



welcome to the
gaming
summit



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scroll

thankyou to the iab australia gaming working group

iab.
australia

gaming
summit

gaming state of the nation research

natalie stanbury
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iab.
australia

[sli.do iabgamingsummit23](https://sli.do/iabgamingsummit23)

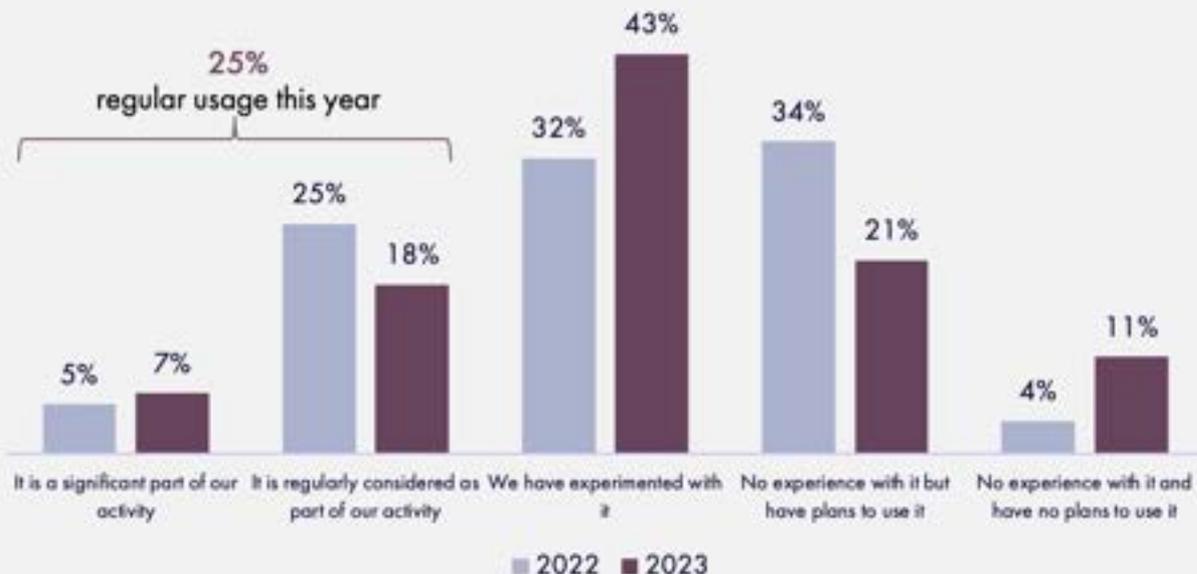
A survey in June/July 2023 amongst **100 advertising decision makers working in agencies and brands** with experience or intention to buy game advertising and marketing.

Designed to assess industry understanding and use of game advertising and prioritise initiatives to help marketers drive business results.

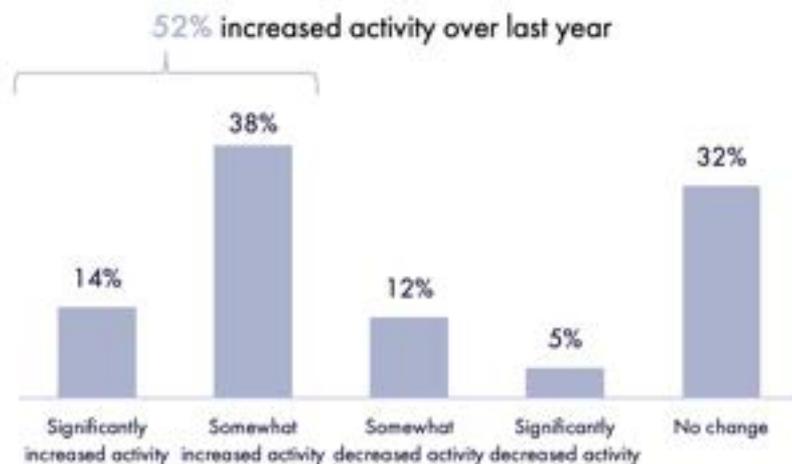
experience with game advertising

68% have used game advertising

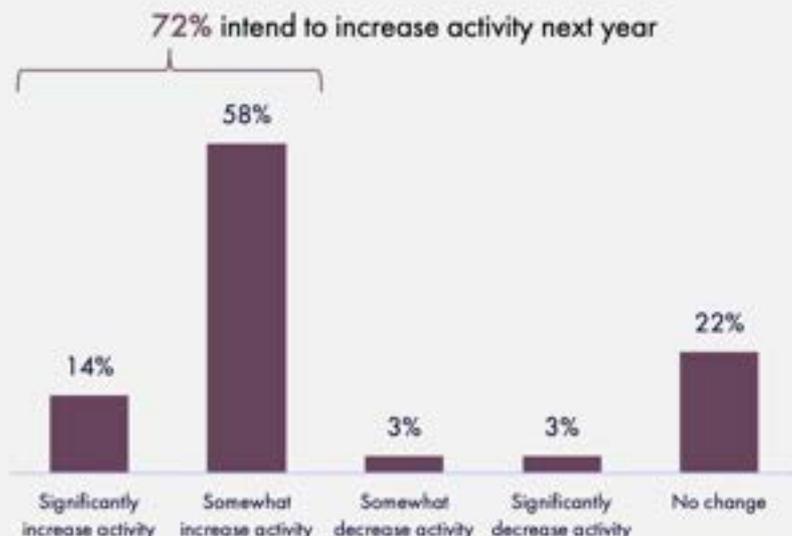
experience with game advertising and marketing to date



changes in activity and participation
over the last 12 months
amongst those using game advertising

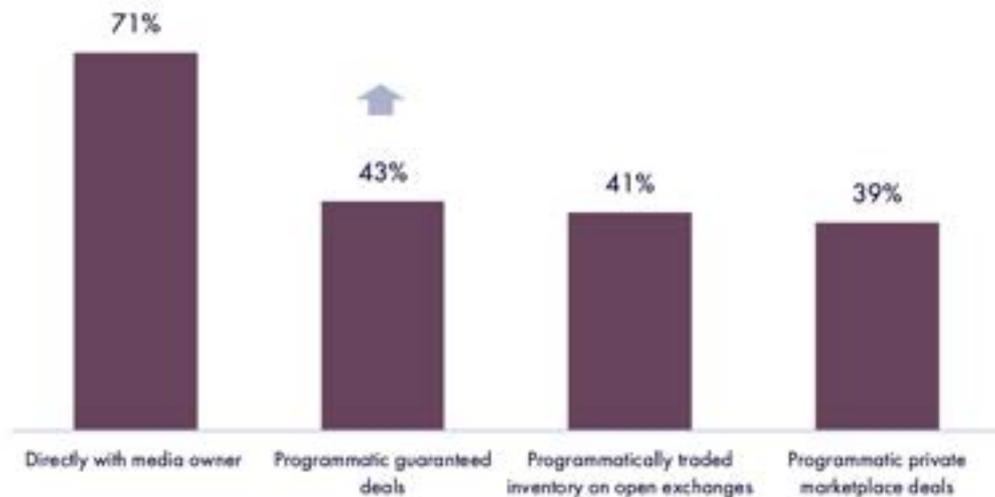


expected changes in activity and participation
in the next 12 months
amongst those using game advertising

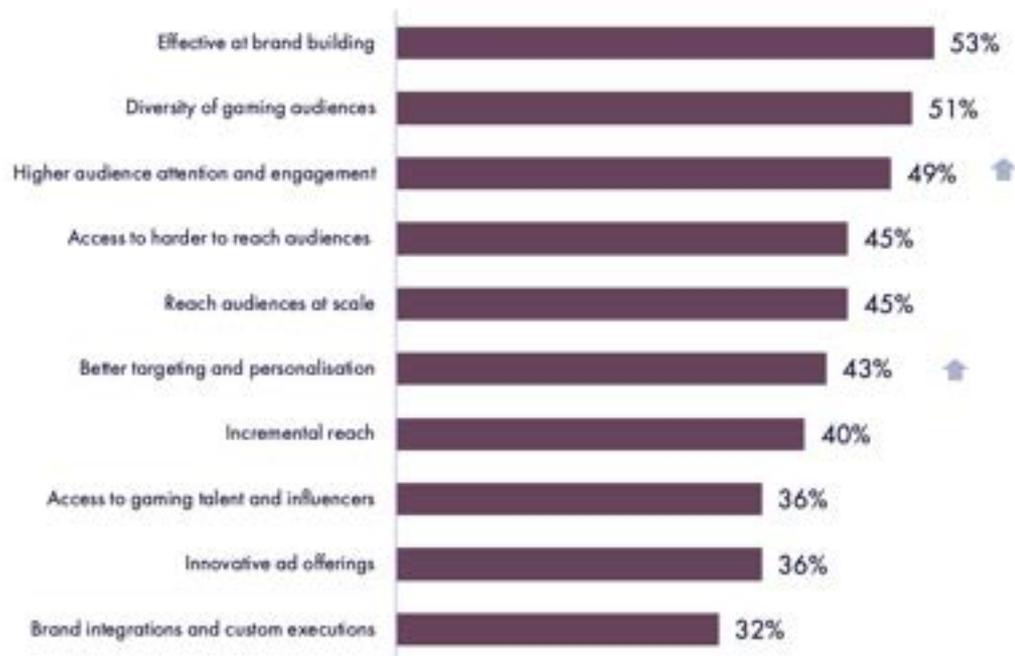


most game
advertisers
continue to buy
directly with the
media owner

buying methods used for game advertising



top drivers of continuing to use and recommend game advertising



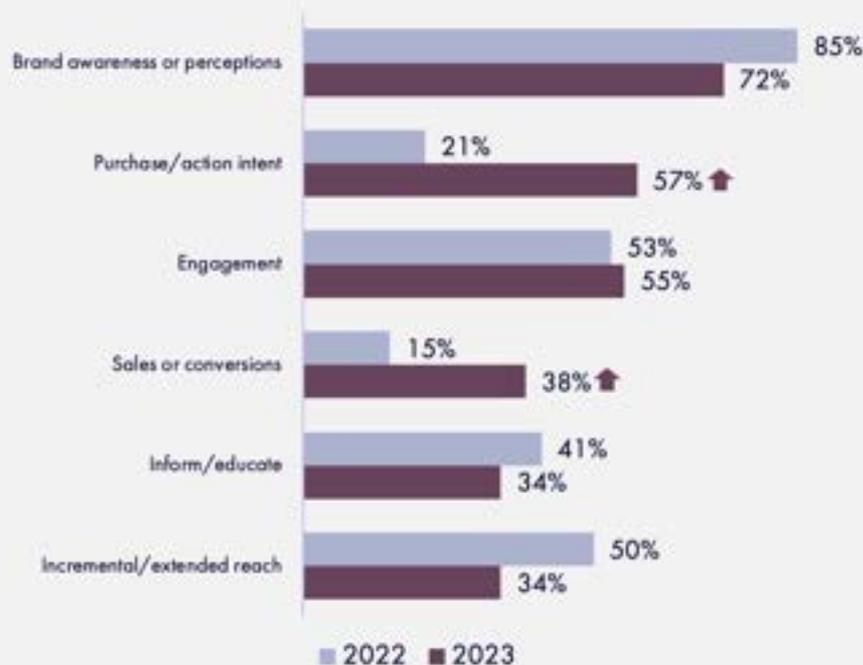
Impact on brand continues to be the #1 driver of using game advertising.

Higher audience attention (up 13% pts) and better targeting (up 17%) have increased as drivers of using game advertising since last year.

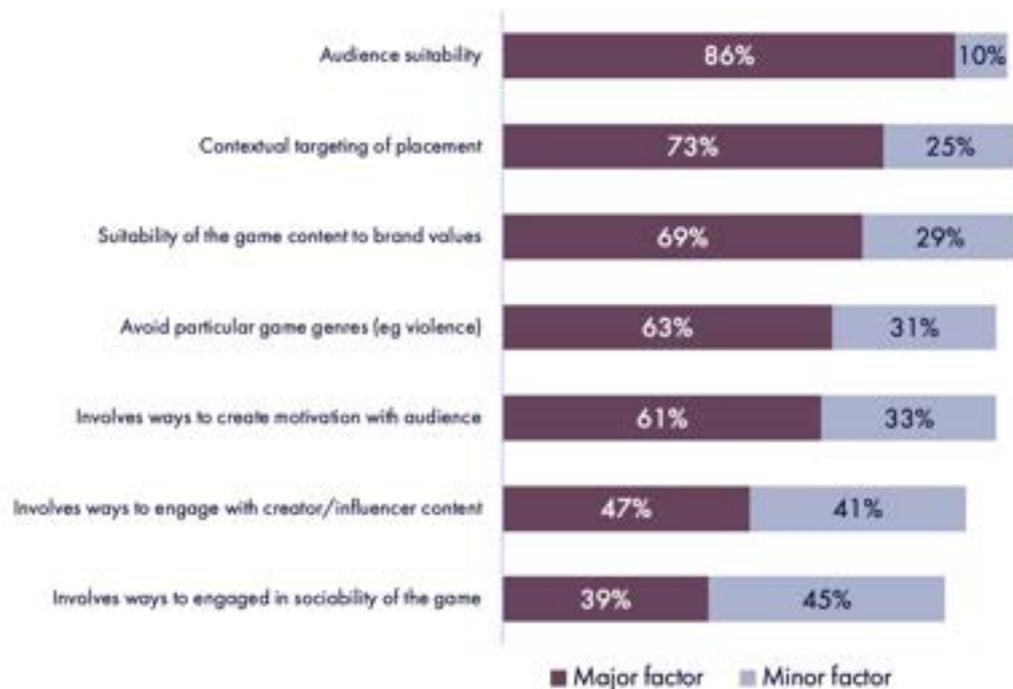
objectives of game advertising

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

objectives of game advertising and marketing



considerations for placement of game advertising

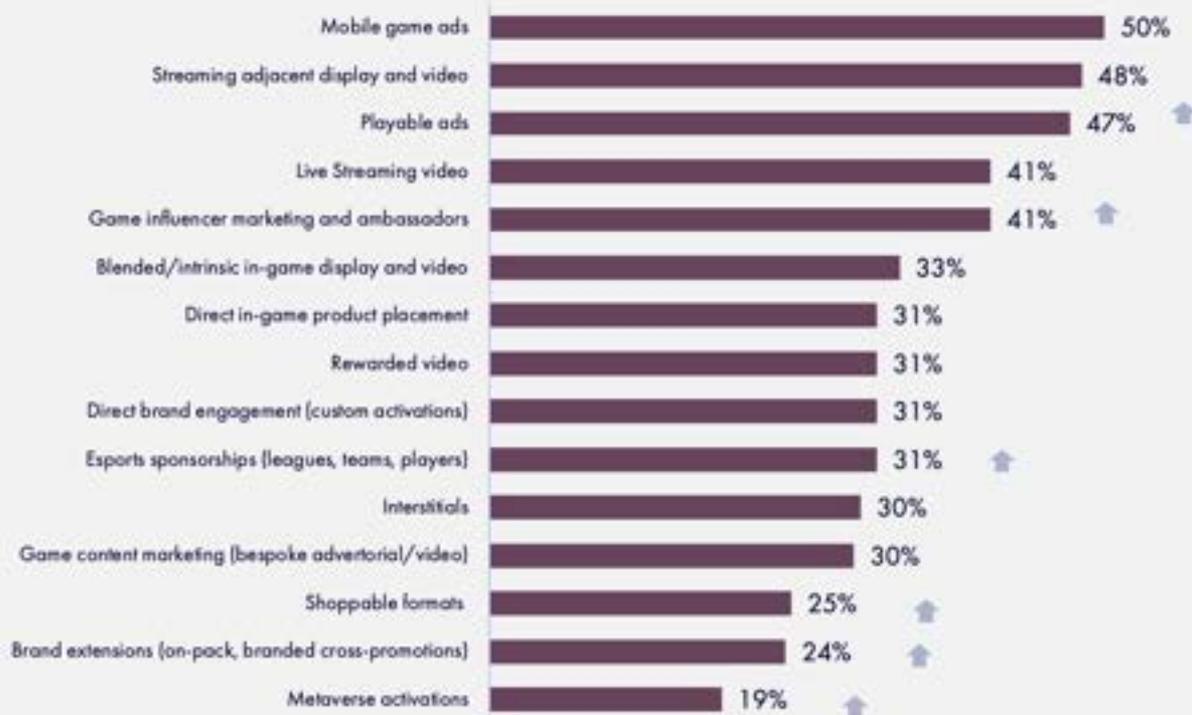


Audience suitability remains the key consideration when evaluating game advertising opportunities.

ad formats used in game advertising

Mobile and streaming adjacent display and video continue to be the most used game ad formats with playable ads continuing to increase in usage.

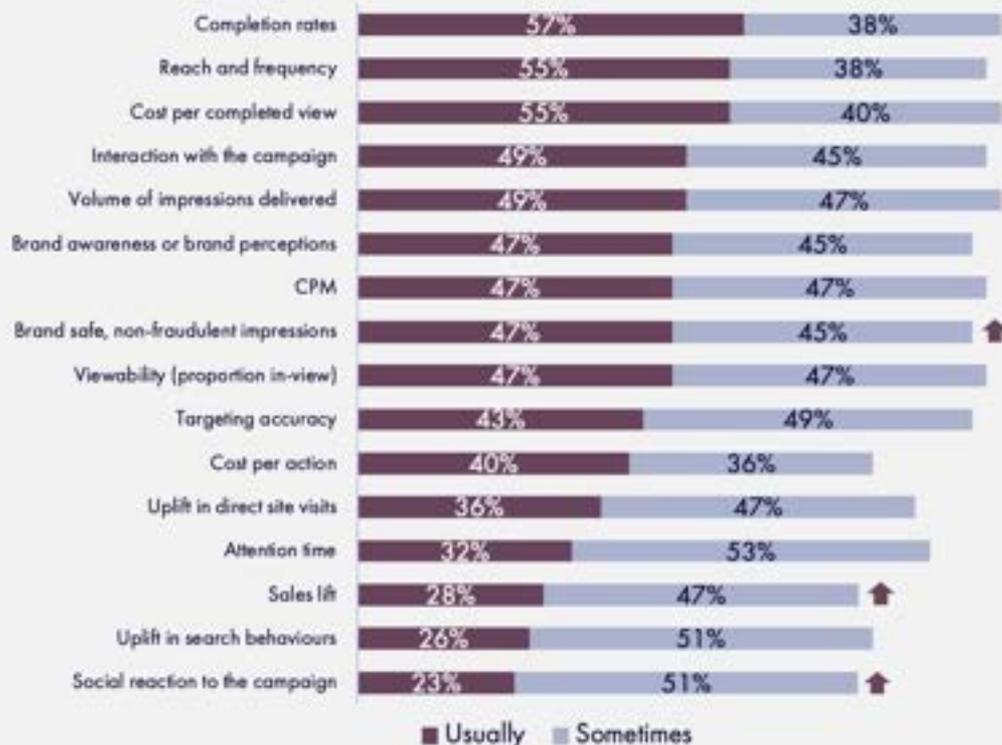
game advertising formats used in the last year



metrics used to assess success

Completion rates and reach and frequency have overtaken impressions delivered as the most often used metrics to assess campaign success.

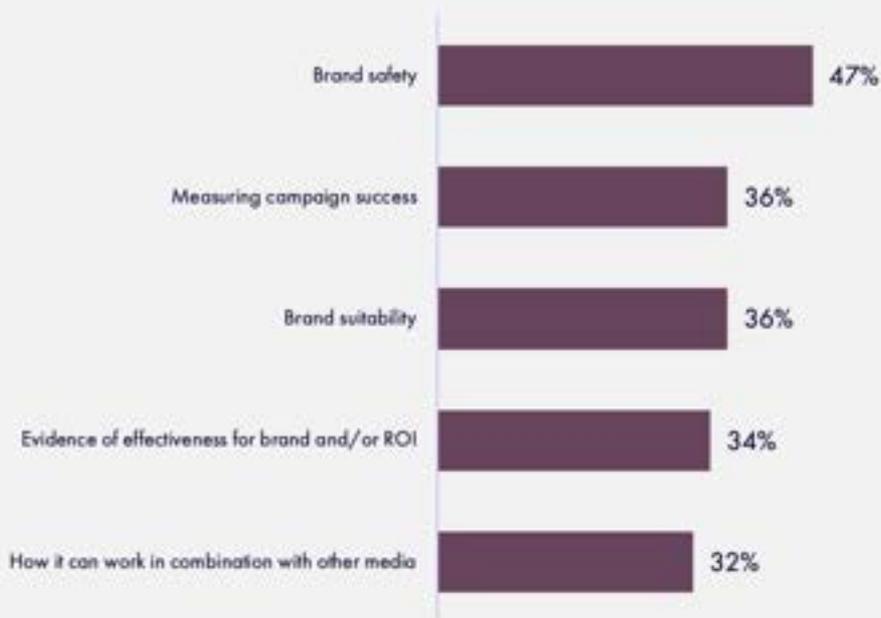
metrics used to assess campaign success



key barriers for increasing investment

Brand safety has increased to become the #1 barrier for increasing investment in game advertising.

top barriers for increasing investment in game advertising



what to do.

- Continue to invest in game advertising and marketing and experiment with formats.
- Leverage brand building and brand storytelling opportunities ... and look for potential success across the marketing funnel.
- Use technology and planning measures that ensure gaming environments are suitable for the brand.
- Continue to provide evidence of the effectiveness for brand and ROI outcomes as well as demonstrate how game advertising works with other media.
- Design creative with context in mind.
- Keep informed and build knowledge.

**game
advertising**
state of the nation
report



gaming
summit

gaming consumer trends

raelene knowles

COO

interactive games and
entertainment association (igea)



iab.
australia

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IGEA

interactive games & entertainment association

gcap games
connect
asia pacific

www.igea.net @igea



Who is the
average
Australian
gamer?

The average Australian gamer



CONNECTED BY
GAMES

IGEA  BOND
UNIVERSITY

DAA22
DIGITAL AUSTRALIA 2022

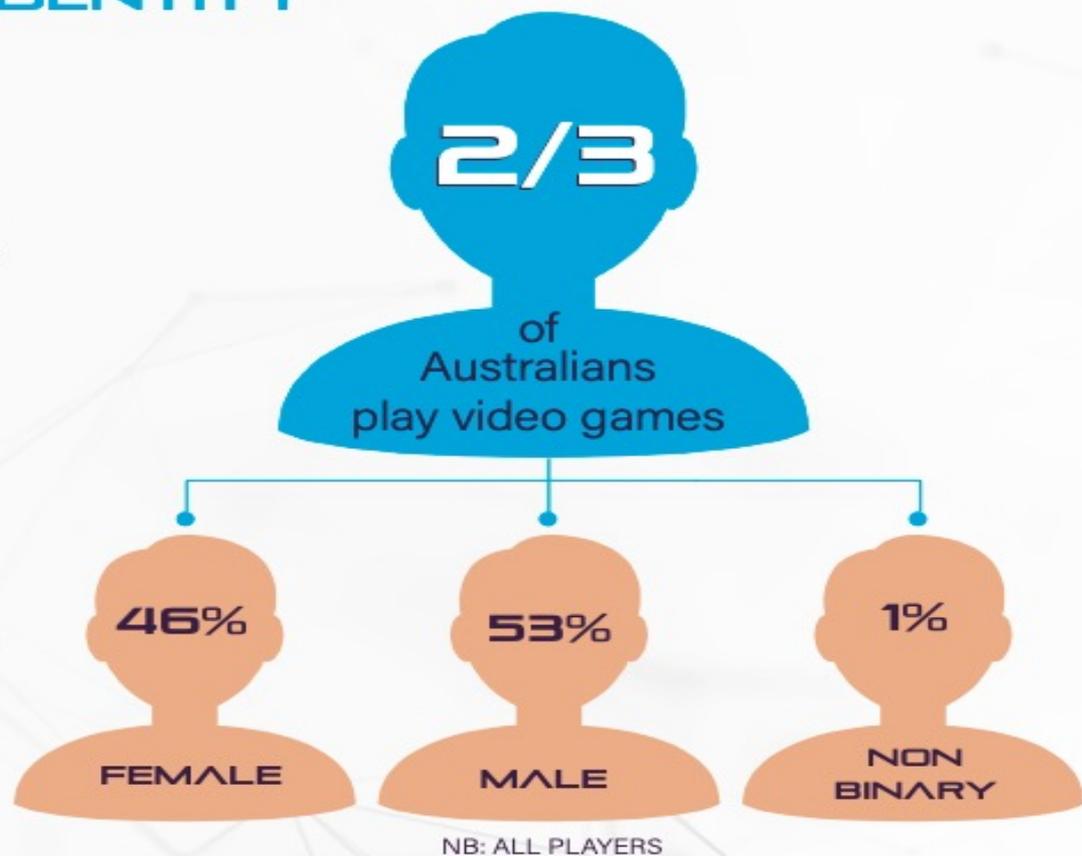
> PLAYERS' GENDER IDENTITY

Two-thirds, or more than 17 million of Australia's 25.8 million residents, are connected with video games.

In this report, we asked participants about their gender identity and included Female, Male and Non-binary options.

Doing so sheds more light on the diversity of Australians who connect with games, even if the results are similar to the past decade of this research.

Compared with 38% of all players identifying as female in 2005, that proportion is 46% today, compared with 53% identifying as male and under 1% identifying as non-binary.



> PLAYERS' AGES



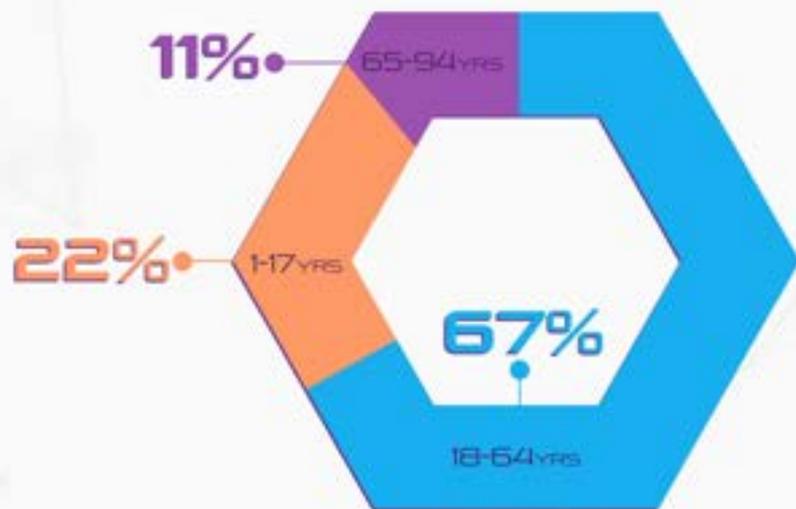
NB: AVERAGE PLAYER AGE - GAME HOUSEHOLDS

The average age of people who play video games in 2021 is 35 years, up from 34 years in the previous two studies reporting in 2019 and 2017.

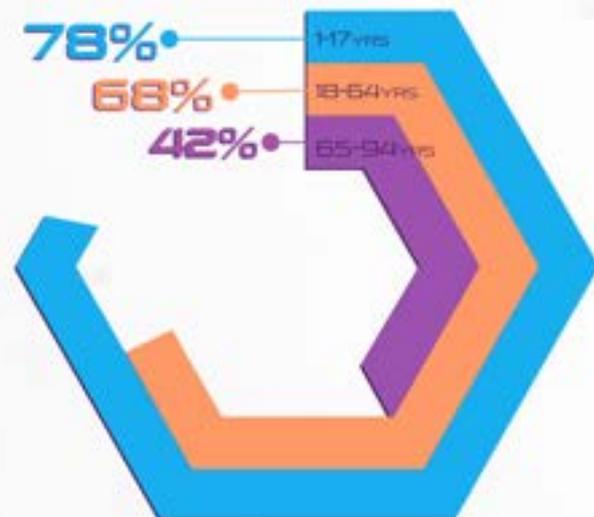
When this research series began in 2005, the average was 24 years. The greatest increase in ages of players occurred over a decade ago and has since steadily climbed.

The increased average age of players over time reflects both the ageing population of Australia, and growth of new players among older adults as the platforms and types of games have grown.

> PLAYERS' AGE CATEGORIES

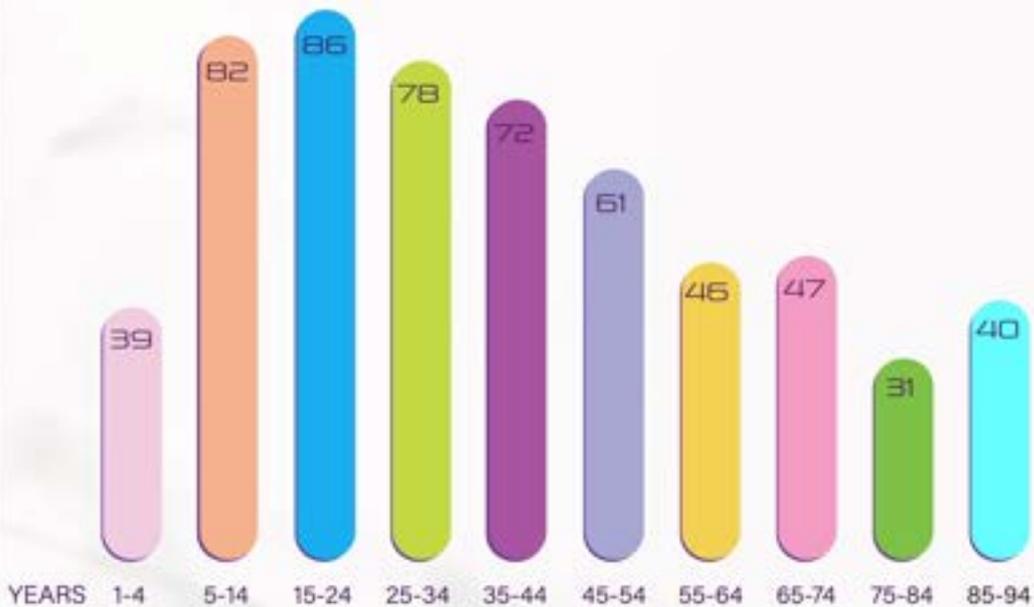


NB: PLAYER AGE GROUPS AS PROPORTION OF TOTAL - ALL PLAYERS



NB: PLAYER PROPORTIONS WITHIN AGE GROUPS - ALL PLAYERS

> PLAYERS' AGE GROUPS



NB: ALL PLAYERS %



> NUMBER OF GAME DEVICES

64% have 2 or more devices to play

2021

92%



92% Australian households have at least **1** device on which to play video games

2005

76%



76% Australian households had at least **1** device on which to play video games

NB: ALL HOUSEHOLDS

> TYPES OF GAME DEVICES

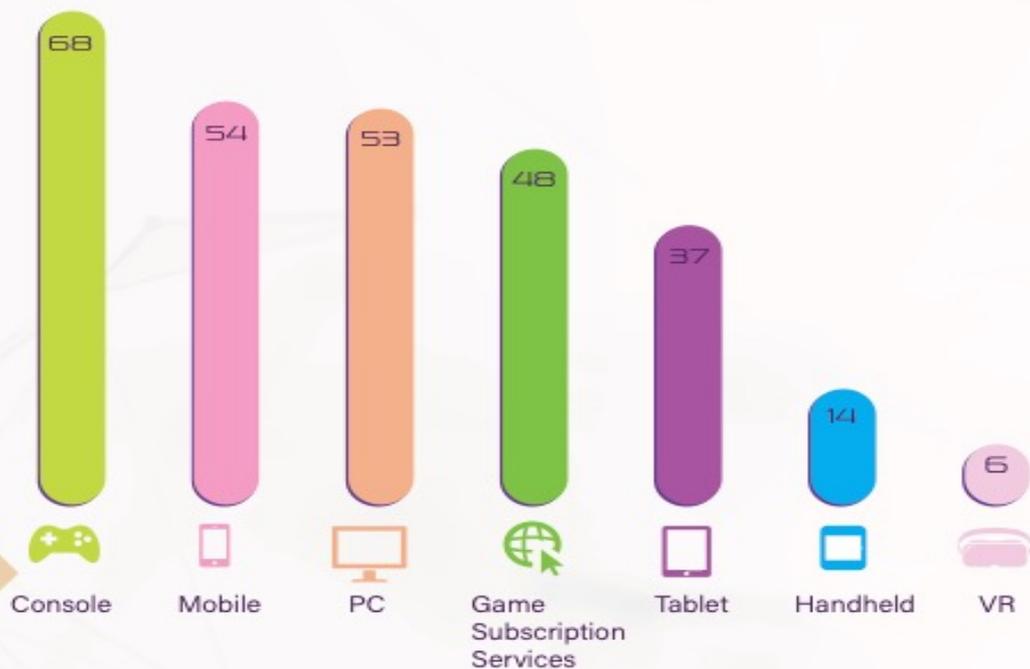
The most common device for playing games in 2021 was a dedicated console (68%), trading places with PCs from the previous study – a pattern we have observed in past reports.

However, in 2021, we observed mobile rise to second place among devices used to play in game-connected households.

Regardless of the type of device used to play games, 48% used a game subscription service.

“I revived an interest in an old video games console, and purchased an even older retro-machine from the 80’s that I last played in the mid 90’s.”

Male. Age 69 years. Household of 2. Melbourne.



NB: GAME HOUSEHOLDS %

> TOTAL PLAY SUMMARY

The average daily total of play for Australians of all ages who play video games is 83 minutes

83
MIN

The average time children play per day is 106 minutes

106
MIN

94
MIN

The average time male video game players play is 94 minutes

10
MIN

The typical daily casual game play, twice a day is 10 minutes

61
MIN

The average time retirement age adults play per day is 61 minutes

70
MIN

The average time female video game players play is 70 minutes

1
HOUR

The typical daily in-depth game play is 1 hour

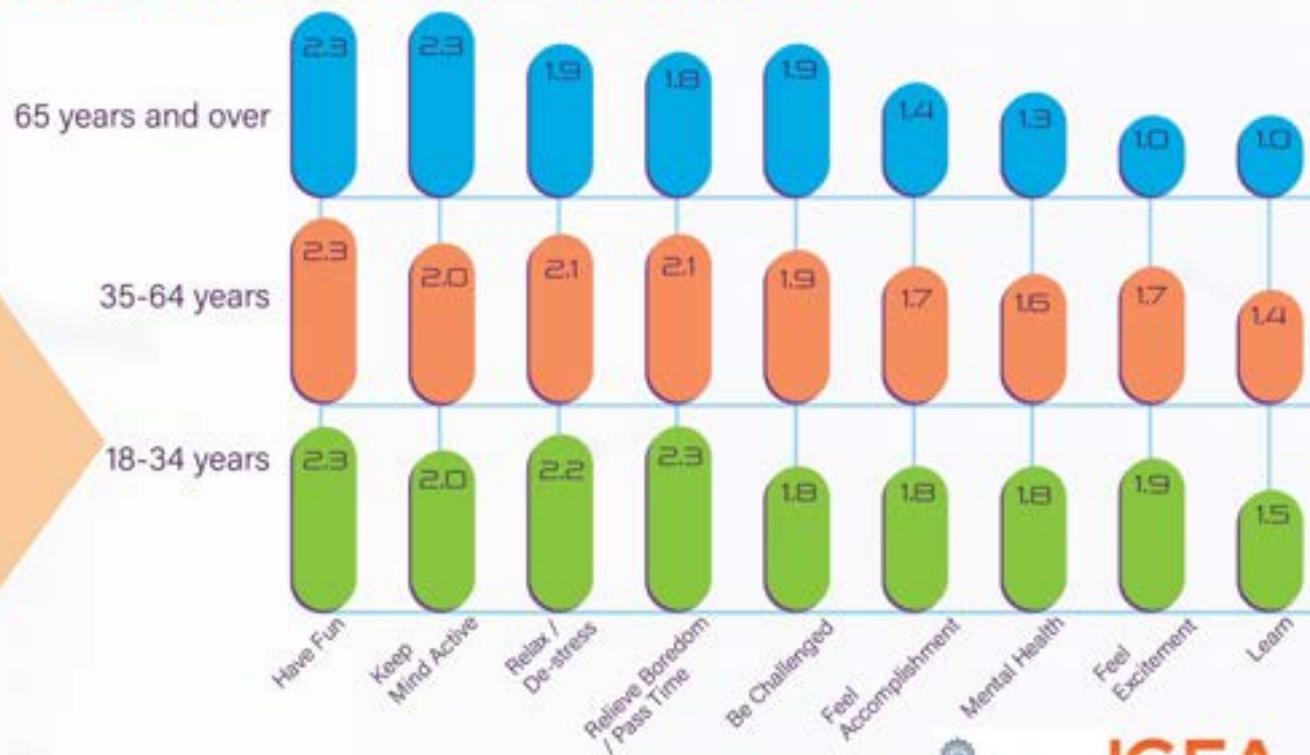
82
MIN

Average time working age adults play per day is 82 minutes

> **REASONS PEOPLE PLAY GAMES**

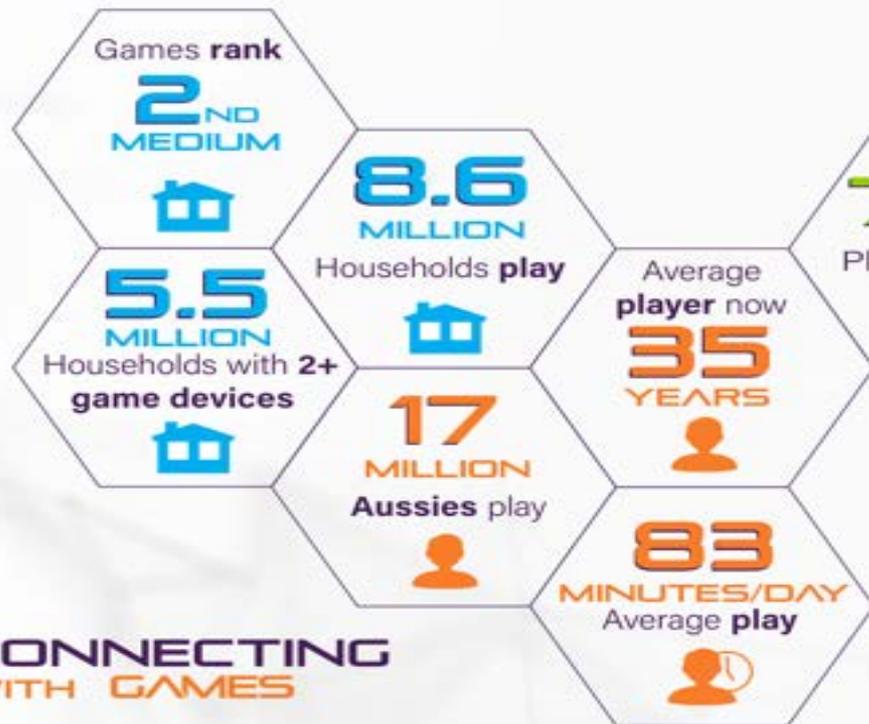
THE TOP 5 REASONS AUSTRALIANS PLAY VIDEO GAMES

1. Have fun
2. Keep the Mind Active
3. De-stress
4. Pass Time
5. To Be Challenged



> KEY FINDINGS

> CONNECTING TO GAMES



> CONNECTING THROUGH GAMES



> CONNECTING WITH GAMES

> KEY FINDINGS

> CONNECTING GAMES WITH FAMILIES



> CONNECTING GAMES AND CULTURE

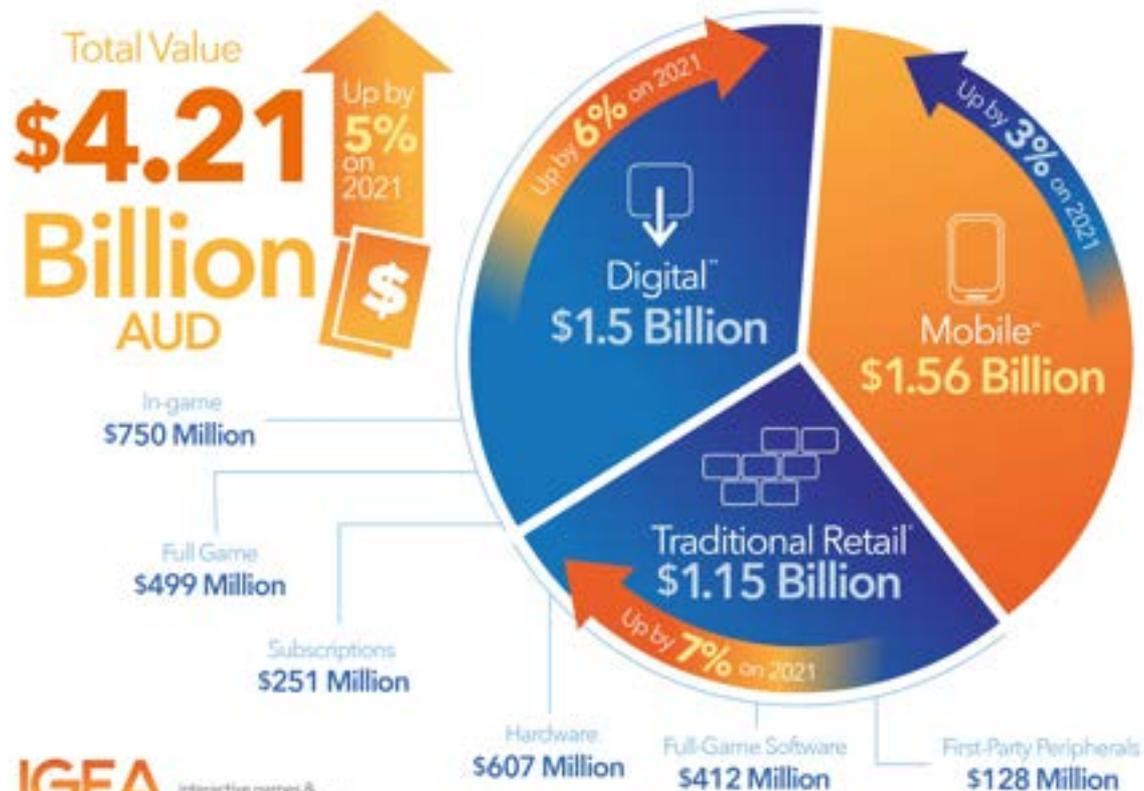
> CONNECTING GAMES AND PERSONAL GROWTH



> CONNECTING GAMES AND ECONOMY

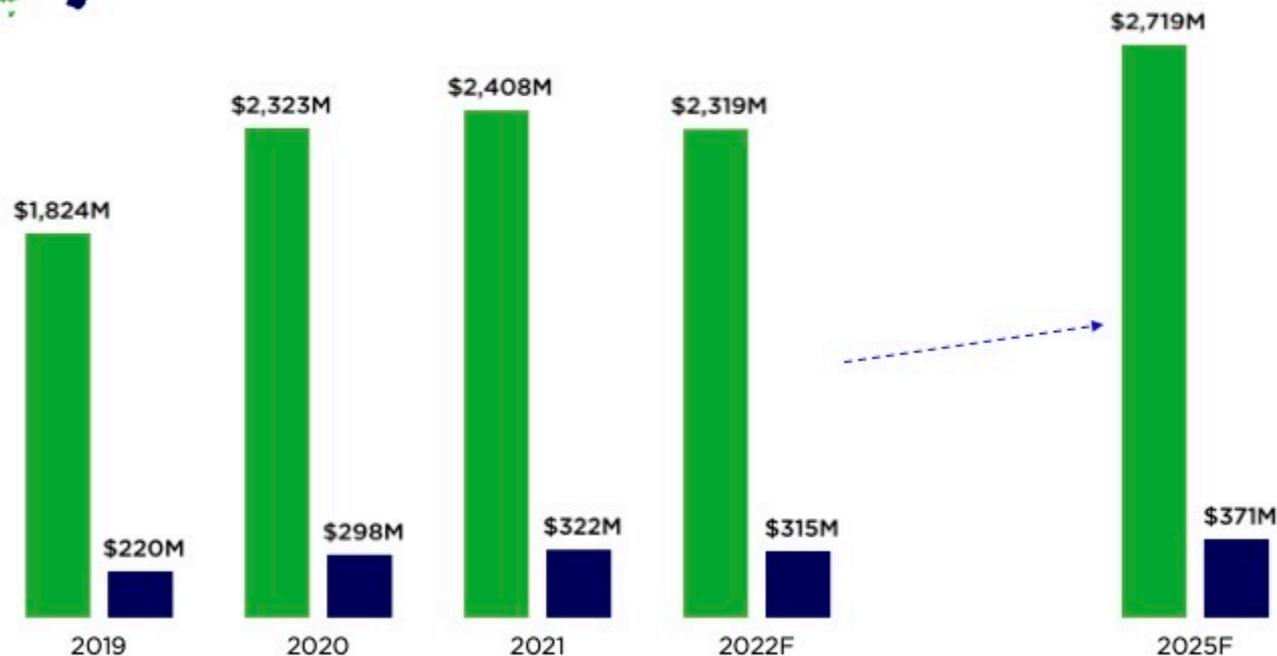
Video Game Sales

2 0 2 2 S N A P S H O T



AU & NZ Outperform Global Market Since 2019 Off Console Markets

Australia & New Zealand Games Market Revenues | Forecasts toward 2025



+6.9%

Australia Market CAGR
2019 - 2025

+9.1%

New Zealand Market CAGR
2019-2025

+6.6%

Global Market CAGR
2019-2025



newzoo

	2020	2021	2022
Storefront			
Apple App Store	5,319,220	5,464,724	5,640,810
PlayStation	3,691,352	4,052,896	4,233,334
Epic Games Store	2,643,946	3,179,580	3,533,947
Android App Stores	3,206,514	3,270,991	3,313,689
Nintendo	2,808,291	3,053,444	3,156,602
Xbox	2,421,639	2,711,876	2,863,870
Steam	1,661,865	1,787,235	1,898,218



Best selling genres

1. Adventure games
2. Puzzle games
3. Battle Royale
4. Shooter
5. Role Playing

Launching 8 August Sydney

www.igea.net for details



AUSTRALIA
PLAYS 2023

TO ENTERTAIN ▶ TO CONNECT
TO LEARN ▶ TO CREATE ▶ FOR FUN

Australia Plays is the latest in the Digital Australia research series spanning 18-years which explores the demographics and behaviours of video game players in Australia and their attitudes towards games.

IGEA
International Game Entertainment Association

 **BOND UNIVERSITY**

gamers in the age of streaming

luke carmichael

head of advertiser partnerships
samsung ads





Gamers in the age of streaming

Luke Carmichael

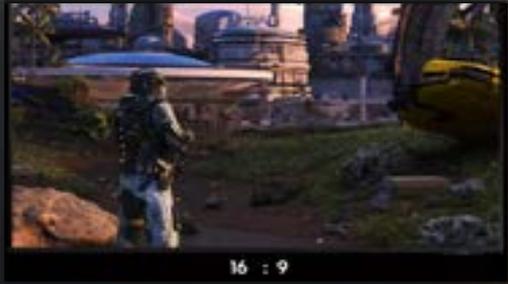
Head of Advertiser Partnerships, Samsung Ads

SAMSUNG Ads

#1

Market share of Smart TVs
in Australia and worldwide





16 : 9

See the bigger picture



Linear



Streaming



Gaming

Away from the game

Around and in the game

A woman and a man are sitting on a couch, playing video games. The woman is on the left, wearing a dark green sleeveless top and light-colored pants, holding a white game controller. The man is on the right, wearing a grey hoodie, also holding a white game controller. A yellow cable is visible, connecting the two controllers. The background is a dark room with a blue and yellow graphic overlay. The text "Connect with qualified gamers" is overlaid in white.

Connect with qualified gamers

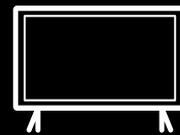
SAMSUNG Ads



**Connected
consoles**



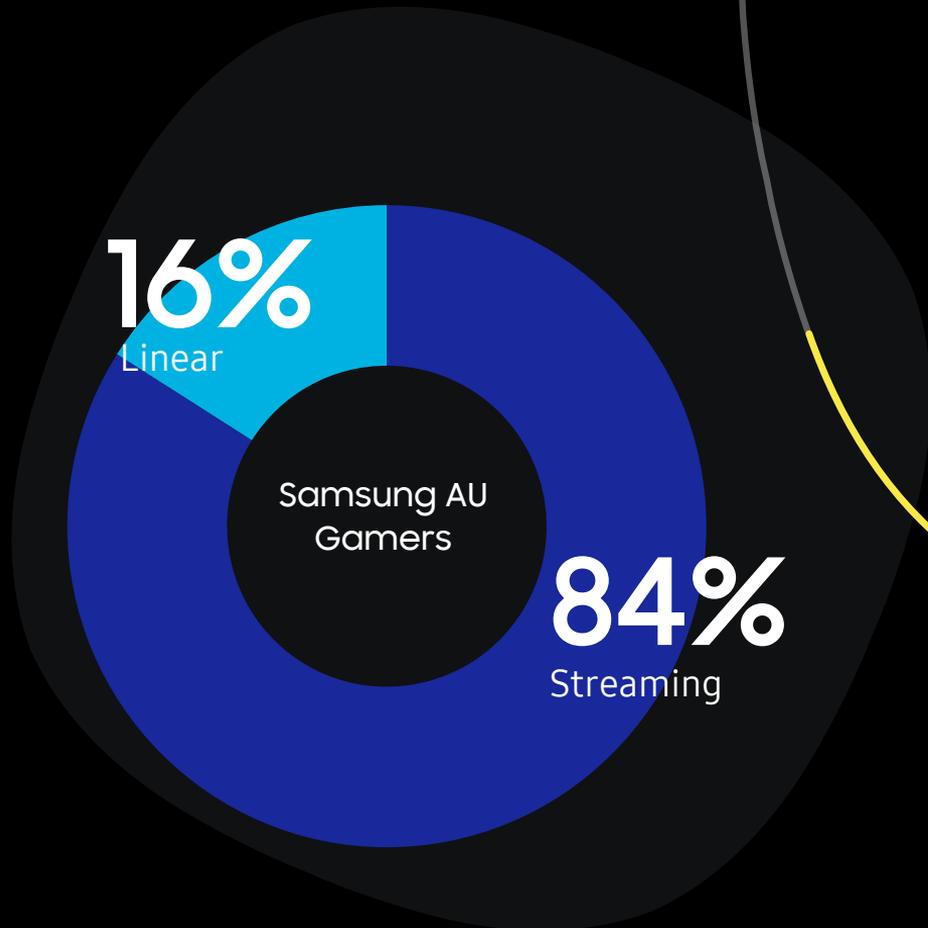
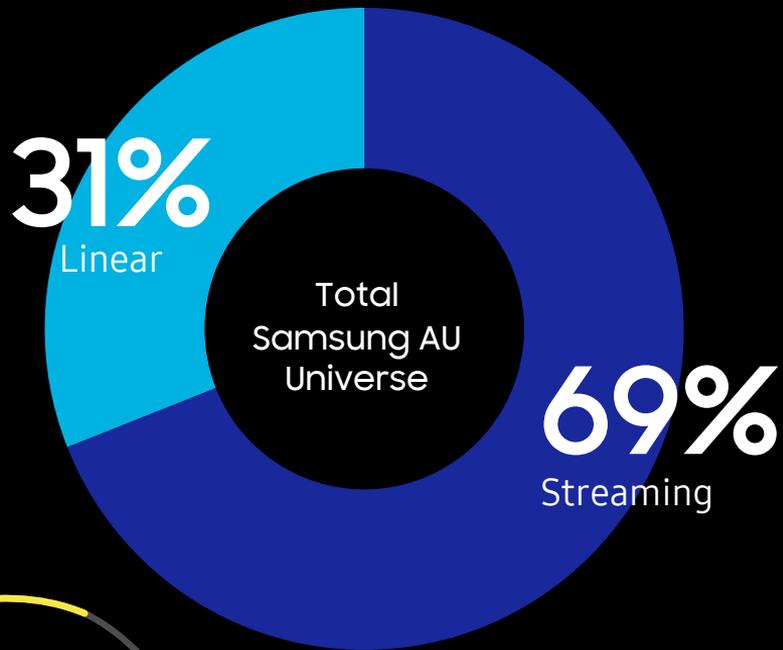
**Validated gamer
households**



**Games
played**

A person is sitting on a dark grey outdoor sofa on a patio, watching a large television mounted on a wooden wall. The patio is decorated with a blue and white striped rug, a yellow round table, and several potted plants. A yellow canopy is visible in the background.

Away from the game





Around and in the game

SAMSUNG Ads



+18%

Increase in the number of
connected consoles Q1 YoY



+73%

Growth in Next-Gen connected
consoles YoY



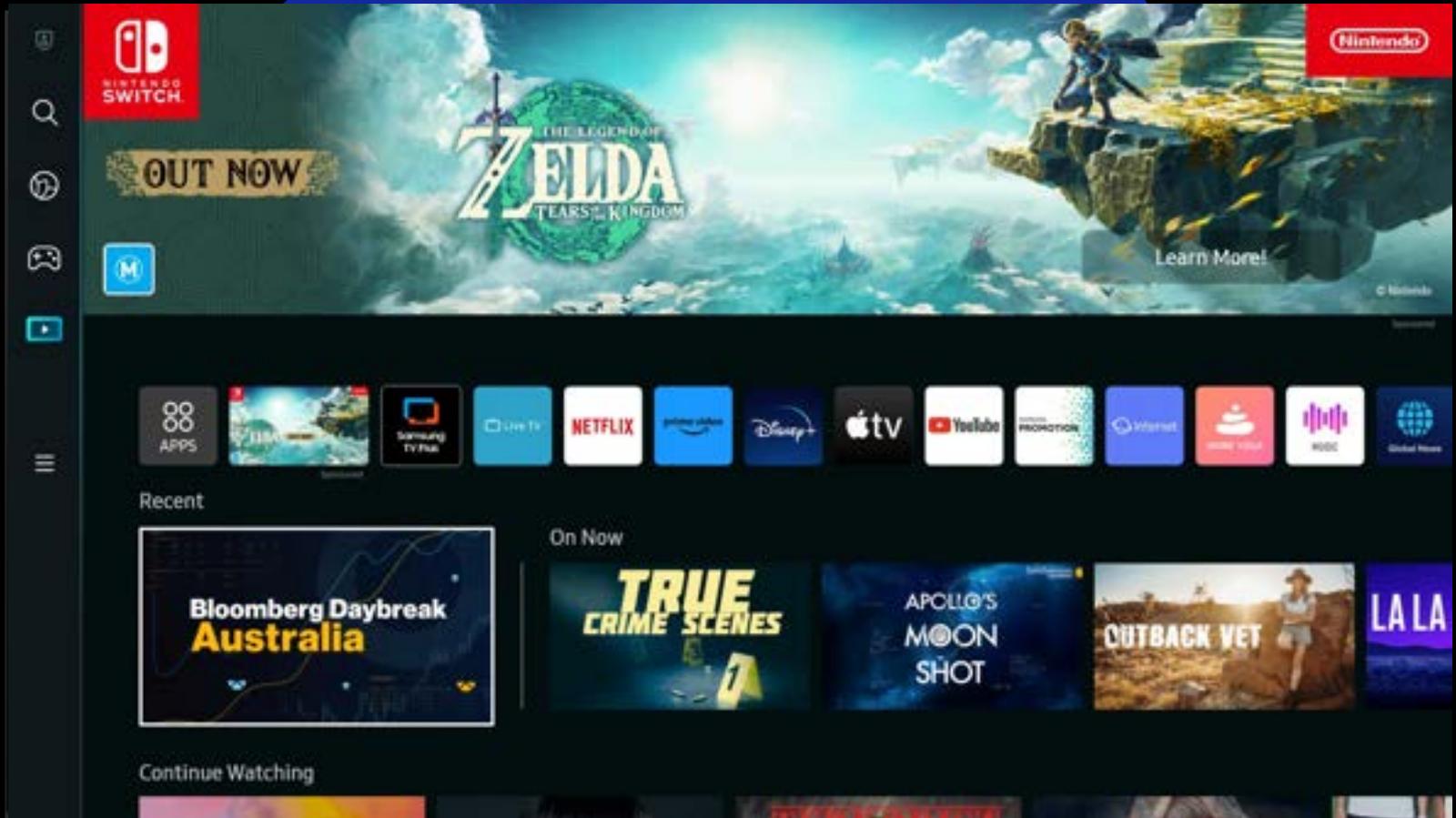
-31%

Next-Gen Gamers spend almost
a third less time watching TV vs.
Prev-Gen Gamers

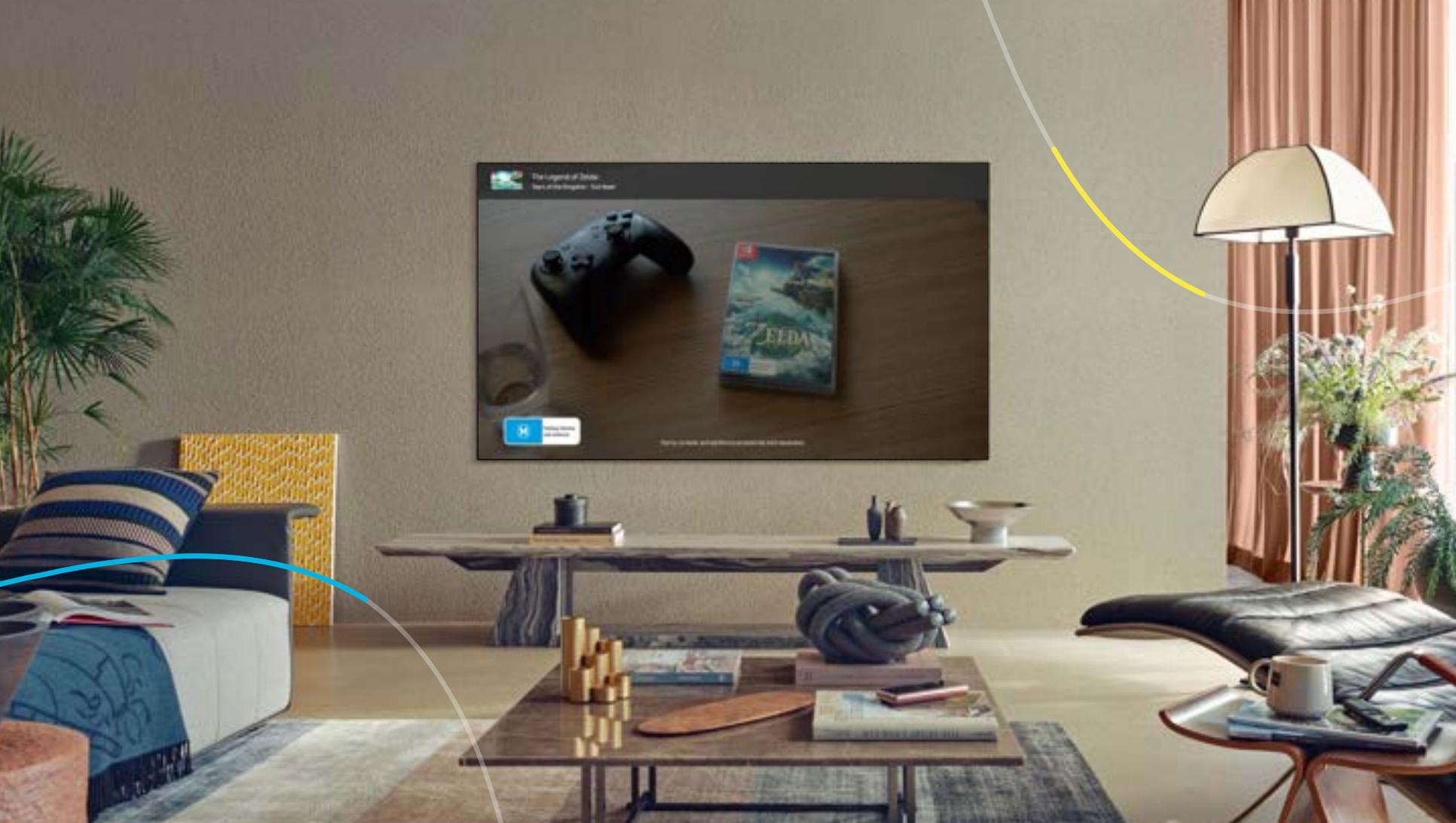


How to reach gamers on the big screen

SAMSUNG Ads



SAMSUNG Ads



Connect with the right gamers



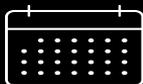
Console Users



Genre Fan



Franchise Fans



Lapsed Gamers



Competitor Conquesting



Socio-demographics



1

**Qualified Gamers
are reachable**

Harness advanced **targeting capabilities** to reach known gamers



2

**Gamers are
Streamers**

Capitalise on the growth of streaming to connect with Gamers.



3

**Aid Gamers in
discovery mode**

Explore creative ways to position your brand within smart TV environments



Gaming is entering the
streaming universe

SAMSUNG Gaming Hub

SAMSUNG Ads

No downloads
No storage limits
No console



U.S. partners shown.



 GAME PASS

ARK: Ultimate Survivor Edition

case study #1: azerion and new balance

caitlin huskins
commercial director
azerion



<https://azerion.preview.ceros.com/lifestyle-new-balance/page/page-6412b6187449b>



Next. Level. Digital. Entertainment. Media.