

**we  
are.  
social**

# Videogames: Audience, Strategy & You

SARAH BRIN



# Agenda

**01: WHY IT'S IMPORTANT FOR BRANDS TO BE  
FLUENT WITH GAMING CULTURE**

**02: HOW TO APPROACH GAMING AUDIENCES IN  
MEANINGFUL WAYS**

**03: TAKEAWAYS FOR THE ROLE AN AGENCY  
CAN PLAY IN VIDEOGAME-CULTURE CAMPAIGNS**

**04: QUESTIONS & CONVERSATION**





# **Part 1: Why it's important for brands to be fluent with gaming culture**

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**Videogames make  
money.**

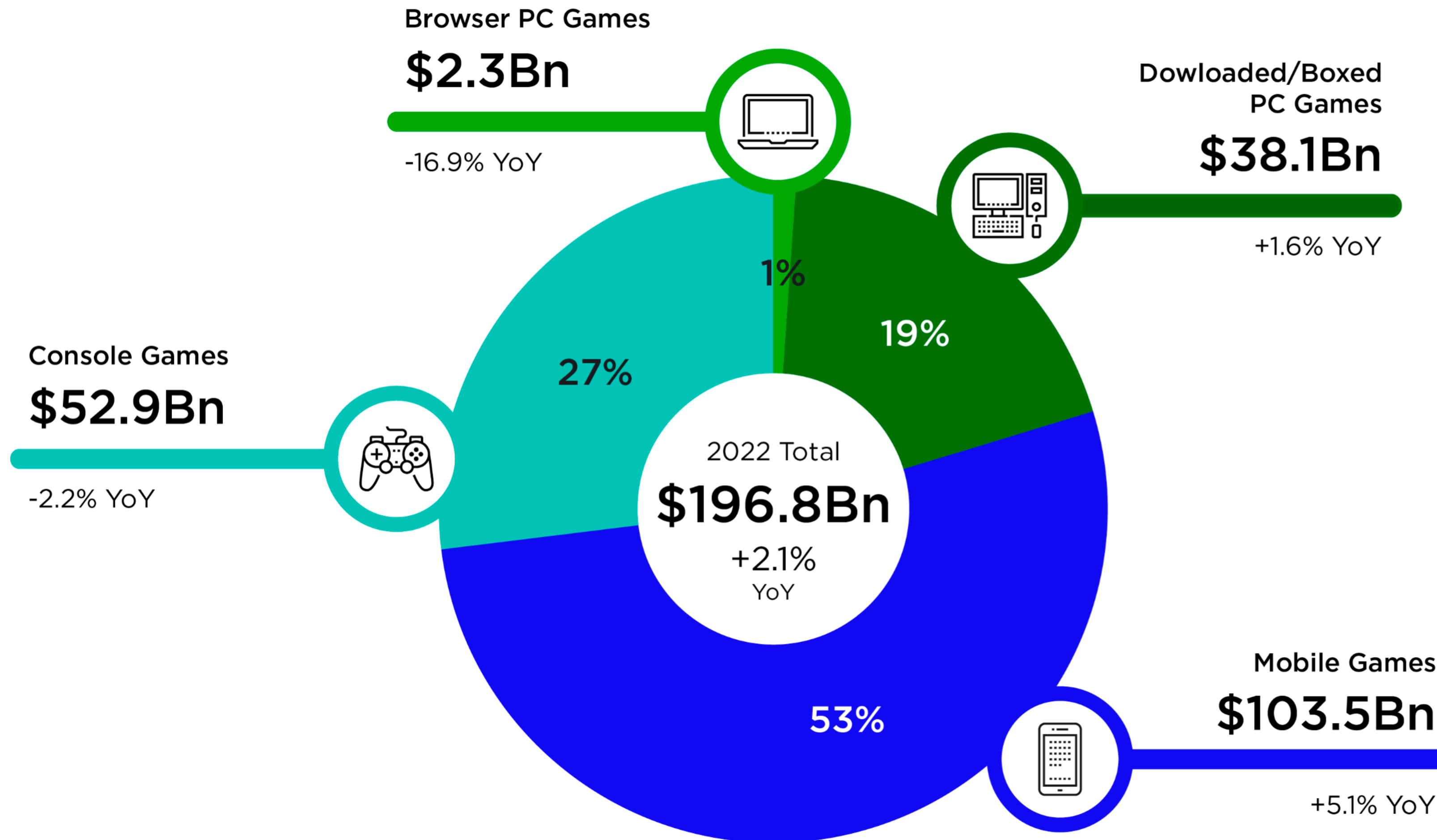
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# 2022 Global Games Market

Per Segment With Year-on-Year Growth Rates



## \$103.5Bn

Mobile game revenues in 2022 will account for 53% of the global market

Our revenues encompass consumer spending on games: physical and digital full-game copies, in-game spending, and subscription services like Xbox Game Pass. Mobile revenues exclude advertising. Our estimates exclude taxes, secondhand trade or secondary markets, advertising revenues earned in and around games, console and peripheral hardware, B2B services, and the online gambling and betting industry.

Source: ©Newzoo | Global Games Market Report | July 2022

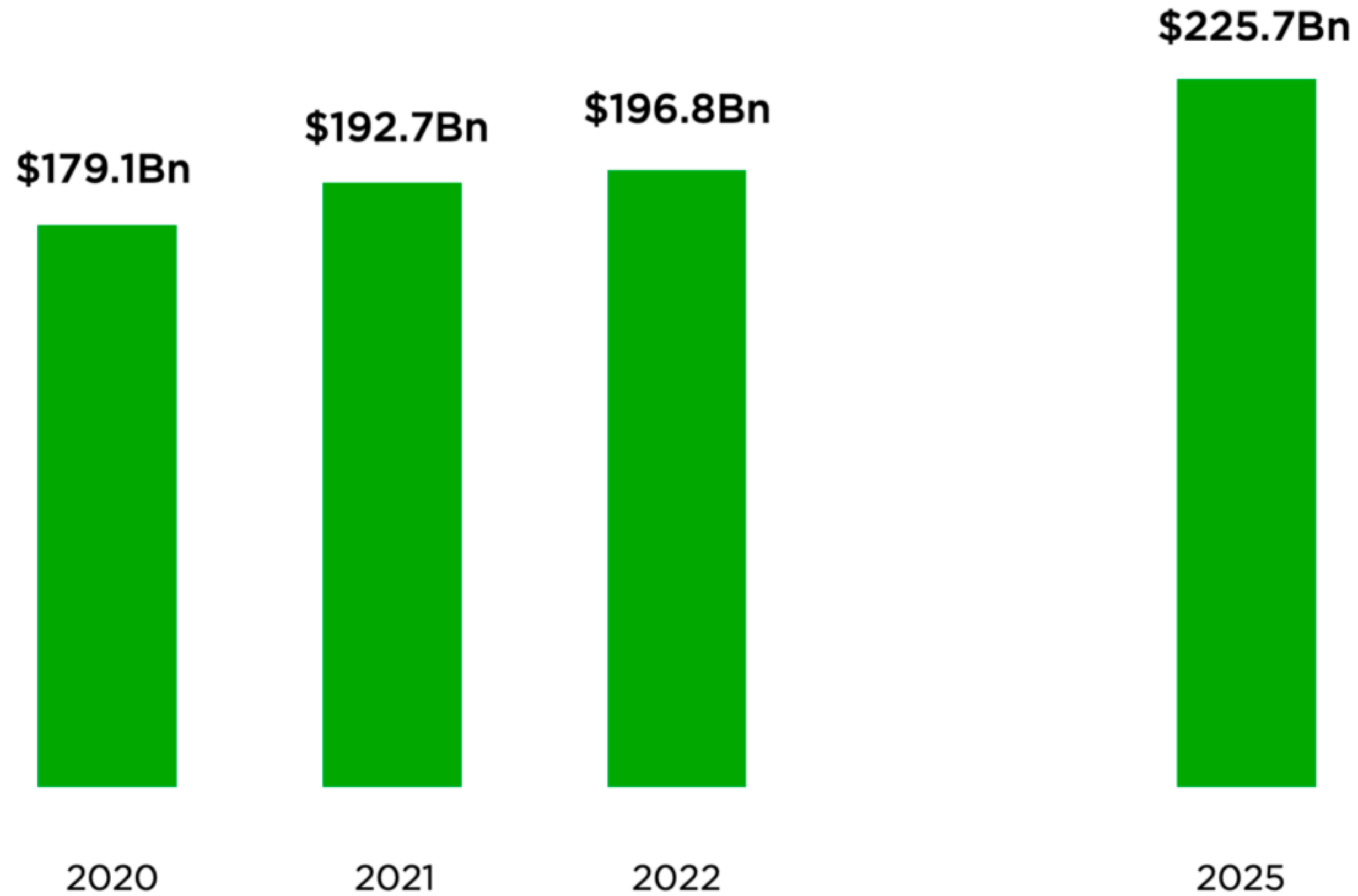
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# Global Games Market Forecast

Forecast Toward 2025



**+4.7%**

Total Market CAGR  
2020-2025

Our revenues encompass consumer spending on games: physical and digital full-game copies, in-game spending, and subscription services like Xbox Game Pass. Mobile revenues exclude advertising. Our estimates exclude taxes, secondhand trade or secondary markets, advertising revenues earned in and around games, console and peripheral hardware, B2B services, and the online gambling and betting industry.

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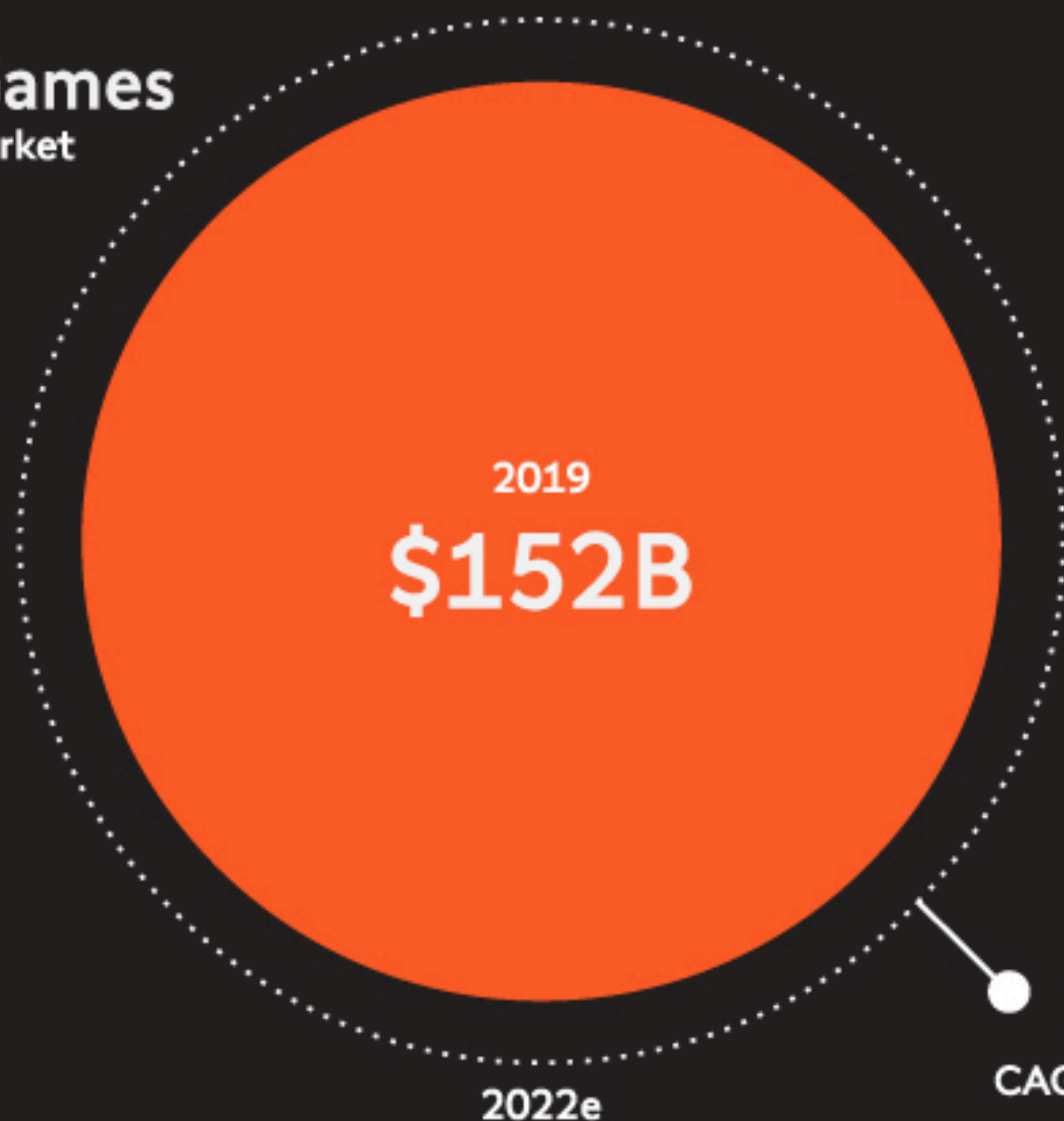
[newzoo.com/globalgamesreport](https://newzoo.com/globalgamesreport)



# The Big Business of ONLINE GAMING

The industry's unprecedented growth now challenges traditional forms of entertainment.

Online Games  
Global Market



**\$196B**

CAGR (2018-2022E): 9%

Box Office  
Global Revenue



2019  
**\$43B**

Recorded  
Music  
Global Revenue



2018  
**\$19B**

All values in US\$  
Sources: Newzoo, Billboard, IFPI



# \$196B

CAGR (2018-2022E): 9%

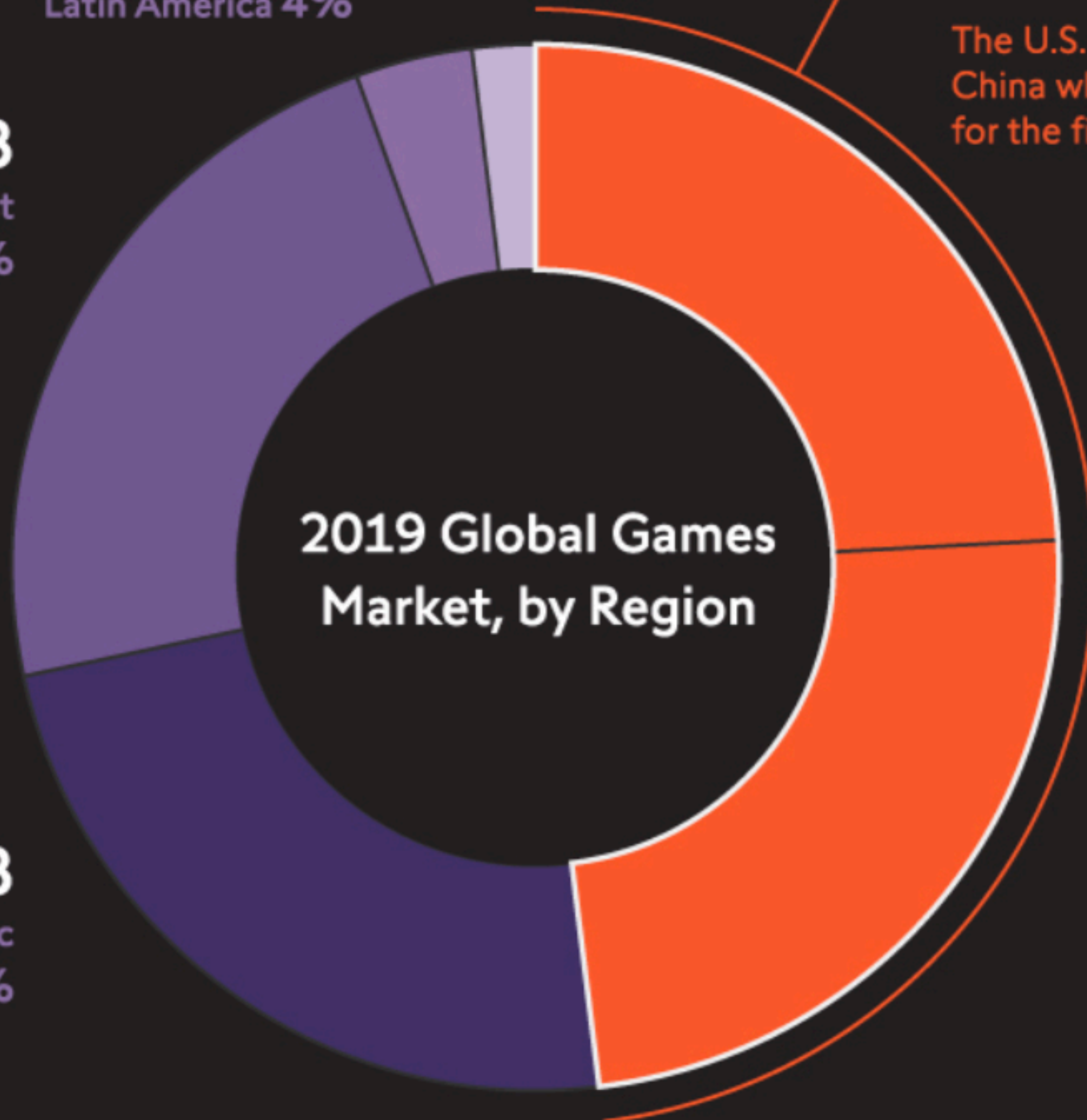
\$5.6B  
Latin America 4%

\$2.7B  
Canada 2%

\$34.7B  
Europe/Middle East  
Africa 23%

The Asia-Pacific region leads  
in global gaming, making up  
almost half of the total market.

\$35.7B  
Asia-Pacific  
(excluding China) 23%



In 2019, **48%** of all  
consumer spending on games  
came from the U.S. and China.

The U.S. has since replaced  
China when it comes to spend  
for the first time ever:

\$36.9B  
U.S. 24%

\$36.5B  
China 24%



**Videogames are  
culture.**

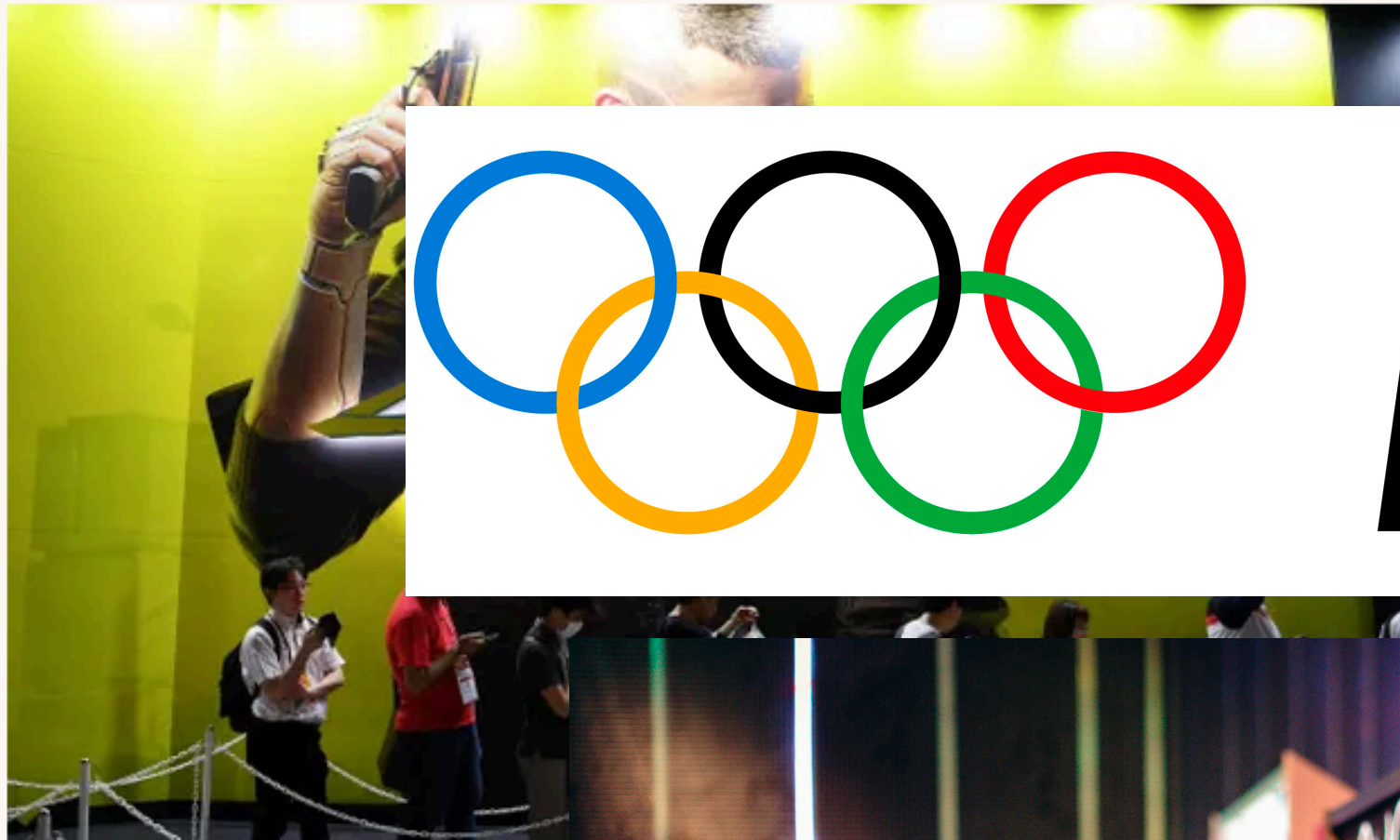
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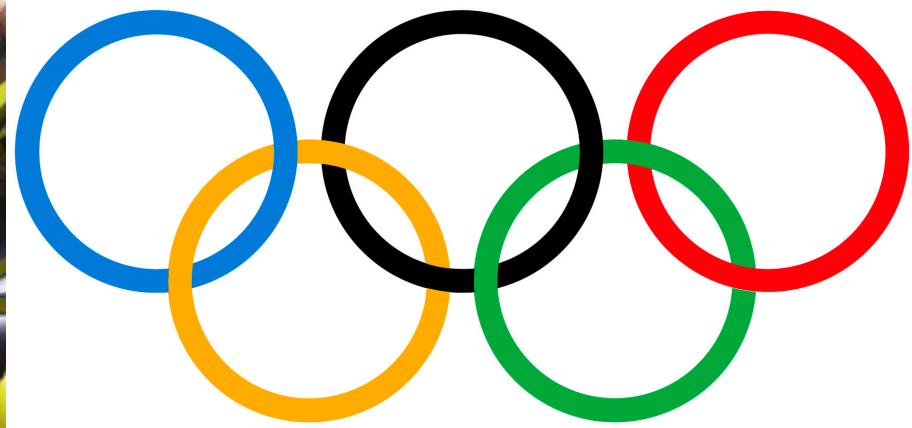
Video games have replaced music as the most important aspect of youth culture

*Sean Monahan*

The global video gaming industry took in an estimated \$180bn in 2020 - more than sports and movies worldwide



📷 'Starring Keanu Reeves and featuring Cyberpunk 2077 cost a staggering \$317m distance of the largest Hollywood budget'



# OLYMPIC VIRTUAL SERIES



## From MoMA's Video Game Collection

Get inspired by the visual language of video games with this UT collection from The Museum of Modern Art (MoMA) in New York.

The interactive design of video games has given them a well-earned place in the collection of MoMA. We selected some of these examples of enduring digital design innovation from MoMA's collection of beloved titles. We hope playful UT designs that blend elements of MoMA with each



## The Last of Us: TV finally has the perfect video game adaptation



Inspired casting, excellent acting, hugely inventive storytelling ... no console-to-screen journey has ever been this good. And it's one of the year's best television shows to boot



📷 'Perfect lightness of touch' ... Pedro Pascal and Bella Ramsey as Joel and Ellie in The Last of Us. Photograph: HBO/Warner Media





# The Cannes Festival 2022 is open in Fortnite

FORTNITE + JACK





**Game platforms mean  
connection.**





### Subscribed Channels

**PilotHunterTV**  
 Fortnite 8

### Followed Channels

**shroud**  
 PLAYERUNKNOWN'S... 52,125

**DrLupo**  
 Fortnite 42,000

**DrDisRespectLIVE**  
 PLAYERUNKNOWN'S... 18,358

**SypherPK**  
 Fortnite 13,709

**chocoTaco**  
 PLAYERUNKNOWN'S... 5,177

[Show More](#)

### Online Friends

**Ross**  
 watching Kitboga

**PilotHunterTV**  
 streaming Fortnite

### Recommended Channels

**sodapoppin**  
 Wizard of Legend


**Asmongold**

Videos 121

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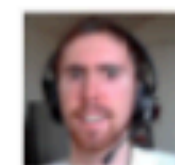
World of Warcraft

9,709

20,077,146

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[Share](#)

⋮


**Asmongold**

2 years ago

[Twitter.com/Asmongold](#)
☐ Edit Panels


Stream Chat

[Rooms](#)

**Dogarino316**  
 7,500

**whoRInG1** 5,100

**TheLavaBear1** 5,000

 **zalma\_**: Pog Clap

**OrenoKashi**: MORE ASHLEY = MORE SUBS Pog

 **ignitorr**: happy 4 u nick @Nmplol

 **milosjw**: over 100k a year...

 **randomsperg**: BEST EMOTES ON TWITCH

 **WOW Army**: Arena match won! New 2v2 Arena  
 Ranking: 2716

 **propei**: didn't even realize, but gifted a sub and now im a nice guy

 **UbeyDoo**: 3 hours a day and ditch every other day

 **OldForsenPepeHands**:

 **BattlePu**:

**RusArbys**: You r a cool guy

 **GooseNinja**: Because you are lovable @Nmplol

**krazkolul**: im still not a sub if someone wants to gift OMEGALUL

**Kyuiroh**: LUI


[Chat](#)











# **Part 2:** How to approach gaming audiences in meaningful ways

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**There are all kinds of  
gamers. Who is your  
audience?**

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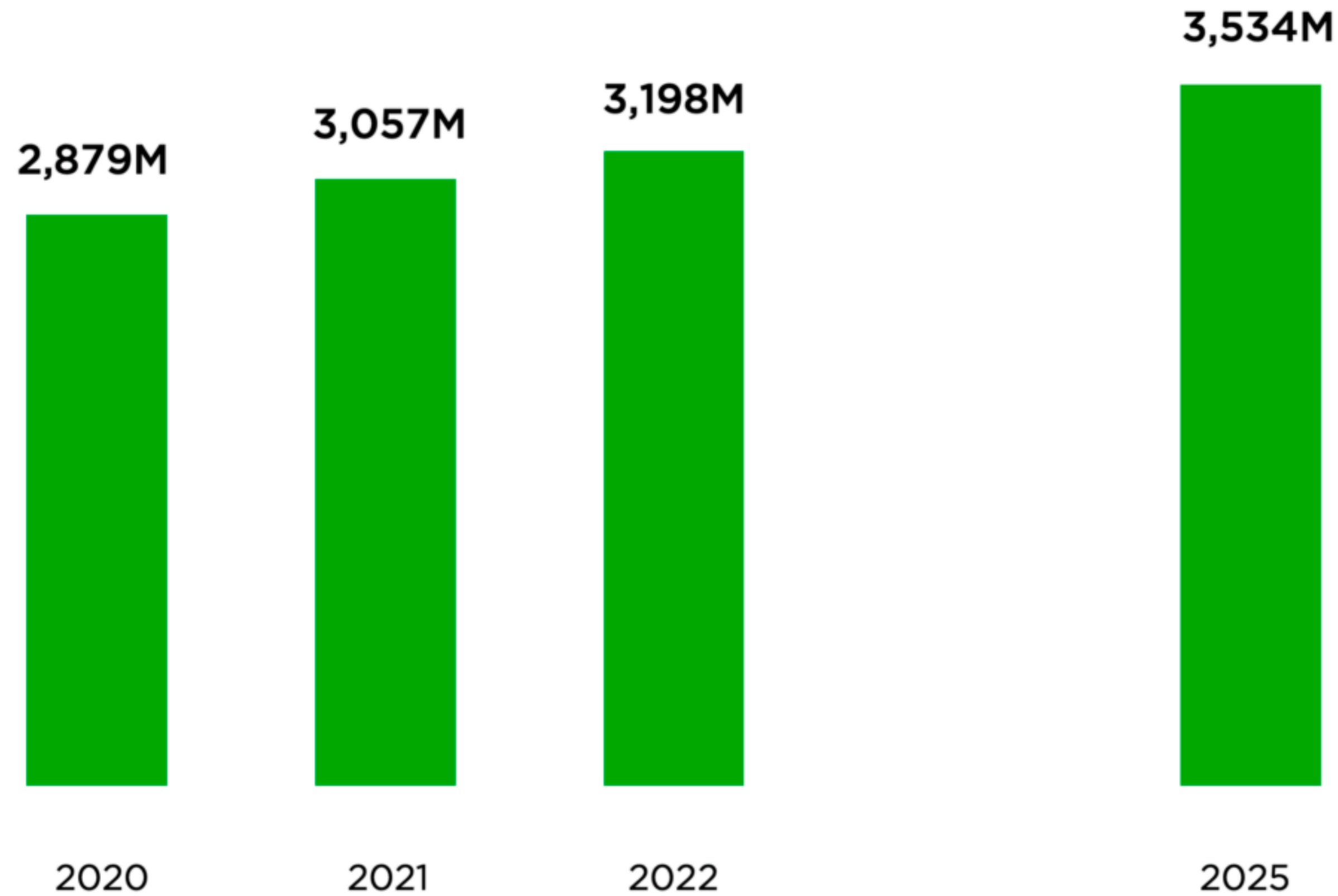






# Global Player Forecast

Forecast Toward 2025



## +4.2%

Total Players CAGR  
2020-2025



Mobile Players in 2022

### 2,675M



Console Players in 2022

### 603M



PC Players in 2022

### 1,045M

Source: ©Newzoo | Global Games Market Report | July 2022

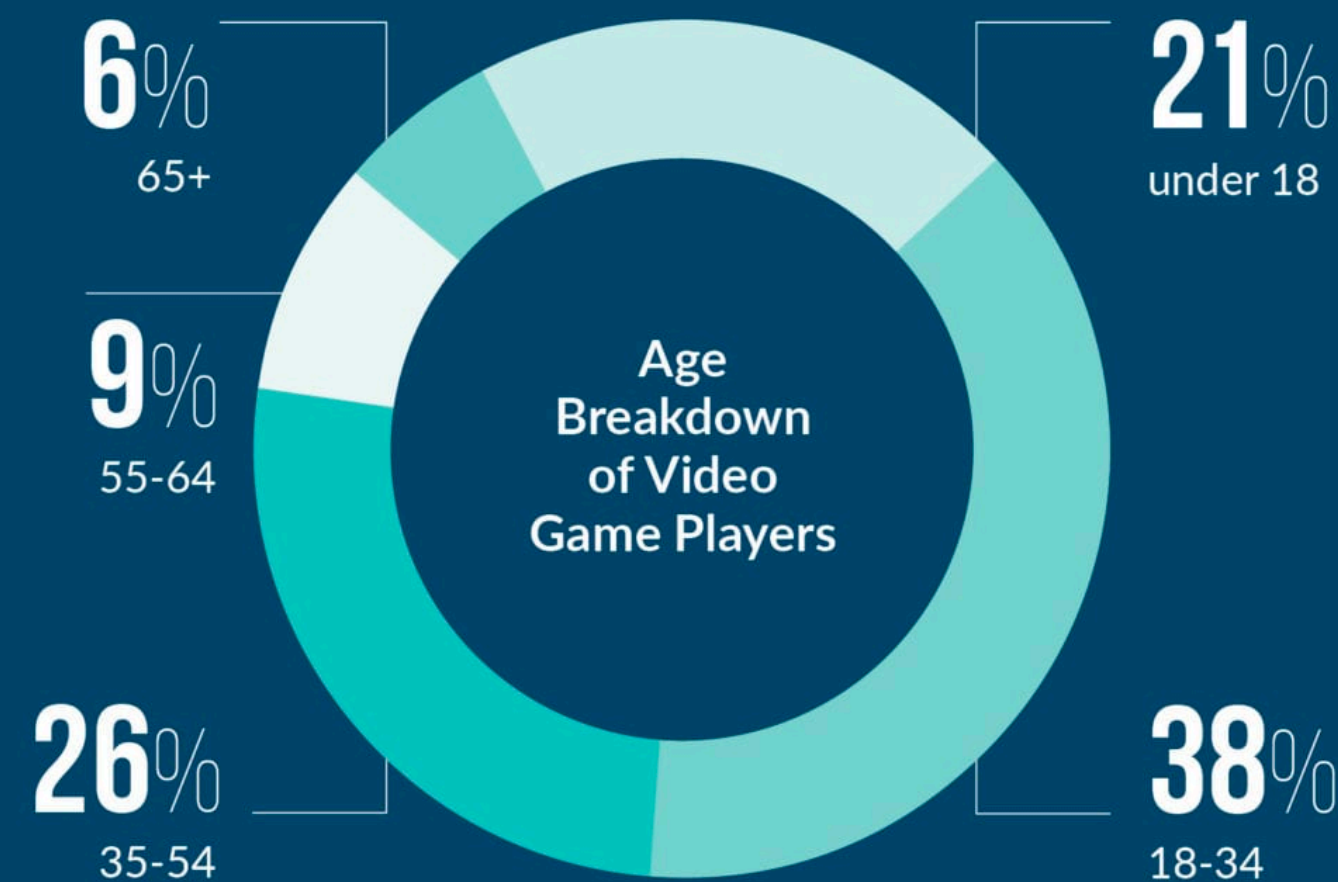
[newzoo.com/globalgamesreport](https://newzoo.com/globalgamesreport)

Definition of players: anyone who has played games on PC, console, or mobile device in the last six months.



# A NATION OF GAMERS: WHO WE ARE

We're a nation that believes in the power of play. No matter who you are or where you're from, there's a game for everyone.



**35-44 YEARS** is the average age range of a video game player

 **75%** of Americans have at least one video game player in their household.

 There are approximately **46 MILLION** video game players with disabilities\*

\* Source: The AbleGamers Charity


## MEN 18-34


 **75%** play video games **on a console**

 **51%** most often play **action games**


 **68%** prefer to play **with friends**

### FAVORITE GAMES

 **80%** Shooter games (e.g., *Call of Duty*, *Fortnite*)

 **68%** Adventure games (e.g., *Tomb Raider*, *Uncharted*)

 **65%** Role-playing games (e.g., *World of Warcraft*, *The Witcher*)

 **70%** say games **help them stay connected with friends and family**


## WOMEN 18-34

 **77%** play video games **on a smartphone**

 **46%** most often play **casual games**


 **48%** prefer to play **with friends**

### FAVORITE GAMES

 **59%** Family games (e.g., *Super Mario Party*, *Just Dance*)

 **52%** Action games (e.g., *Grand Theft Auto*, *Super Mario Odyssey*, *God of War*)

 **50%** Racing games (e.g., *Need for Speed*, *Mario Kart*)

 **55%** say games **help them stay connected with friends and family**

## HOW WE PLAY

An entire generation of adults grew up on computers and smartphones. Even for those who didn't, video games are a natural part of their lives and their children's lives.

### Devices Owned by Gamers

**73%** own a game console

**43%** own a handheld system

**29%** own a VR device

**25%** own a mobile VR device

### Most Common Devices Used for Video Game Play Among Adult Players

**61%** smartphone

**52%** game console

**49%** personal computer

### Most Popular Game Genres

**71%** casual games

**53%** action games

**48%** shooter games





# SHE PLAYS GAMES

**Paving a Career in the Games Industry Through Twitch**



Hosted by  
**Lauren Kaye**  
@leveluplauren





**BLACK  
GIRL  
GAMERS**

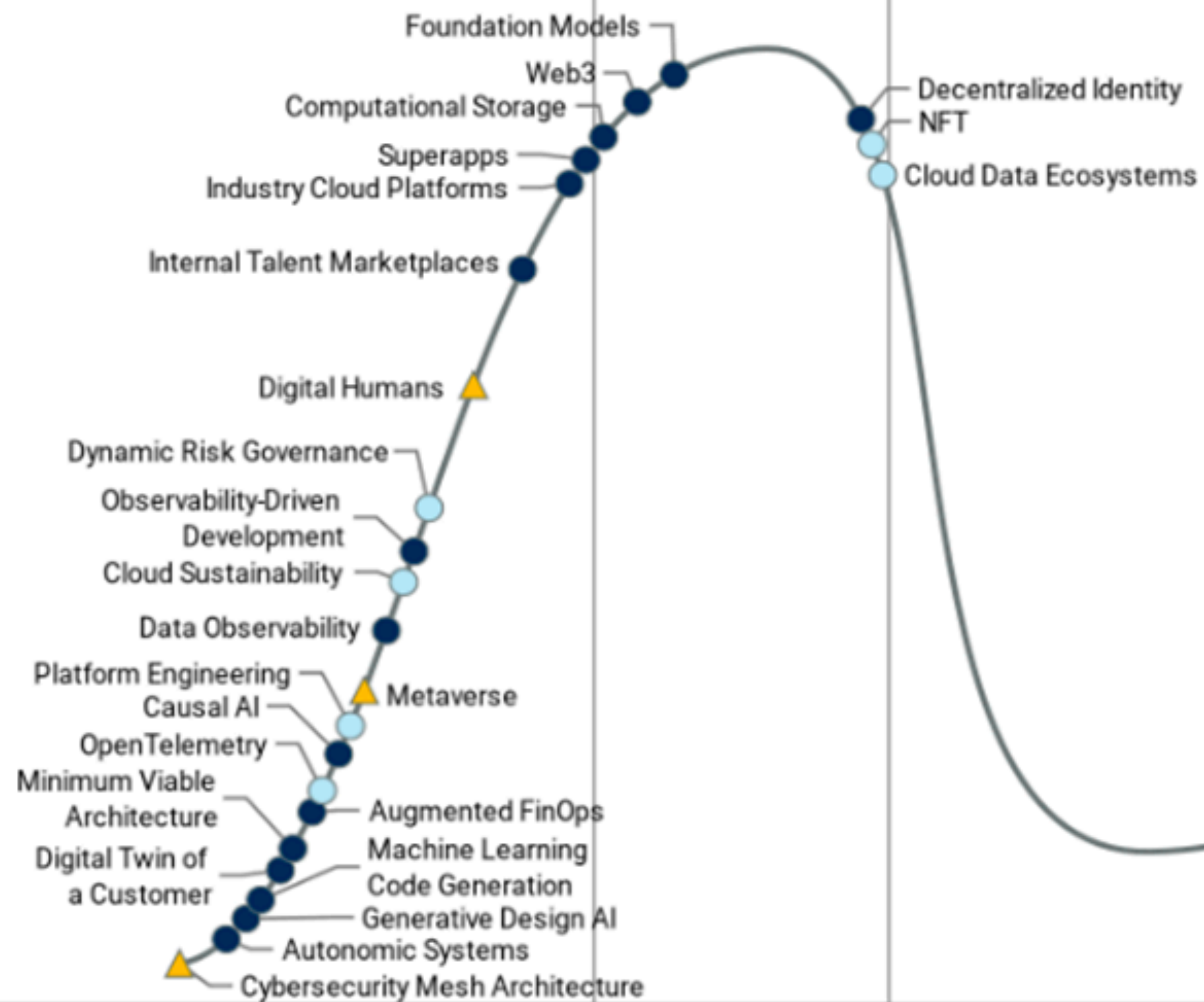


**Game partnerships should  
align with brand values  
and goals, not hype.**

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EXPECTATIONS



Innovation  
Trigger

Peak of Inflated  
Expectations

Trough of  
Disillusionment

Slope of  
Enlightenment

Plateau of  
Productivity

TIME

Plateau will be reached: ○ <2 yrs. ● 2–5 yrs. ● 5–10 yrs. ▲ >10 yrs. ✗ Obsolete before plateau



# Authenticity is the most important value for Gen Z – even beyond future plans and being rich.



[- Read less](#)

The vast majority of Gen Z respondents reported that authenticity is more important than any other personal value tested, including: spending time on things that will help their futures, independence, changing the world, and being rich or famous.

Gen Zs aren't looking for "picture perfect."

They embrace quirks and flaws. Just look at the recent beauty trends – instead of cosmetics, they're focusing more on skincare and perfecting that no makeup look.

# 92%

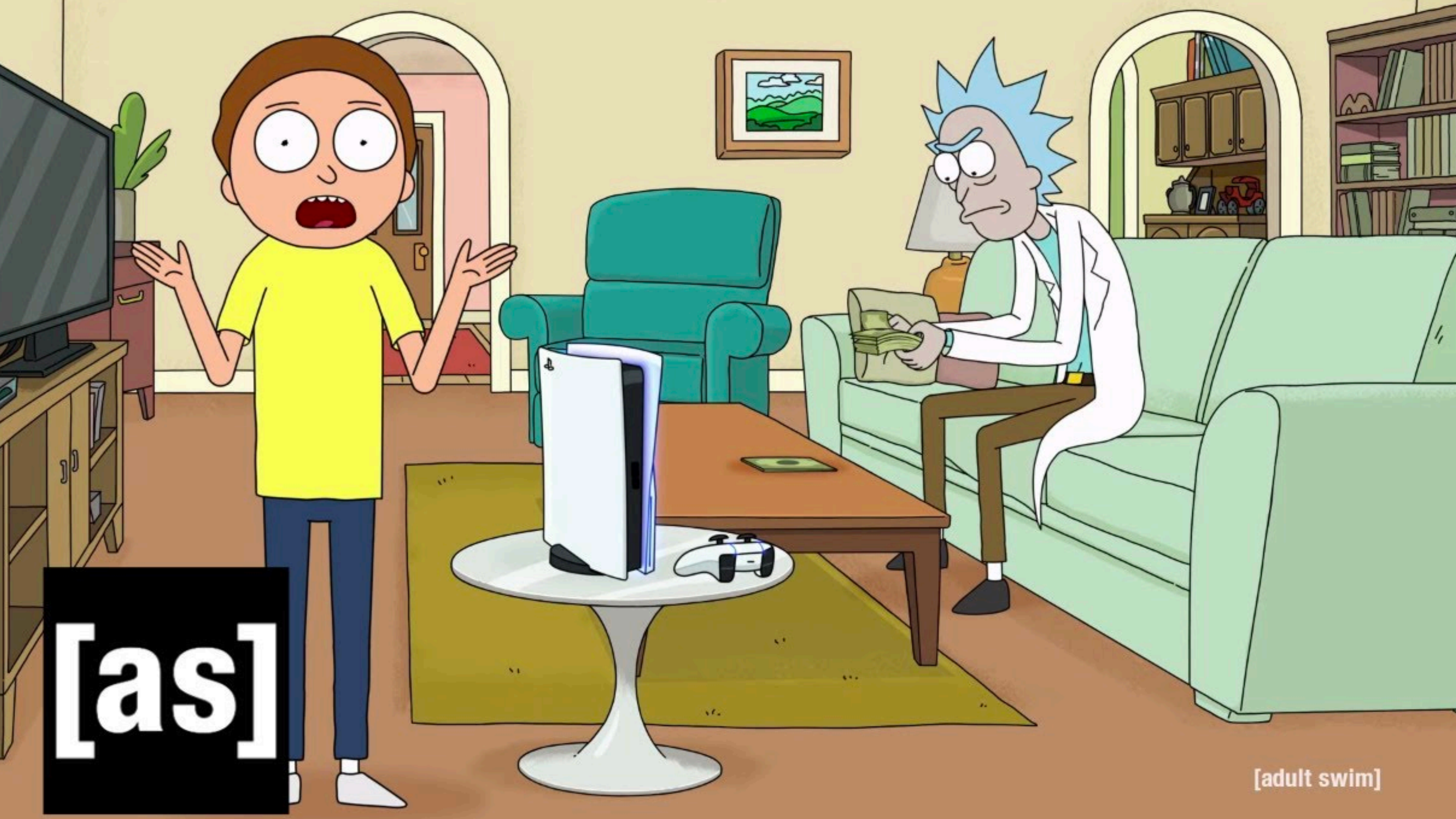
indicated that being authentic and true to oneself is extremely or very important. Those reporting it being extremely important increased 16 percentage points from pre-pandemic levels.



**Finding the right match  
matters.**

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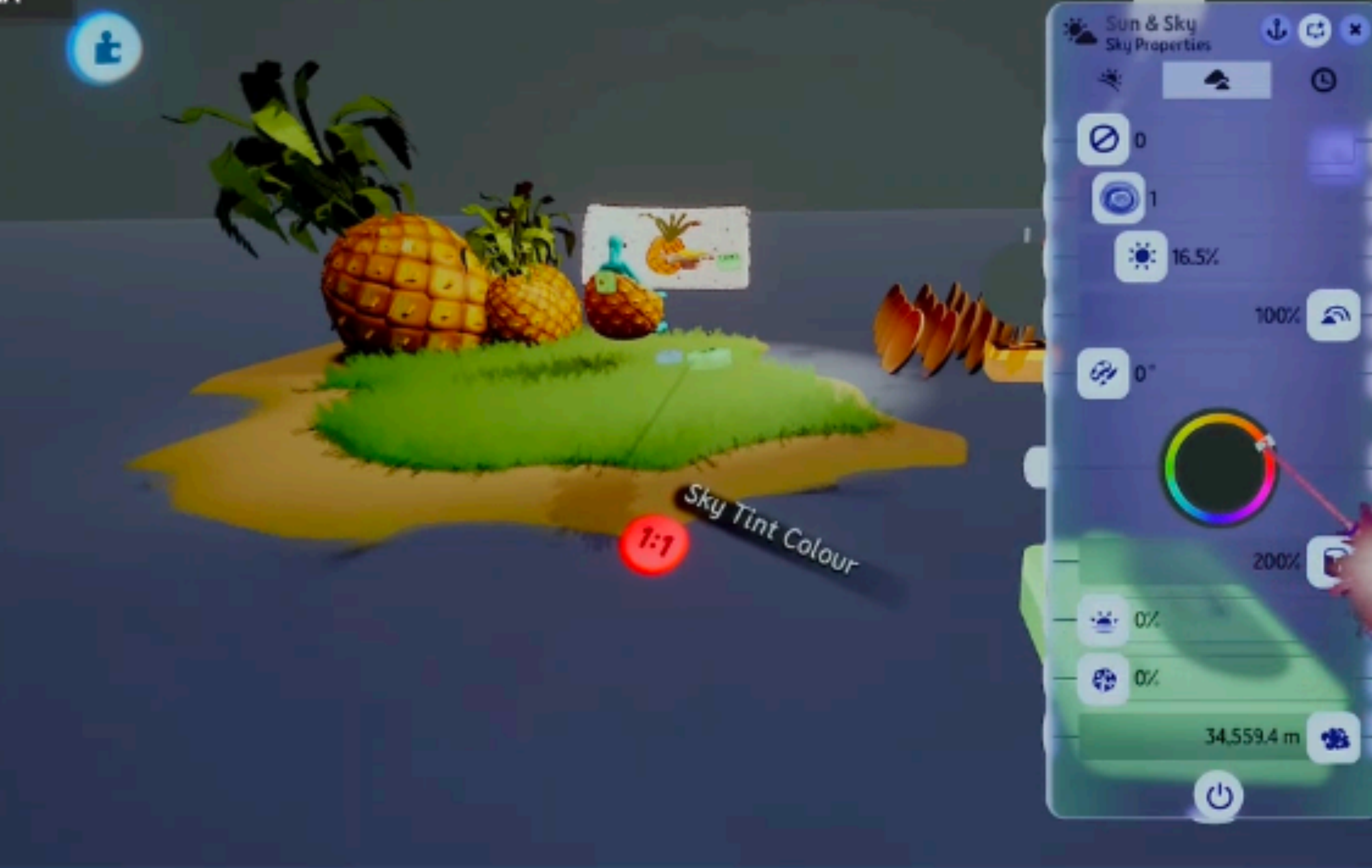




[as]

[adult swim]





KMoe4 ❤️ 🎁 🎁

I want a VR sneaker closet





# Show us your Game Face!

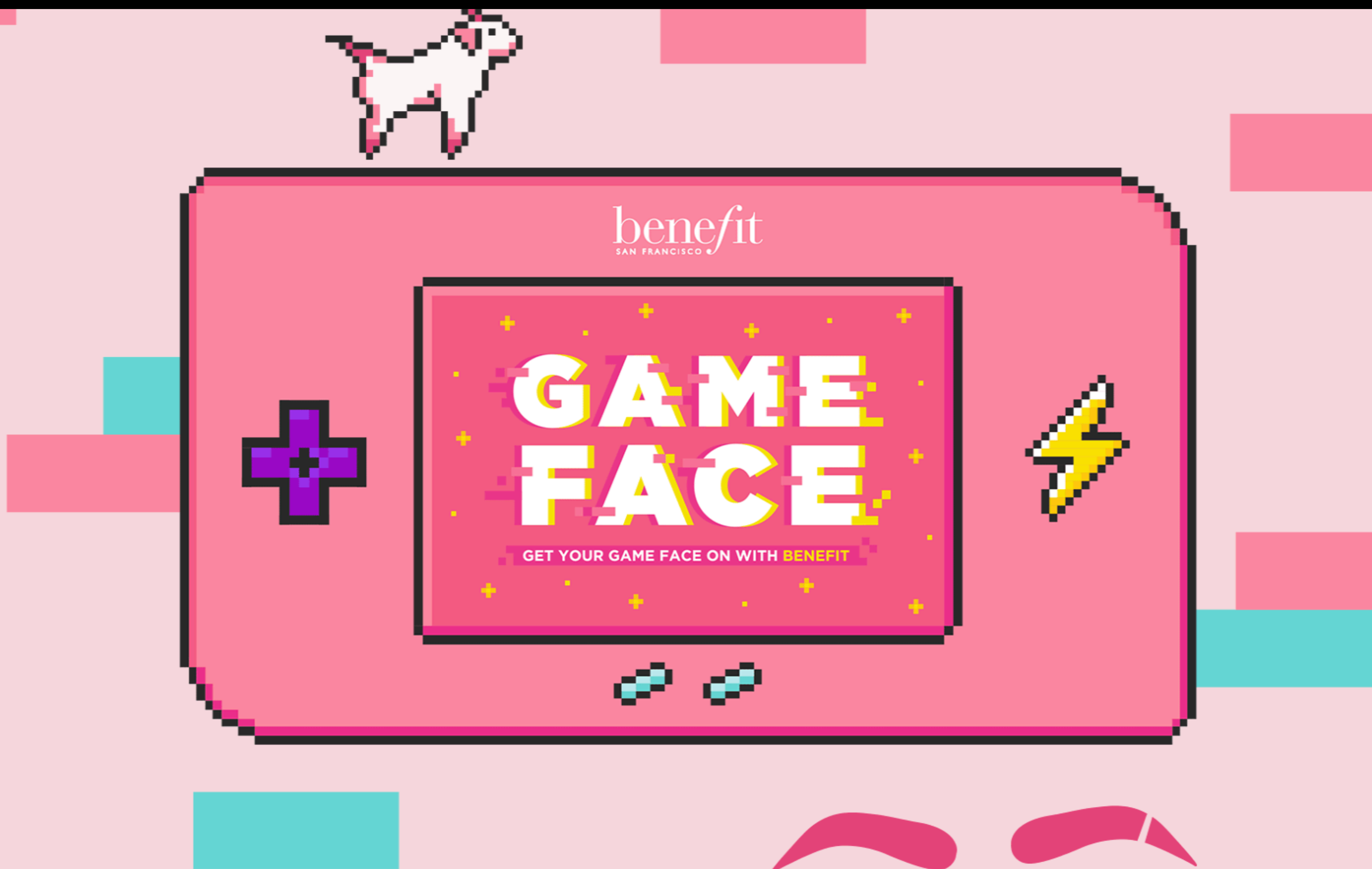
Are you a Twitch streamer who loves makeup? We're on the lookout for streamers for gaming + beauty collabs! If interested, shoot your Twitch ID over to [twitch@benefitcosmetics.com](mailto:twitch@benefitcosmetics.com).

## Perks

- Get Hosted on Benefit's [Twitch Channel](#)
- Receive free products
- Get gifted subscriptions

EMAIL US

Support





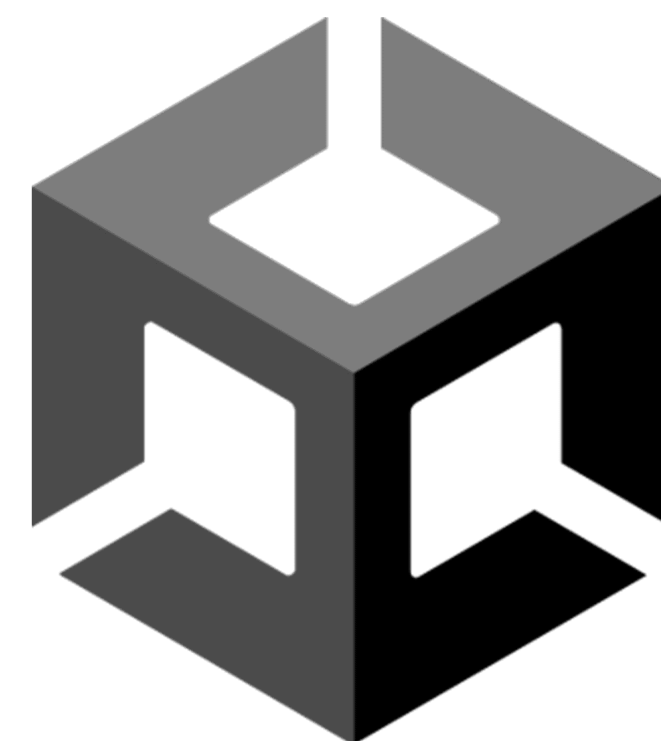
**Making videogames  
requires expert  
knowledge.**

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**UNREAL**  
**ENGINE**



**Unity**



**ROBLOX**



**Gaming campaigns  
require client onboarding  
and specialist knowledge.**

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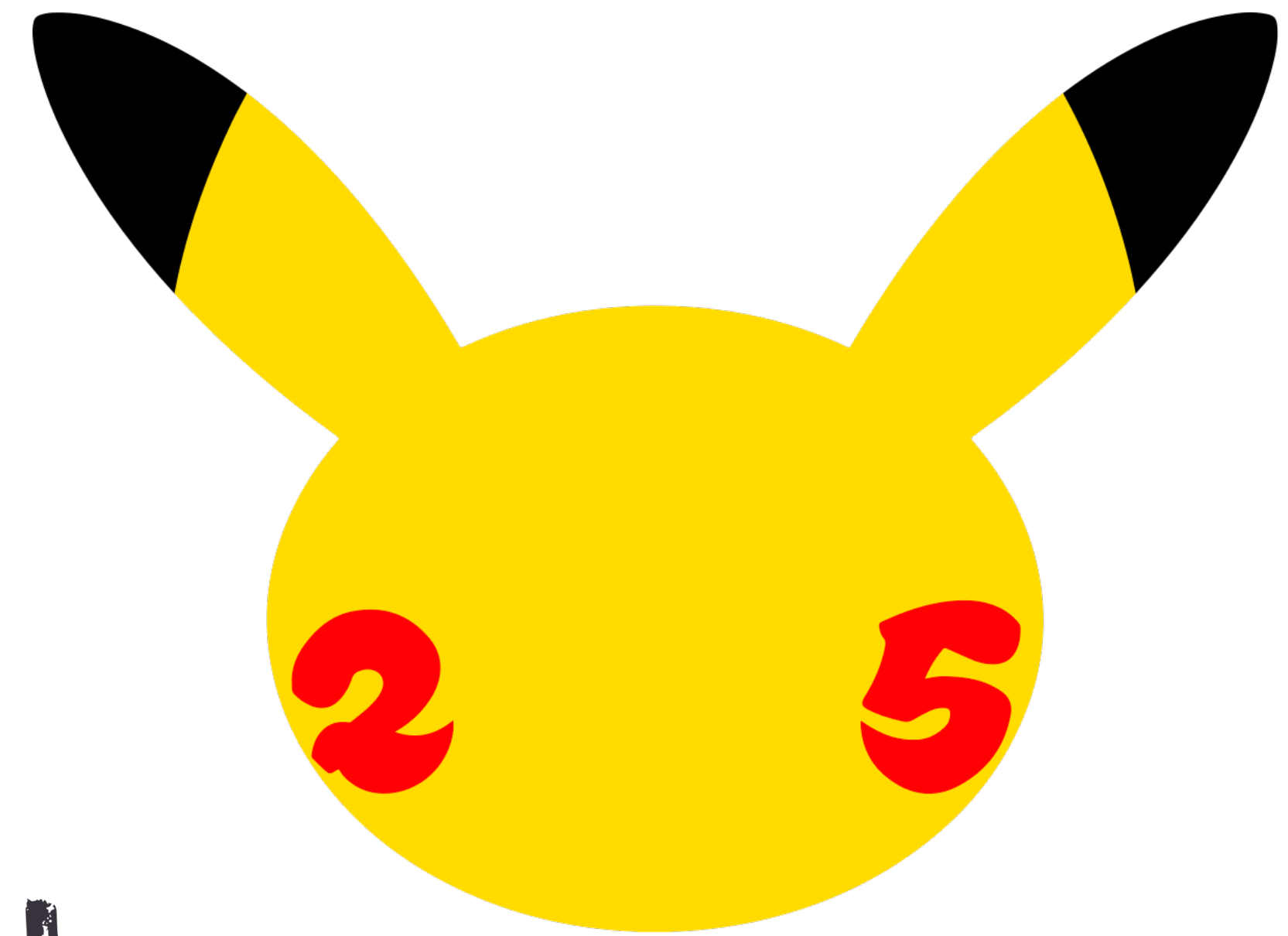
**Different brands, platforms  
and games will have different  
restrictions and processes  
for getting things done.**







**ROBLOX**



**HORIZON**  
ZERO DAWN™





**The internet is a mess,  
integrity matters.**

---





 **35%**  
OF UK WOMEN  
GAME ON PC

**23%**  
GAME ON  
CONSOLE 

 **33%**

OF FEMALE GAMERS  
SAY THEY'VE BEEN THE  
VICTIM OF ABUSE OR  
DISCRIMINATION FROM  
MALE GAMERS

 WHERE  
ABUSED:  
ONLINE  
**63%**

# ABUSE OF FEMALE GAMERS IN THE UK

BY MALE COUNTERPARTS IS DRIVING GAMERS OFFLINE



 **TYPE OF  
ABUSE**

VERBAL **51%**

SENDING INAPPROPRIATE  
CONTENT/  
MESSAGES **40%**

SEXUAL  
HARASSMENT **32%**

THREATS  
OF RAPE **10%**

 **IMPACT**

DON'T REVEAL THAT THEY ARE  
FEMALE WHEN PLAYING ONLINE  
MULTIPLAYER  
GAMES **23%**

WON'T PLAY ONLINE AS WORRIED  
THEY WILL BE  
ABUSED BY MEN **11%**

- 'Bryter' 'research-i', and 'ResearchBods' carried out a survey of 1,151 UK women aged 16+ that play console or PC video games at least once a month in Feb-Mar 2018
- Get in touch for more results from the survey [info@bryter-uk.com](mailto:info@bryter-uk.com)

**Bryter.**



# **Part 3: Takeaways for the role an agency plays in videogame- culture campaigns.**

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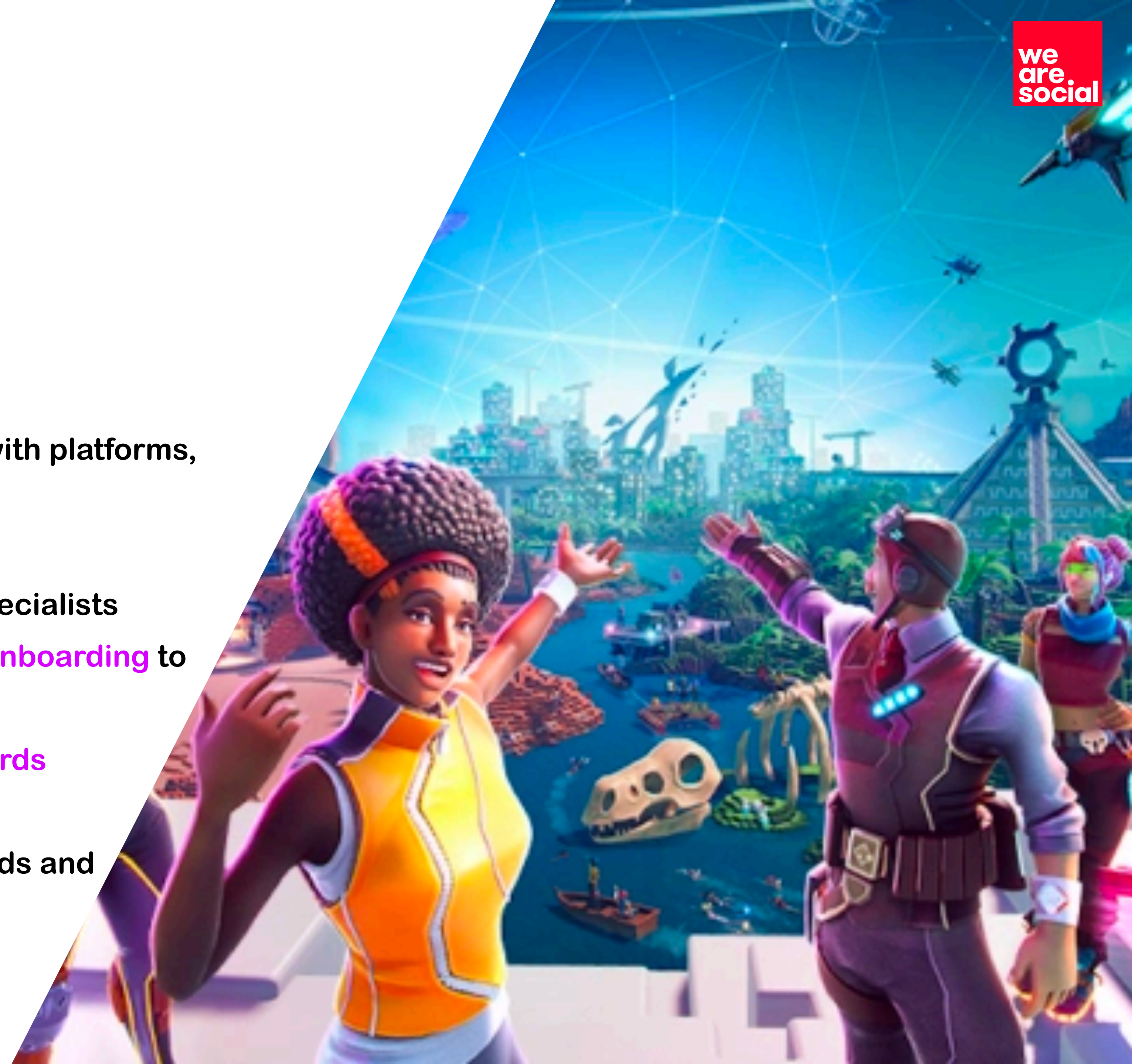


# Presentation Recap:

TAKE THIS, IT'S DANGEROUS TO GO ALONE

A best-in-class agency will:

- Identify and segment **target audiences**
- Generate and match the right **opportunities** with platforms, IPs and influencers
- **Separate** hype from reality
- Source **game developers** and other skilled specialists
- Provide state-of-the-industry **education and onboarding** to gaming culture
- Advise on industry **best practices and standards**
- **Spot trends**
- Flag **risks** and perform due diligence for brands and influencers





# LET'S TALK!

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