Unlocking gaming communities:

a path to success for advertisers and publishers

venatus | GWI.

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Methodology

All figures in this report are drawn from GWI's online research among internet users aged 16-64. Please note that we only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population.

Sample size by market
Unless otherwise stated, the data in this report is taken from a custom survey from August 2023 among 547 (U.S.), 531 (Australia), 521 (UK), 509 (Germany) and 508 (South Korea) internet users aged 16-64 who play games on any device Please note, where clearly stated, this report also draws insights from GWI's ongoing core and gaming global research.

Our research
Each year, GWI interviews over 688,000 internet users aged 16-64 across 53 markets. Respondents complete an online questionnaire that asks them a wide range of questions about their lives, lifestyles, and digital behaviours. We source these respondents in partnership with a number of industry-leading panel providers. Each respondent who takes a GWI survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and no respondent can participate in our survey more than once a year (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

Our quotas
To ensure that our research is reflective of the online population in each market, we set appropriate quotas on age, gender, and education – meaning that we interview representative numbers of males vs females, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources. This research is also used to calculate the 'weight' of each respondent; that is, approximately how many people (of the same gender, age, and educational attainment) are represented by their responses.

Foreword

GWI.

In a multimedia world, attention is the new commodity that reveals the most important points of engagement in a consumer's life. For some time, and particularly since the explosion of game activity during the pandemic, gaming has positioned itself as one of the most effective ways to capture this precious attention. Gaming advertising has evolved with in-game advertising and other creative approaches expanding the horizon of what can be achieved with the gaming audience.

The gaming audience is extremely diverse, representing around 80% of the online population at its broadest definition. This represents an opportunity for advertisers and publishers to appeal to such a broad and diverse audience. Ensuring that advertising in gaming is innovative and imaginative is key though – how can you make effective advertising that is relevant, engaging, and unobtrusive? GWI is delighted to partner with Venatus to demonstrate how advertising in gaming is shaping the industry and how global and local audiences respond differently to online and offline content and advertising.

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In recent years, gaming has firmly established itself within global culture. As AAA games turned into blockbuster films, free-to-play franchises have surged, and mobile games have gone viral, people worldwide are engaging with gaming. The research presented here delves into the rich tapestry of the gaming world. Understanding gaming communities is pivotal for crafting impactful advertising strategies for brands and advertisers, and it is equally essential for publishers seeking to monetize their content effectively while staying committed to providing their gaming audiences with premium experiences.

We take pride in collaborating with GWI, a renowned world leader in global research and insights. Together, we offer the industry an enlightening view of the global gaming landscape, its diverse communities, and the strategies publishers and advertisers can employ to achieve more effective advertising outcomes.

Introduction

The world of gaming has transcended its initial role as a mere form of entertainment to become a dynamic space where connections are forged, memories are made, and families and friends gather to share and discover new experiences. As technology continues to blur the lines between physical and digital realities, gaming has emerged as a powerful bridge between individuals, cultures, and generations. In this rapidly evolving landscape, understanding the diverse gaming attitudes, behaviors and preferences across the globe are not only fascinating, but imperative for developers, content publishers, and advertisers seeking to tap into this vibrant ecosystem.

In this report, we'll leverage data collected from a custom research study on the gaming landscape (run by GWI in Australia, Germany, South Korea, the UK, and the US), alongside GWI's existing gaming behavior research, to dig into the following areas:

- The impact of macro-environmental factors on gaming behaviors
- The fundamentals of gamers
- Finding the right content and events
- The influence of gaming communities and purchase drivers
- Which ads stand out?
- The everyday purchasing habits of gamers
- How the purchase journey of gamers begins

Macro-environmental factors have exerted influence over gamers' behaviors in recent years. Lockdowns during the pandemic saw an upsurge in gaming, as many turned to video games as a means to pass time and socialise with others during extended periods of confinement. But as the economic landscape underwent turbulent fluctuations, gamers then began to scrutinize their entertainment spend with a more discerning eye; reducing this luxury expense during a financial crisis.

Today, gaming remains a strong activity in Australia, Germany, South Korea, the UK, and the US – around 8 in 10 internet users engage with video games in some capacity. Moreover, the diversity of the industry cannot be ignored – 93% of LGBT+ community members in Australia, Germany, the UK and the US play video games (making them 16% more likely to do so than the average internet user in these markets).

In the 5 surveyed markets, the average time spent on games consoles per day is 1 hour, while for mobiles it's just over 2 hours and via PCs/Laptops/Tablets is just under 4 hours. During the week, gamers mostly play mobile, PC or console games between 5pm-10pm (most commonly between 7pm-10pm), while Mobile gamers tend to wake up and start playing from 9am during the weekends. On top of this, gamers also spend more than 1 hour on social media daily.

Players' interest in gaming extends well beyond the games themselves. We find that gamers like to interact with online gaming content and communities too, where they're exposed to ads. As such, developers, content publishers, and advertisers need to identify where and how to grab gamers' attention. This begs the two-folded question: why do gamers interact with communities in the way they do, and how can developers, publishers, and advertisers attract their attention and stand out from the crowd?

In this report, we will deep-dive into the attitudes, behaviors, and preferences of gamers to help developers, publishers, and advertisers deliver effective marketing messages. To do so, we'll explore gamers' behaviors from the pre-pandemic era to now, and examine specific gaming genre preferences across sub-groups. We'll look into the types of content gamers consume, measure their love for esports and gaming events, explore the perceived benefits of gaming communities, and discover what makes them buy. We'll also examine the type of ads that resonate most with gamers, which everyday products they engage with, and how they start their purchase journey. All of this will help us to form a holistic image of gamers around the world.

Audience definition

In a custom study from August 2023, we interviewed internet users who play games on any gaming device. Among this target, we recruited the following sample sizes in each market: n=531 in Australia, n=509 in Germany, n=508 in South Korea, n=521 in the UK, and n=547 in the US. All respondents are internet users aged 16-64. Alongside our custom dataset, we also have access to GWI's Global Syndicated dataset ('GWI Core') as well as GWI's specialized gaming dataset ('GWI Gaming'), which allows us to dig into gamers' attitudes, behaviors and preferences.

Key takeaways

While gaming communities share similarities, the diversity of audiences within them offers brands of all kinds of opportunities to activate campaigns within gaming media

Promoting on brand/product and price comparison sites, sites with consumer reviews and gaming content allows advertisers to reach their audiences, and publishers to successfully monetize their platforms. To expand their strategies, non-endemic brands, like in beauty and fashion, snacking and FMCG should seek to communicate with their audience through gaming content.

Players share gaming preferences, but different genders have diverse favorites as well

The ever-expanding world of gaming attracts consumers of all genders from diverse cultures, engaging with a variety of games and looking to expand their experiences. Promoting products through a range of game genres, like Action-adventure/Open world, Shooter, and Action/Platform, on PC/Laptop, console and mobile is an effective way to grab the attention of both males and females. Beyond that, Sports and Racing titles will likely draw more males in, while Simulation and Puzzle/Platform titles more females. Unpredictable circumstances, like the pandemic, brought families and friends closer together. A third of female gamers say they play games with their family, while male gamers prioritize friends and other gamers online, so content that caters to these preferences is more likely to resonate with audiences across the world.

The power of online gaming content

Gaming publisher sites and platforms are often the bridge between brands and gamers. Players head to video sharing sites, blogs, forums, and communities weekly. These content types help them discover new games and hidden gems, and find game reviews, new and updates, and gameplay tips. The experience of gaming within and away from games isn't an individual one, though: gamers tend to involve their wider player community in their purchase journeys. Advertisers can take advantage of the plethora of sources gamers use to discover and interact with them by planning their communications around online publishers' platforms. To expand their strategies even further, brands can promote their products in and around esports tournaments and gaming events which have seen consistent engagement among games globally in the last 3 years. What's more, live esports tournament attendance is estimated to increase in the next 4 years.

Gaming media opportunities like 'in-game,' 'around-the-game,' and 'away-from-the-game' ads are likely to be more impactful than traditional ad types

Using a variety of ads that are seamlessly integrated with games and gaming content, like 'in-game,' 'around-the-game,' and 'away-from-the-game' ads, helps grab the attention of players who are constantly exposed to different ads. These ads are more likely to be relevant and stay within the memory of gamers, whose curiosity and interests are heightened when they encounter them. Gamers are also more likely to consider the brands or products promoted in those ads, which further proves their value. Among 'around-the-game' ads, rewarded ads bring the most value to gamers, and using a variety of rewarded ad formats can bring brands and consumers closer together. A balanced approach between dynamic and static 'away-from-the-game' ads, with more focus on dynamic ads, can also increase gamers' ad engagement. Online and in-person, interactive brand experiences can be very appealing to gamers and beneficial to brands as players are looking for diverse gaming experiences.

01

The impact of macro-environmental factors on gaming behaviors

Macro-economic factors have impacted gaming engagement. 80% of internet users play games on any given device

Setting the gaming scene across different markets, time periods, and platforms

There's no doubt that we've gone through some turbulent times over the last 3 years – from the coronavirus outbreak to the current economic uncertainty, these events have impacted habits and priorities across the globe. What does this look like for gamers though? To answer this question, we looked closely into the gaming-related attitudes and behaviors among gamers before, during, and after the pandemic across our 5 surveyed markets.

Gaming is still going strong, with 80% of internet users playing games as of Q2 2023. The US stands out here, with more people currently playing games than pre-COVID-19 (83% in Q1 2023 vs 72% in 2019). Older groups have seen some impressive growth in particular – the number of US Gen X and baby boomers playing games grew 12% between 2019 and 2020, and a further 6% between 2020 and H1 2023. In fact, we see that gaming is on the rise and the industry's revenue is projected to experience a compound growth of 8% in the next 5 years (PwC, 2023).

When it comes to devices that people have been using for gaming, there are some clear winners between 2020-2023: gaming on handheld devices has grown by 12%, and gaming on a VR headset has risen by an impressive 48%. Console and mobile gaming have remained steady too. PC/Laptop gaming however, has fallen slightly between Q2 2020 and Q2 2023.

The Nintendo Switch continues to prove incredibly popular, with the number of Console gamers who use the handheld device growing 43% between Q2 2020 and Q2 2023. Overall, we see that more and more consumers are looking to broaden their gaming experiences by incorporating more devices into their gaming suite.

The pandemic had an instant impact on online gaming behaviors. Between 2019-2020, the number of gamers playing online with real-life friends grew 9% in the UK. In Australia, there was a big increase in females doing the same (+17%). This activity has been most apparent among young gamers, and it has continued long after pandemic-enforced lockdowns have eased. In fact, between 2019 and 2023, we've seen the role of gaming in people's lives evolving consistently. Gamers who play online with real-friends have increased by 8% across all surveyed markets. Today, 38% of Gen Z and 27% of millennial gamers play games online with their real-friends.

When analyzing spending data, we see that physical game purchasing has fallen by almost 30% globally since 2019. However, over that period, purchases from digital stores have gathered pace, with a 9% increase between 2019 and Q2 2023. In-game spending has increased too: between 2020 and Q2 2023, the number of gamers who purchase in-game items has grown by 21%.

When it comes to what they're playing, in Australia, Germany, the UK and the US, the fastest-growing genres between Q4 2020-Q2 2023 were online Board/Card games (+42%), Action RPGs (+41%), Action/Platform (+37%), Free-to-play Casino style games (+34%), and Puzzle/Platform games (+24%).

Looking deeper into growth at a franchise level, the fastest-growing games between the same period were *DOTA 2* (+91%), *Starcraft* (+70%), *Roblox* (+69%), *Valorant* (+64%), and *The Last of Us* (+53%). Notably, the Roblox community has grown to be so strong that the brand has announced the roll-out of Roblox Assistant, an AI chatbot that will function as a powerful medium for gamers to cultivate their creativity and allow Roblox users to create worlds through prompts (Roblox, 2023).

The way that gamers are engaging with the category has changed too. The fastest-growing activity among US gamers is downloading a game from an app-store (+20%). We also see more US gamers watching gaming streams on Twitch or YouTube, with an 18% rise since Q2 2021 – suggesting that gamers gravitate towards community-based experiences. Additionally, US gamers rely more on their offline friends for gaming info, with a +15% rise since Q2 2021.

More female representation in gaming is gathering demand from gamers – the number of UK gamers who follow a female esports player/team grew 15% between Q4 2020-Q4 2022 (+21% among females and +10% among males).

The number of UK gamers who say females should be encouraged to play games grew 21% between Q4 2020-Q4 2022 too. Overall, we see that diversity and inclusivity are becoming a pillar of the gaming community and brands, publishers, and advertisers alike should ensure that they are evolving as fast as the industry does.

02

The fundamentals of gamers

Action and Shooter games are most popular across all genders, while males prefer Sports and Racing games, and females platform and puzzle

Unveiling unique gaming passions across markets and genders

With gaming becoming such a huge pillar of the entertainment industry, there's a diverse range of preferences among sub-groups globally. Identifying the genres and franchises that resonate most in Australia, Germany, South Korea, the UK, and the US today is fundamental when considering how to capture the attention of players across the globe.

Action-adventure/Open world, Shooter and Action/Platform games carry wide appeal across markets and genders. Still, gender-related preferences are present: male gamers are more likely to lean towards Sports and Racing games, while females prefer Puzzle/Platform and Simulation. What's more, various types of casual games increased in popularity since the pandemic, indicating that players are broadening their genre choices and their passions are evolving.

This section of the study looked closely at the most popular franchises – among Console gamers, it's clear that *Call of Duty*, *The Legend of Zelda*, *GTA*, and *Super Mario* have maintained their long-standing popularity. On PC/Laptop, Battle Royale titles like *PUBG: Battlegrounds* and *Fortnite* continue to attract gamers. Players in South Korea seem to favor the former, which was developed there, while American, Australian, UK and German gamers prefer the latter. A love for the sandbox title *Minecraft* is seen across all markets, while *League of Legends* is one of the most popular games in South Korea. *Angry Birds* is one of the most popular titles across all markets on mobile phones. *Bejewelled* is a favorite in Australia, Germany, UK and the US, while *Marvel* mobile games are preferred by games in Germany.

Notably, Shooter games – a genre that was once considered male-oriented – has been consistently attracting more female gamers over the last 5 years. Interestingly, females' genre preferences don't differ as much from males'. Female Shooter players say they game because it's a 'great way to have fun' (67%), 'to relax' (59%), 'pass the time' (45%) or 'escape from reality' (39%). We notice that both genders are passionate about a variety of games, showing a great opportunity to developers, publishers, and advertisers to invest and capitalize on a range of entry-points into the growing gaming community.

That said, gender differences do exist. We see that significantly more males than females are drawn to franchises like *World of Warcraft*, *Diablo* and *The Witcher*, while females prefer games like *The Sims* and *Roblox*. In South Korea and the US, significantly more male than female gamers play *Marvel* games on mobile. Significantly more male Mobile gamers prefer sports titles like *Madden Mobile* in the US, and *FIFA Mobile* in other markets, while female gamers lean towards games such as *Diner DASH*.

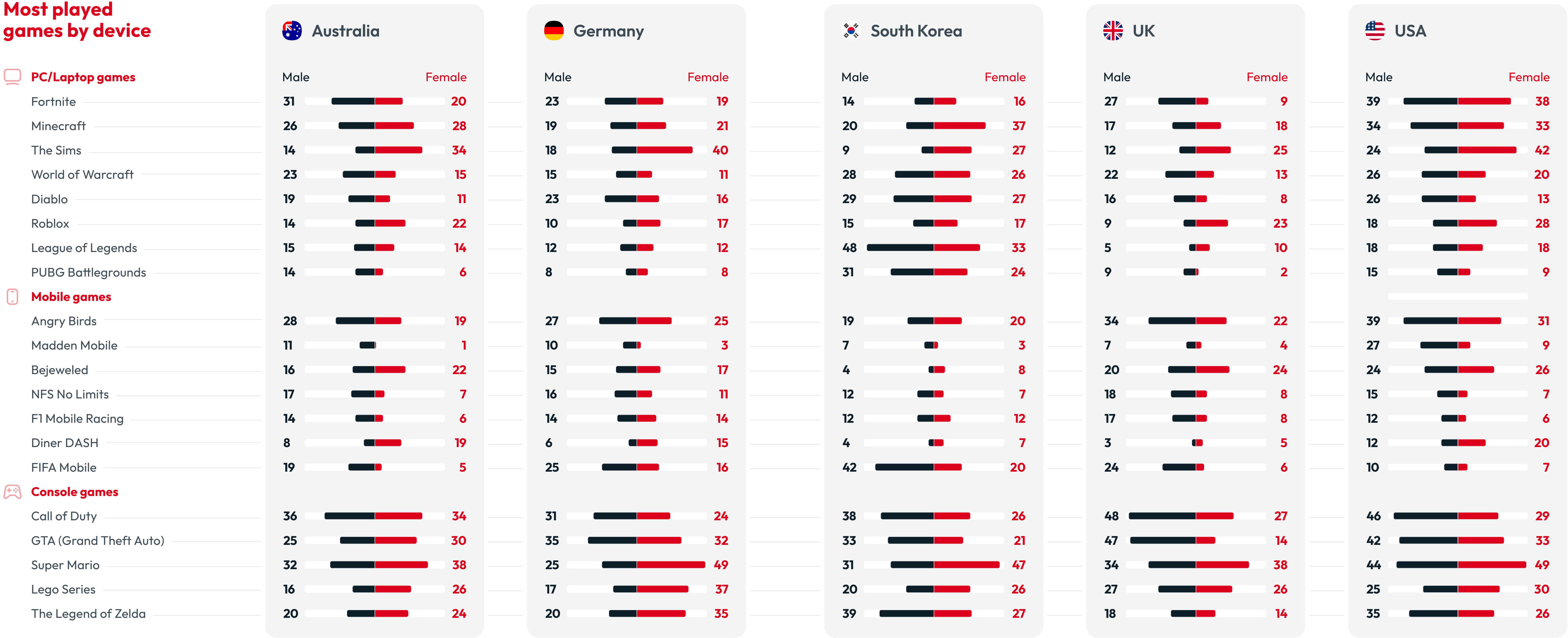
While male and female gamers share genre favorites across different devices, gender intricacies shouldn't be overlooked. Advertisers should consider the environment they place their ads and tailor their messaging to suit the profile of players, depending on the genre of the game played. For example, advertisers with a primarily female audience could maximize their opportunities to connect with their key demographic through strategic activations within puzzle and simulation games. Similarly, publishers should optimize the relevance of the ad creatives shown in their platforms to maximize user engagement and consequent ad revenue.

Most played genres

	Australia			Germany			South Korea			UK			USA		
	Mobile	PC/Laptop	Console	Mobile	PC/Laptop	Console	Mobile	PC/Laptop	Console	Mobile	PC/Laptop	Console	Mobile	PC/Laptop	Console
Action-Adventure/Open world	46	58	74	43	53	68	28	41	63	51	64	75	54	68	79
Shooter	42	55	65	37	48	60	37	53	62	45	60	68	49	61	71
Puzzle/Platform	40	38	39	38	34	42	23	20	31	41	43	39	46	49	49
Action/Platform	34	36	48	29	34	46	15	20	34	34	41	48	40	50	59
Sports	24	25	35	32	34	48	27	38	42	36	44	51	33	38	50
Simulation	31	39	40	35	43	47	26	35	47	36	48	46	32	43	44
Battle Royale	23	28	35	23	29	36	14	23	26	26	34	39	31	41	48
Racing	27	31	41	29	35	47	15	21	36	34	42	51	30	39	43
RPG	24	33	40	26	34	42	12	18	27	25	36	38	29	43	45
Party Games	27	28	34	27	26	39	8	10	17	25	29	29	29	36	40
Survival/Horror	18	25	30	18	24	31	16	23	36	22	31	34	25	35	39
Fighting	18	21	26	15	18	24	15	22	33	21	28	31	26	34	38
Strategy/Real-time strategy	23	34	31	26	35	34	31	46	53	23	36	30	25	35	34
MOBA	16	23	22	20	27	29	26	40	45	16	26	22	19	28	29
MMO	17	26	23	18	26	26	20	31	37	15	25	21	19	29	27

Base: PC/Laptop gamers (Australia: 1,143, Germany: 1,479, South Korea: 489, UK: 1,161, USA: 2,755); Smartphone gamers (Australia: 1,940, Germany: 2,488, South Korea: 887, UK: 2,438, USA: 5,556); Console gamers (Australia: 1,120, Germany: 1,344, South Korea: 195, UK: 1,567, USA: 3,184)

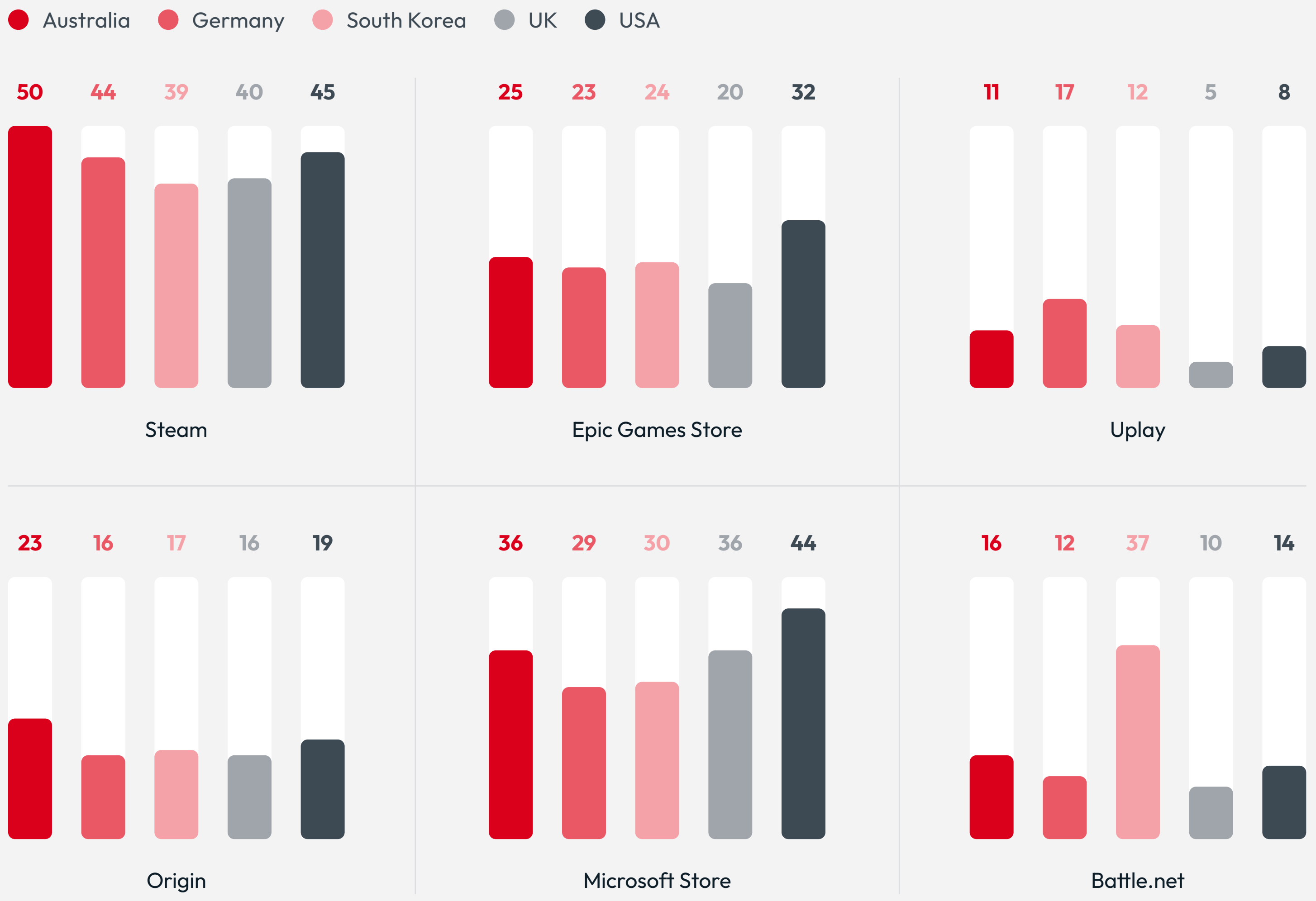
Most played games by device



	Australia		Germany		South Korea		UK		USA	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
PC/Laptop games										
Fortnite	31	20	23	19	14	16	27	9	39	38
Minecraft	26	28	19	21	20	37	17	18	34	33
The Sims	14	34	18	40	9	27	12	25	24	42
World of Warcraft	23	15	15	11	28	26	22	13	26	20
Diablo	19	11	23	16	29	27	16	8	26	13
Roblox	14	22	10	17	15	17	9	23	18	28
League of Legends	15	14	12	12	48	33	5	10	18	18
PUBG Battlegrounds	14	6	8	8	31	24	9	2	15	9
Mobile games										
Angry Birds	28	19	27	25	19	20	34	22	39	31
Madden Mobile	11	1	10	3	7	3	7	4	27	9
Bejeweled	16	22	15	17	4	8	20	24	24	26
NFS No Limits	17	7	16	11	12	7	18	8	15	7
F1 Mobile Racing	14	6	14	14	12	12	17	8	12	6
Diner DASH	8	19	6	15	4	7	3	5	12	20
FIFA Mobile	19	5	25	16	42	20	24	6	10	7
Console games										
Call of Duty	36	34	31	24	38	26	48	27	46	29
GTA (Grand Theft Auto)	25	30	35	32	33	21	47	14	42	33
Super Mario	32	38	25	49	31	47	34	38	44	49
Lego Series	16	26	17	37	20	26	27	26	25	30
The Legend of Zelda	20	24	20	35	39	27	18	14	35	26

Base: PC/Laptop gamers (Australia: 294, Germany: 292, South Korea: 323, UK: 197, USA: 271); Smartphone gamers (Australia: 359, Germany: 341, South Korea: 458, UK: 317, USA: 446); Console gamers (Australia: 247, Germany: 212, South Korea: 127, UK: 232, USA: 268)

PC/Laptop platforms played most on



Base: PC/Laptop gamers (Australia: 294, Germany: 292, South Korea: 323, UK: 197, USA: 271)

Focusing on platform affinities and crafting genre-specific content to connect with gamers

PC/Laptop gaming boasts widespread appeal. Hardcore gamers value its unmatched versatility, allowing them to customize gameplay experiences and hardware specs as their needs change. Beyond this enthusiast circle, the multi-functionality of owning a PC or laptop means that virtually anyone can enjoy gaming without the necessity of purchasing a dedicated console.

At least half of all gamers in Australia, Germany, South Korea and the US play games via a PC/Laptop, with 3 in 10 doing the same in the UK. As such, deciphering the services and genres that PC/Laptop gamers choose can be very valuable in understanding which priorities should be set when marketing to PC/Laptop gamers.

In all markets, ***Steam*** **is one of the most popular platforms for PC/Laptop gamers – 8 in 10 engage multiple times a week**. The *Microsoft Store* is also popular among PC/Laptop gamers in Australia, Germany, the UK and the US: it's popular among female PC/Laptop gamers in South Korea too.

For males in South Korea, *Battle.net* is a very common storefront. What's more, as digital store purchases are on the rise, advertisers and publishers have a fantastic opportunity for strategic collaborations with various platforms to increase ad reach.

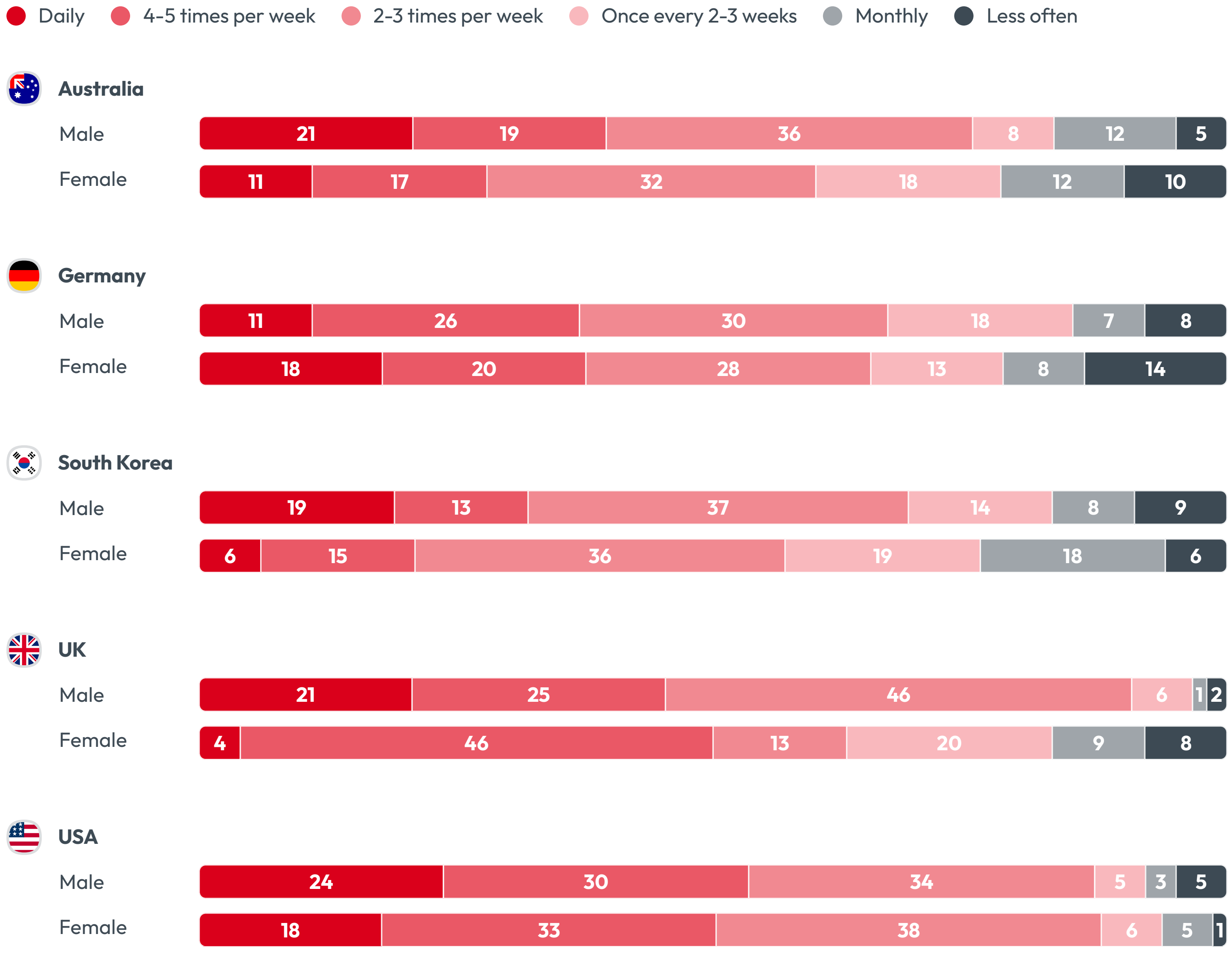
When looking at the most preferred gaming genres on *Steam*, we notice that both genders lean towards action, adventure, and strategy games. Male *Steam* gamers show a stronger preference for shooter and RPG games, while females enjoy simulation games.

Overall, *Steam* gamers engage with the platform at least 2–3 times a week – indicating it's a great medium to reach PC/Laptop gamers with seamlessly integrated ads in and around their favored games.

Advertisers can leverage gender-related genre preferences by designing campaigns that are most likely to effectively resonate with male and female players respectively – maximizing relevance and interest where possible.

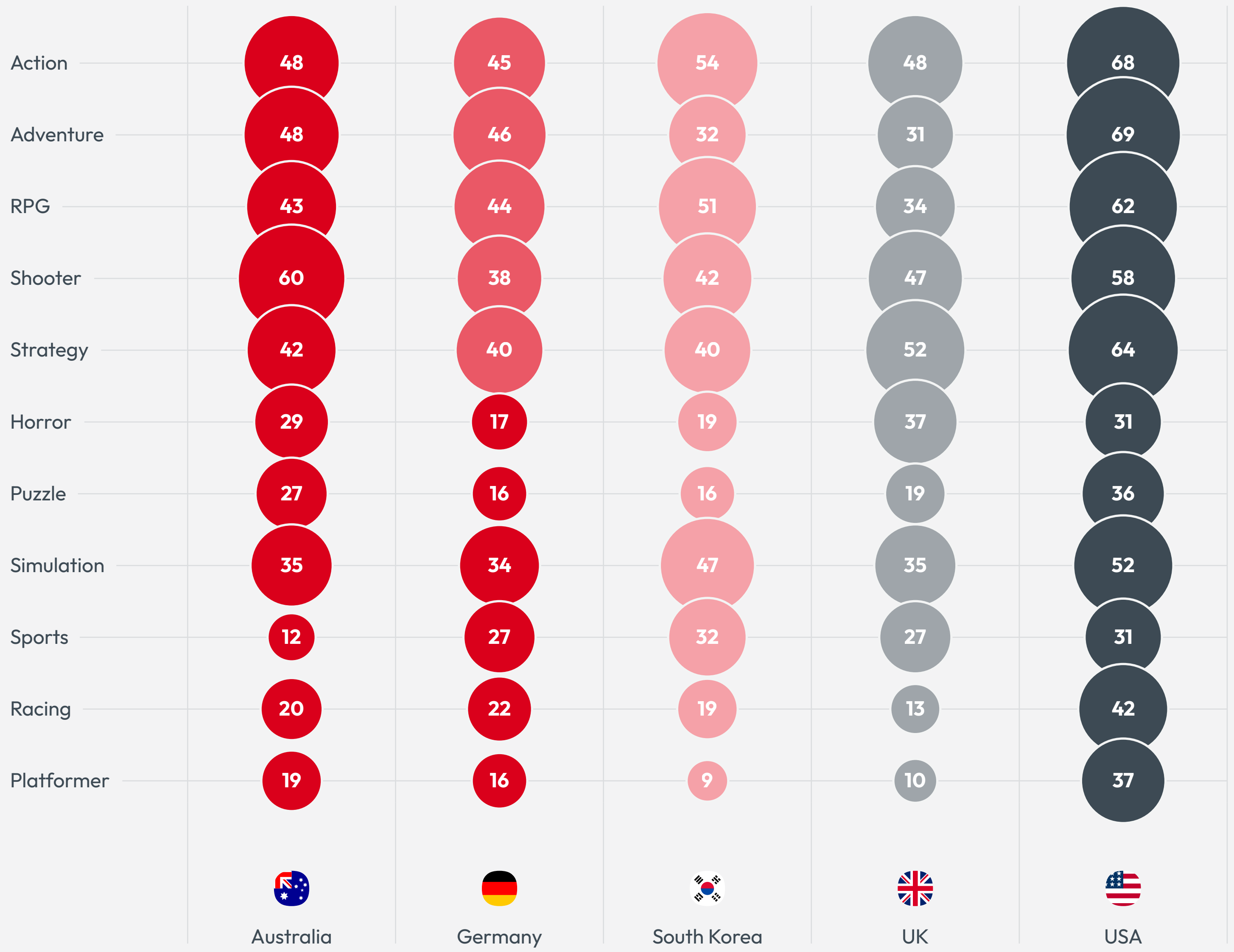
At least half of all gamers in Australia, Germany, South Korea and the US are gaming via PC/Laptop

Steam frequency of use



Base: Steam frequency of use (Australia: 129, Germany: 106, South Korea: 114, UK: 66, USA: 97)

Steam top genres



Base: Steam top 3 genres (Australia: 129, Germany: 106, South Korea: 114, UK: 66, USA: 97)

Globally, gaming forges connections, with nuanced gender differences shaping companionship dynamics

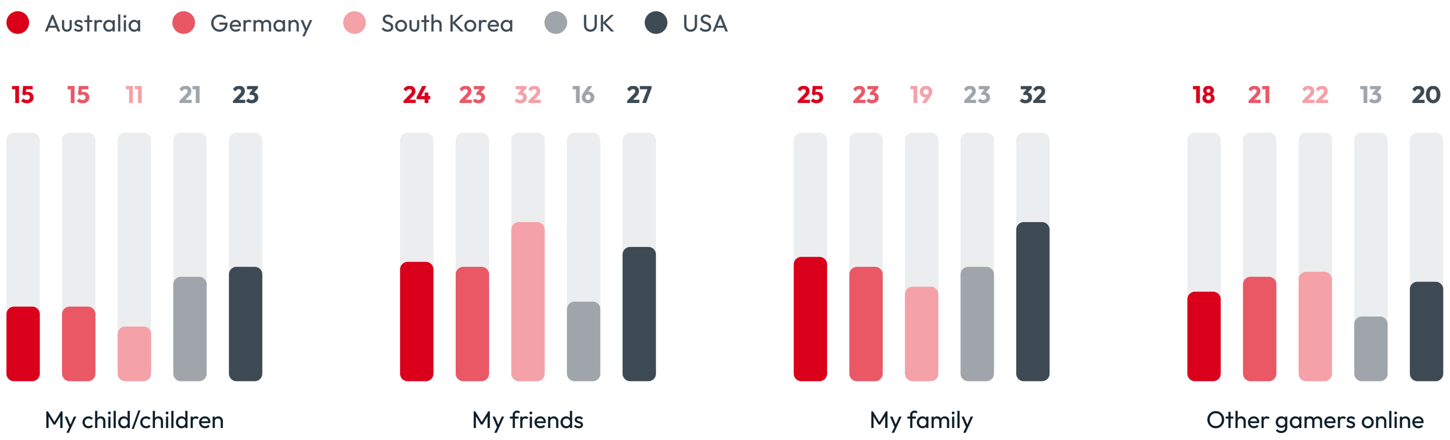
Fostering bonds with family and friends through gaming

The world of gaming extends far beyond individual experiences, often acting as a bridge to form connections and shared moments. We can see the significance of family time among gamers who are parents. **They play to unwind, but also spend time with family, and an average of 1-1.5 hours is spent playing games with children.** This showcases how passions like gaming can bring families closer through quality time.

While family is the most preferred gaming companion for females across all the surveyed markets (32%), males show a different story. In South Korea, they gravitate towards friends (41%) and other online gamers (29%). In Australia, the UK and the US, males put friends before family as gaming companions. German gamers prefer playing games with other gamers online (25%).

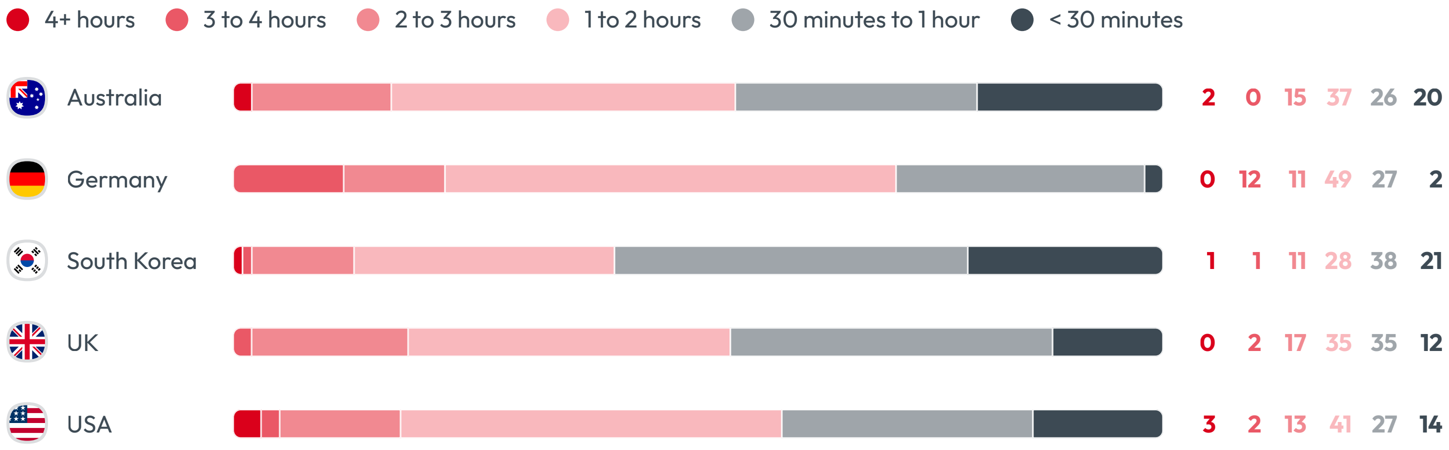
The balanced approach between friends, family, and other online gamers should not be ignored, especially for males. Advertisers should implement more family-focused strategies to reach female gamers. Developers should acknowledge that family-oriented marketing material for female gamers might serve them well, but content centred around friends and other online gamers may be more relevant among male gamers.

Gaming companion



Base: Gaming companion (Australia: 531, Germany: 509, South Korea: 508, UK: 521, USA: 547)

Time spent playing with children



Base: Time spent playing games with children (Australia: 86, Germany: 66, South Korea: 69, UK: 88, USA: 119)

03

Finding the right content and events

Gamers are looking to squeeze as much out of their experience as possible, by consuming a range of related content

Extending the world of gaming beyond the game itself

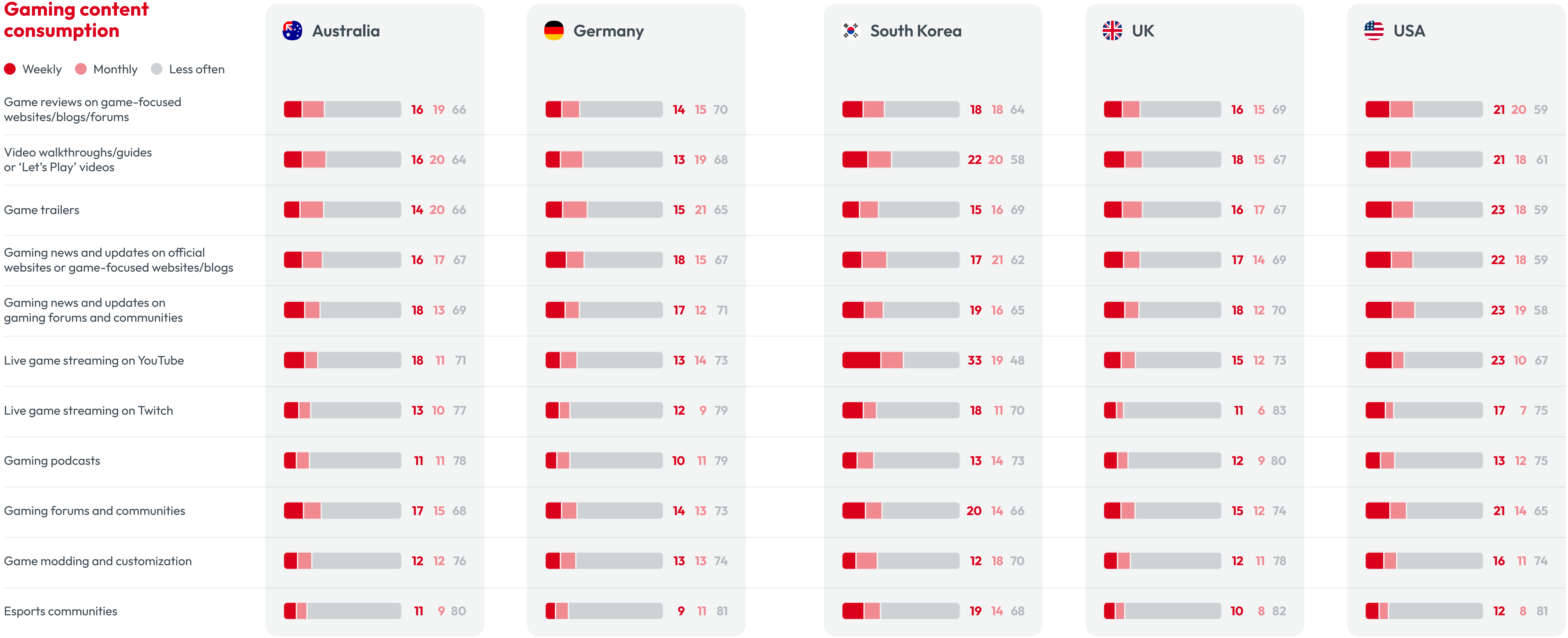
Consumers often look to expand their entertainment experiences, and gaming is no different. While players spend a considerable chunk of their week playing games, engagement extends far beyond the games themselves – and it's only expected to increase.

We see that **42% of gamers engage with a some form of additional content on a weekly basis.** But what content are they consuming? There's a large appetite for game reviews and news/updates on game-focused sites (inc. blogs, forums and communities). Trailers, video walk-throughs/guides, and live streams on YouTube are popular too. The diversity of content consumed suggests that savvy advertisers should activate their campaigns across a mix of gaming media channels. Impactful placements in community sites or 'away-from-the-game' placements are valuable tools to reach gaming audiences.

While gaming content engagement is highest among males (52%), a notable proportion of female gamers consume content weekly as well (32%) – further emphasizing the potential to reach this demographic through gaming-related content. As you may expect , Console gamers who have gone out of their way to buy dedicated gaming hardware, have a very strong appetite for consuming this type of content: around 6 in 10 engage. The US boasts the strongest appetite for gaming content across both genders, while in Australia, South Korea and the UK, it's the male gamers who consume this content more frequently.

As players interact with various types of gaming content multiple times a week to stay close to the industry, advertisers can leverage this passion for gaming by creating multi-channel campaigns on video sites, forums and community platforms, and game-focused sites to increase their reach. Publishers should utilize the popularity of their websites and platforms and monetize sections of their sites that are most preferred among games. Advertisers should showcase the value of well integrated and targeted ads on different sites and platforms. In general, advertisers can expect a more abundant male audience across gaming sites and content in Australia, South Korea and the UK, while a more balanced gender split can be assumed across gaming content sites in Germany and the US.

Gaming content consumption



● Weekly ● Monthly ● Less often

	Australia			Germany			South Korea			UK			USA		
Game reviews on game-focused websites/blogs/forums	16	19	66	14	15	70	18	18	64	16	15	69	21	20	59
Video walkthroughs/guides or 'Let's Play' videos	16	20	64	13	19	68	22	20	58	18	15	67	21	18	61
Game trailers	14	20	66	15	21	65	15	16	69	16	17	67	23	18	59
Gaming news and updates on official websites or game-focused websites/blogs	16	17	67	18	15	67	17	21	62	17	14	69	22	18	59
Gaming news and updates on gaming forums and communities	18	13	69	17	12	71	19	16	65	18	12	70	23	19	58
Live game streaming on YouTube	18	11	71	13	14	73	33	19	48	15	12	73	23	10	67
Live game streaming on Twitch	13	10	77	12	9	79	18	11	70	11	6	83	17	7	75
Gaming podcasts	11	11	78	10	11	79	13	14	73	12	9	80	13	12	75
Gaming forums and communities	17	15	68	14	13	73	20	14	66	15	12	74	21	14	65
Game modding and customization	12	12	76	13	13	74	12	18	70	12	11	78	16	11	74
Esports communities	11	9	80	9	11	81	19	14	68	10	8	82	12	8	81

Base: All respondents: 2,616 (Australia: 531, Germany: 509, South Korea: 508, UK: 521, USA: 547)

Gaming communities remain steadfast in the face of the public health and economic turbulence of the last two years

Decoding esports enthusiasm and gaming event allure across multi-market gaming landscapes

Another way that players are engaging with the industry is by attending or watching esports tournaments and gaming events online. In our 5 surveyed markets, we see strong engagement levels with esports tournaments, **particularly those related to *Dota 2*, *League of Legends*, *Rocket League* and *Call of Duty* – this is true across both genders.**

Esports engagement has been very strong (and stable) since the pandemic, with only a 7% change in engagement across 2021-2023. In fact, as live event attendance becomes more and more popular, esports tournaments are expected to see a +14% compound growth in attendance in the next 5 years (PwC, 2023), which further highlights the reliability and opportunities esports tournaments offer. Players are eager to connect with the growing gaming community, and are passionate to dive deeper into the communities related to their favorite games.

South Korea shows the highest involvement with esports – a third of males engaged with *League of Legends World Championship 2022*, a 33% increase from 2021. *Call of Duty League* and *PUBG Mobile Global Championship* were also popular among gamers in South Korea, while the latter displayed high engagement in Australia as well.

It's clear that gamers are passionate about the industry, with gamers engaging with the category in a variety of ways (like esports tournaments and gaming events). Moreover, this passion remains stable year-on-year, which offers the opportunity for developers, publishers, and advertisers to confidently market their products and services around these events (in both the online and in-person environments). Furthermore, the diversity in gaming is apparent in these events as well, where both genders are keen to get involved. With that said, a greater focus should be given on male gamers when marketing in South Korea – where a gender-skew is more apparent.

Gaming events engagement

Base: All respondents: 2,616 (Australia: 531, Germany: 509, South Korea: 508, UK: 521, USA: 547)

04

The influence of gaming communities and purchase drivers

Discovery fuels gaming communities. A third of gamers engage with communities to discover new gaming experiences

Illuminating the nuanced priorities of gaming communities

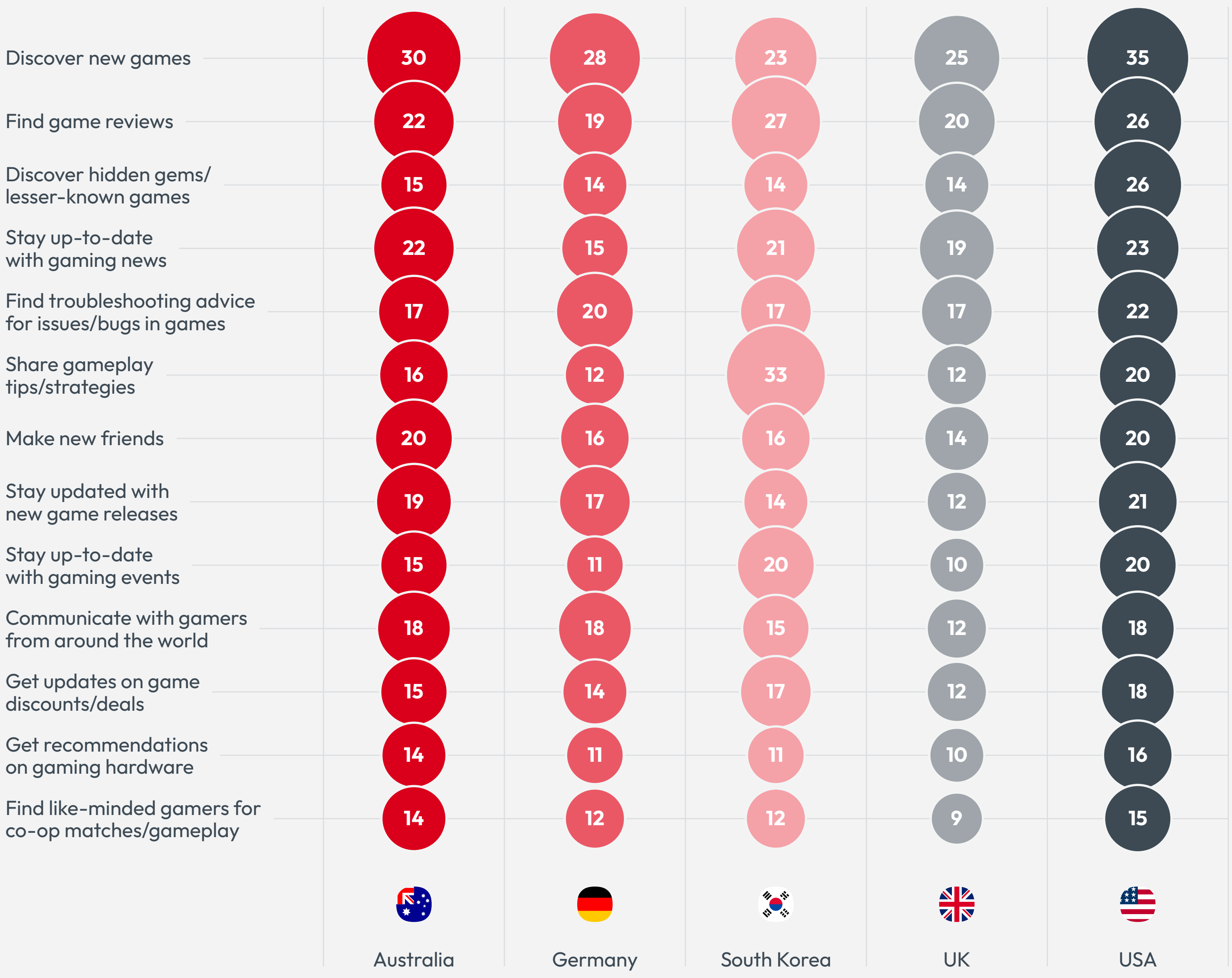
Consumers have always been drawn to activities that make them feel a part of a supportive and valuable community – and gamers are no different. Players around the world have built communities to come closer through their passion. **When looking at the benefits of gaming communities, the desire to 'discover new games' emerges as a top reason. This is closely followed by discovering 'gameplay tips/strategies', 'game reviews', and 'hidden gems'.**

In the US, significantly more male gamers also prioritize 'staying current with the gaming world' and 'connecting with other gamers'. Additionally, in Australia and the UK, significantly more males think that 'staying up-to-date with gaming news' is a valuable element of gaming communities. In Australia and the US, both genders like 'making new friends' through communities as well.

South Korea's distinctive landscape stands out once more – 4 in 10 male gamers here consider 'getting and sharing gameplay tips/strategies' as the most beneficial aspects of gaming communities.

We can see a close relationship between the benefits players find in gaming communities and the gaming content they consume, with 'game discovery', 'tips/strategies', 'game reviews' and 'news' being most gamers' priority. Gamers are part of a strong collective that lets them tap into their passions and expand their gaming experiences. As such, developers should roll out engaging marketing content that taps into what gamers are looking for in their online communities – forging meaningful connections between gamers and brands. Publishers should monetize relevant content sections while considering gamers' preferences. Advertisers can roll out ads on a variety of platforms, including video and publishers' sites, gaming blogs and forums to consistently reach a large base of gamers.

Community engagement benefits



	Australia	Germany	South Korea	UK	USA
Discover new games	30	28	23	25	35
Find game reviews	22	19	27	20	26
Discover hidden gems/ lesser-known games	15	14	14	14	26
Stay up-to-date with gaming news	22	15	21	19	23
Find troubleshooting advice for issues/bugs in games	17	20	17	17	22
Share gameplay tips/strategies	16	12	33	12	20
Make new friends	20	16	16	14	20
Stay updated with new game releases	19	17	14	12	21
Stay up-to-date with gaming events	15	11	20	10	20
Communicate with gamers from around the world	18	18	15	12	18
Get updates on game discounts/deals	15	14	17	12	18
Get recommendations on gaming hardware	14	11	11	10	16
Find like-minded gamers for co-op matches/gameplay	14	12	12	9	15

Base: All respondents: 2,616 (Australia: 531, Germany: 509, South Korea: 508, UK: 521, USA: 547)

Deciphering gamers' purchase decision patterns

What actually influences gamers when they're looking to buy a new game? **When looking at this decision-making process, we see that game reviews have a huge influence. Recommendations by friends or family and price also come up as important contributing factors across all markets.**

Game trailers are another important purchase driver among American, Australian, British and German gamers, while gameplay videos are prominent among males in South Korea and the US. In Germany, value-for-money is important, and players are driven to buy games with extended gameplay hours, which offers a great opportunity for ad placements within the gameplay and around a game's interface. Moreover, male gamers in Germany stand out for valuing premium products, so offering exclusive in-game content (including premium content) could be valuable.

In the US, 1 in 5 male PC/Laptop players find game ads influential, while in South Korea, it's Console gamers who are influenced by game ads. As such, larger ad investments in those markets for males, Console and PC/Laptop gamers can help brands achieve greater campaign results. South Korean Console and PC/Laptop gamers also tend to follow influencers and gaming experts on social media, which opens avenues for strategic influencer partnerships in this market.

Overall, at least half of all gamers are loyal to the brands they like, and they're likely to research a product online before buying it. Importantly, the interconnection between the gaming content communities, and purchase drivers is further emphasized. Reviews are a common thread between them, while game trailers and recommendations by friends are very important as well. Readily available and reliable content by publishers is essential, while fostering loyalty through tailored brand campaigns will maximize relevance for their audience. The importance of price shouldn't be overlooked, with game discounts, value-for-money, and premium content being on the radar of gamers.

Game reviews and the genre of the game itself play a vital role in purchasing decisions

Purchase drivers

	Australia	Germany	South Korea	UK	USA
The game genre	30	36	30	25	35
Recommendations by friends or family	24	20	18	22	32
Recommendations by other online gamers	11	10	10	13	12
Recommendations by the gaming community	12	7	11	11	13
Recommendations by gaming influencers	9	7	8	5	10
Game reviews	28	21	27	24	33
Game trailers	21	21	10	19	28
Game advertisements	9	9	12	13	14
Gameplay videos	15	14	24	14	21
The price of the game	35	33	21	32	38
The game is discounted	18	17	17	18	18
The game provides extended gameplay hours	9	25	7	10	9
The game has online multiplayer features	11	7	8	7	11
I can play the game on my smartphone	14	12	25	14	25
I can play the game on a PC/Laptop	20	21	19	15	16
I can play the game on a console	20	19	8	18	19
The game is offered for free	14	15	25	11	19

Base: All respondents: 2,616 (Australia: 531, Germany: 509, South Korea: 508, UK: 521, USA: 547)

05

Which ads stand out?

‘In-game’, ‘around-the-game’ and ‘away-from-the-game’ ads prove to stay in gamers’ memory the most

Finding the ‘right’ ads

Online ads have a huge presence in the digital lives of gamers. Across the 5 surveyed markets, we see that gamers spend an average of 3:28 hours online via their PC/Laptop/Tablet, as well as an additional 3 hours online via mobile. This substantial online presence underscores the potential for brands to reach this diverse consumer group through the avenue of online ad space. Moreover, advertising revenue in the gaming industry is expected to nearly double by 2027 (PwC, 2023).

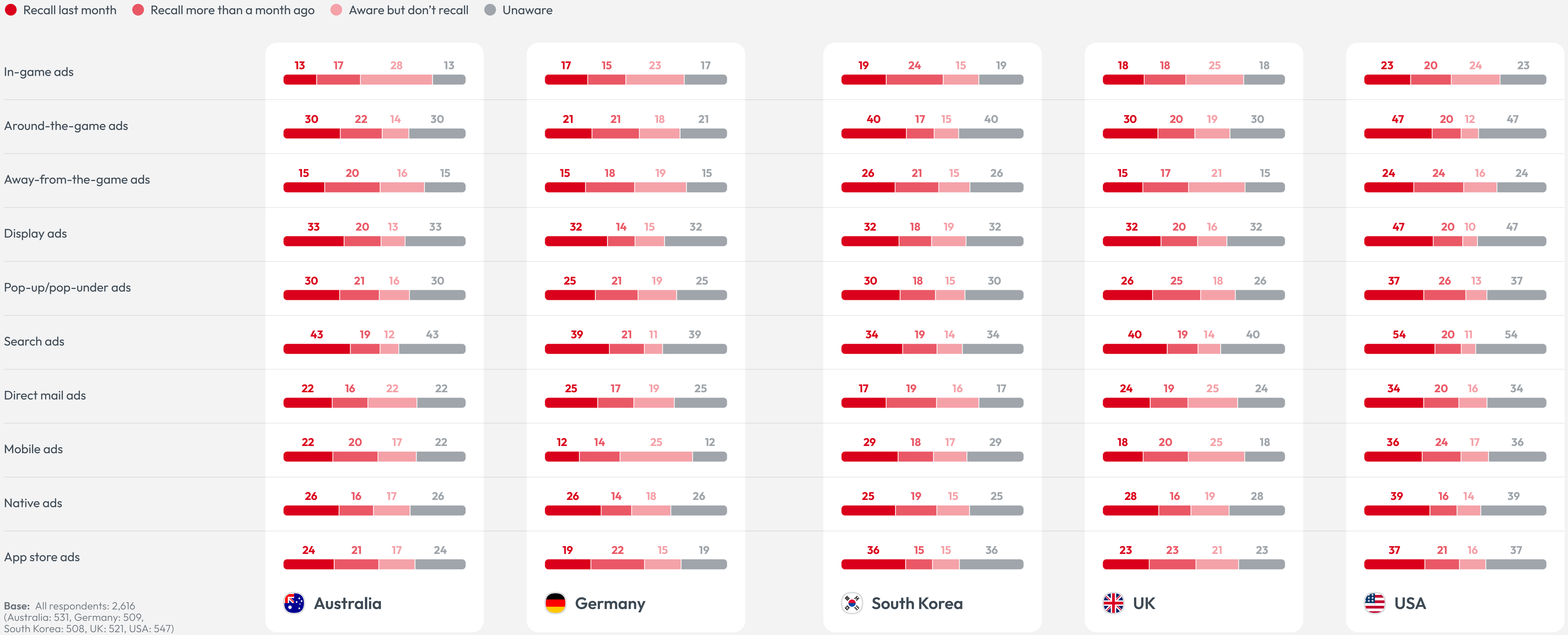
Which ads stand out though? **Globally, 40% of gamers were exposed to an ‘in-game’ ad before, 59% saw an ‘around-the-game’ ad (a remarkable 40% claim to have seen one in July 2023 alone), and 43% say they’ve seen an ‘away-from-the-game’ ad.**

Across all markets, the highest recall figures recorded are in the US, especially for ‘search’, ‘around-the-game’, and ‘display ads’. In South Korea, almost half of all gamers recalled ‘around-the-game’, ‘in-game’, ‘away-from-the-game’, ’search’, ’display’, and ‘pop-up/pop-under ads’. Notably, almost two thirds of Console gamers in South Korea and the US claimed exposure to an ‘around-the-game’ ad last month, making these markets stand out from the rest.

In Australia and the UK, half of all gamers recalled seeing ‘around-the-game’, ’display’, ‘pop-up/pop-under’ and ‘search’ ads. ‘In-game’ and ‘away-from-the-game’ ads don’t fall far off, with at least 3 in 10 having been exposed to them. German gamers show similar rates to Australia and the UK, with slightly fewer gamers recalling ‘around-the-game’ ads.

As ‘around-the-game’, ‘in-game’ and ‘away-from-the-game ads’ saw some of the highest exposure among all markets and audiences. Advertisers should take advantage of these ad offerings to maximize campaign exposure. A greater focus should be given to ‘around-the-game’ and ‘in-game’ ads which gamers recall the most.

Ad type awareness and recall



Base: All respondents: 2,616
(Australia: 531, Germany: 509,
South Korea: 508, UK: 521, USA: 547)

What follow-up actions are taken when gamers see an ad?

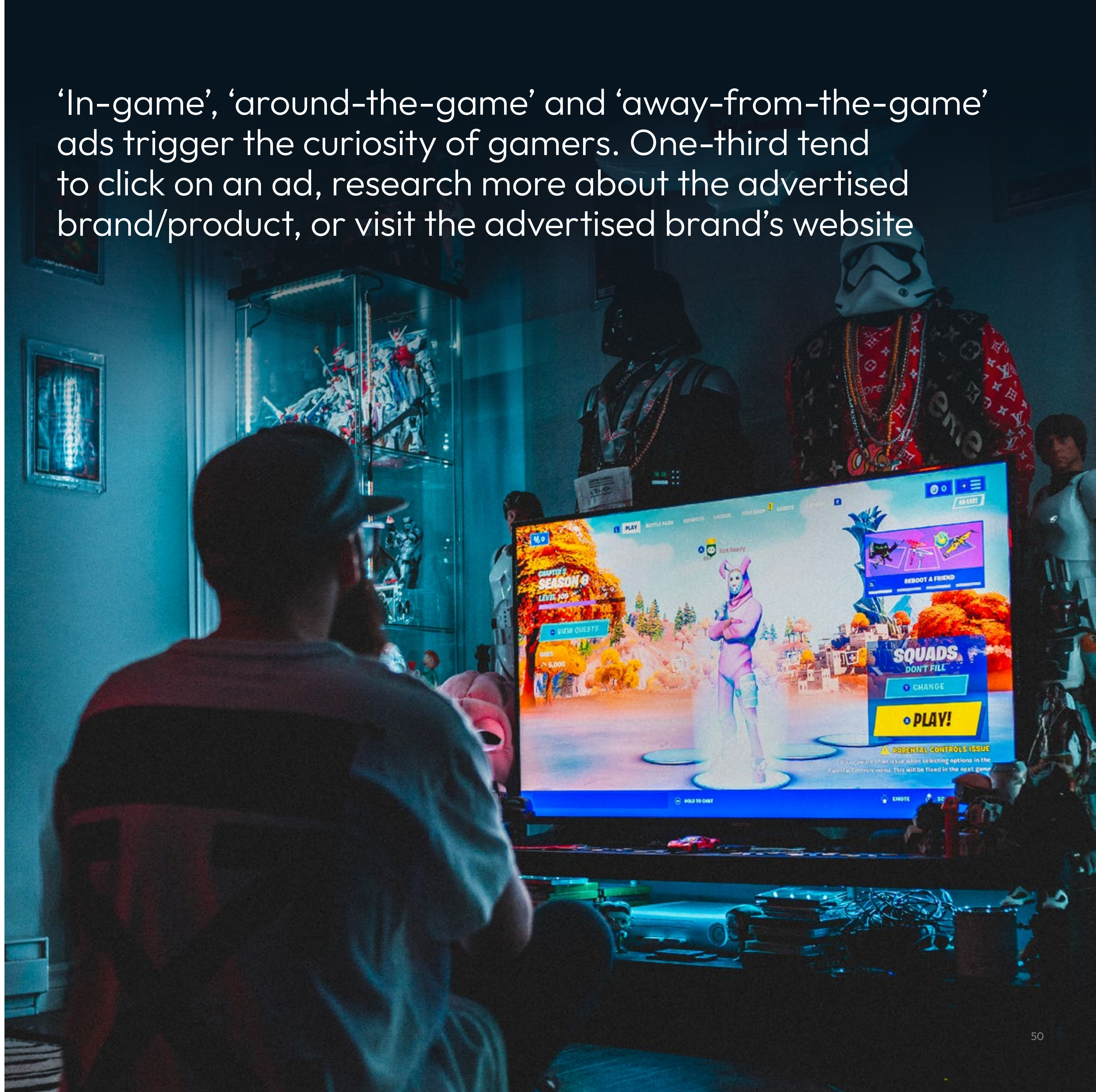
Being able to recall seeing an ad shows that it can grab the consumer's attention, but it doesn't guarantee any follow-up action. If we want to understand gamers' behaviors when encountering an ad, it's important to learn what they do following exposure. **Looking at our 5 markets, the main action gamers take when they see an 'in-game', 'around-the-game' and 'away-from-the-game' ad is clicking-through, researching more about the brand/product, and visiting the brand's website.**

In the US, we see that males are significantly more likely than females to research more about the brand/product they've seen in an 'in-game' ad, while in the UK, 'around-the-game' ads are more likely to prompt this action. In Germany 'around-the-game' and 'away-from-the-game' ads most commonly drive this action.

In South Korea, males are more likely to interact with gaming ads than females. This is most true when it comes to 'around-the-game' and 'away-from-the-game' ads. Upon encountering these ad types, males are more likely to research the brand/product they've seen and visit the advertised brand's website. Australia is the only market where females are more likely to take action after ad exposure – especially in clicking on an 'around-the-game' ad they've seen.

When comparing 'in-game', 'around-the-game' and 'away-from-the-game ads' to the other more traditional ad types measured in the survey, only 'display', 'pop-up/pop-under' and 'search ads' show similar interaction rates. However, considering the abundance of these types of ads on the internet, it's likely that well-integrated 'in-game', 'around-the-game' and 'away-from-the-game' ads will resonate best with gamers. Advertisers should promote these ad offerings, while developers and publishers should consider utilizing these ad types to prompt follow-up action.

'In-game', 'around-the-game' and 'away-from-the-game' ads trigger the curiosity of gamers. One-third tend to click on an ad, research more about the advertised brand/product, or visit the advertised brand's website



Actions taken after seeing an ad type

Base: Recall a relevant ad type last month or more than a month ago (Australia: 424, Germany: 395, South Korea: 403, UK: 411, USA: 494)

The ads that stick to and influence gamers

When we look at which ad types resonate most with gamers, we see that almost half find 'around-the-game' ads to be memorable; 36% say the same for 'in-game' ads, while 26% express this for 'away-from-the-game' ads. When comparing these ad types to those boasting high exposure rates among gamers (like 'display', 'pop-up/pop-under' and 'search' ads), the more traditional ad types were seen to be less memorable.

Gamers are also more likely to consider the advertised brand or product if it has been seen in an 'in-game', 'around-the-game', or an 'away-from-the-game' ad. More gamers are likely to do so when seeing these ad types than 'display', 'pop-up/pop-under' and 'search' ads.

In Australia and the US, the memorability of 'in-game', 'around-the-game', and 'away-from-the-game ads' is similar to the levels seen globally. US gamers are more likely to consider the advertised brands or products seen in 'around-the-game' ads (42%). Notably, female German gamers are far more likely than their male counterparts to find 'around-the-game' ads memorable (44%).

While 'away-from-the-game' ads display lower resonance than 'in-game' and 'around-the-game' ads across most markets, Australia and the UK stand out over other markets. Almost 4 in 10 female gamers in the UK find 'away-from-the-game' ads memorable and tend to consider the advertised brands or products. On the other hand, 31% of male gamers in Australia consider the advertised brands or products in 'away-from-the-game' ads.

'In-game', 'around-the-game', and 'away-from-the-game' ads can clearly be successful among the diverse audience of gamers. This gives advertisers the opportunity to showcase the value developers and publishers can get when including these ad types in their platforms.

'Around-the-game', 'in-game' and 'away-from-the-game' ads are the most memorable among gamers who are more likely to consider the brand or product seen in them

Ad memorability

Base: Recall a relevant ad type last month or more than a month ago (Australia: 424, Germany: 395, South Korea: 403, UK: 411, USA: 494)

Ad consideration

Base: Recall a relevant ad type last month or more than a month ago (Australia: 424, Germany: 395, South Korea: 403, UK: 411, USA: 494)

Which ads are relevant and enhance the gaming experience?

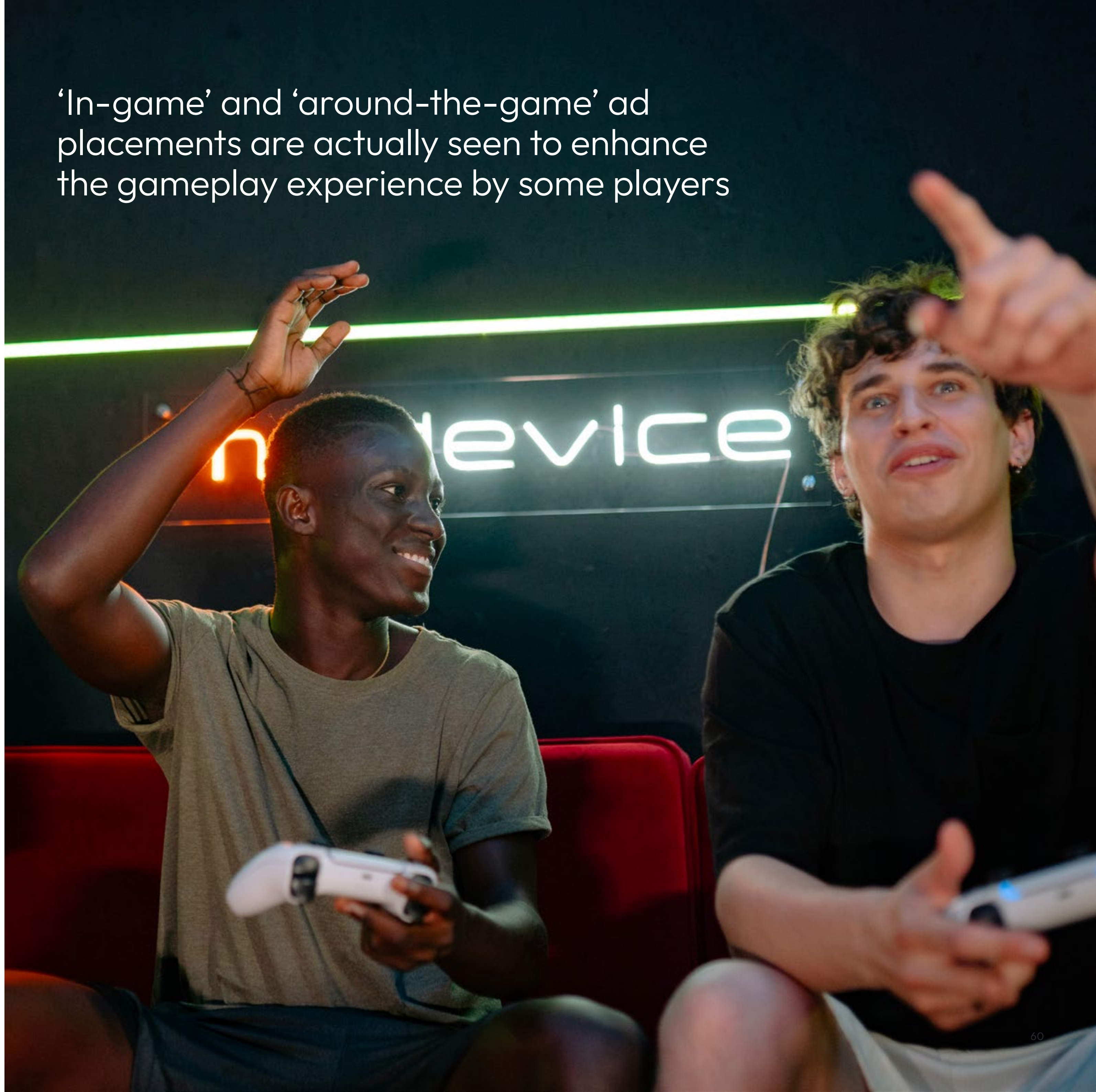
While gamers can recall products and brands seen across various ad types, it's important to understand how relevant these ads are, and to be mindful of how disruptive they might be to the gaming experience.

More than a third of gamers across our surveyed markets find 'in-game' and 'around-the-game' ads to be relevant, and a similar number say the same about 'away-from-the-game' ads (29%). Clearly, these specialized ad types are not only a great way to reach gamers, but they allow brands to do so in a highly relevant and engaging manner. 'In-game' and 'around-the-game ads' seamlessly integrate with the gaming environment, creating a natural and immersive experience for players. These ad types, when executed thoughtfully, become an integral part of the gaming ecosystem, enhancing rather than disrupting the overall enjoyment of the game.

Gender discrepancies can be seen here though, and this time it's in regard to their perception of game ads. In the US, half of female gamers find 'around-the-game' ads to be relevant to them, which is significantly more than males. On the other hand, the Australian and South Korean gaming landscape reveals that significantly more males consider 'away-from-the-game' ads to be relevant. In South Korea, this is further accentuated, with significantly more males considering that 'around-the-game' ads are relevant to them, and that 'in-game' ads enhance the gaming experience.

It's clear that 'in-game', 'around-the-game' and 'away-from-the-game' ads, which blend into the gaming environment and experience, can bring value to advertisers, developers, and publishers. Such parties should focus their advertising investments on these ad types to remain relevant and even enhance the gaming experience of players.

'In-game' and 'around-the-game' ad placements are actually seen to enhance the gameplay experience by some players



Ad relevance

Base: Recall a relevant ad type last month or more than a month ago (Australia: 424, Germany: 395, South Korea: 403, UK: 411, USA: 494)

Ad impact to the gaming experience

	Australia			Germany			South Korea			UK			USA		
In-game ads	39	33	28	36	37	28	33	36	32	27	38	36	32	29	39
Around-the-game ads	47	29	24	41	35	23	48	30	22	27	38	36	37	31	32
Away-from-the-game ads	41	35	23	42	36	22	42	37	22	27	38	36	36	43	22
Display ads	45	38	17	40	38	23	40	40	20	36	42	22	33	43	24
Pop-up/pop-under ads	53	29	18	48	33	19	45	33	22	53	26	21	54	24	22
Search ads	31	43	26	24	52	24	35	44	21	29	47	24	30	44	26
Direct mail ads	32	42	27	33	40	27	37	40	23	24	43	34	32	41	27
Mobile ads	42	36	22	34	32	35	41	37	22	34	41	25	37	42	21
Native ads	41	43	17	32	42	26	31	42	26	29	47	25	36	47	18
App store ads	33	43	24	28	41	31	31	41	29	24	52	25	27	45	29

Base: Recall a relevant ad type last month or more than a month ago (Australia: 424, Germany: 395, South Korea: 403, UK: 411, USA: 494)

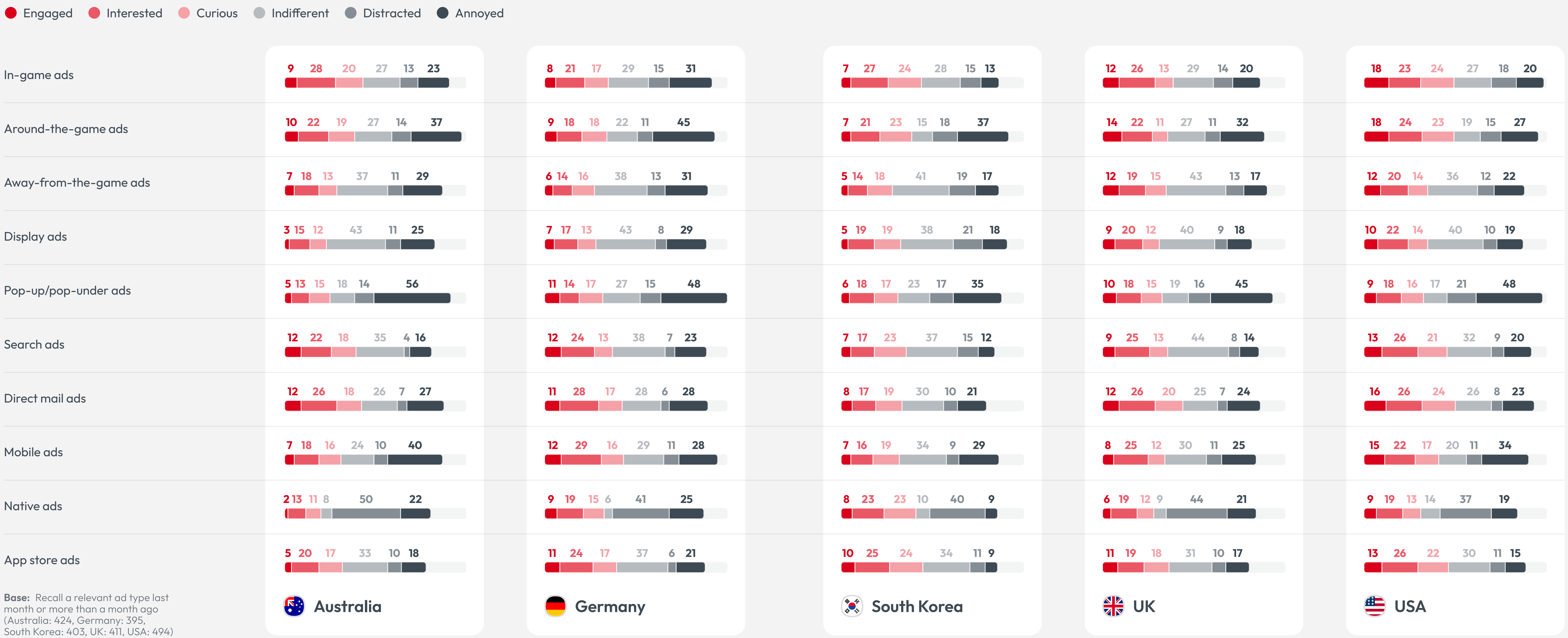
‘In-game’ and ‘around-the-game’ ads trigger the curiosity and interest of gamers the most

Uncovering gamers’ emotions when seeing ads

What do gamers feel when they see different ad types? Which ads evoke more positive emotions? These are common questions that are crucial for companies considering which ad types to go for. **Across our 5 surveyed markets, gamers reported that after seeing an ’in-game’ or ‘around-the-game’ ad, they felt curious about the brand and products that were featured. Compared to other ad types, ‘in-game’ ads were also seen as significantly less annoying for gamers.** These findings illustrate the importance for publishers to offer premium ad inventory opportunities. Optimizing gaming platforms for ‘in-game’ and ‘around-the-game’ formats will allow for greater monetization opportunities while maintaining a positive experience for the user. For advertisers, these aforementioned format types are premium opportunities to spark interest among the target audience – planting a seed of curiosity before following-up with ad placements that drive purchase behavior or action with ‘away-from-the-game’ ads in highly contextual environments.

Looking at these markets more closely, we see that gamers in South Korea and the US are the mostly likely to feel interested in and curious about the brand or product they see in an ‘around-the-game’ ad. They’re also more likely to feel curious about the content of ‘in-game’ ads, so allocating more advertising budget in those markets may boost campaign results.

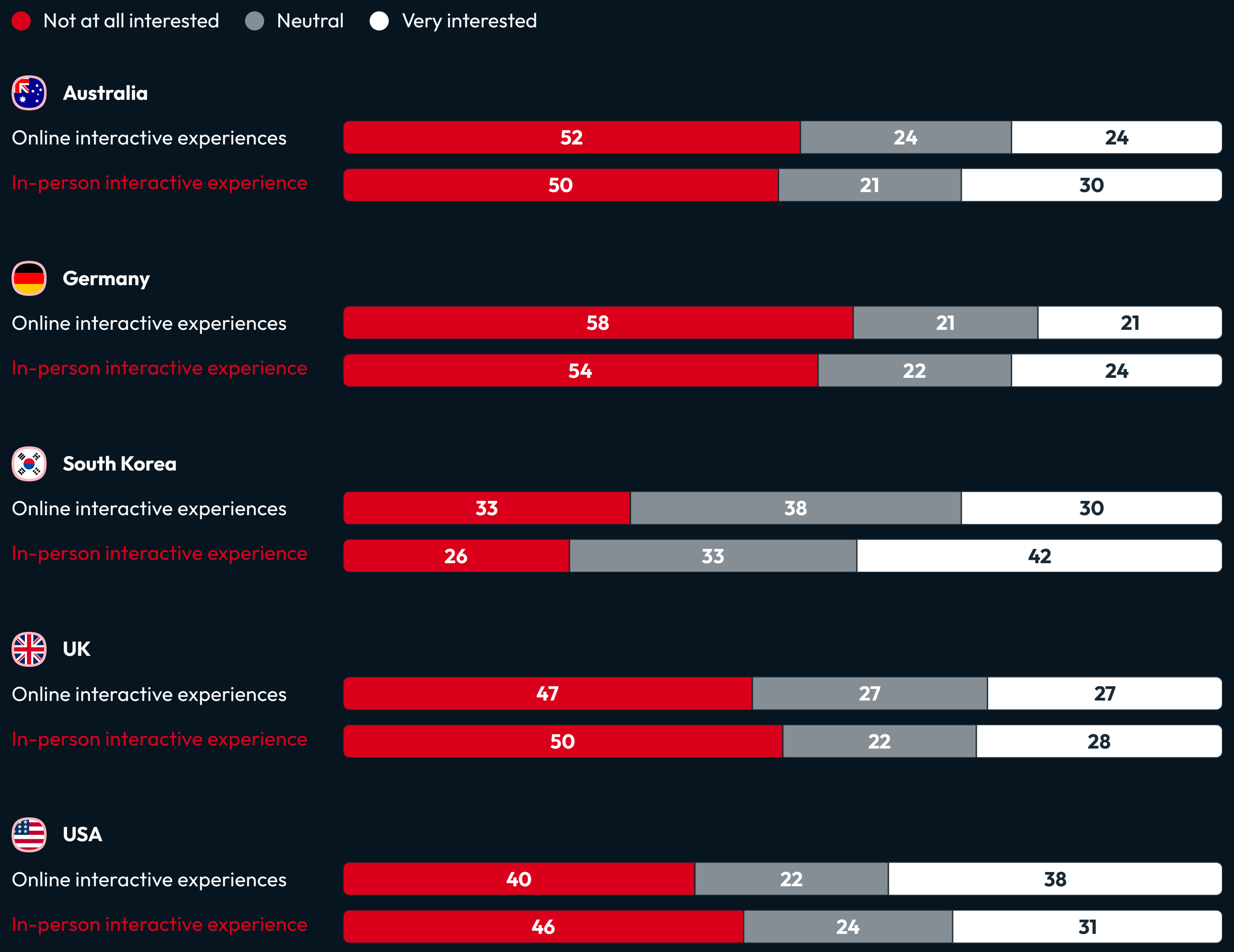
Emotions by ad type



	Australia	Germany	South Korea	UK	USA
In-game ads	9 28 20 27 13 23	8 21 17 29 15 31	7 27 24 28 15 13	12 26 13 29 14 20	18 23 24 27 18 20
Around-the-game ads	10 22 19 27 14 37	9 18 18 22 11 45	7 21 23 15 18 37	14 22 11 27 11 32	18 24 23 19 15 27
Away-from-the-game ads	7 18 13 37 11 29	6 14 16 38 13 31	5 14 18 41 19 17	12 19 15 43 13 17	12 20 14 36 12 22
Display ads	3 15 12 43 11 25	7 17 13 43 8 29	5 19 19 38 21 18	9 20 12 40 9 18	10 22 14 40 10 19
Pop-up/pop-under ads	5 13 15 18 14 56	11 14 17 27 15 48	6 18 17 23 17 35	10 18 15 19 16 45	9 18 16 17 21 48
Search ads	12 22 18 35 4 16	12 24 13 38 7 23	7 17 23 37 15 12	9 25 13 44 8 14	13 26 21 32 9 20
Direct mail ads	12 26 18 26 7 27	11 28 17 28 6 28	8 17 19 30 10 21	12 26 20 25 7 24	16 26 24 26 8 23
Mobile ads	7 18 16 24 10 40	12 29 16 29 11 28	7 16 19 34 9 29	8 25 12 30 11 25	15 22 17 20 11 34
Native ads	2 13 11 8 50 22	9 19 15 6 41 25	8 23 23 10 40 9	6 19 12 9 44 21	9 19 13 14 37 19
App store ads	5 20 17 33 10 18	11 24 17 37 6 21	10 25 24 34 11 9	11 19 18 31 10 17	13 26 22 30 11 15

Base: Recall a relevant ad type last month or more than a month ago (Australia: 424, Germany: 395, South Korea: 403, UK: 411, USA: 494)

Interest in interactive brand experiences



Base: All respondents: 2,616 (Australia: 531, Germany: 509, South Korea: 508, UK: 521, USA: 547)

Bringing brands and gamers closer through interactive brand experiences

Brands are continually seeking innovative ways to forge stronger bonds with their audiences. Through this, interactive gaming brand experiences have emerged as a captivating medium to bridge the gap between brands and consumers – and they're popular among gamers too. Our research unveils that 30% of gamers are actively interested in online and in-person interactive brand experiences. This presents a promising opportunity for publishers, developers, and advertisers to further engage gamers and diversify their promotional strategies.

In South Korea and the US, a significant portion of gamers demonstrate a keen interest in online interactive brand experiences. There appears to be a strong level of enthusiasm among gamers in these markets for this type of brand connection.

Notably, our findings in Australia and South Korea indicate that male gamers exhibit higher interest in in-person interactive brand experiences. This suggests that outdoor initiatives may find greater success in these markets – especially in reaching this demographic.

As the marketing landscape continues to evolve, brands that can leverage these insights are well-positioned to establish more favorably in the eyes of gamers, fostering deeper connections and unlocking the full potential of their promotional campaigns.

30% of gamers express interest in both online and in-person, interactive brand experiences

The value ads can bring to gamers

It's crucial that gamers see value in the ads they encounter. This value proposition is frequently realized through reward-based gaming ads. Across our surveyed markets, nearly half of all gamers show a strong affinity for 'daily reward,' 'bonus level/content,' 'second chance,' and 'value exchange' ads. These ads offer a unique opportunity for developers and publishers to enhance profitability while sustaining high engagement levels with their games.

Interestingly, market nuances become apparent in the specific forms of value that gamers prioritize. In Australia, for instance, 'out-of-lives' ads surpass 'second chance' ads in appeal, while in South Korea and the UK, gamers find 'hint' ads particularly enticing. Clearly, gamers are eager for more opportunities to continue playing their favorite games and are willing to engage with reward based ads when there's a clear value exchange.

For advertisers, the key lies in integrating a variety of these rewarded ad formats into campaigns. By doing so, advertisers can ensure that gamers remain deeply engaged, while allowing them to maintain their interest in the games they play. Consequently, players may be more inclined to download and play a game promoted through a rewarded ad or explore brands and products featured within such ads.

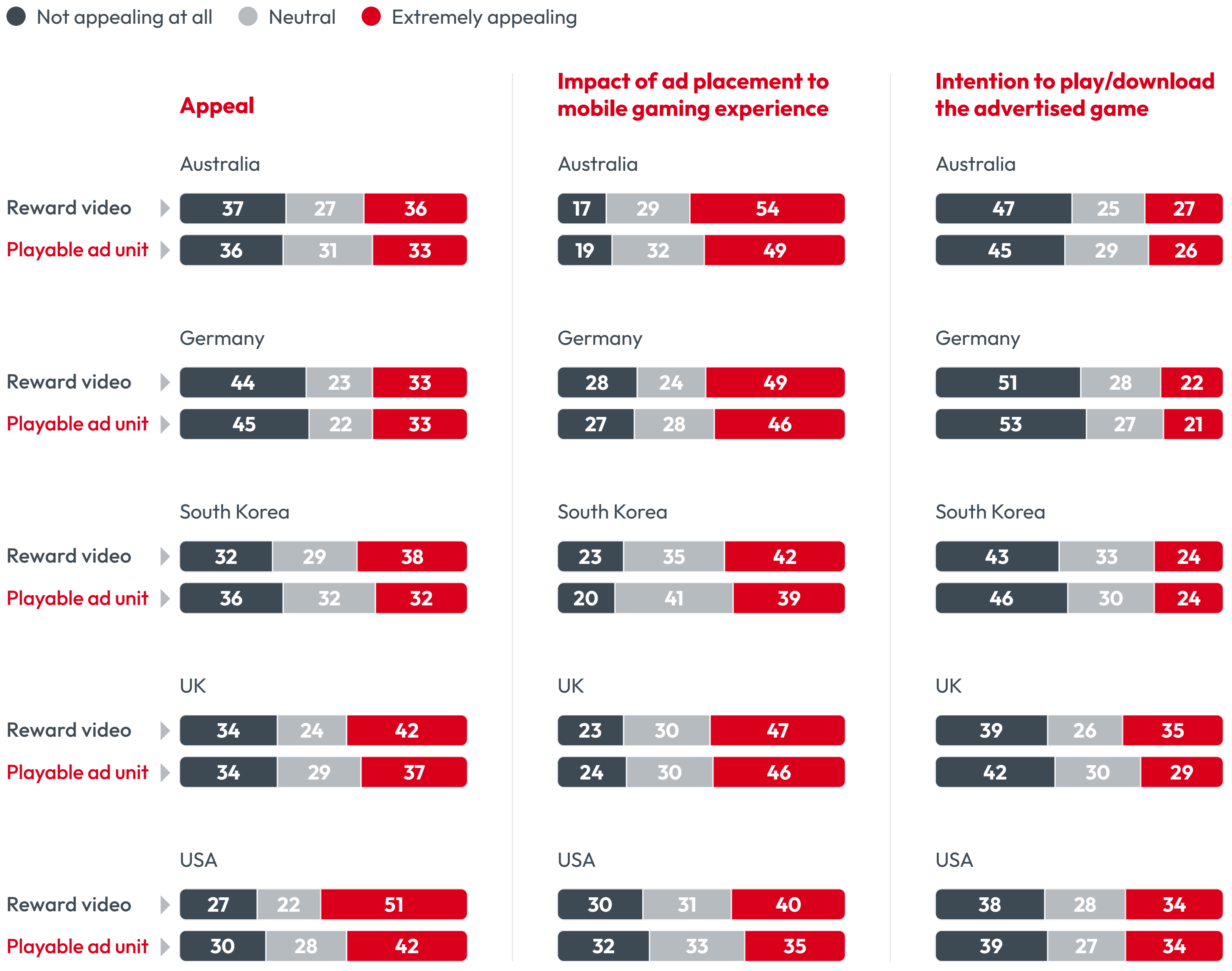
This strategic approach not only benefits gamers but also empowers advertisers and developers to establish more meaningful connections with their audiences, ultimately fostering brand loyalty and driving conversion.

Around half of gamers welcome reward ads into their gaming experience

Rewarded ads appeal

Base: All respondents: 2,616
(Australia: 531, Germany: 509,
South Korea: 508, UK: 521, USA: 547)

Reward video vs playable ad unit



Base: Mobile gamers (Australia: 458, Germany: 341, UK: 317, USA: 446)

How mobile reward video and playable ad unit compare

In the realm of mobile gaming, rewarded ads play a pivotal role in achieving high ad resonance and engagement. To optimize advertising strategies, it's imperative to understand gamers' preferences regarding specific mobile ad formats. In this study, we sought to gauge the appeal of both 'mobile reward video ads' and 'playable ad units' among gamers across various markets.

Our findings reveal that both ad formats enjoy substantial appeal among Mobile gamers. Across all surveyed markets, a significant portion (46%) found 'reward video ads' appealing, while a comparable number (39%) expressed the same sentiment regarding 'playable ad units.' This balance of appeal across different ad types offers game developers, publishers and advertisers a unique opportunity to employ a range of ad formats while ensuring sustained engagement and resonance among gamers.

Moreover, when examining the impact of 'mobile reward video' and 'playable ad units' on the mobile gaming experience, we observed that nearly 1 in 3 Mobile gamers do not consider these ads disruptive in any way.

Comparing the intention to download or play a game featured in 'reward video' and 'playable ad units,' we find consistent preferences across markets once again. At least one-third of Mobile gamers express their intent to download or play a game showcased in both 'reward video' and 'playable ad units.' This further substantiates the effectiveness of both ad formats in driving user engagement and conversions.

> Around a third of Mobile gamers do not find these ads disruptive in any way

Across all markets, gamers are significantly more likely to engage with dynamic ads than static formats

Comparing a static vs dynamic ad on RPG Site

As previously discussed **(page 31)**, a substantial number of gamers are actively seeking out gaming content across the web. Understanding which ads resonate most effectively with this audience is pivotal in planning successful advertising campaigns, and for publishers to select the most appropriate ad formats for their platforms. To gain a deeper understanding of the dynamics between content platforms and advertising, we measured the appeal of both dynamic and static 'away-from-the-game' ads on a prominent gaming content publisher's website.

Across all markets, we saw a preference for dynamic ads. Gamers, it seems, appreciate the ability to interact with advertisements and learn more about the promoted products or brands. This finding not only empowers publishers to monetize their sites effectively, but also ensures that users encounter ads they find genuinely appealing.

It's worth noting that while static ads are seen to be less disruptive, the difference is insignificant across all markets and audiences.

To assess the resonance of ads with gamers who consume content on gaming platforms, it's crucial to gauge gamers' intent to engage with the advertised brands or products. In this regard, dynamic ads outperform static ones across all markets. Gamers express a greater inclination to seek more information about the advertised brand or product, consider purchasing it, discuss it, and follow the brand on social media when exposed to dynamic ads. This dynamic format excels in piquing gamers' interest and eliciting engagement.

Still, for game developers, publishers, and advertisers, a balanced approach is recommended. While dynamic ads clearly hold appeal and engagement potential, it's important not to overuse them, as they may disrupt gamers' online experiences. A well-rounded strategy that incorporates both static and dynamic ad formats, with a greater allocation of budget and effort towards dynamic ads, is advisable. This kind of approach ensures optimal resonance with gamers, while maintaining a positive user experience in the gaming content ecosystem.

RPG Site – static vs dynamic ad

Base: All respondents: 2,616 (Australia: 531, Germany: 509, South Korea: 508, UK: 521, USA: 547)

RPG Site – static vs dynamic ad – likely to engage

Base: All respondents: 2,616
(Australia: 531, Germany: 509,
South Korea: 508, UK: 521, USA: 547)

06

Interest in and purchasing behaviors around everyday products

4 in 10 female gamers are interested in beauty and fashion. The most popular products purchased in Q1 2023 are clothes, moisturizer, and shoes

Understanding gamers' interests and purchasing behaviors beyond gaming

Beyond their passion for gaming, what else captivates the attention of gamers in Australia, Germany, South Korea, the UK, and the US? Our exploration of these five surveyed markets reveals intriguing insights into the diverse products that appeal to gamers.

We found that 40% of female gamers have an interest in beauty and cosmetics, with an additional 30% loving fashion. These categories are particularly popular among Gen Z and millennials. While male interest in these categories is comparatively lower, it's noteworthy that 1 in 10 have an interest in fashion, and nearly 1 in 10 in beauty and cosmetics. These findings show opportunities for fashion and beauty brands to strategically advertise their products within gaming content.

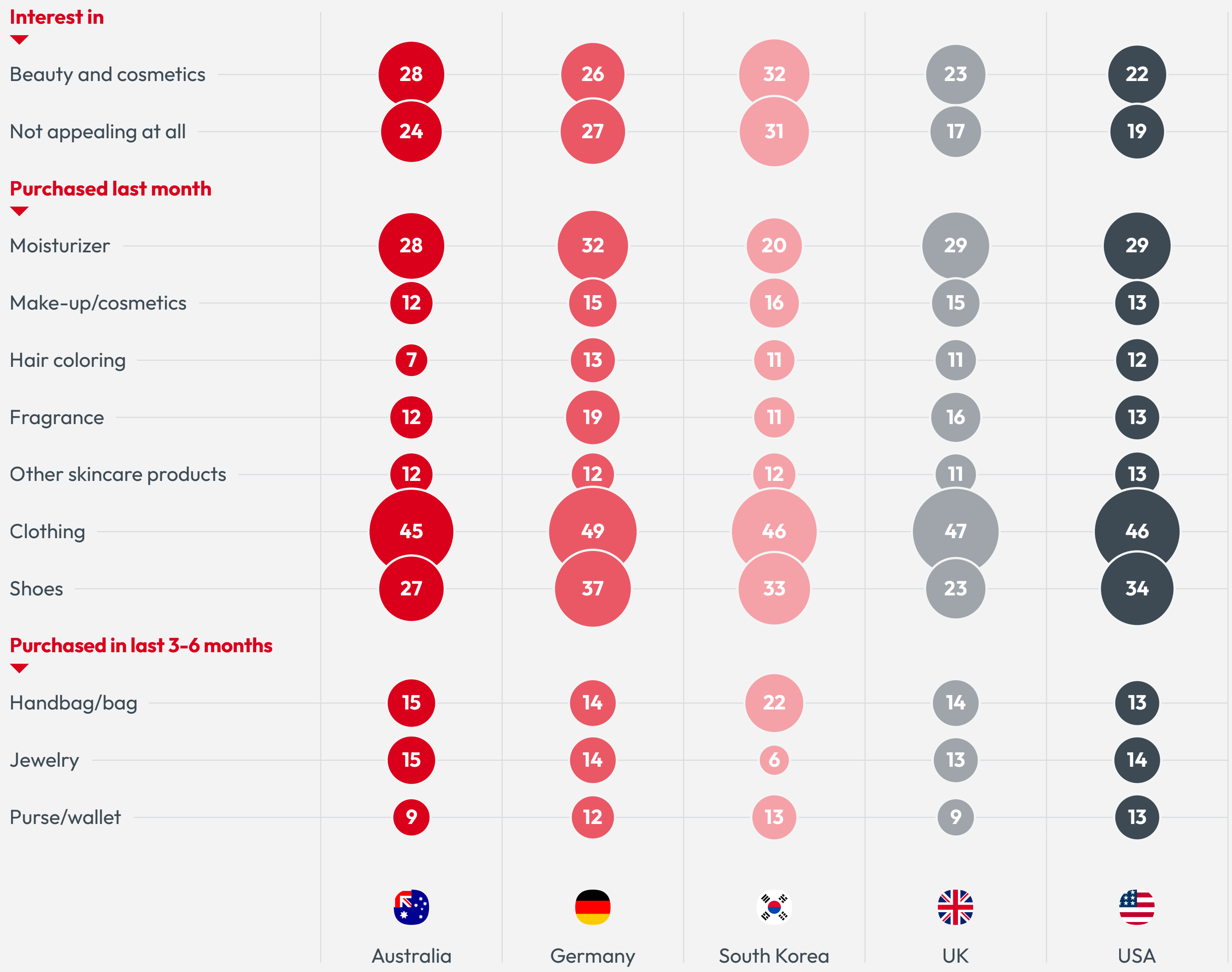
South Korea emerges as a standout market here, with half of female gamers having an interest in beauty and 4 in 10 in fashion. This trend extends to male gamers as well, with South Korea boasting the highest proportion of male gamers interested in beauty (17%) and fashion (25%) among all markets surveyed. This presents a compelling opportunity to target a more diverse audience of both female and male gamers in South Korea, by strategically placing gaming advertisements within beauty and fashion-focused content.

When examining gamers' purchasing behaviors in the US, we see that most gamers recently bought clothes, moisturizers, and shoes. Australian gamers exhibit similar purchasing habits to their US counterparts, but here, females show a preference for handbag/bag purchases in the last 3-6 months. Germany and the UK share a similar purchasing pattern. However, we note a higher proportion of female gamers in these markets purchasing a wider variety of beauty and fashion items, including makeup, hair coloring products, handbags, and jewelry, alongside other popular products. There's also a preference for online clothing purchases in these markets.

Female gamers in South Korean align closely with the purchasing habits seen in Australia and the US, while South Korean males also prioritize glasses and bag purchases in the last 3-6 months.

For non-endemic brands to the gaming category, these insights open the door to implementing strategic ad avenues. This approach can significantly expand their reach and enhance their ability to stand out within the advertising ecosystem, appealing to a broader and more diverse audience by targeting gamers.

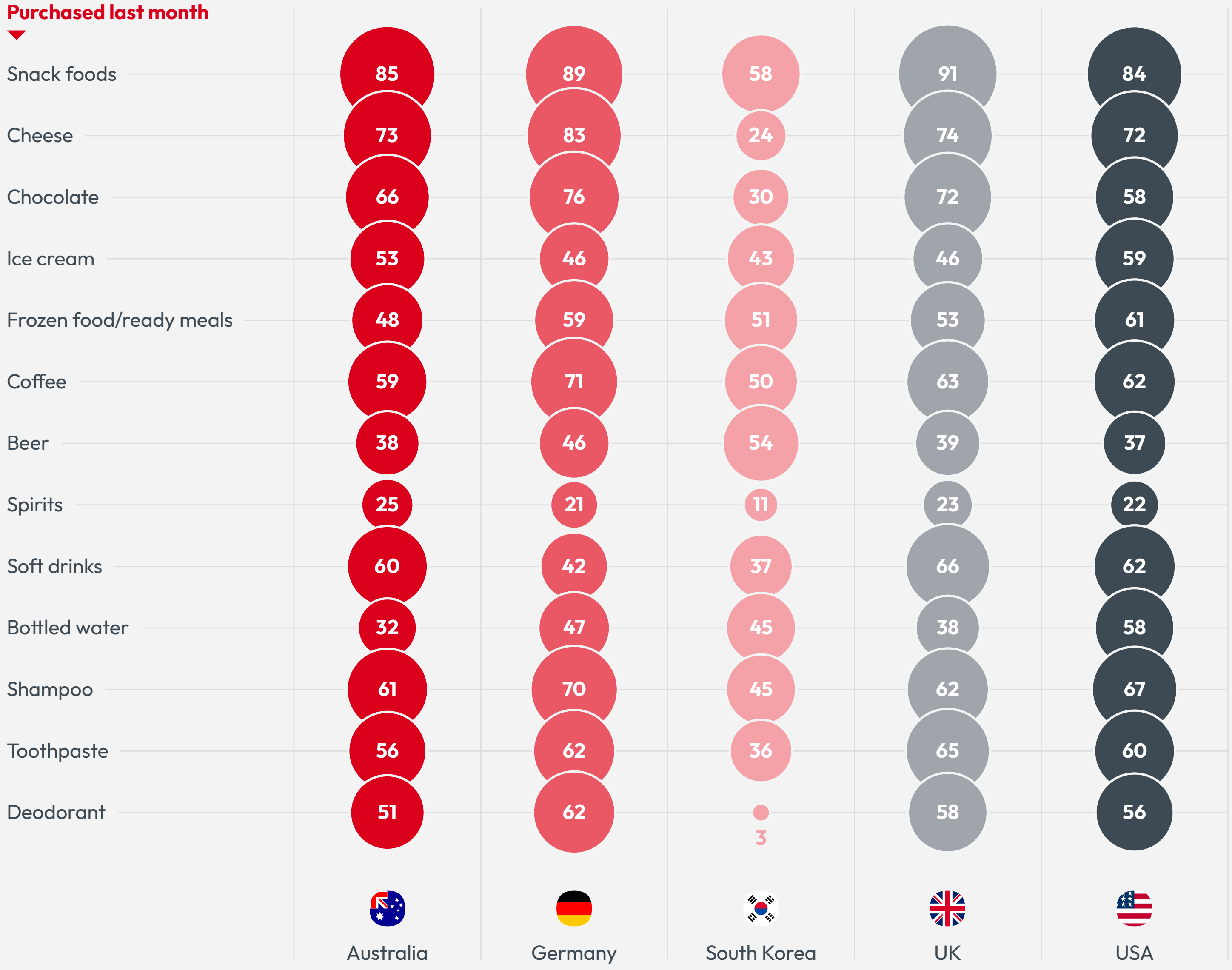
Interest in and purchase behavior – beauty/cosmetics and fashion



	Australia	Germany	South Korea	UK	USA
Interest in					
Beauty and cosmetics	28	26	32	23	22
Not appealing at all	24	27	31	17	19
Purchased last month					
Moisturizer	28	32	20	29	29
Make-up/cosmetics	12	15	16	15	13
Hair coloring	7	13	11	11	12
Fragrance	12	19	11	16	13
Other skincare products	12	12	12	11	13
Clothing	45	49	46	47	46
Shoes	27	37	33	23	34
Purchased in last 3-6 months					
Handbag/bag	15	14	22	14	13
Jewelry	15	14	6	13	14
Purse/wallet	9	12	13	9	13

Base: All respondents: 2,616 (Australia: 531, Germany: 509, South Korea: 508, UK: 521, USA: 547)

Purchase behavior



Purchased last month

	Australia	Germany	South Korea	UK	USA
Snack foods	85	89	58	91	84
Cheese	73	83	24	74	72
Chocolate	66	76	30	72	58
Ice cream	53	46	43	46	59
Frozen food/ready meals	48	59	51	53	61
Coffee	59	71	50	63	62
Beer	38	46	54	39	37
Spirits	25	21	11	23	22
Soft drinks	60	42	37	66	62
Bottled water	32	47	45	38	58
Shampoo	61	70	45	62	67
Toothpaste	56	62	36	65	60
Deodorant	51	62	3	58	56

Base: All respondents: 2,616 (Australia: 531, Germany: 509, South Korea: 508, UK: 521, USA: 547)

Exploring gamers' everyday product preferences

To gain a comprehensive understanding of gamers' interests and purchasing behaviors it is essential to delve into the products they engage with beyond the gaming category.

Remarkably, 8 in 10 gamers have purchased snack foods in the last month. This comes as no surprise, as snacking can often accompany long gaming sessions or content consumption (such as watching gaming videos on streaming sites). For snack food brands, this presents a unique opportunity to connect with the vast and diverse audience of gamers.

In all markets except South Korea, cheese emerges as the second-most popular product purchased in the last month, while in South Korea, it's beer that takes this position. Other popular products include milk, coffee, and shampoo. Gamers in Australia, the UK and the US display a preference for soft drinks and potato chips purchases, while South Korean gamers prioritize bottled water and ice cream. German gamers tend to prioritize personal care items like deodorant and toothpaste. Chocolate also enjoys popularity in Australia, the UK and the US, while a significant proportion of German, South Korean, and US gamers purchased frozen food/ready meals recently.

While it's evident that snack foods are a popular choice among gamers, it's important to note the wide spectrum of everyday products they regularly purchase (including milk, cheese, shampoo) – and how this differs across markets. This diverse shopping behavior underscores the potential for brands across various categories to effectively market their products to this expansive gaming audience, forging valuable connections and enhancing their advertising strategies.

8 in 10 gamers purchased snack foods in the last month

07

How the purchase journey of gamers begins

Gamers rely on a mix of media options when discovering and looking for new brands and products

How do gamers start their purchase journey and interact online with brands?

To round out our understanding of how gamers discover and research new brands/products, it's important for us to take a wider view outside of gaming too. What are their sources of discovery across other categories? Across markets, gamers mostly discover new brands and products via TV ads, search engines, and word-of-mouth recommendations from friends or family. Their online product research takes place primarily on search engines, brand/product sites, price comparison sites, and through consumer reviews.

In the US and Australia, at least 2 in 10 gamers discover new brands and products directly through the brand/product websites, and through website ads. In Australia, 23% of gamers are also influenced by social media ads. In the UK, significantly more females are influenced by website ads than males. This is the opposite in South Korea, where significantly more males than females discover new brands and products via ads seen on websites.

The way gamers research brands and products beyond gaming further illustrates the value advertisers, game developers, and publishers can get from centering their advertising campaigns around product websites, blogs, content with reviews, and social media. With many gamers heading there to discover products, brands that are active on those platforms are more likely to grab gamers' attention.

Brand discovery and online product research

Purchased last month	Australia	Germany	South Korea	UK	USA
Ads seen on TV	39	38	37	38	47
Ads seen on websites	21	15	18	19	25
Ads seen on social media	23	17	13	14	22
Ads seen before online videos or TV shows	10	13	12	10	19
Ads seen on mobile or tablet apps	7	10	17	9	14
Word-of-mouth recommendations	34	28	31	32	42
Brand/product websites	23	13	16	23	22
Consumer review sites	16	7	27	13	17
Search engines	48	38	41	41	43
Product comparison websites	14	16	23	13	10

Online product research	Australia	Germany	South Korea	UK	USA
Search engines	65	62	50	60	65
Consumer reviews	40	21	31	35	42
Product/brand sites	32	22	22	31	38
Price comparison websites	25	34	34	24	20
Social networks	23	23	21	18	20
Video sites	13	8	22	8	13
Blogs on products/brands	8	7	22	8	8

Base: All respondents: 2,616 (Australia: 531, Germany: 509, South Korea: 508, UK: 521, USA: 547)

08

Profiling gamers by market

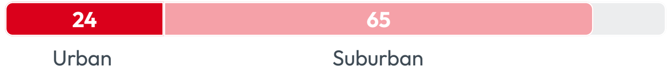
Australian gamers

Gender

Generations

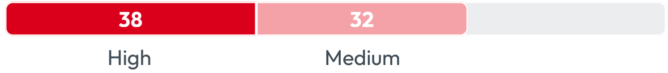
Education

Urban context



Parental status

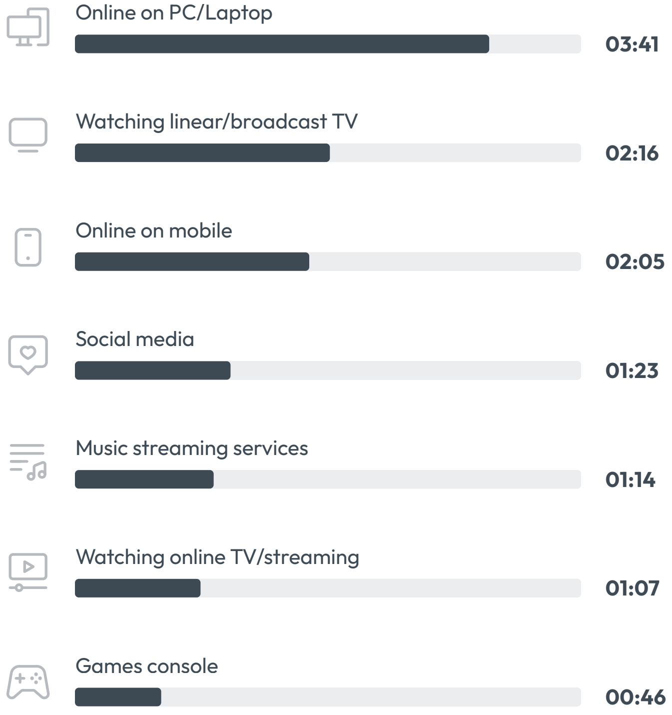
Income segmentation



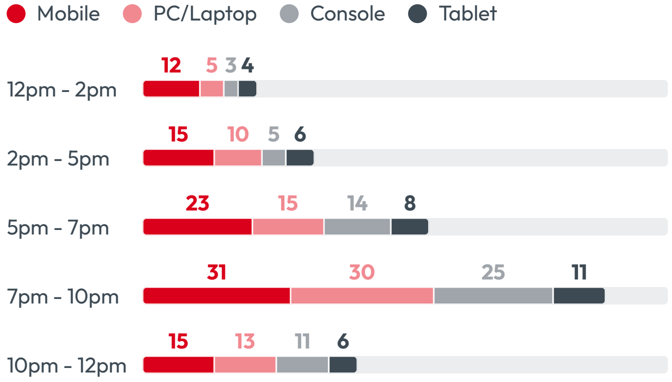
Preferred CPU

Most females play games on a mobile, while males on a mobile and console

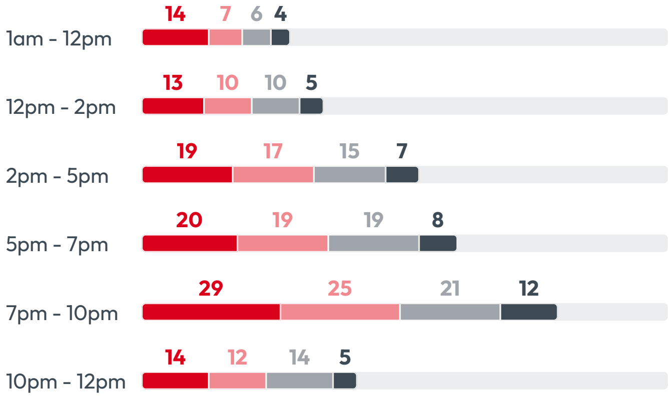
Daily time spent on media



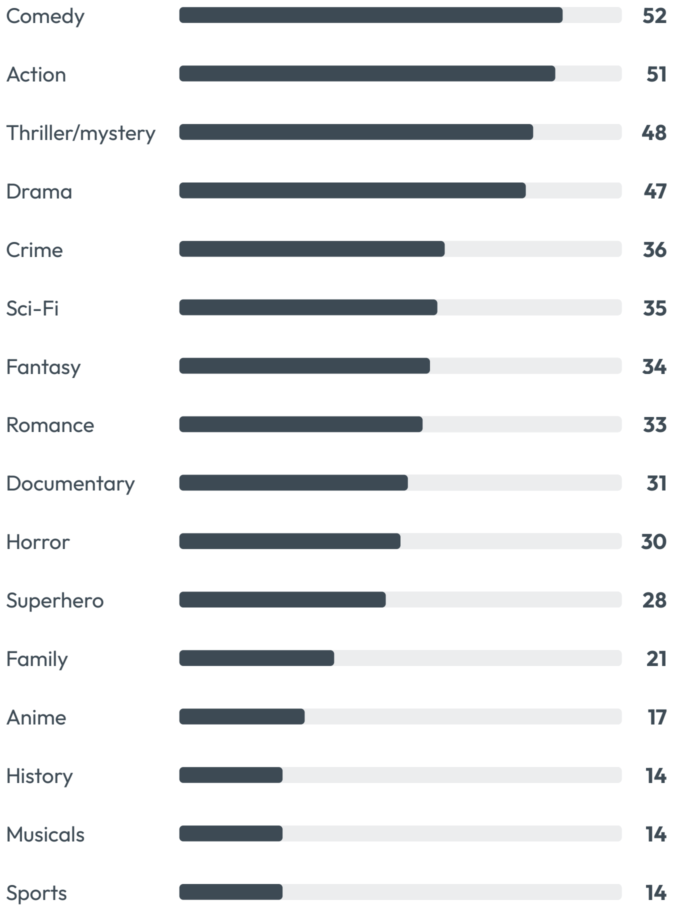
Weekdays gaming sessions



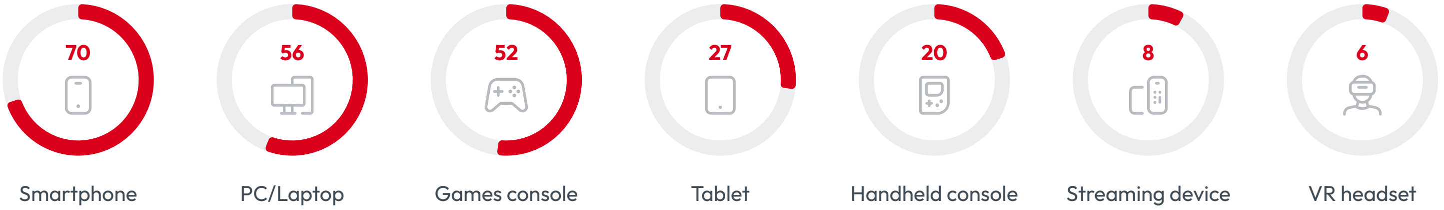
Weekend gaming sessions



Movie genre preferences



Deviced used for gaming

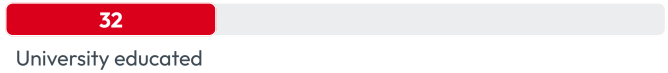


German gamers

Gender

Generations

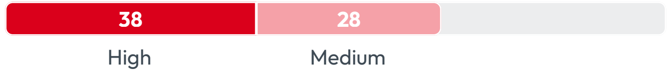
Education



Urban context

Parental status

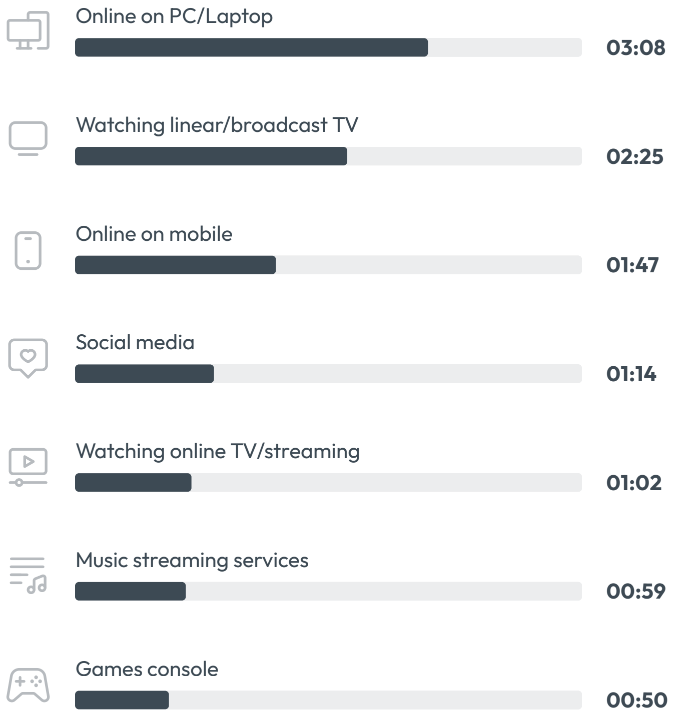
Income segmentation



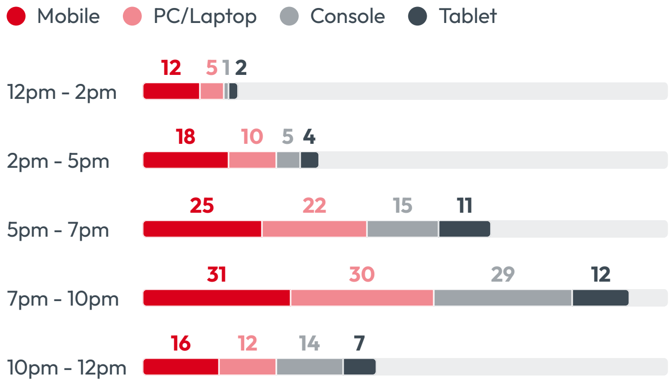
Preferred CPU

Most German gamers play mobile games in the weekdays, between 7-10pm

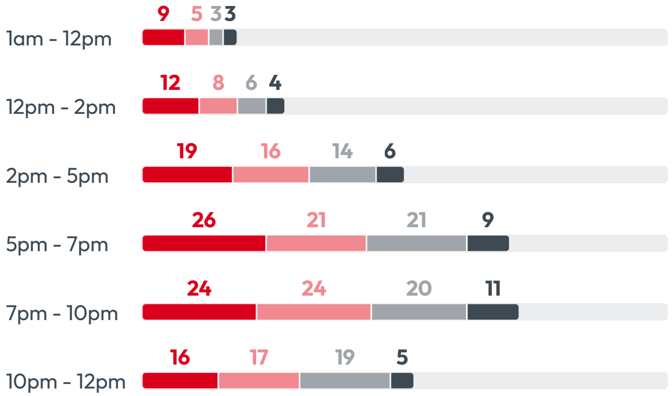
Daily time spent on media



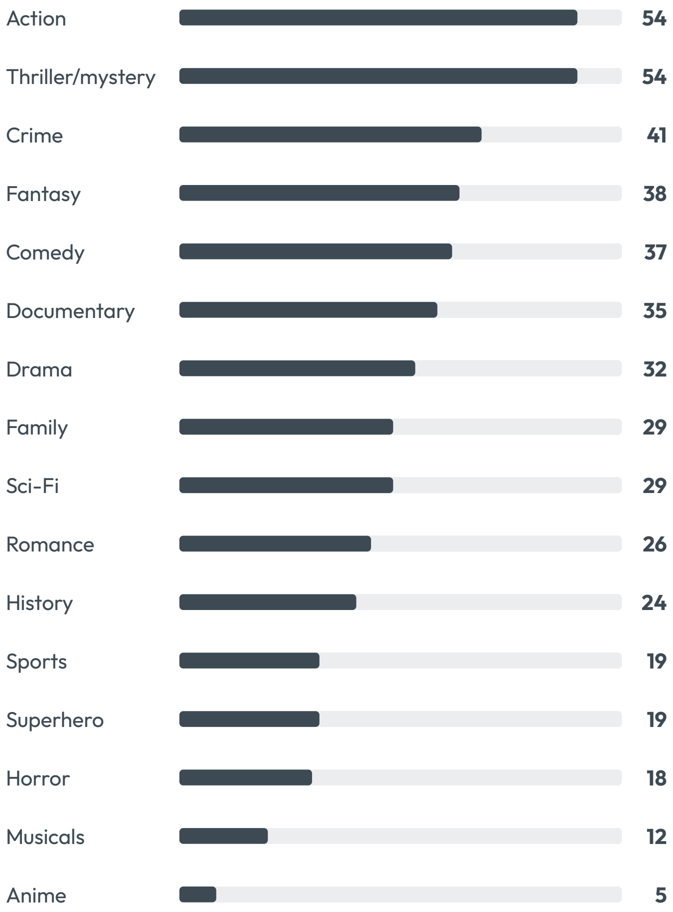
Weekdays gaming sessions



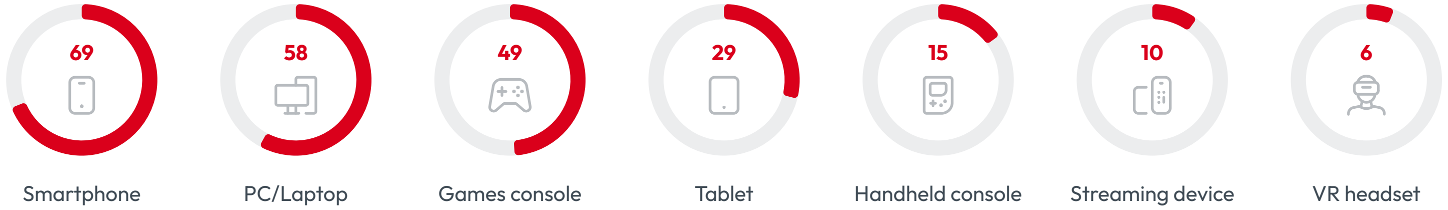
Weekend gaming sessions



Movie genre preferences



Deviced used for gaming



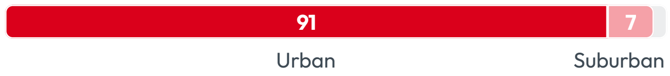
South Korean gamers

Gender

Generations

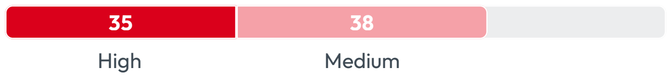
Education

Urban context

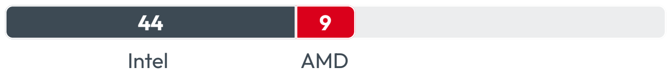


Parental status

Income segmentation

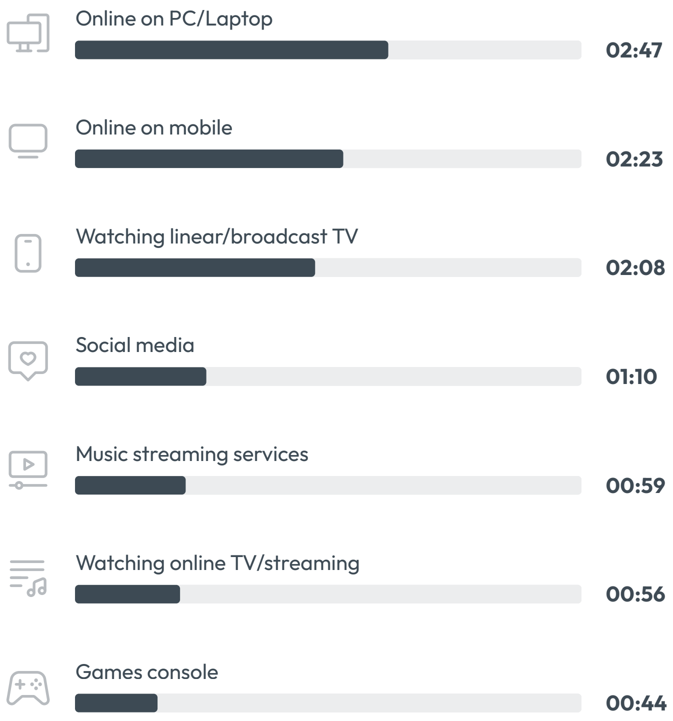


Preferred CPU

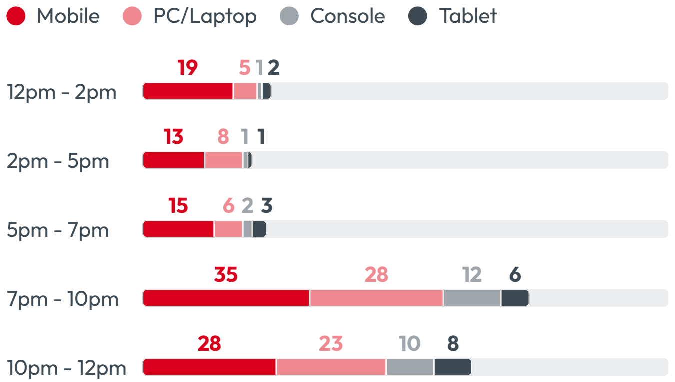


9 in 10 gamers in South Korea play games on a mobile

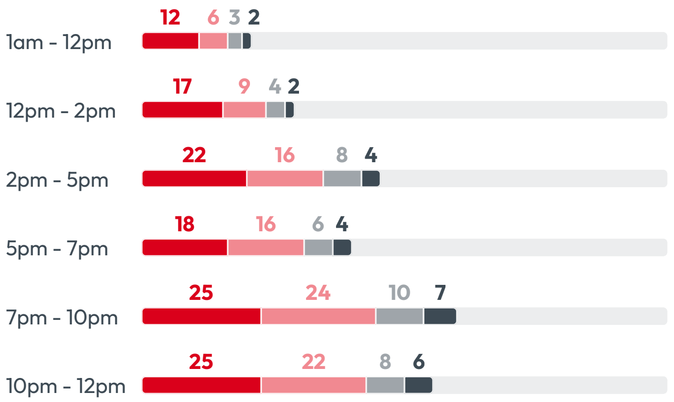
Daily time spent on media



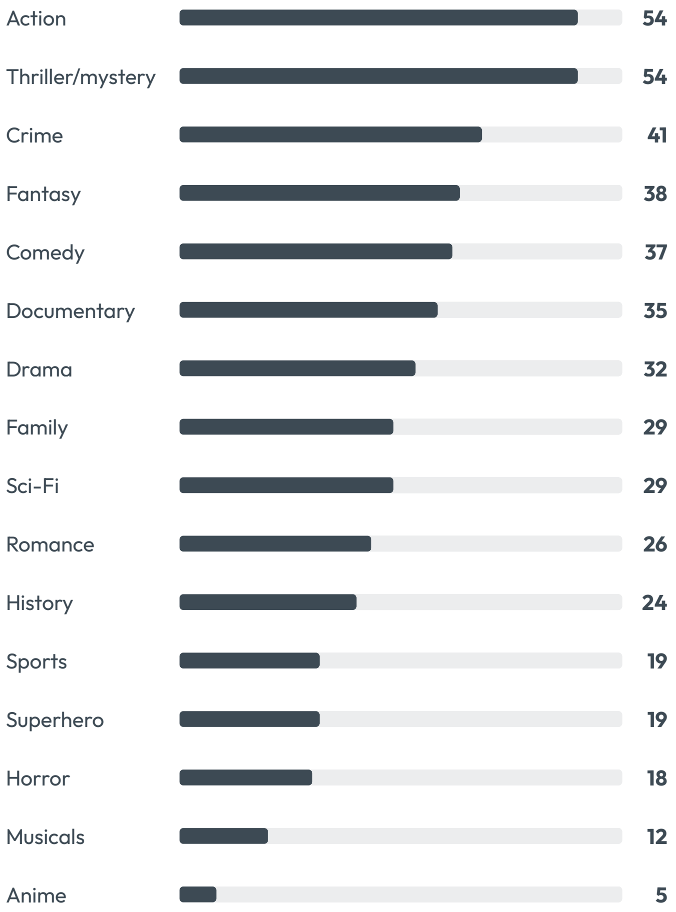
Weekdays gaming sessions



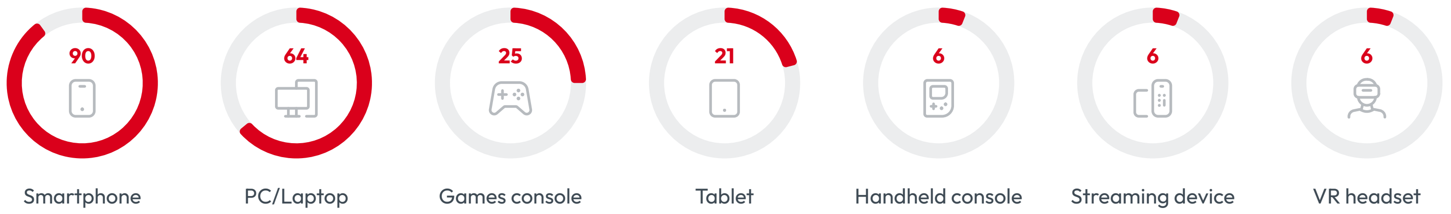
Weekend gaming sessions



Movie genre preferences



Deviced used for gaming

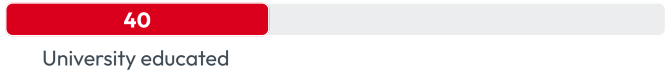


Gamers in the UK

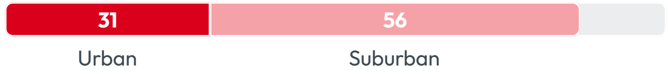
Gender

Generations

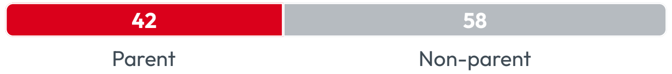
Education



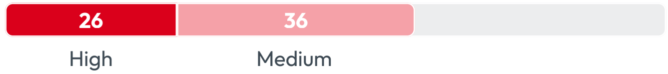
Urban context



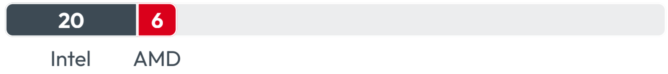
Parental status



Income segmentation

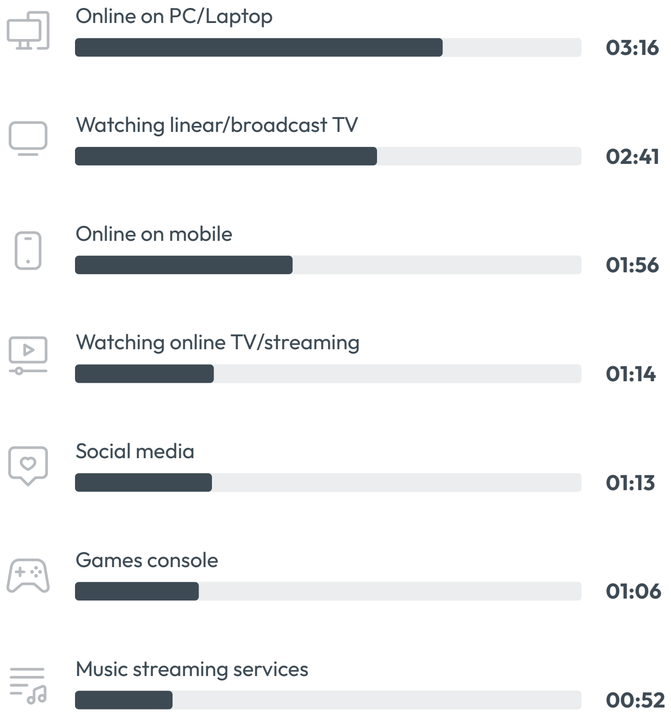


Preferred CPU

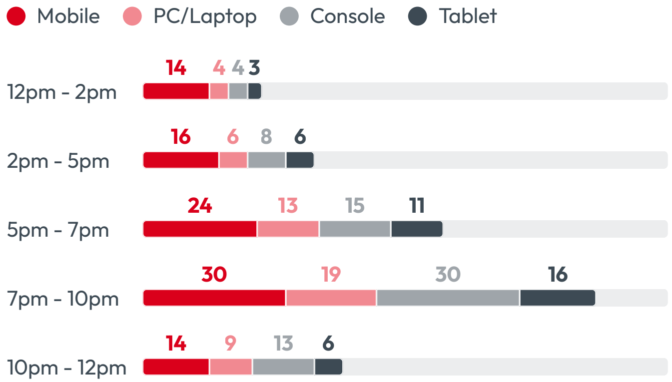


The majority of male gamers in the UKplay on a console and females on a mobile

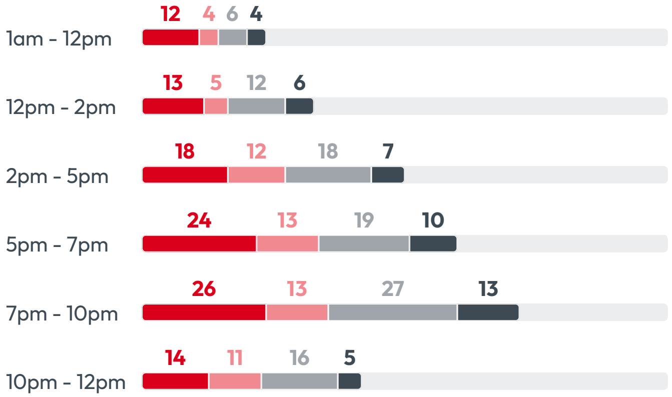
Daily time spent on media



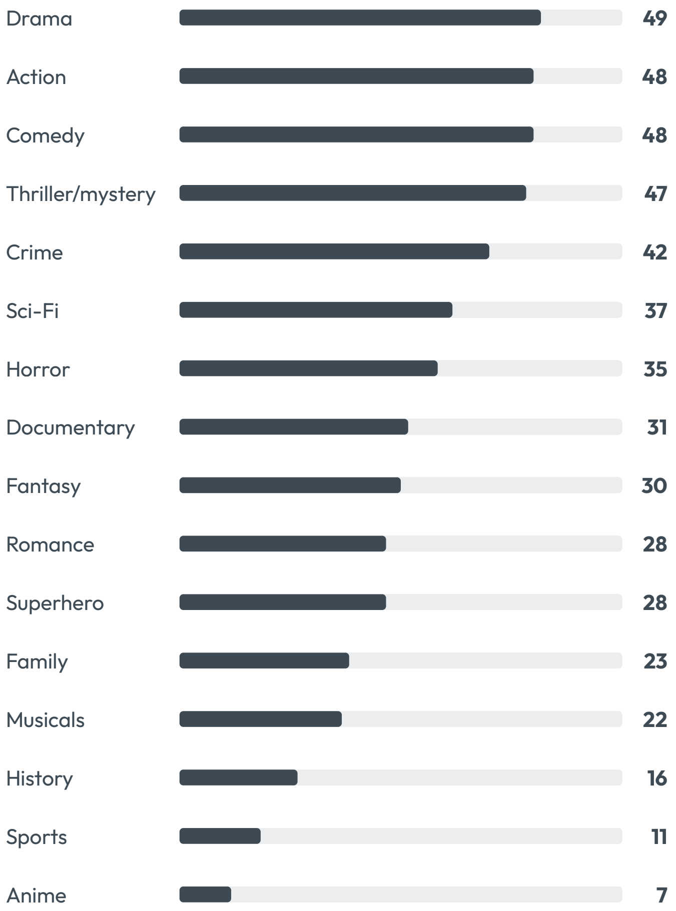
Weekdays gaming sessions



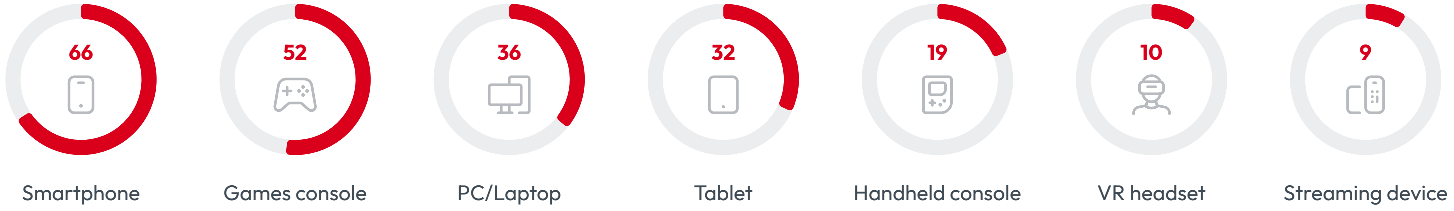
Weekend gaming sessions



Movie genre preferences



Deviced used for gaming



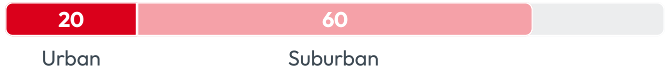
US gamers

Gender

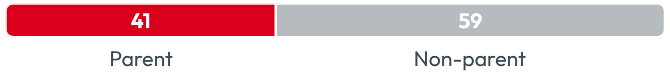
Generations

Education

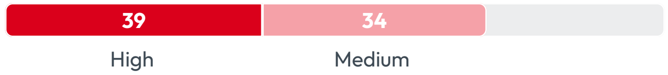
Urban context



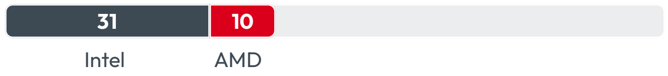
Parental status



Income segmentation

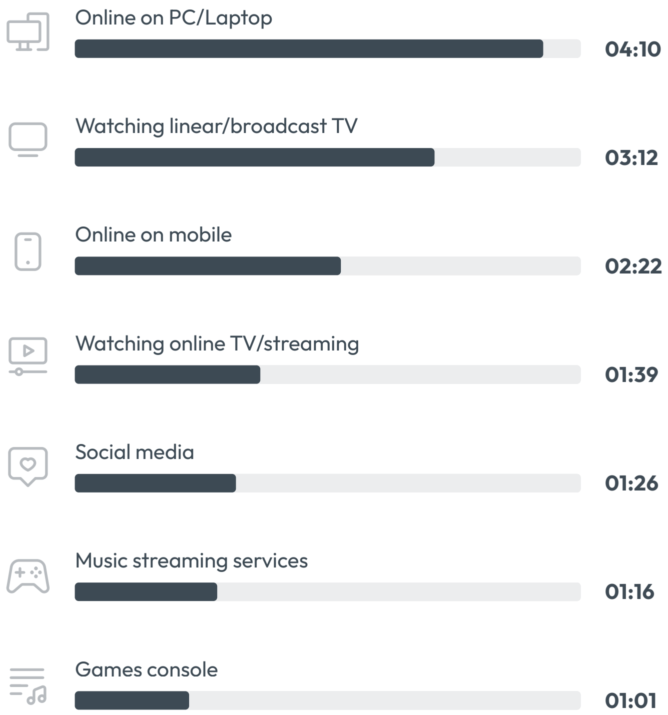


Preferred CPU

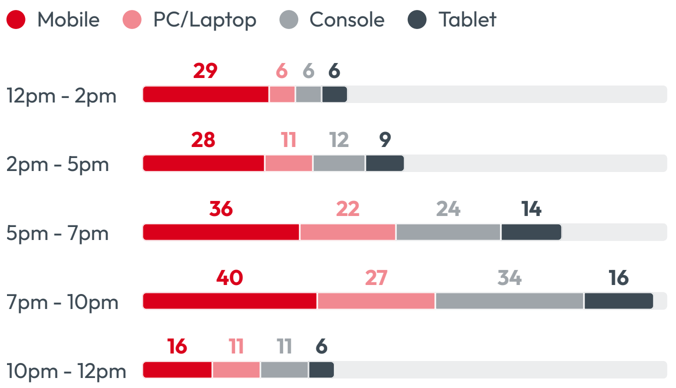


Most gamers play mobile games from 7-10pm in the weekdays and weekend

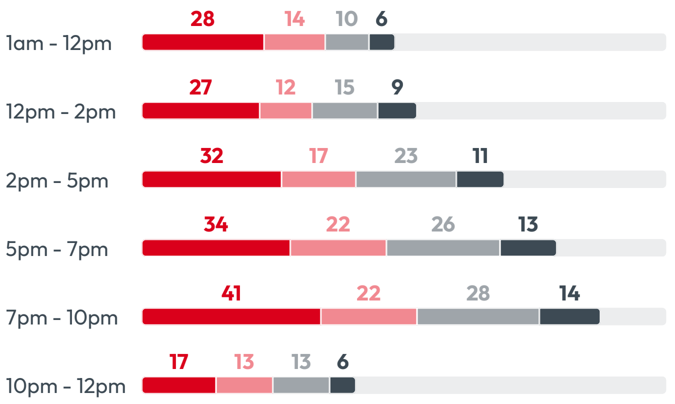
Daily time spent on media



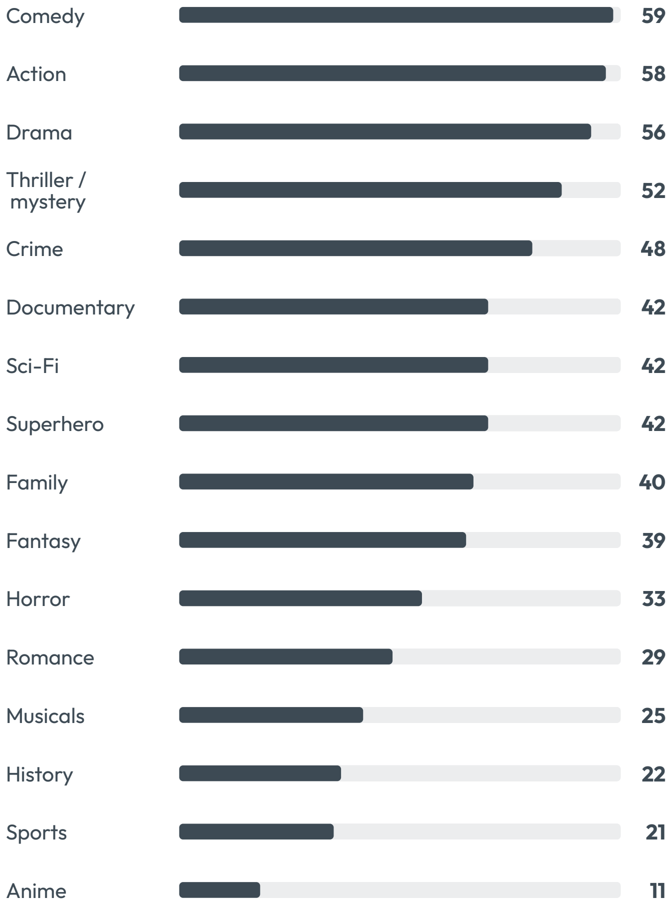
Weekdays gaming sessions



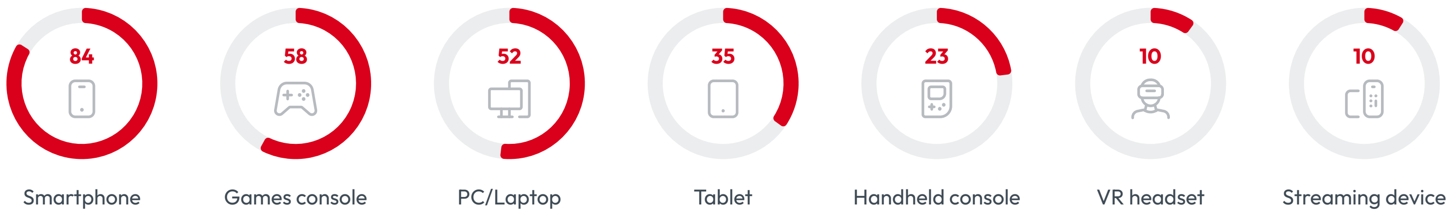
Weekend gaming sessions



Movie genre preferences



Deviced used for gaming



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