

A black and white photograph of a woman with long dark hair, wearing large white over-ear headphones. She is sitting in a gaming chair, looking towards the left of the frame. Her right hand is resting on her chin. In the background, there are blurred lights and what appears to be a gaming setup with a monitor and keyboard. The overall atmosphere is that of a gaming cafe or esports arena.

game
advertising summit

2022



Poppy Hill (chair)
DoubleVerify



Ricky Chanana
Twitch



Ben Murray
Interplay Media



George Henshaw
ESPN



Matthew McGinley
InMobi



Annie Goodman
Magnite



Nick Brignell
GroupM



Sasha Smith
Howatson + co



Simon Slee
Double Jump
Communications



John McNerney
Yahoo



Ronnie Chiu
Twitter



Rowan Williams
Oracle



Julien Muret
Google



Luke Carmichael
Samsung Ads



Yun Yip
Foxcatcher



Georgia Woodburn
Azerion JAPAC



James O'Driscoll
Digital Turbine

thankyou to the iab australia **gaming working group.**



game advertising.

iab.
australia

research & insights

from game advertising
survey | 2022

Natalie Stanbury
Research Director
IAB Australia



methodology.

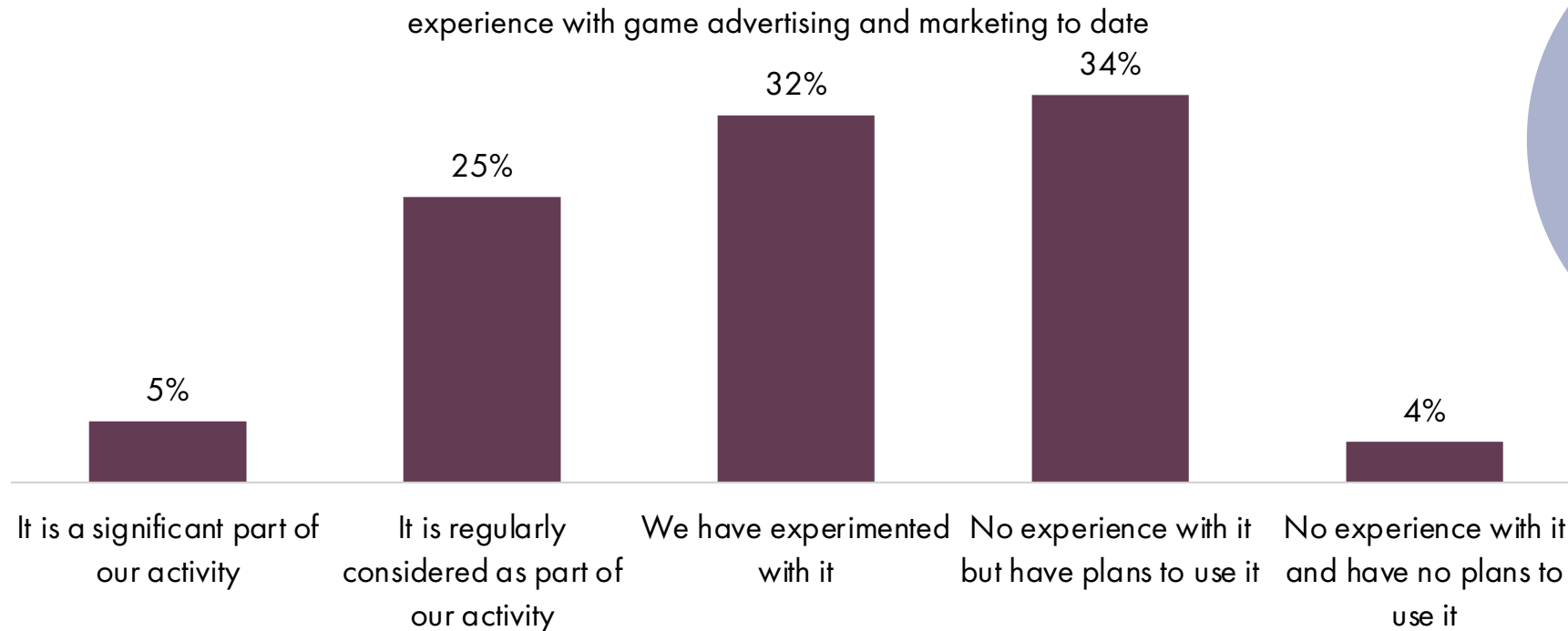
The IAB Game Advertising Working Group conducted a survey in June 2022 amongst **80 advertising decision makers** working in agencies and brands with experience or intention to buy game advertising and marketing.

The survey was designed to **assess industry understanding and use of game advertising** and prioritise initiatives to help marketers drive business results.

This wave 2 report compares results from wave 1 survey conducted in August 2021 (IAB Attitudes to Game Advertising Report 2021).

experience with game advertising.

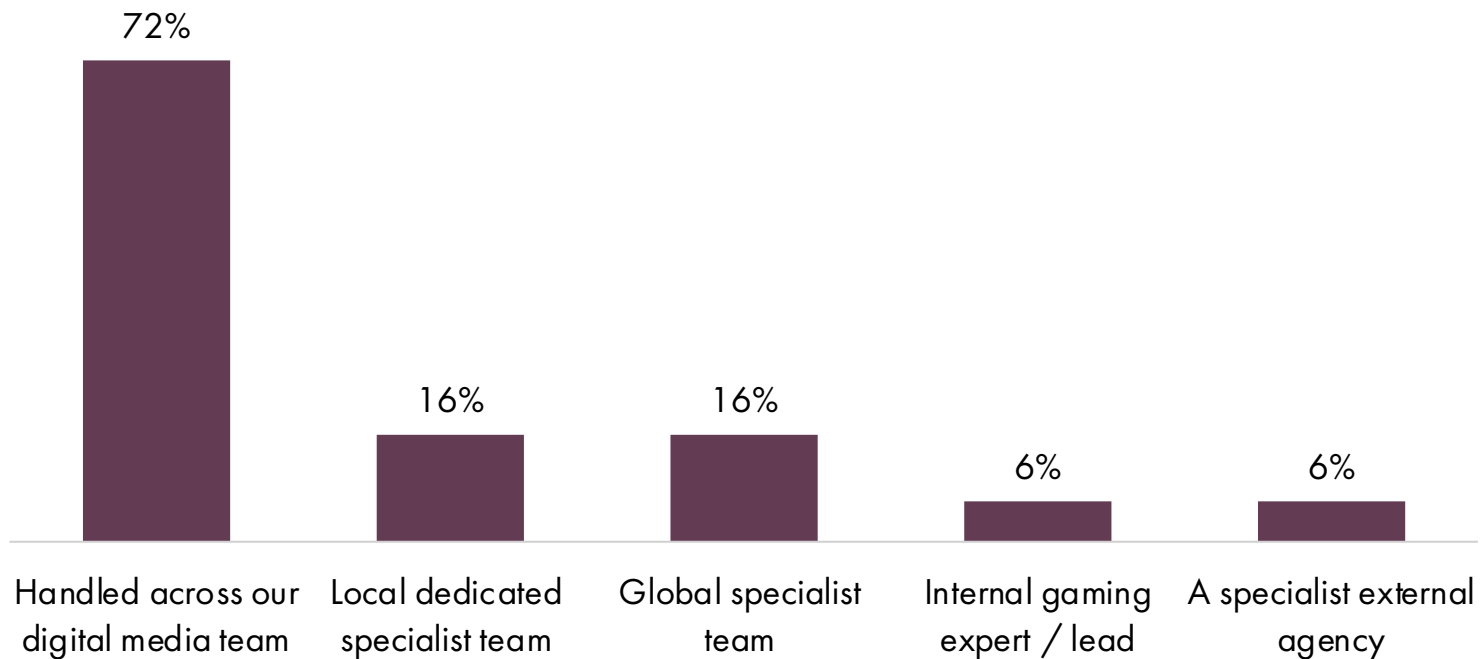
Experience with game advertising amongst mainstream advertising agencies is mostly at the experimental stage with 30% regularly considering or using it (up from 20% in 2021).



62%
have used game advertising to date.

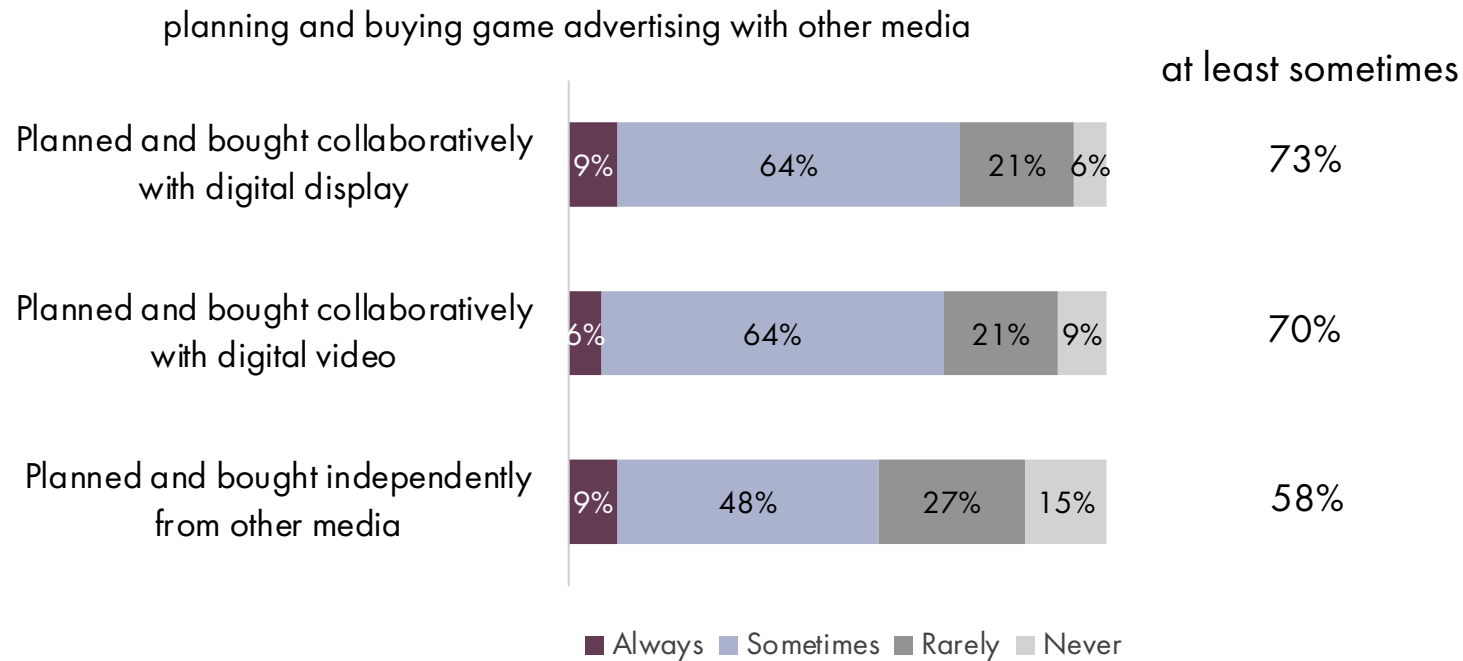
agency structure for game advertising.

agency structure for game advertising



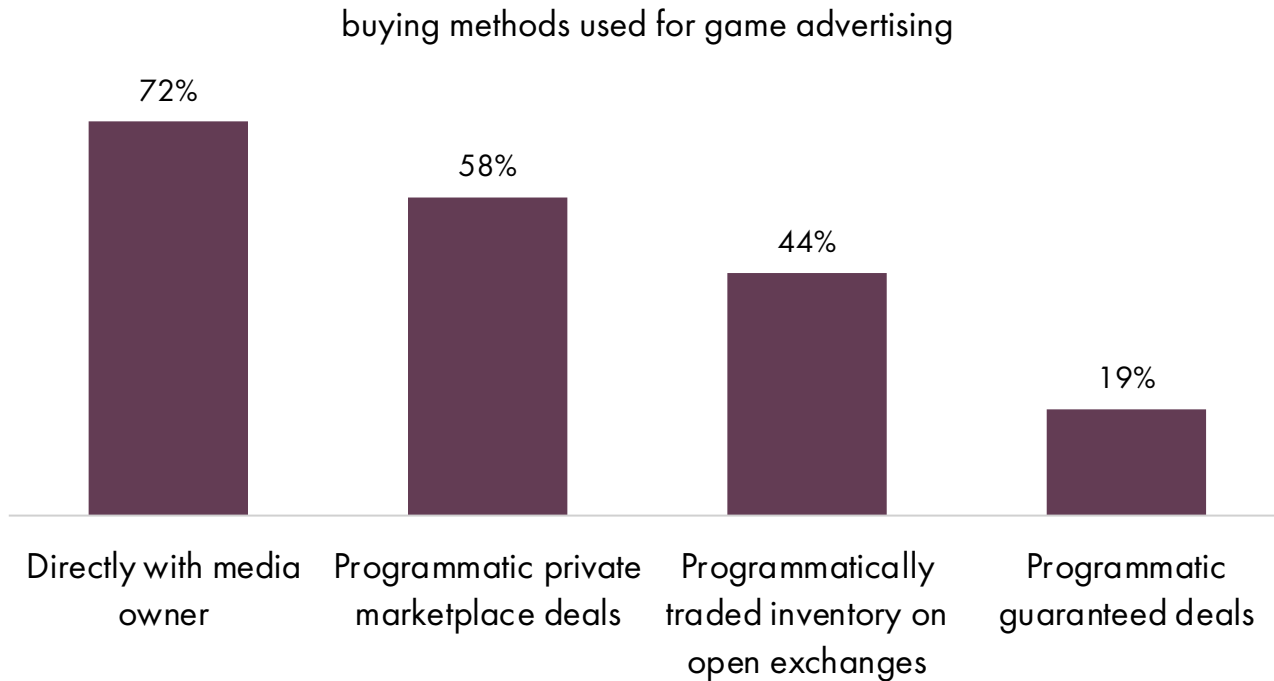
Game advertising is mostly handled by the digital media team in agencies.

planning and buying with other media.



73% of game advertisers always or sometimes plan and buy game advertising collaboratively with digital display advertising (up from 65% last year).

methods for buying game advertising.



"I am excited about native in-game and blended formats that can be traded programmatically, as well as an increase in console/PC inventory that can be traded programmatically".
- media agency

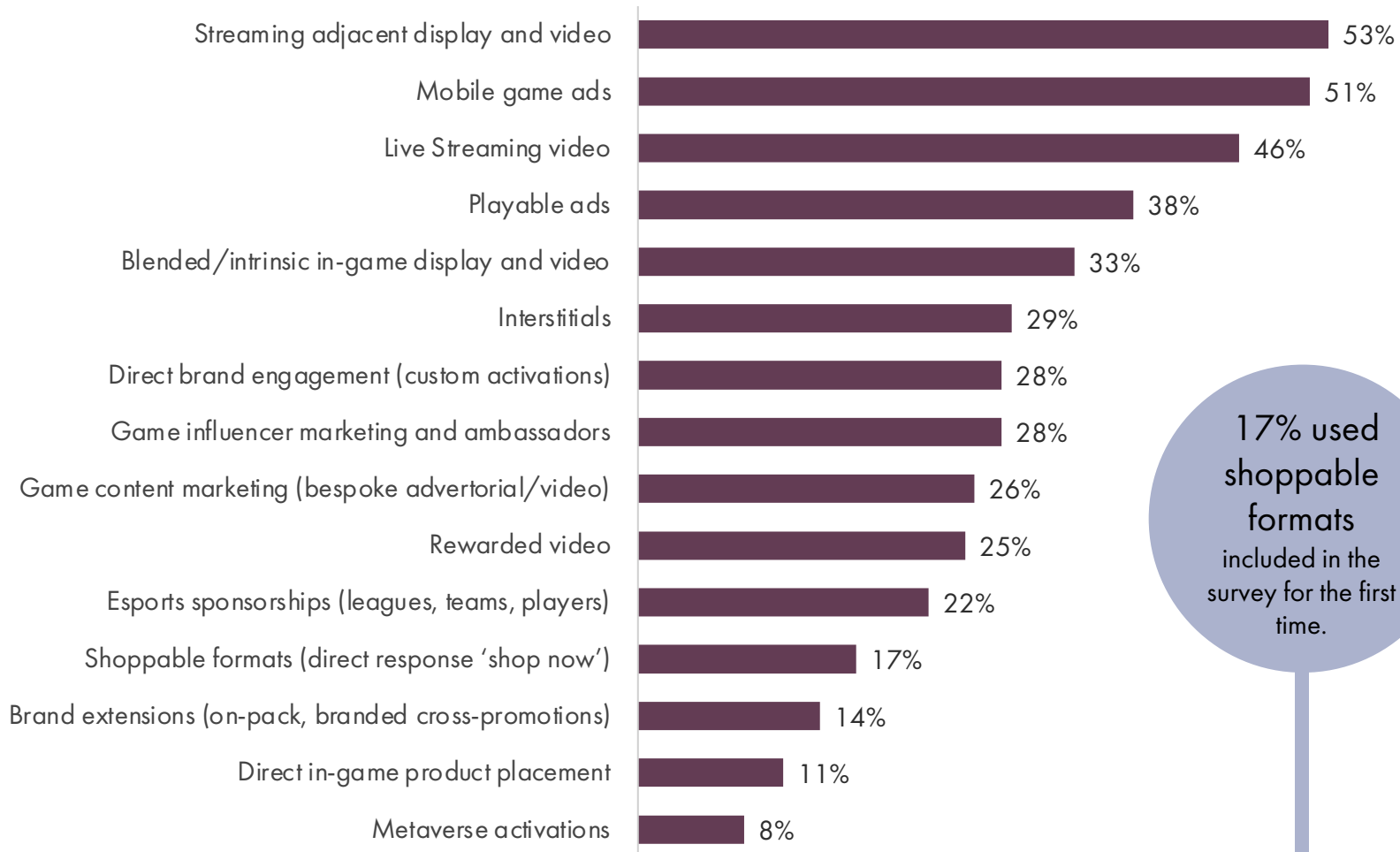
"Programmatically inserting stadium advertising into sport games is something that will be really interesting to watch as it develops to understand how the users react"
- media agency

Source: IAB Australia Game Advertising State of the Nation 2022

Q - Which of the following advertising buying methods have you used for game advertising?

formats used in game advertising.

game advertising and marketing formats used

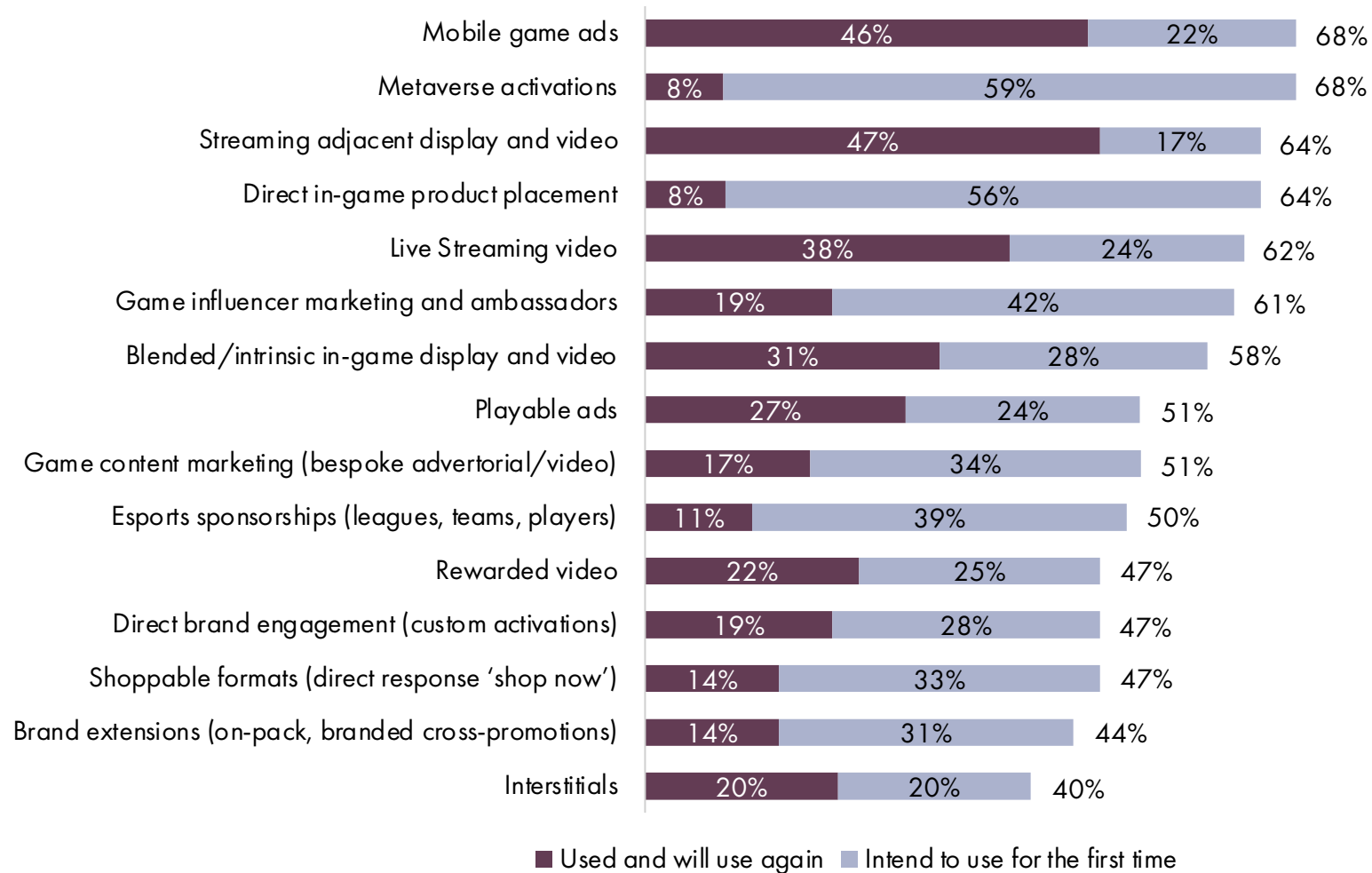


17% used shoppable formats included in the survey for the first time.

There has been increased usage of blended/intrinsic in-game display and video (+10) and playable ads (+9) on last wave.

formats intend to use in game advertising activity.

game advertising and marketing formats intend to use



"The Metaverse is just getting to a really exciting space and being able to reach consumers in this environment is new and bold. I'd love to see where this all ends up."
- Brand Marketer

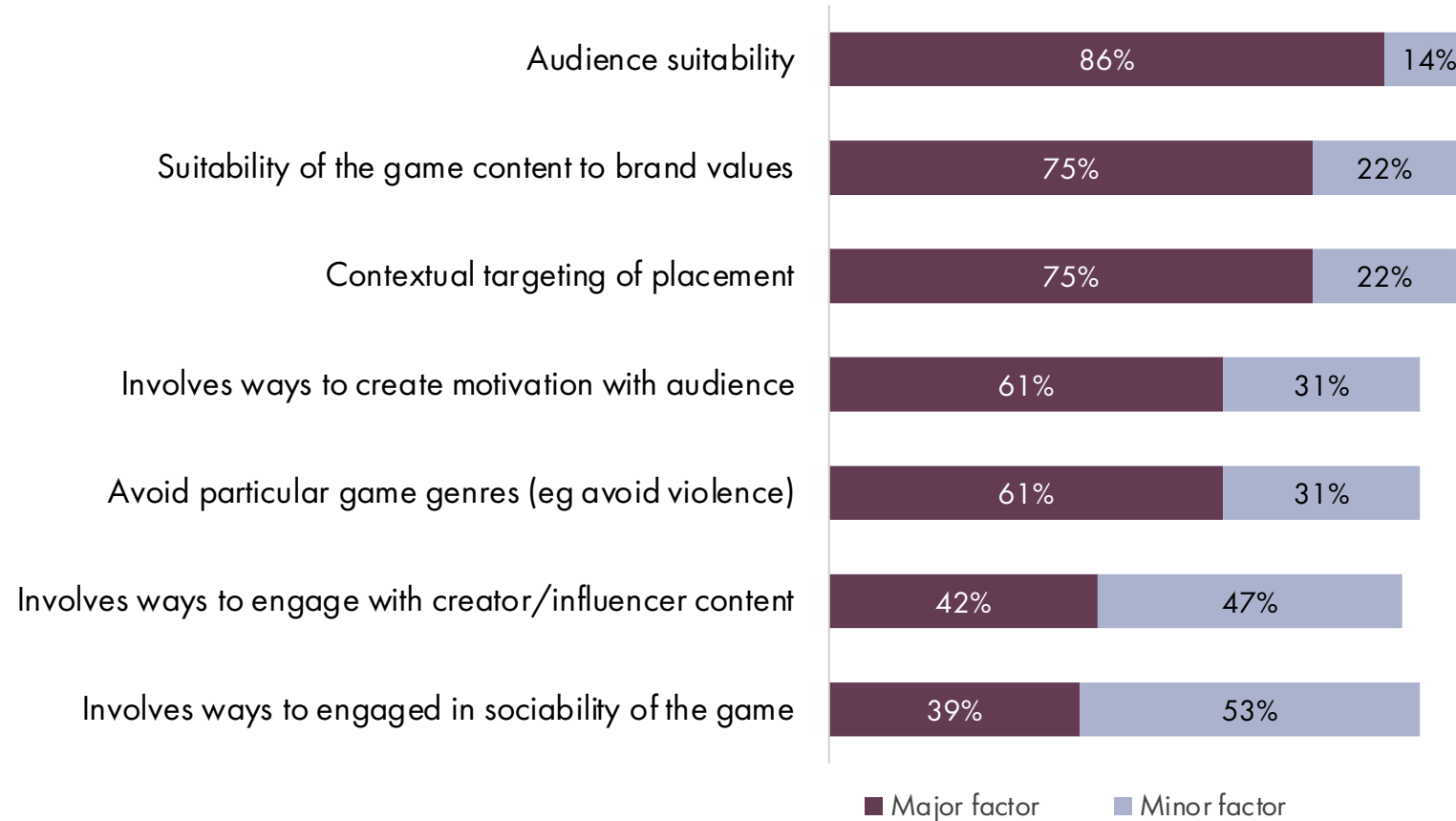
68%
intend to use mobile game advertising in the next year.

Source: IAB Australia Game Advertising State of the Nation 2022

Q - Which of the following game advertising and marketing formats have you used or do you intend to use?

evaluating game advertising opportunities.

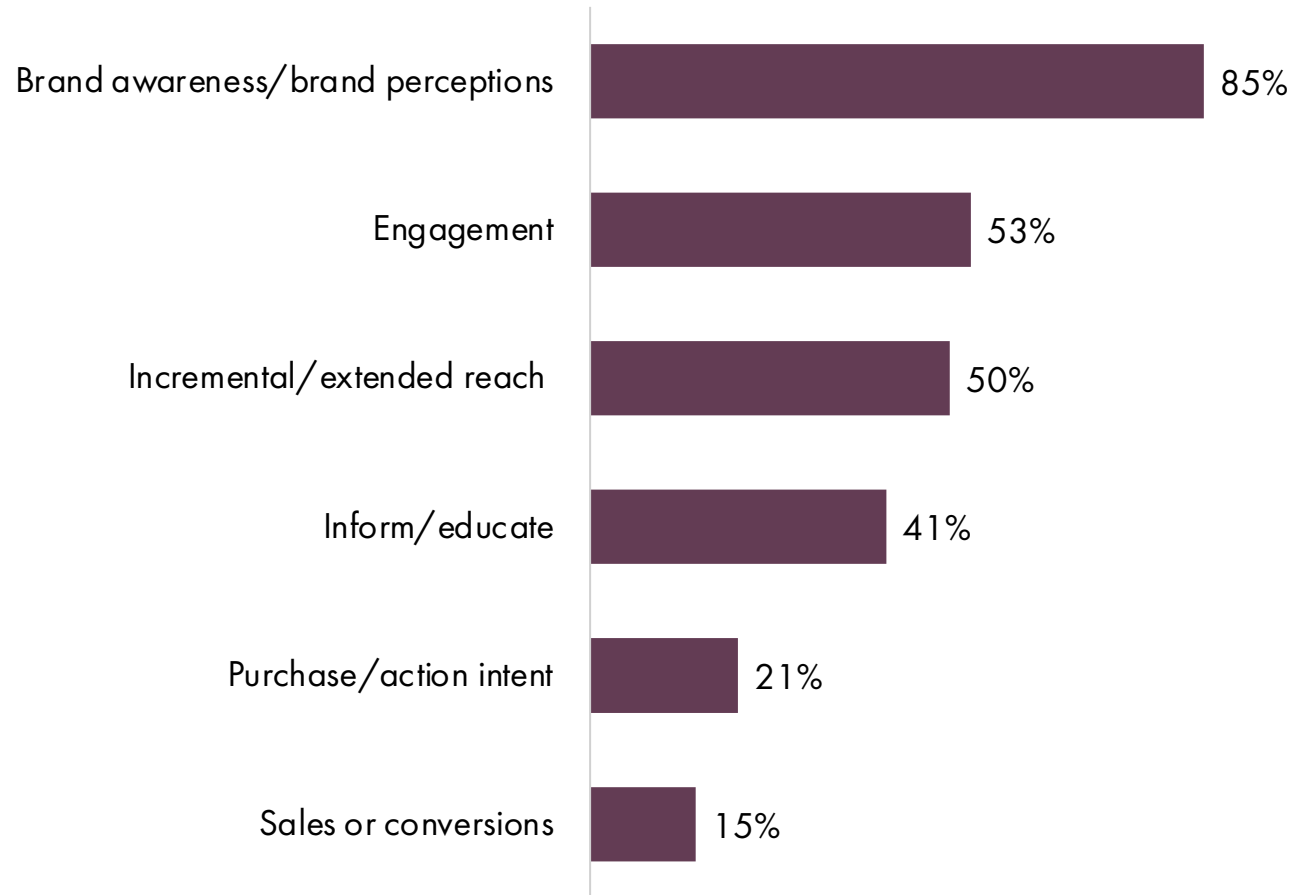
considerations for placement of game advertising



Audience suitability remains the key consideration when evaluating game advertising opportunities.

objectives of game advertising.

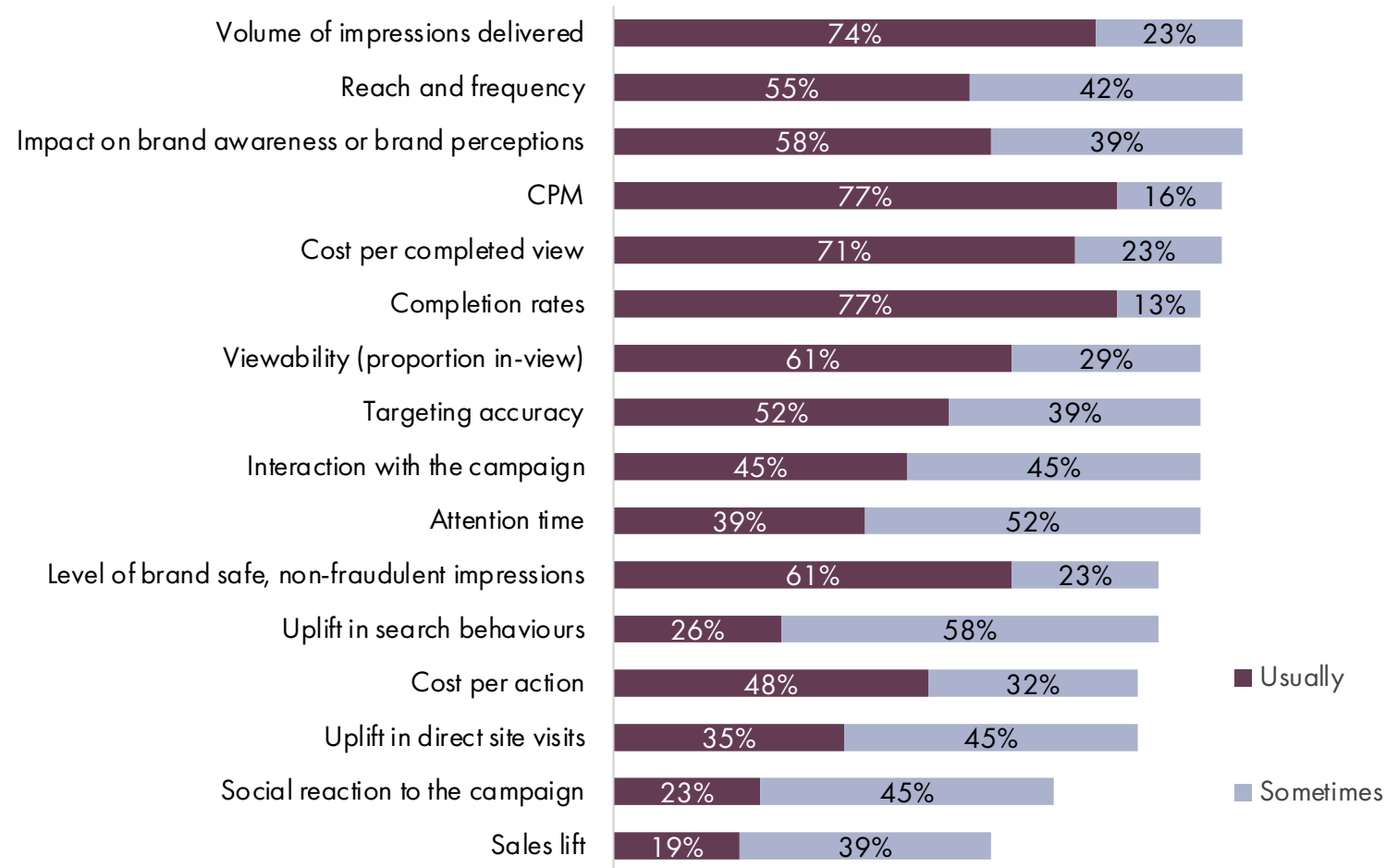
objectives of game advertising and marketing



Brand building
is the #1 objective
for game
advertising and
marketing.

metrics used to assess success.

metrics used to assess campaign success



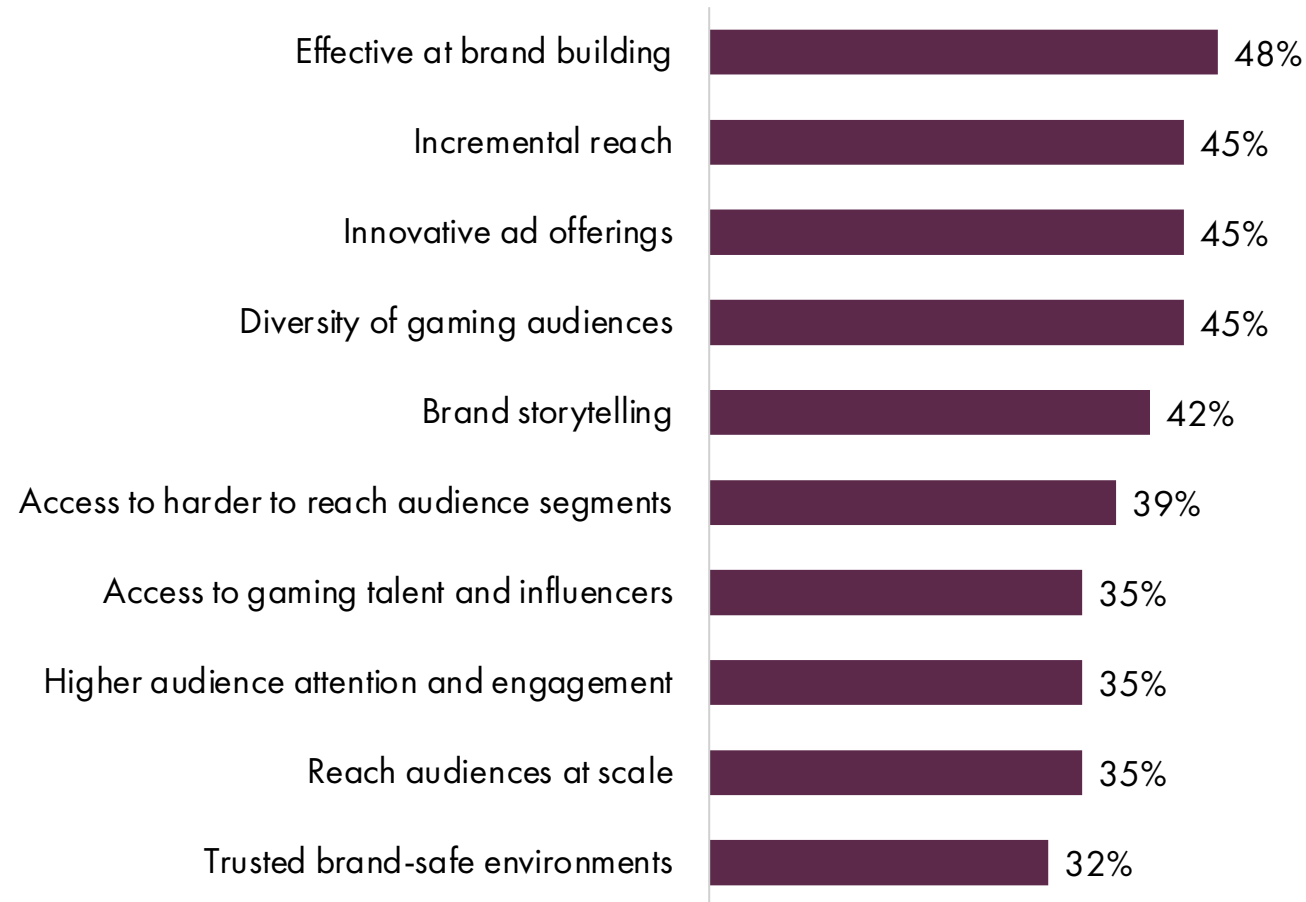
Aligned with branding as the key objective for game advertising, usage of brand metrics to measure success has increased (+15) since last wave.

Source: IAB Australia Game Advertising State of the Nation 2022

Q - How often are you using the following metrics to assess campaign success for game advertising and marketing?

key drivers for using game advertising.

Key drivers for using game advertising



"The development of game advertising as a more utilised space will mean there will become more creative opportunities to incorporate brands into games."
- Media agency

"The opportunity to diversify how we reach audiences and provide a more engaging experience that sits within the consumers mindset"
- Media agency

opportunities for increasing investment.

top 3 barriers to further investment in game advertising and marketing

1. Evidence of effectiveness for brand and ROI

2. Understanding how it can work in combination with other media

3. Brand suitability

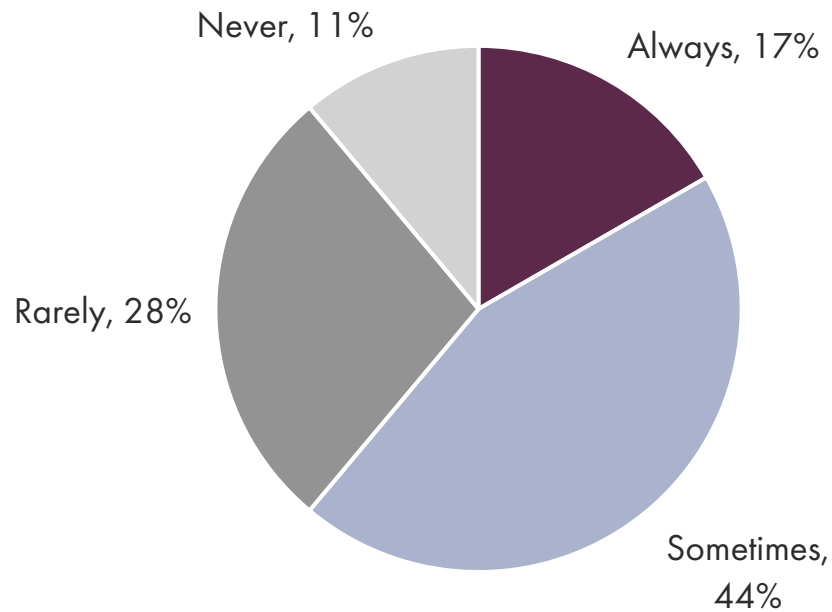
"Curious to know the impact of in-game advertising/product placement on business results/outcome"
- Media agency

"Need to know more about campaign effectiveness measurement - what's the north star?"
- Media agency

fit for purpose creative in game advertising.

Creative is a key driver of advertising effectiveness, however 4 in 10 advertisers rarely or never develop tailored creative executions for game environments. There has been improvement on last wave with 61% at least sometimes tailoring creative, up from 41% last wave.

frequency of creating tailored creative executions



Given the strong impact from creative its worth the effort to invest in strong impactful creative that is designed for the specific game environment.

summary.

Continue to experiment with game advertising and marketing.

Most mainstream agencies have used game advertising and are experimenting with a wide range of formats. There is substantial future appetite to use popular formats again and emerging formats for the first time.

Design creative with context in mind.

To optimize ad effectiveness, produce content best suited to the platform and audience. Consider relevance, suitability, simplicity of message and authenticity.

When evaluating audiences go beyond the gamer persona.

There has been a shift in thinking about game audiences over the last year from getting access to hard-to-reach audiences to focusing on the diversity of audiences and gaming as a broadly appealing entertainment environment.

Leverage brand building and brand storytelling opportunities.

Branding remains the key objective for game advertising campaigns and is now the key driver for investment. Ensure you measure what you set out to achieve and align measurement metrics with campaign objectives.

Continue to provide evidence of the effectiveness for brand and ROI outcomes as well as demonstrate how game advertising works with other media.

Keep informed and build knowledge.

It is important for the industry to provide opportunities to increase knowledge broadly across digital teams within agencies.

product presentations and case studies from the game advertising handbook.



Simon Slee

Business Development Director
Double Jump Communications



Ricky Chanana

Head of Sales AUNZ
Twitch



Matthew McGinley

Head of Publisher and
Telco Development
InMobi



Georgia Woodburne

Managing Director
Azerion JAPAC

iab.
australia



Simon Slee

Business Development Director



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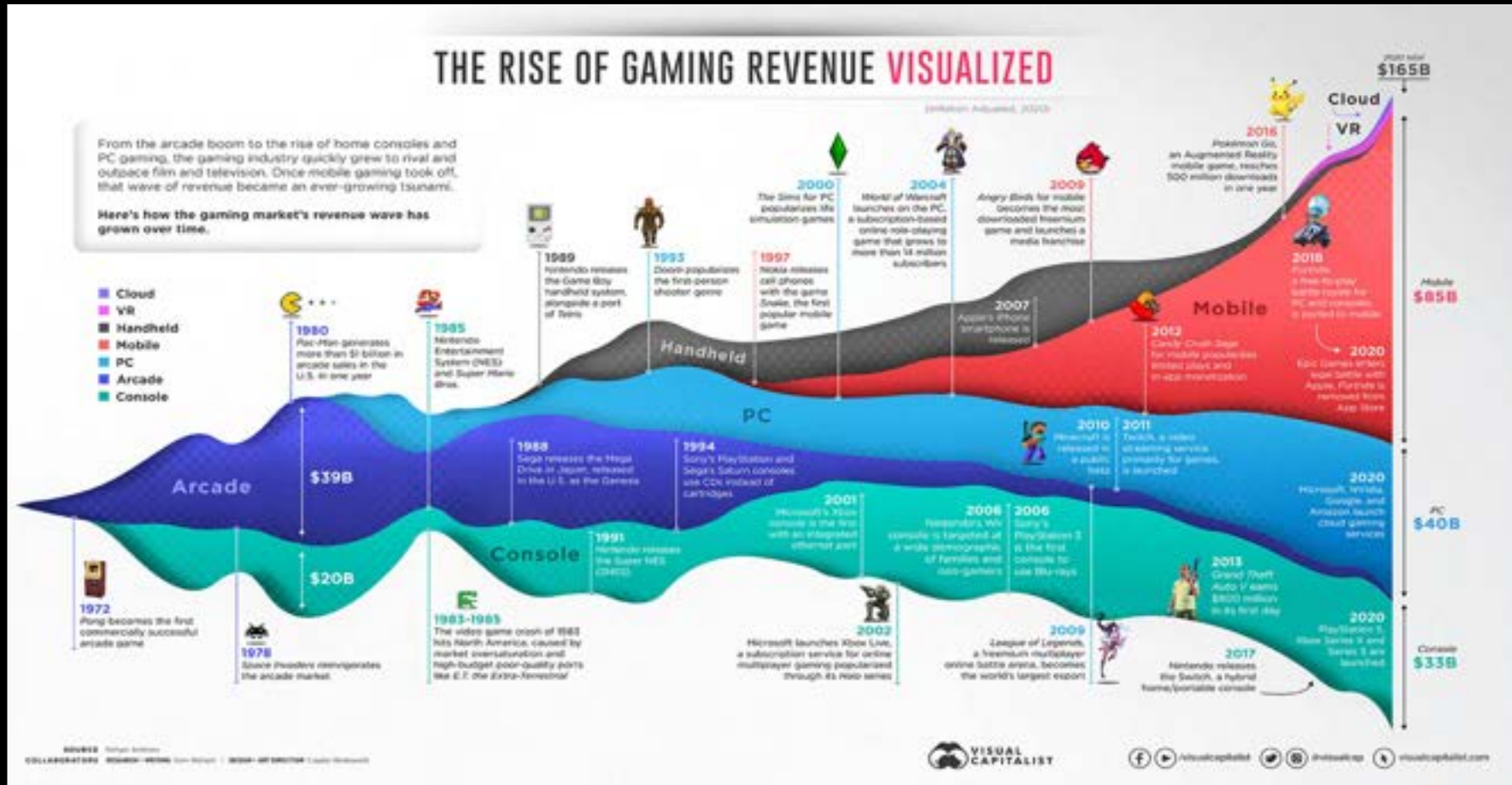


Gaming Handbook 2022

Audience & Environment Considerations

“Is gaming right for my brand?”

Gaming: 50 Years Young = USD\$200B



Bigger than film & music combined
50% mobile

Source: Visual Capitalist



“Everyone is a gamer...”

68% of
Aussies
play

Average
age is
35yrs

46% are
female

9.7 hours
weekly
playtime



“But they don’t all identify as one.”

14%
of players
self-identify

Only 6%
for female
players

55% mobile
players are
female

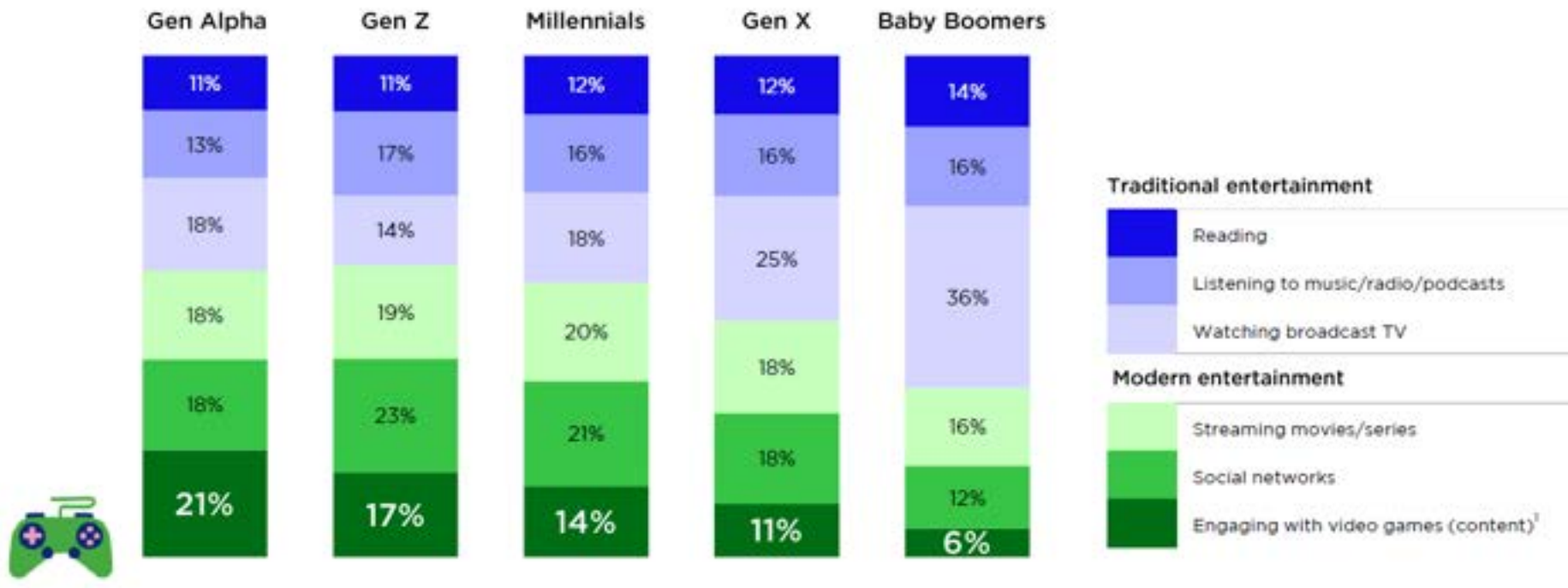
“Gaming is just an important slice of entertainment attention.”



Gaming Attention Economy

% Leisure Time Spent per Week per Entertainment Platform (Outside of Work)

Base: Total online population



Rank 2nd Aussie household entertainment

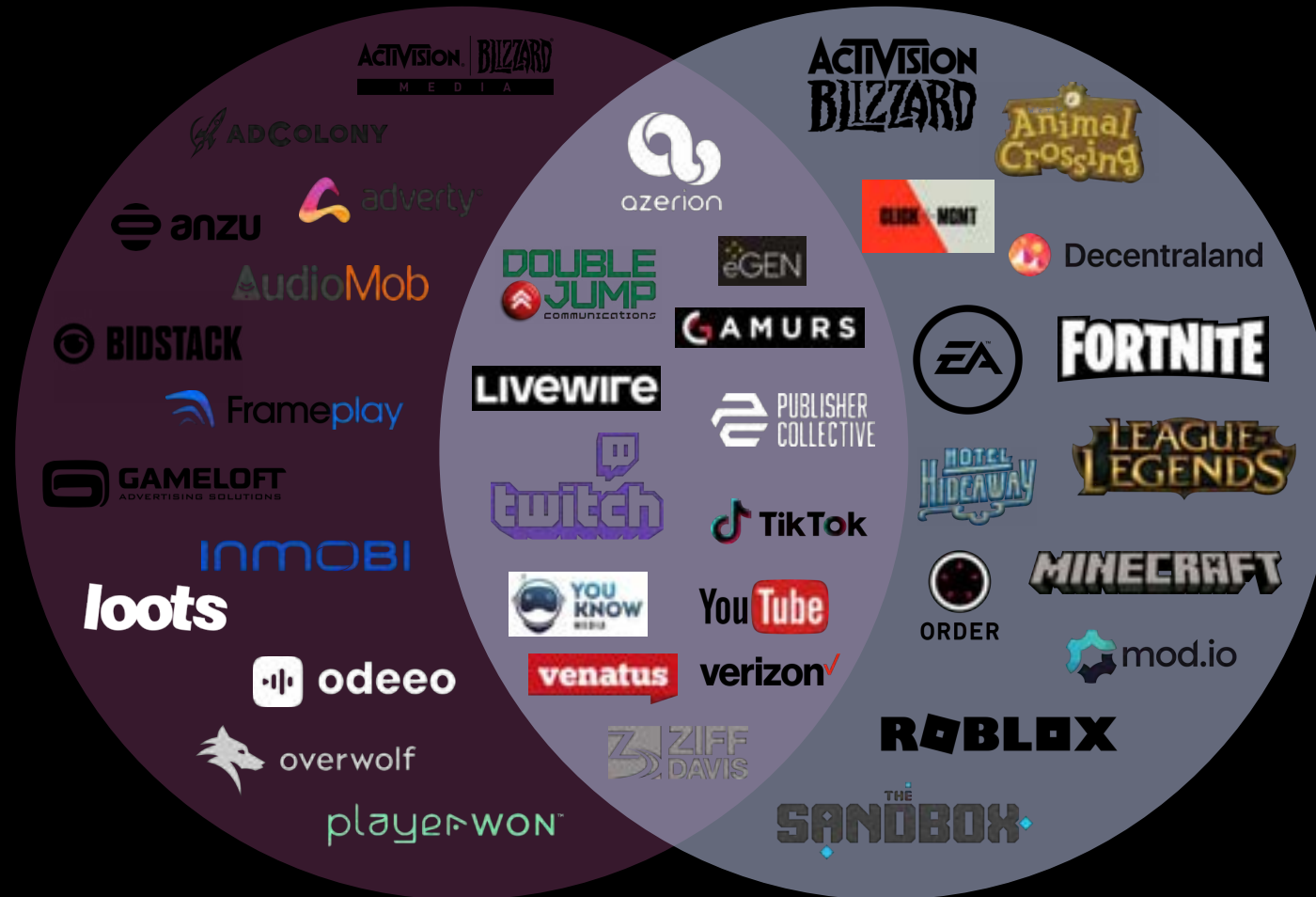
68% of 18-34s second-screen gaming while watching TV

“How do I activate across gaming environments?”



Gaming Environments

Game Advertising (Media) <-> Game Marketing (Content)



Gaming Environments



IAB UK Classification

IAB Gaming Environments

In The Game

Advertising opportunities that are delivered directly into computer and video gaming experiences and are natively integrated within PC games, console games and mobile games.

- Dynamic In-Game Advertising (DIGA)
- Digital Video In-Game Advertising (DVIGA)
- Static In-Game Advertising (SIGA)
- Hardcoded In-Game Ad Objects
- Advergames / Metaverse
- In-stream Video Ads
- Direct In-Game Product Placements

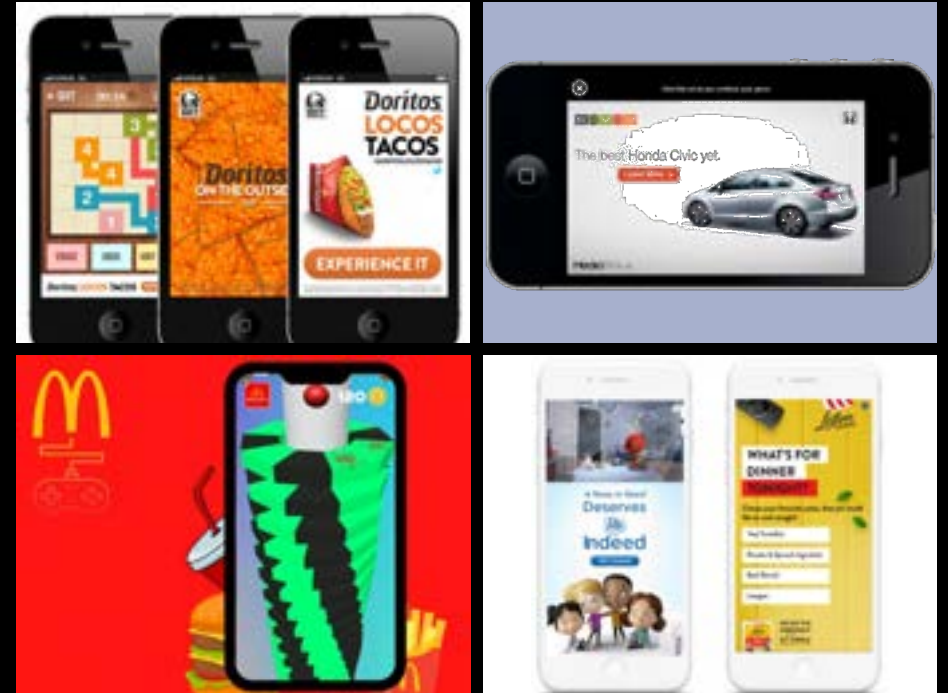


IAB Gaming Environments

Around The Game

Advertising opportunities made available during a gaming experience, but not directly within the gameplay itself. Some examples of this include Banners, Interstitials, Playables or Rewarded Videos.

- Interstitial Ads
- App/Web Based Banners Ads (inc. Native Ads)
- Outstream Video Ads
- Rewarded Video Ads
- Skippable Interstitial Video
- End Cards
- Picture-By-Picture Ads
- In-Game Audio Ads



IAB Gaming Environments

Away From The Game

Opportunities within gaming that exist away from the gameplay experience itself. This includes streaming, esports, influencer/creators and content marketing.

- Game Content Marketing (bespoke advertorial or viral video)
- Brand Extension Promotions
- Esports Sponsorships
- Game Creator Marketing & Ambassadors



34B hrs.
livestreaming in
2021
(21% YoY)

17% of 18-34
follow gaming
creators

YouTube
gaming
viewers 53%
more loyal

"Is gaming right for my brand?"

**"How can gaming help reach audiences
and deliver more impact."**

twitch

Presented by:

Ricky Chanana

Head of sales AUNZ

Twitch

Before we begin:

Can you
recognise any of
these?



Market Analysis

Australia Gaming Market Analysis

AU Gaming Population

 **7.1M**
Payers

 **13.1M**
Players

51% of **Australia's** online population (25.8M) are gamers (13.1M). Among the gamers, 7.1M of them have spent money on games, mostly on **mobile (37%)** and **console games (36%)**.

AU Gaming Revenue

\$2.3 Bn
Total Revenue

Australia is a billion-dollar market with an average annual spend of **\$323.90**, making Australia's payers some of the world's biggest spenders on games (per capita).

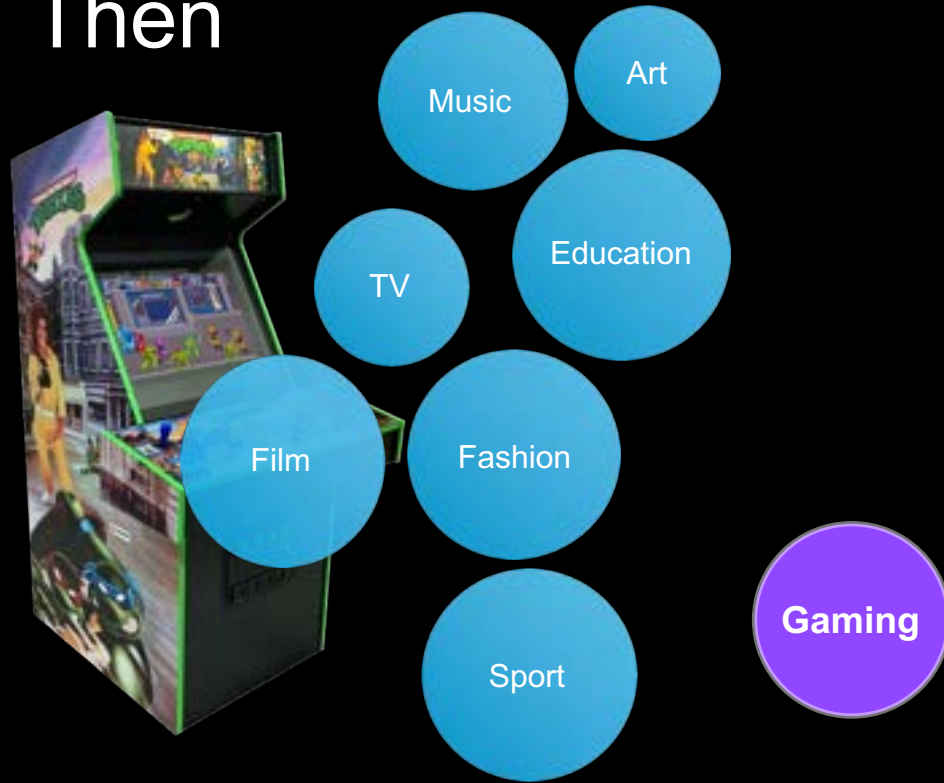


AU Gaming Population (in Millions)

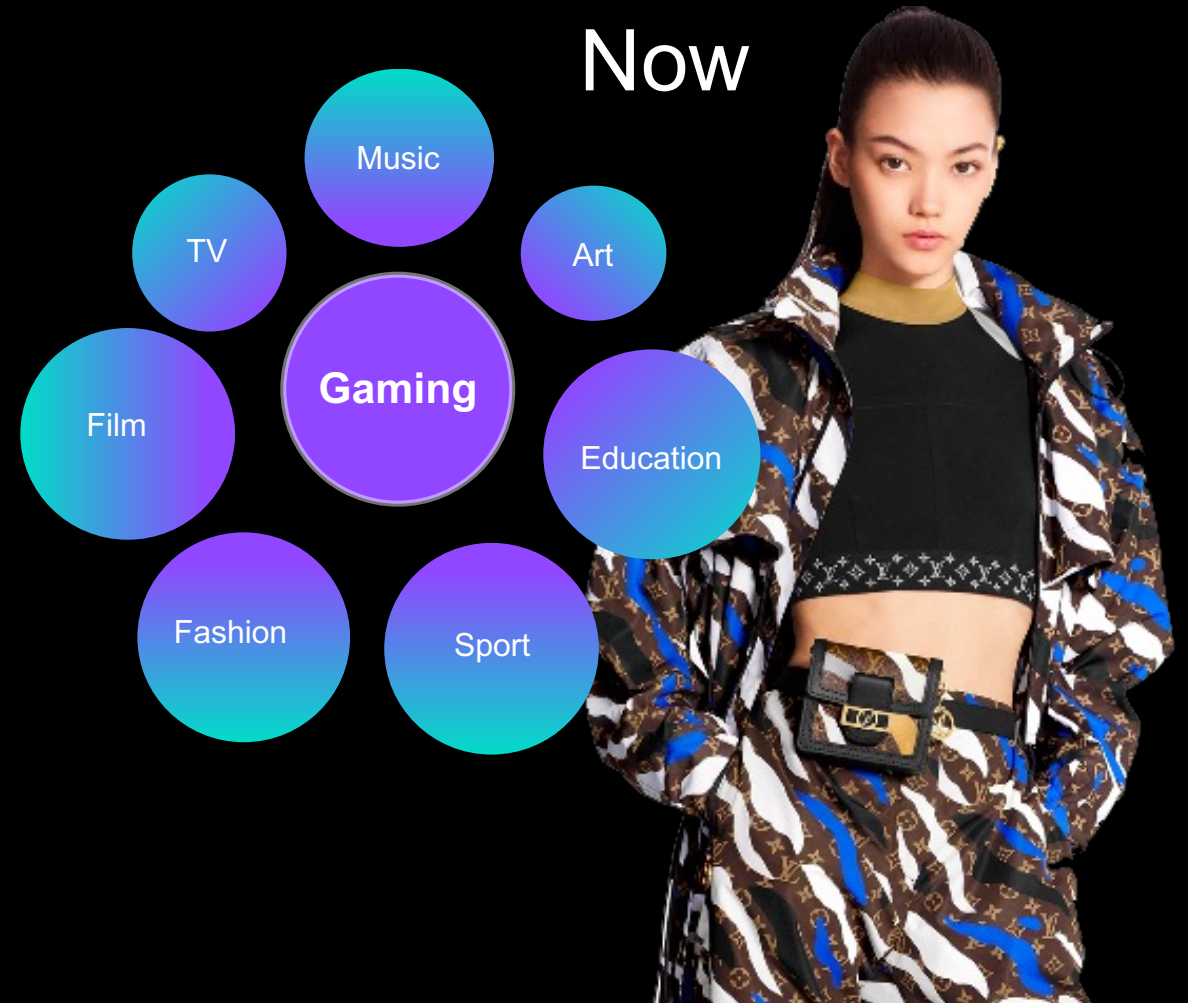


Games today has a huge influence

Then

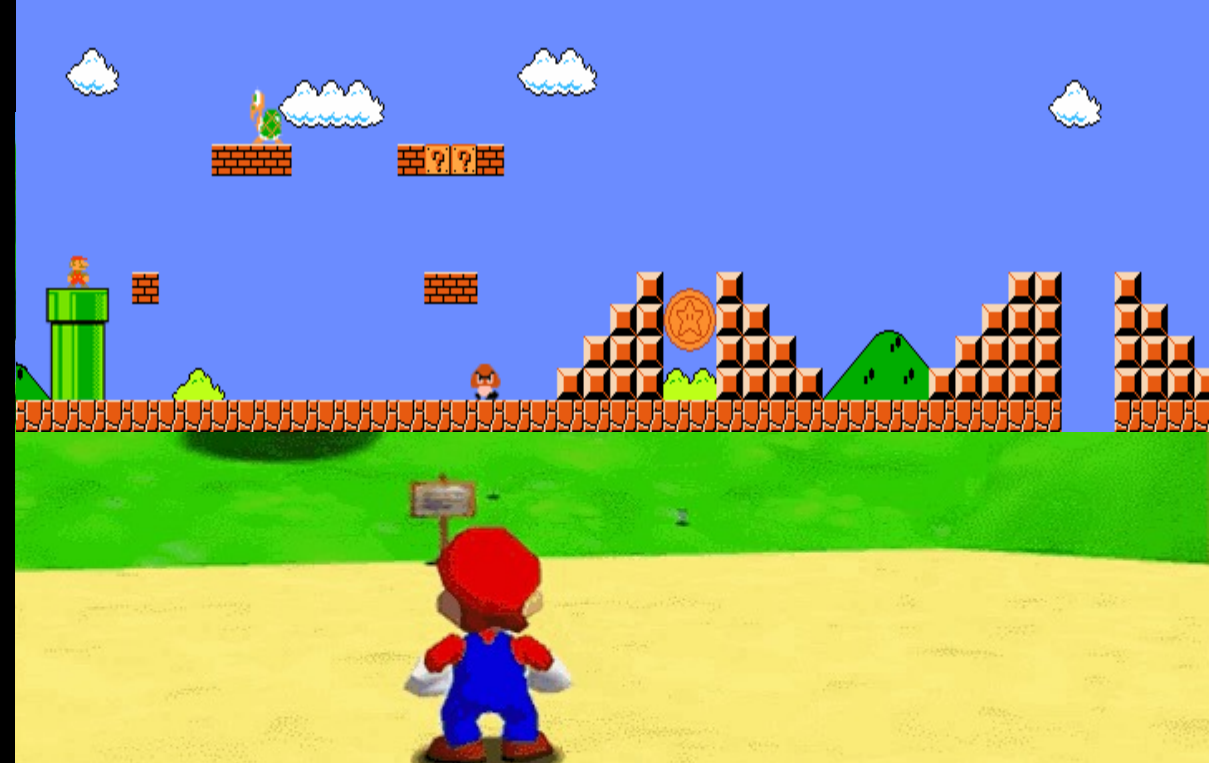


Now



01

The World of Video Games



Gaming in The Present

! Gaming is enjoyed by all genders and ages

Today, **over 4 in 10 internet users are gamers**, defined as those with an interest in gaming and who play games on any device.

More than **75% of internet users worldwide are gaming** on any devices that they owned.

Gaming demographics

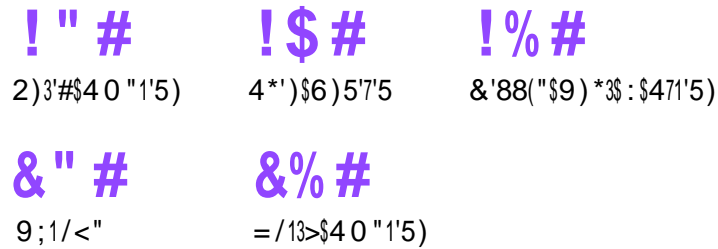
% of internet users gaming on any device who are...

37%



Gaming by region

% of internet users in each region who game on any device



! "\$%\$(aged 16-22), *\$(aged 16-22) *\$(aged 37 - 55) (aged 37 - 55)

Different Types of Gamers



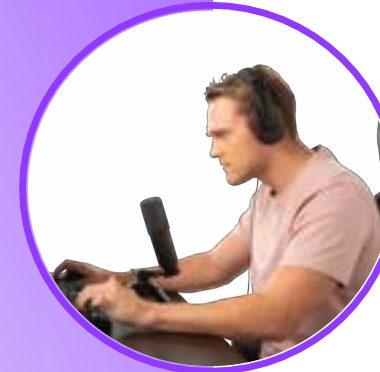
Recreational Gamers

- ✓ Dabbles in video games in short sessions or infrequently
- ✓ Sees gaming as a way to pass time



Regular Gamers

- ✓ Regularly plays video games, but not serious or competitive
- ✓ Can be competitive and wanting to be part of a bigger part of their social groups or communities



Serious Gamers

- ✓ Plays video games frequently, seriously or competitively
- ✓ Up-to-date with the latest in gaming trends and activities

Gaming Devices: How People Play Games

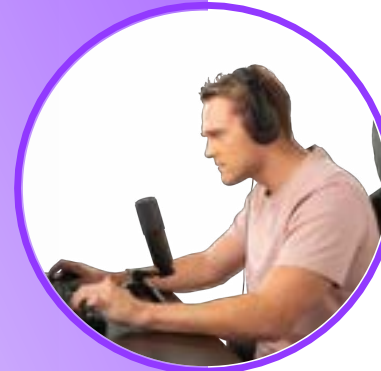
** featuring top genres & games



Console Gamers



Mobile Gamers



PC Gamers



Gaming Genres: A Game for Every One

Genres

Genres are the defining characteristics of interaction within video games (core gameplay)

There is always a game that appeals to someone who likes a specific genre



Total no. of genres worldwide

100+

Genres across different devices



Examples



02

Video Games in Modern Culture



Gaming Genre:

Education

Games have been used as a teaching tools in the last 20 years but has especially made progress as a medium to educate by developing people's knowledge through simulations and real-world applications of concepts.



Gaming Genre:

Movie & TV

Video games are one of the most commonly used form of narrative storytelling by writers and directors to tell a story but are also used as stories behind the narratives to movies.



Gaming Genre:

Music

Video games have become one of the most interactive platforms in which music brands and companies have made use of games to create new music for the younger generations.



Gaming Genre: Finance

The emergence of the Metaverse and technologies such as blockchain and cryptocurrency have seen an increase in companies using video games as one of the tools to increase adoption of their currencies and economies.



Gaming Genre:

Esports

Esports, also known as esports, or electronic sports is organized competitive video gaming. It primarily involves teams competing against each other in tournaments for a cash prize. Functionally, it's the same as traditional sports. Top-level athletes are constantly vying for the top spots in their sport, or game, of choice.



Gaming and Mainstream Media Gaming and
Mainstream Media Gaming and Mainstream
Gaming and Mainstream Media Gaming
Mainstream Media Gaming and Mainstream



Gaining
Acceptance



A Common
Language



Future of
Entertainment



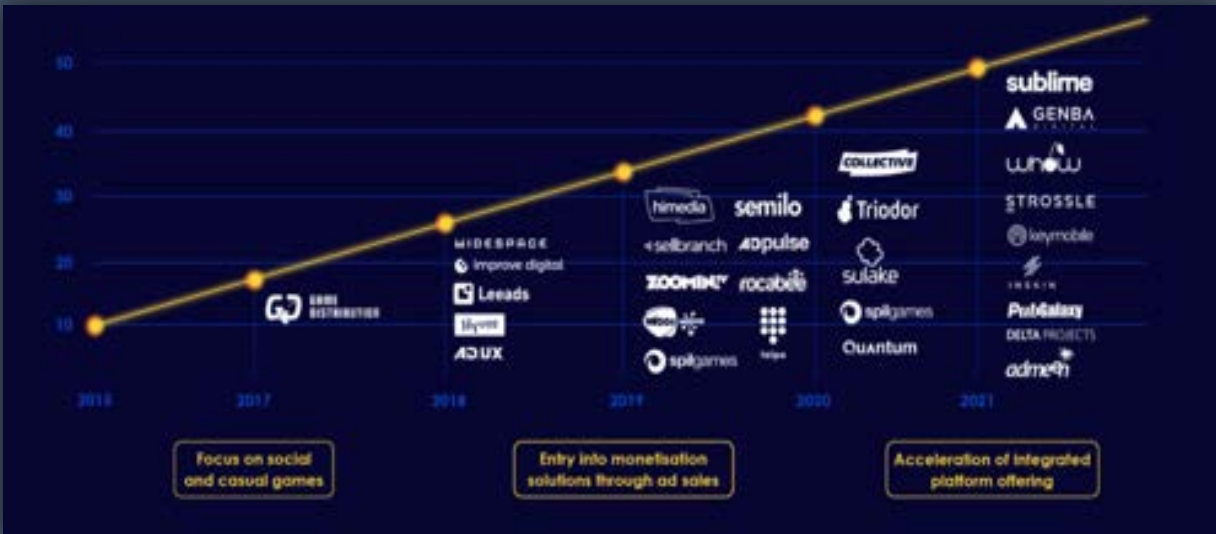
twitch ads

Thank you.



**Join the future
of entertainment**

47 Ents/Tech/Media acquisitions (since 2014)



Casual

Simple and fun Free to Play games played during downtime, e.g. Candy Crush



17,500 O&O Games

Social

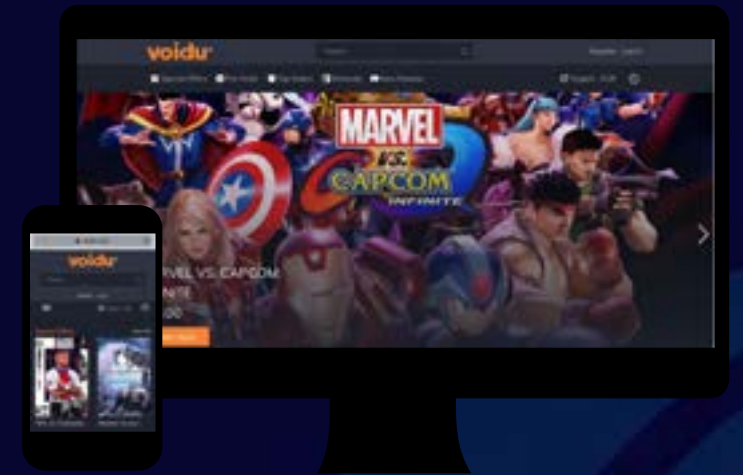
Virtual social multiplayer games or metaverses played with an avatar, e.g. Roblox



3 virtual worlds

Hardcore

Console and/or online PC games available in retail or e-commerce platforms e.g. Esports on PlayStation



Exclusive partnership with Bidstack

Metaverse Timeline

Gen Y, 17-35 yrs., 70% male

Gen Z, 17-24 yrs, 60% female

HABBO

(2000)

SECOND LIFE

(2003)

ROBLOX

(2006)

MINECRAFT

(2011)

HOTEL HIDEAWAY

(2016)

ActiveWorlds & Worlds Chat
(1995)

Animal Crossing

(2001)

imvu

(2004)

WOoz world

(2010)

avakin life

(2013)

FORTNITE

(2017)

Gen Z/Alpha, 10-18 yrs., 78% female



Live Events & Branded Experiences

More than a decade before Travis Scott's iconic performance in Fortnite, in 2005, Habbo hosted a 12 stop virtual tour featuring the Gorillaz, the first virtual music experience of its kind. It was not until 2006 that Second Life followed suit, hosting Duran Duran.



Taylor Swift

HABBO

(2010)



Wooz world

(2012)

Hotel Hideaway hosted a live music event

85.000

visitors watched our first live performance hosted by Luuk van Dijk.

245.000

pieces of digital event merchandise sold

287.000

impressions on social media promoting the concert

62M

impressions within our gaming ecosystem promoting the concert



The partnership so far..

425k branded items sold
in-game in the first 2
weeks

Avg 46 mins in the villa
per player so far

Love Island branded
room is the most popular
room in-game with 1.7m
visits by 272k players in
the first 2 weeks

HOTEL
HIDEAWAY



love island

Take risks. Be prepared to fail. Make quick decisions and trust your gut. Most importantly, never forsake the customer for the bottom line.

- Ridley Plummer Metaverse & NFT Project Manager Tennis Australia



azerion

Make the most of
your digital brand
experience

G.Woodburne@azerion.com

What are 2 things that you can do today on Mobile?

Matthew McGinley,
Head of Publisher & Telco Development





Castrol **POWER1**

Objective

Castrol aimed to drive consideration, strengthen brand recall and purchase intent for 'Castrol POWER1' aimed at Gen Y and Millennials.

Solution

Engage with Filipino Gamers in an immersive in-game experience and measure the overall impact.



Castrol POWER1

“Not only has the brand interest increased significantly, but we have also **discovered deeper metrics on the brand's position and performance in the market.**”

Blended in-game advertising is a promising avenue for brands to explore.”

Camile Sabale
Marketing Manager, Castrol Philippines



70%
respondents
recalled the ad
successfully

75%
post ad view
action recorded

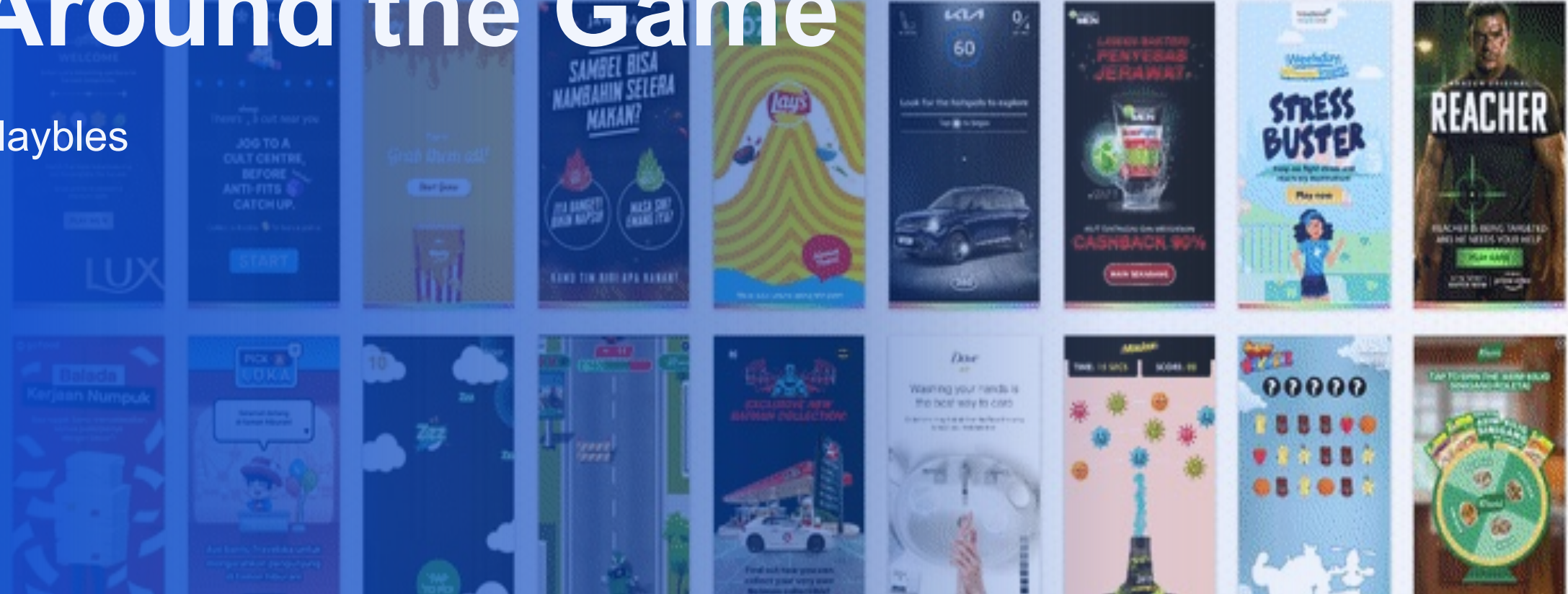
25+ demo
showed highest
purchase intent

Search for Keywords like 'Reebok' or 'Food' or 'Carousel' Hit enter to see results

Categories Countries Formats Functionalities **Mini Games** Verticals Show Mocks

Around the Game

Playbles

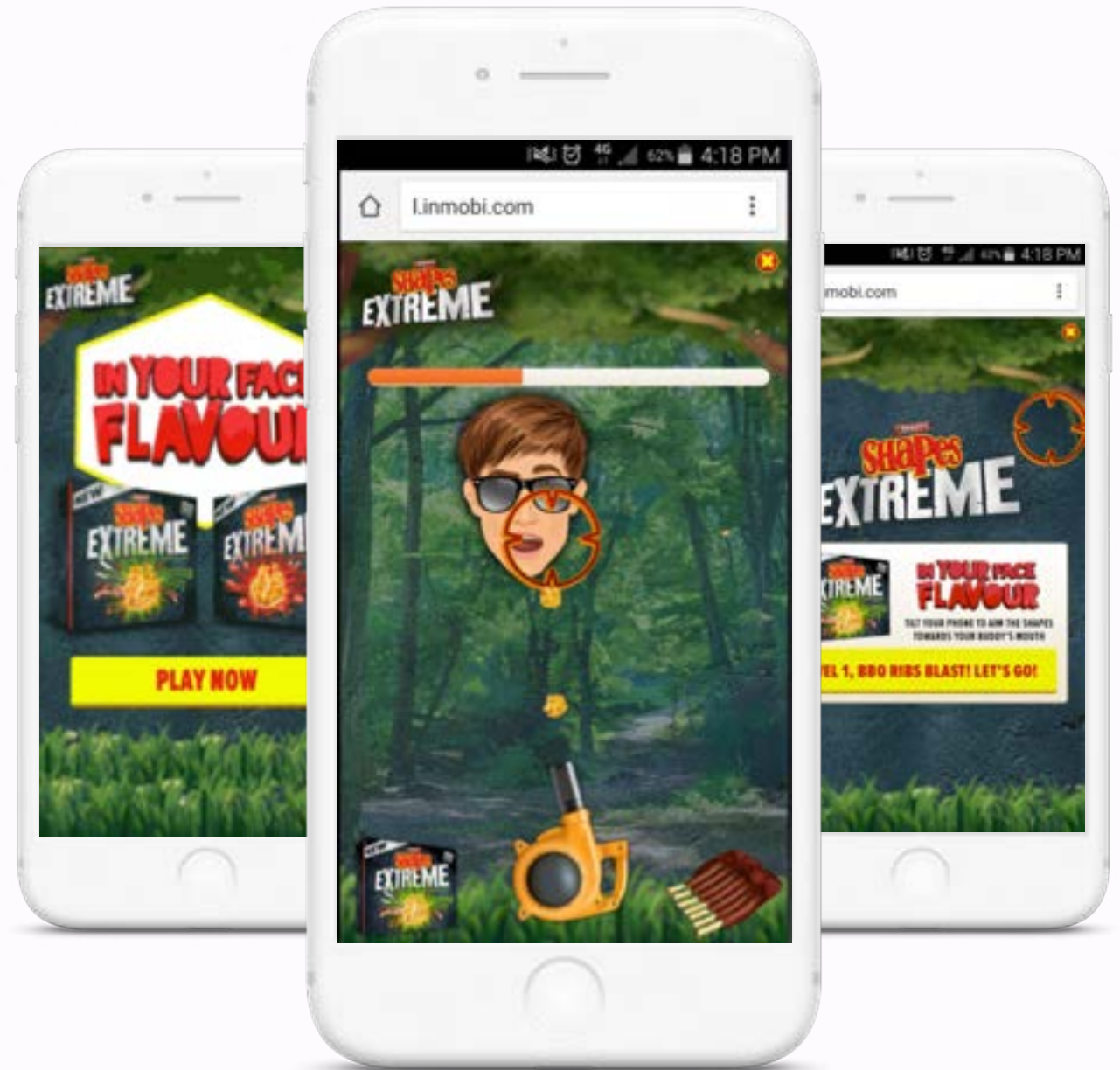


Arnott's Shapes Extreme

*"InMobi enabled us to not only be present where the audience is, but to create a deeper level of engagement through the creation of an interactive ad unit whereby the user could play a game that **matched our TVC and most importantly, our creative comms message.**"*

*The primary takeaway from the brand study is that **88% of exposed respondents agreed that they would like to try Shapes Extreme a big win for a new product launch!**"*

Marco De Castilo
MEC Sydney

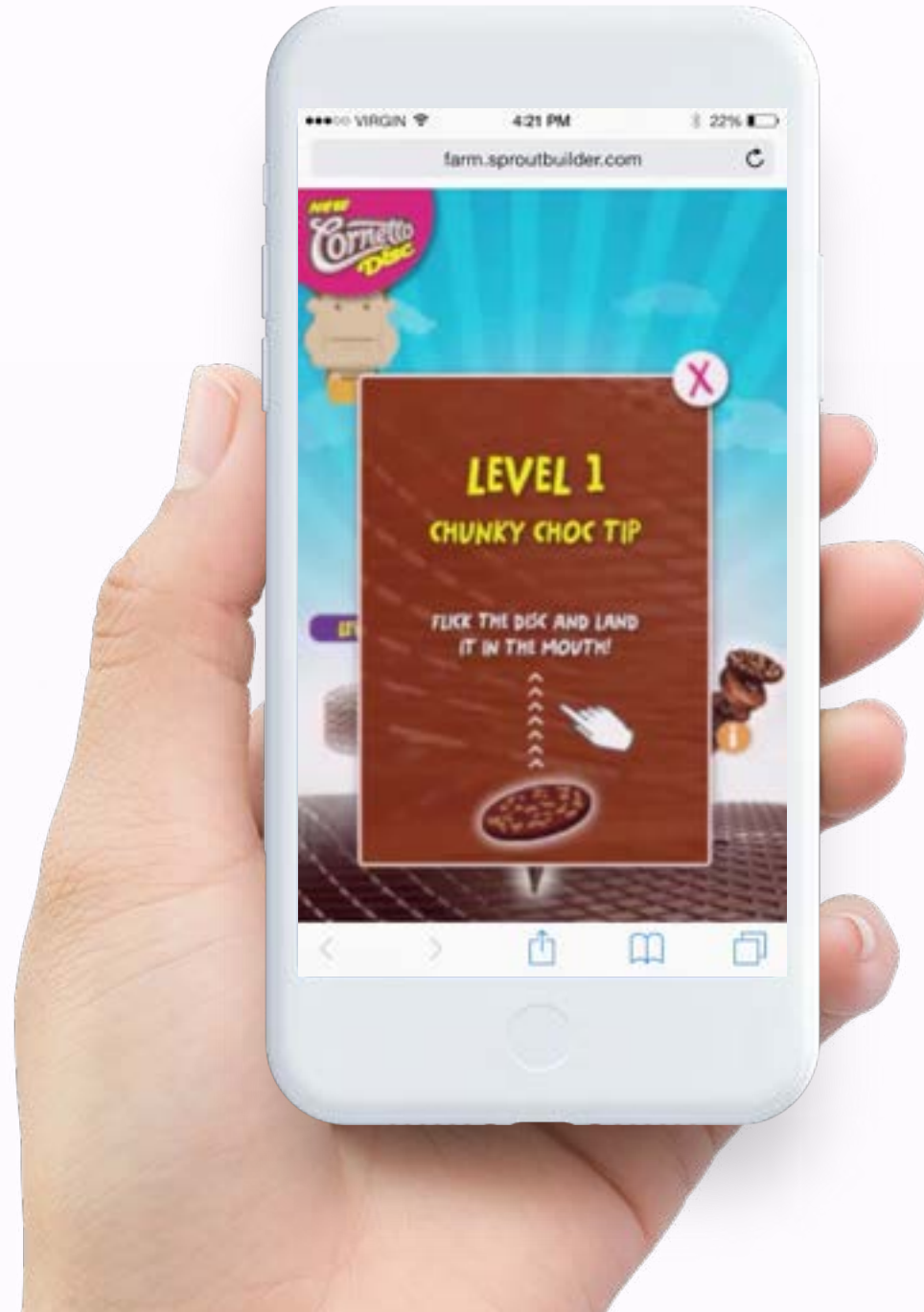


Unilever Cornetto Disc

**73% of exposed
respondents said they
were likely to buy the
new Cornetto Disc**

Commissioned research via YouGov & InMobi

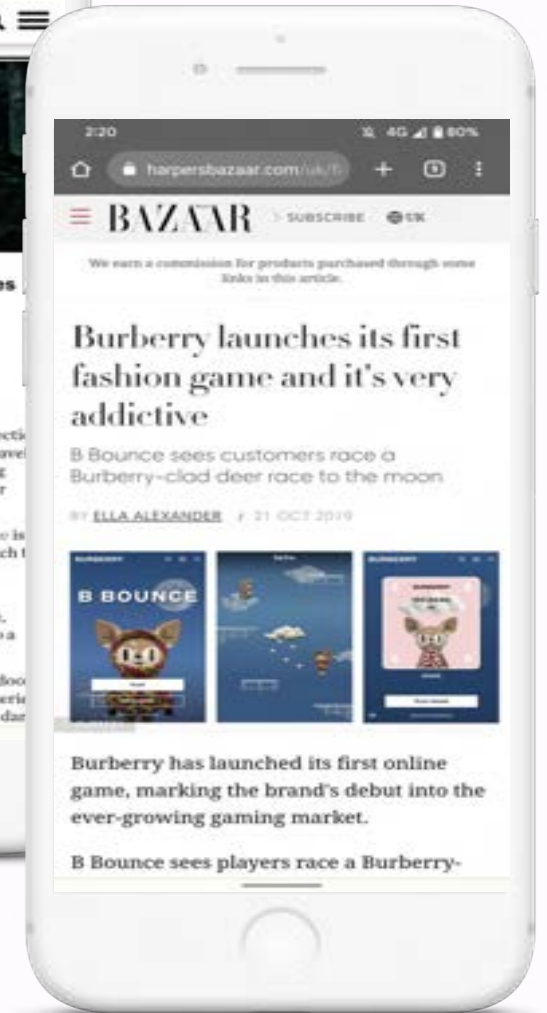
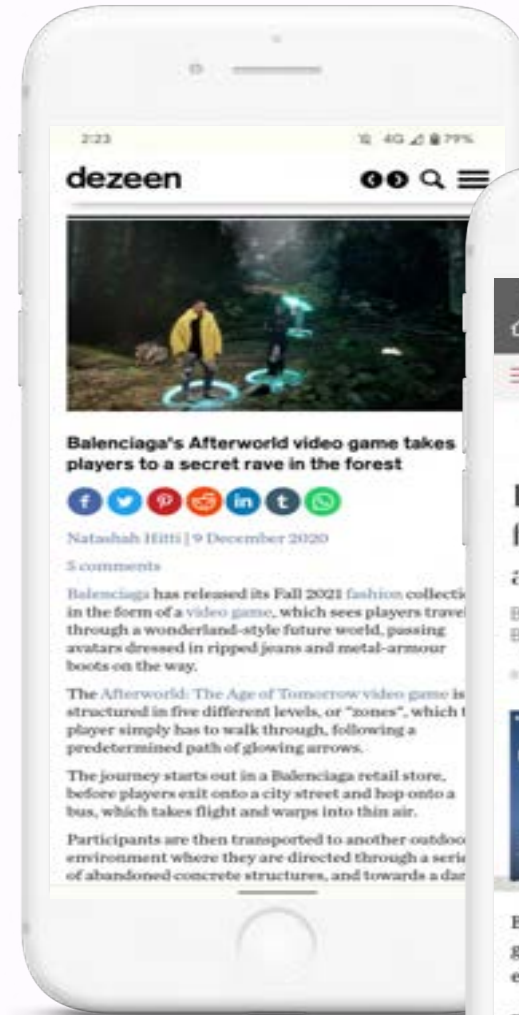
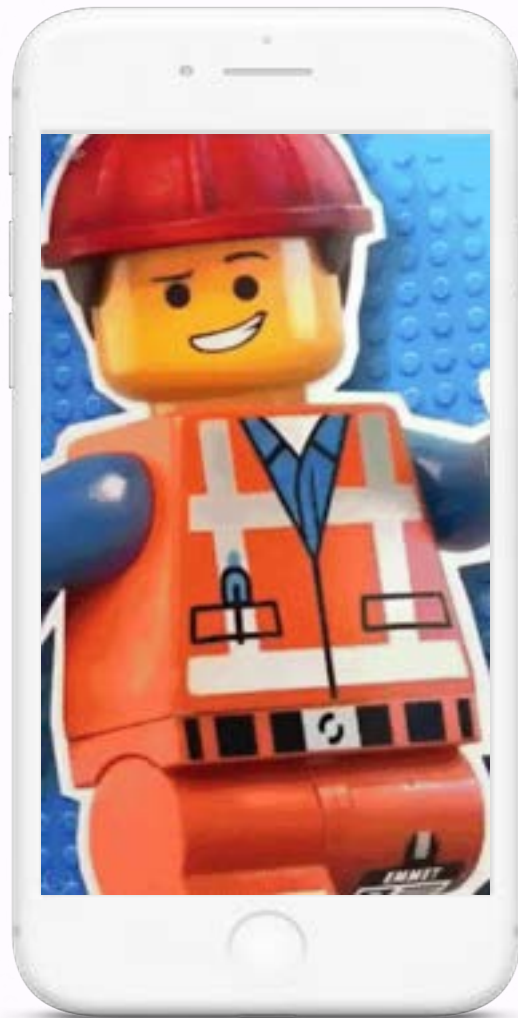
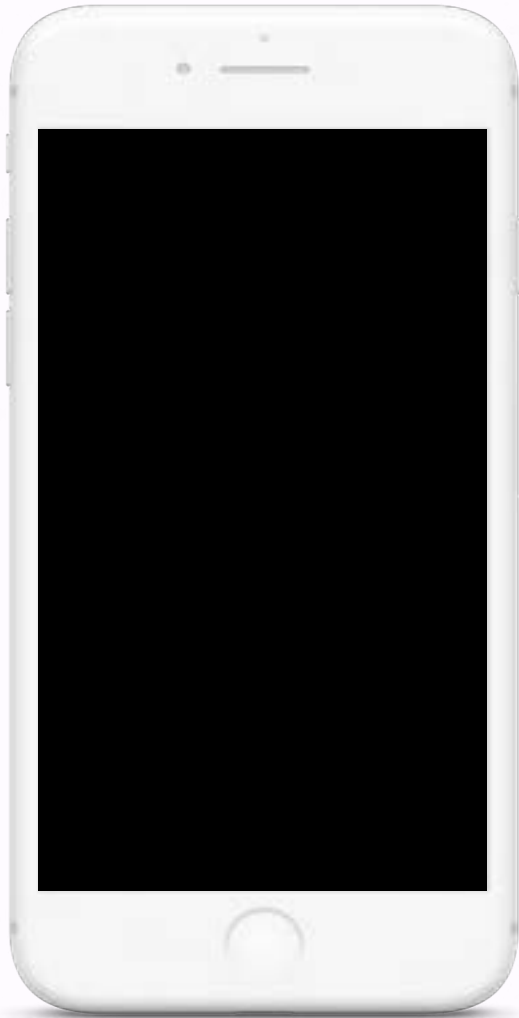
INMOBI



231,705
game plays

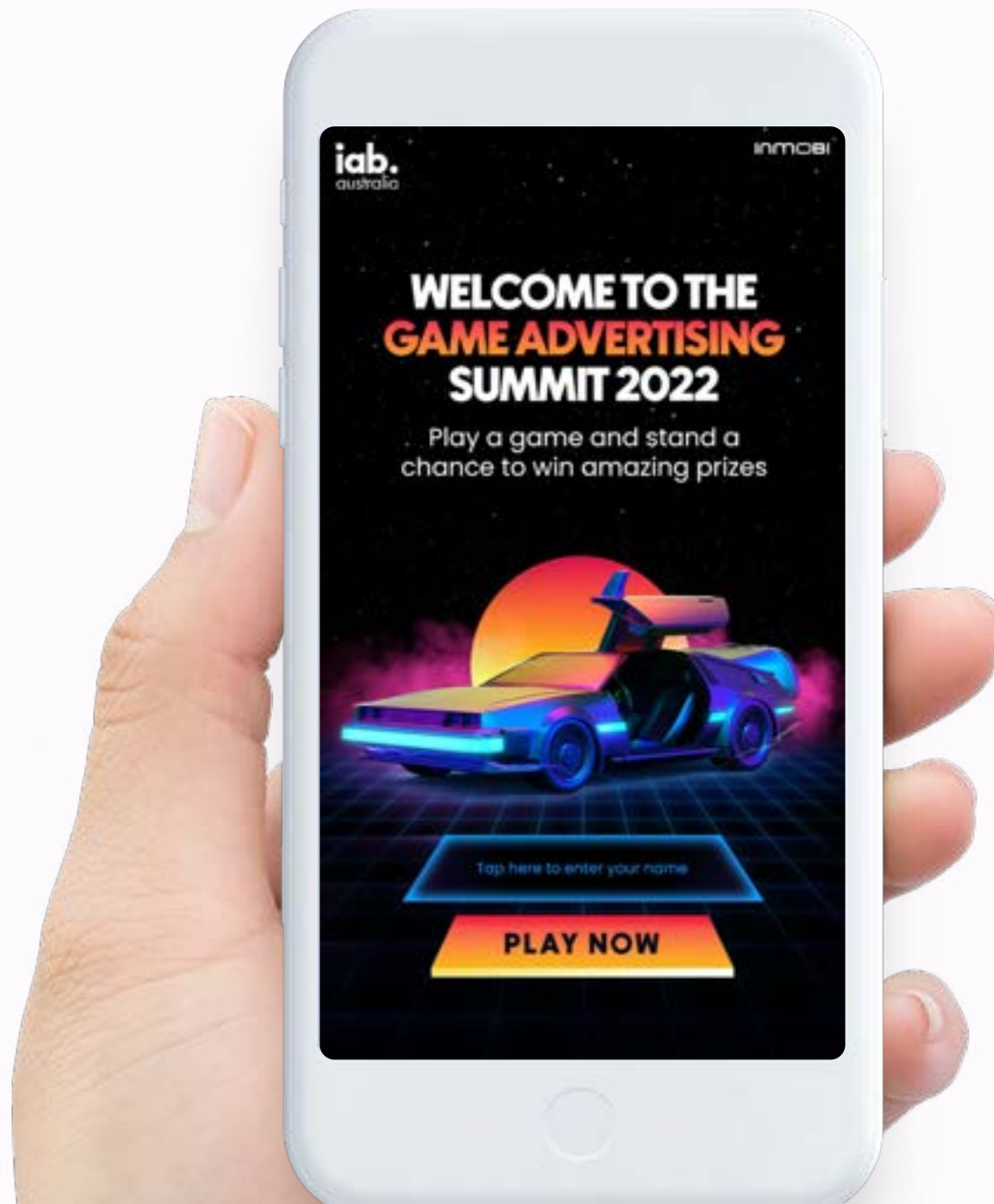
4646
shares on
Facebook

8min+
Average dwell
time



InMobi Rad Racer

Scan to play!



July Debate

MEASURABILITY IS KEY FOR SUCCESSFUL IN-GAME ADVERTISING

06 July 2022

The Royal Exchange Of Sydney, Sydney CBD



Sponsored by

INMOBI & **ORACLE**

ADVERTISING
INDUSTRY
**DEBATE
CLUB**

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BY

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