vignettes added context and color to some of the key characters in the game by leveraging customers' webcams and facial recognition technology.





## SPOTLIGHT

# The Highway To THE METAVERSE



The progressive adoption of virtual reality, augmented reality, and mixed reality, as well as the growing popularity of blockchain-based technologies like cryptocurrencies and non-fungible tokens (NFTs), will inform both the evolution of the internet as we know it today (Web2) into its successor (Web3), and the emergence of the metaverse, the layer of immersive experiences built upon it.

The metaverse is expected to be the next paradigm for engagement between brands and consumers and the new playground where consumers will experience content and interact with each other.

While interoperability between persistent hybrid shared spaces that blend physical,

digital, and virtual realities – a core characteristic of the metaverse as it is envisioned by most today – is not yet possible, brands need to prepare for the near future where consumers will expect immersive experiences shaped by end users and a new economy based on decentralised ownership.

When brands experiment with decentralised platforms today, they not only engage with growing gaming audiences, they also gain a better understanding of how to show up in a future metaverse state, develop a roadmap towards it, and gain a significant first-mover advantage.





## SPOTLIGHT

The Journey Towards Equity and Inclusion

# Extra fresh



## CASE STUDY

### Launching in the metaverse: Heineken Silver in Decentraland

Heineken wanted to create buzz and excitement among younger drinking audiences for the launch of its new Heineken Silver lager. Based on their research, the Heineken team knew this younger audience was passionate about gaming/metaverse platforms, however they wanted to make sure to connect with it in a relevant, authentic and compliant way. At the same time, Heineken needed to ensure it remained respectful of legal drinking age compliance.

Dentsu Red Star brought in the dentsu gaming and dentsu creative's virtual

experience capabilities to design a gaming/Web3 specific activation, aligned with Heineken's other creative and technical development partners as they implemented the concept: a virtual brewery in Decentraland visitors could explore while socialising with other users at the virtual bar and, in the meantime, get to know the new Heineken Silver brand. As a first of its kind, the virtual brewery received a lot of press and positive momentum through the amplification provided by gaming and Web3 influencers.

The use of 3D design, motion capture, Web3 wallet technology, blockchain, game engine building and the development of proof of attendance protocols and age-gating measures awarded the campaign seven Lions at the Cannes Festival of Creativity, including Silver Lions in the Digital Craft: New Realities and Integrated Brand Experience categories.





## CONCLUSION

# Fostering Mutually Beneficial Relationships

As we have seen in this report, gaming has moved from individual play to engaging mass audiences with the meteoric rise of streaming, has become a primary channel for vibrant fandoms, and is heavily influencing culture - creating limitless opportunities for marketers.

To capitalise on them, brands must genuinely understand gamers, starting with their motivations. Rather than rushing in, a brand should take incremental steps to build a durable and credible presence for the community, bringing value through experiences both within and outside games. Successful brands are the ones who learn and evolve with this always-changing world.

With 5G networks and VR experiences becoming progressively available on a wider scale, gaming's evolution is set to accelerate. We are heading to a future where enhanced connectivity could potentially turn any device into a gaming console with improved graphics, reduced latencies and, ultimately, the interoperability necessary for the emergence of the metaverse.

At dentsu, we constantly monitor the gaming landscape. We know that gaming is more than advertising. It is about creating, amplifying, and adding momentum to culture. It is about fostering mutually beneficial relationships between players, publishers, and brands.

We stand with players and publishers to make gaming accessible for all through principles of representation, inclusion, and advocacy.

We stand with brands by delivering beyond traditional advertising, giving them unprecedented access to all areas of the gaming industry. Through our entertainment expertise within the Japanese market, global venture-level investments, and unique intelligence on gamers, we provide the means to produce, develop and monetise intellectual property such as original games, content, and events. Through our scaled media, creative, and customer experience capabilities, we help brands connect authentically with the right gaming audience.

Gaming is one of today's most exciting marketing spaces – one with unrestrained growth potential and unprecedented creative platforms – and it is wide open for exploration!





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## Methodology - CCS Hub data and GWI gaming data fusion

Dentsu used unconstrained fusion to connect GWI gaming data with CCS Hub data. We used a fusion algorithm powered by industry recognised software RSMB to match respondents from each dataset, using similar answers to shared questions between the datasets. Once the respondent matching was completed, the GWI respondents donated all their gaming data to their corresponding CCS Hub respondents. Finally, we conducted a rigorous evaluation process of fusion diagnostics, attribute penetrations, and significance testing to ensure that the fused data is accurate.

We applied this fusion methodology to the following markets: Australia, Brazil, Canada, China, Denmark, France, Germany, Great Britain, India, Indonesia, Italy, Japan, Mexico, Philippines, Singapore, South Africa, Spain, Sweden, Taiwan, Thailand, United States.

## Methodology – Segmentation of CCSxGWI fused data

The objective of the gaming segmentation was to uncover relationships and traits of gaming audience groups that may be overlooked in gaming personas.

We segmented the CCSxGWI fused data into mutually exclusive audience groups that covered the entire target population, and with answers as similar as possible within each group. The two-phased process started with a detailed analysis of the survey sample, followed by a software-based statistical validation to deliver consistent and robust segments.

We performed this segmentation methodology across nine markets from the CCS core study: Australia, Canada, France, Germany, Great Britain, Italy, Japan, Spain, and United States. We later expanded this approach to the final 12 markets in the study.



# dentsu

### About Dentsu International

Part of Dentsu Group, Dentsu International is a network designed for what's next, helping clients predict and plan for disruptive future opportunities and create new paths to growth in the sustainable economy. Dentsu delivers people-focused solutions and services to drive better business and societal outcomes. This is delivered through five global leadership brands - Carat, Dentsu Creative, dentsu X, iProspect and Merkle, each with deep specialisms.

Dentsu International's radically collaborative team of diverse creators unifies people, clients and capabilities through horizontal creativity to help clients create culture, change society, and invent the future.

Powered by 100% renewable energy, Dentsu International operates in over 145 markets worldwide with more than 46,000 dedicated specialists, and partners with 95 of the top 100 global advertisers.

[www.dentsu.com](http://www.dentsu.com)

### About dentsu gaming

At dentsu, we believe that everyone is a gamer – a community connected across borders around the things they love. Our global network was built to bring gaming's explosive growth to our clients through innovative partnerships, products and solutions. We bring together passionate, multifaceted expertise to help bring incremental value to clients through mutually-beneficial relationships with game publishers, partners and platforms.

[www.dentsu.com/gaming](http://www.dentsu.com/gaming)

**Dentsu gaming partners featured in this report:**

ACTIVISION® BLIZZARD

Frameplay

Microsoft

ONE  
ESPORTS

twitch

YouTube

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- This report provides a clear
- overview of the potential
- opportunities within gaming, and
- how to right-size points of entry
- pending the goals of a given brand.

• **Jonathan Stringfield, PhD**

• VP, Global Business Research &

• Marketing,

• Activision Blizzard

- Author, Get in the Game: How to
- Level Up Your Business with Gaming,
- Esports, and the Future of Technology



- Dentsu's latest report, "FOR THE
- GAME", is a great entry point for
- brands looking to explore the
- gaming world and is also packed
- with detailed insights that would
- be of interest to seasoned vets
- in the industry. I was particularly
- impressed with the research and
- understanding of the current
- gaming audience, and how brands
- can gain so much value from
- entering the gaming world.

• **Jonathon Troughton,**

• CEO,

• Frameplay

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