

# The brave new world of gaming

**Tom Farrand**, Added Value UK, analyses the potential of gaming, an ad platform that should be embraced by brands, marketers and agencies

IMAGINE A BRAVE new world. It is a media channel largely uncluttered with other brands, a destination that consumers dedicate uninterrupted hours to and a place visited by all generations – from teenagers to 65-year-olds. And, believe it or not, it's a potential advertising platform of today, rather than one plucked from history.

It is time for brands to consider gaming seriously as an advertising channel. No longer merely the home for teenage geeks, this medium has come of age, yet few brands are tapping into the opportunity.

A recent survey from Harris Interactive showed that nearly half (49%) of American adults would rather play online games than go to the cinema, 32% opted to play games rather than watch films at home and 37% chose them over watching TV.

Compare these statistics to the \$8.5bn that marketers invest in advertising on TV versus the \$50m ad spend on gaming. We believe we're at a tipping point for the communications industry. Against the backdrop of media fragmentation and declining TV audiences, gaming has the ability to deliver huge audiences on a global scale.

Consider the ownership profile of the most popular gaming platform, Sony PlayStation 2. While it's tempting to assume that most owners would be teenagers, this is far from the case. Most consoles retail from \$300–\$400, with games costing \$50 each. This is a significant purchase, not something that pocket money can afford.

Figures from Datamonitor show that over half of PlayStation 2 users are over 24 years old. For example, the majority (29.2%) of users are 24–34 years old, and there's a significant proportion (17.2%) in the 35+ age bracket. Add this to the fact that female gamers have become one of the fastest-growing audiences in the category and it becomes clear that gaming should not be ignored.

## The players

Beyond the stereotype of teenage geeks addicted to computer games lies a diverse and valuable demographic. Our propri-

etary research, based on interviews with over a thousand people in the UK and Germany, revealed that gamers come from all walks of life. They are male and female, and they range from toddlers to grandparents (see Figure 1).

Historically, gaming has had a male bias. Women in the UK still account for just 27% of all active gamers. However, this statistic is undoubtedly influenced by the fact that game developers are predominantly male – with women making up only 17% of the British game industry's workforce.

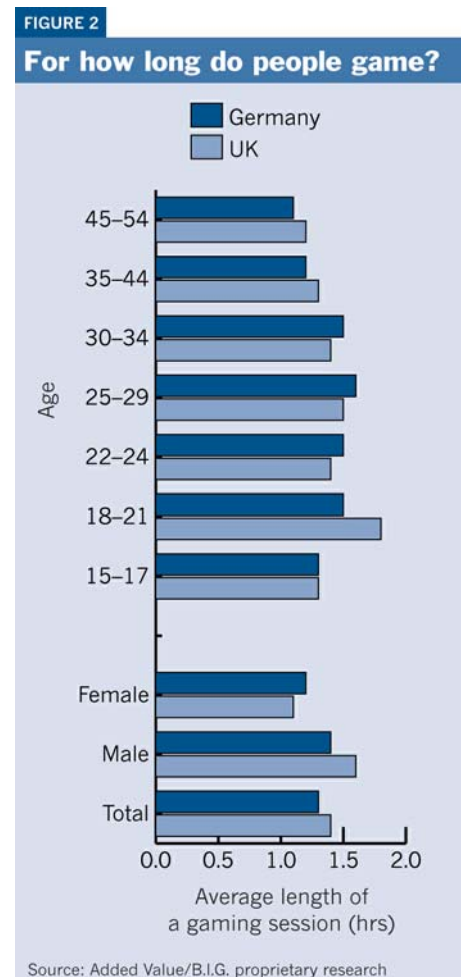
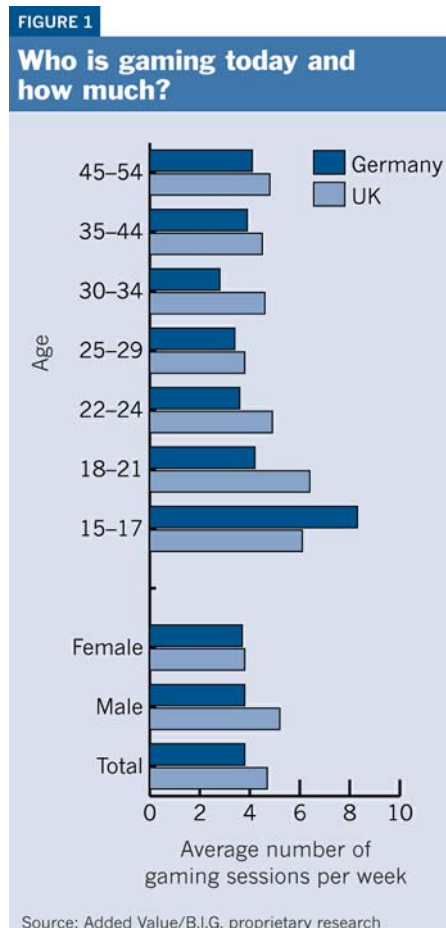
Significantly, more female-friendly formats such as *The Sims Online*, a lifestyle game that enables gamers to build and nurture online characters, are very popular among women. Over 60% of *The Sims Online's* players are female, which is probably aided by the fact that 40% of its development team were also women.

And gaming is not just popular among teenagers. Our research showed that older gamers, aged over 35 years old, are still having around four gaming sessions a week. Admittedly, gamers of school and college age enjoy more weekly sessions, but not many more – just over six weekly sessions in both the UK and Germany.

The only discrepancy lies in the amount of time different age groups spend gaming. As people get older, their gaming sessions shorten. While the average session for a younger person lasts around an hour and a half, it falls to just over an hour for people in middle age (see Figure 2).

## The eight types of gamers

We have identified eight different types of gamers, from hardcore enthusiasts to



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bored, young mums and kids in the playground. We've analysed them in terms of how central gaming is to their lives and the extent to which it fulfils their social needs. The eight groups of people are as follows: Clansmen, Masters of the universe, Boys into gaming, Older boys into gaming, Gameboys, Girls into gaming, Time poor, Quick fun and play. The following sections paint a more detailed picture of their needs and wants.

### 1. Clansmen

They are the hardcore gamers. They're not necessarily professionals, but they are committed and highly skilled. As one told us, 'I want gaming to be taken seriously as

a real sport. See, I know I'm good, but now I want to test myself against the best.' Clansmen are committed, highly skilled gamers who play for at least an hour every weekday, followed by marathon sessions at the weekend, which can last for over 12 hours.

They tend to be aged 15–35 years old and often work in the IT industry. Although they do lots of gaming at home, to them it's also a competitive sport and social activity. They will have never met some of their friends face-to-face, relying instead on playing against them online and talking to them in chat rooms.

Clansmen mainly fall into two categories. There are those who favour online

shooting games or MMOFPs (massively multi-player online first-person shooters) such as *Unreal Tournament* and *Counter-strike*; and those who prefer role-playing games or MMORPGs (massively multi-player online role-playing games) like *EverQuest* and *World of Warcraft*.

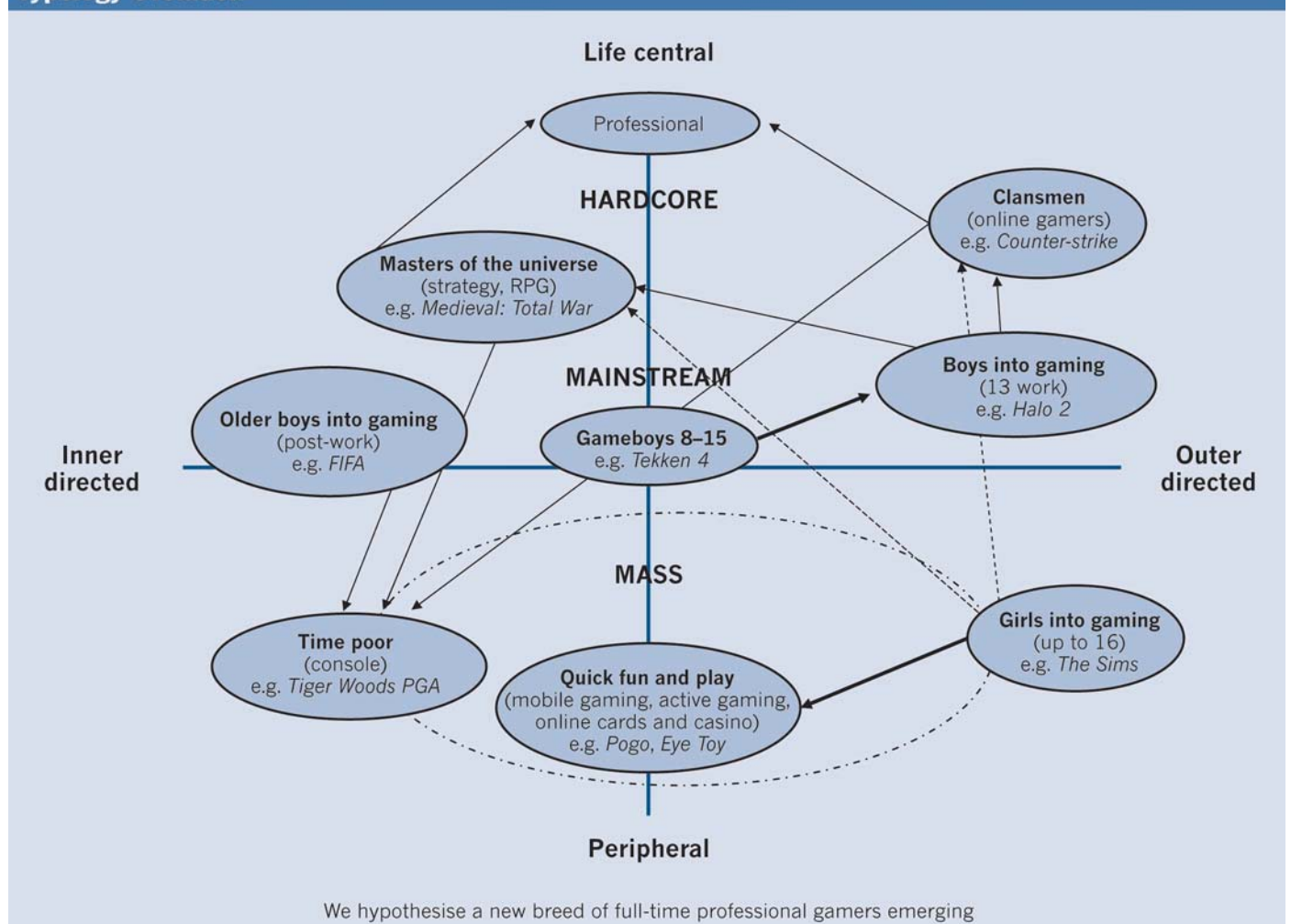
### 2. Masters of the universe

They are harder to pin down. They're likely to be slightly older than the Clansmen, aged 25–40 years old. For them, gaming is a form of relaxation and stress relief, rather than a social activity. They tend to play solo games on their PCs or consoles.

Masters of the universe prefer games that involve strategy. They often choose

FIGURE 3

## Typology evolution



fantasy, historical or narrative-driven games with an intellectual edge, such as *Civilisation* or *Star Wars: Empire at War*. Previously, this kind of strategy game was played solo, but there are more and more multi-player versions available online. They also enjoy playing sporting games, with the most popular games focused on football, like *Championship Manager* and *Football Manager*.

Although gaming is a form of stress relief for Masters of the universe, they are no less passionate than Clansmen. Many of them will play for two to four hours every evening after work and often for longer at the weekend, where they like to compare their performance with that of friends. As one told us, 'I pride myself on being one step ahead and in the know.'

### 3. Boys into gaming

This group consists of young boys aged 13-21. For them, gaming is a central component of their social lives. They are particularly drawn to game titles that they can play as a group and that give them a chance to battle against each other.

Let us imagine a typical Boy into gaming. He's 18, lives with his parents and

is studying for his A-levels. His favourite night out involves meeting up at a mate's house (usually the one with the best PC or console) to play gaming football matches like *FIFA* or *Pro Evolution Soccer*.

Then, they might pop off to a club before returning to someone's house for another gaming session on a PlayStation or Xbox that will last till dawn. In these more chilled-out sessions, the group will play a variety of different games, from driving adventures like *Getaway* to first-person shooting games like *Halo: Combat Evolved*.

When he's alone, he'll sometimes play these games against the computer to hone his skills. But his real motivation for practising is to increase his chances of beating his mates at their next session. 'I love playing games with my mates: the best nights are when they all come round and we have a good session together', one told us.

### 4. Older boys into gaming

They do not quite have the stamina they used to when it comes to playing games through the night. Aged 21-28, these older boys are in full-time work and use gaming to help unwind after a day in the office.

Occasionally they will get together with the boys like the good old days to play a few games. And sometimes they'll get addicted to a new game and go on a solo marathon session. As one told us, 'the closer a game is to reality, the more intense it is'.

Many of these gamers are in limbo. They are in a transition phase. While they're still gaming with friends on social occasions, they're also beginning to use gaming as a way of finding new friends and communities online. While some have the potential to become hardcore gamers, others will drift towards the Quick fun and play category (see below).

### 5. Gameboys

They are also a group of mainstream gamers, but they are at the younger end of the spectrum, aged 8-13 years old. They like to hang out in the corner of the playground boasting about top scores, lending each other the latest new games and telling stories about last night's gaming session.

'Me and my mates are always arguing about who's the coolest gaming character, who's the fastest finger, that kind of stuff', one told us. Portable gaming consoles like

TABLE 1

Gaming occasions						
Key gaming occasions	After school	After work	In a break	Social blast (post-study/work, pre-going out)	On the go (mobile)	Marathon all-nighter (planned or spontaneous)
Who (consumer typologies)	Boys into gaming Girls into gaming Gameboys  Solus/small groups	Older boys into gaming Masters of the universe Clansman  Solus occasion	Boys into gaming Girls into gaming Gameboys Quick fun and play  Solus occasion	Boys into gaming Older boys into gaming Girls into gaming Clansman (virtual)  Group occasion (2-5)	All groups but especially Gameboys (handhelds) Quick and fun Girls into gaming Boys and older boys into gaming (mobile)  Solus/pairs	Boys into gaming Older boys into gaming Clansman Masters of the universe (solus)  Group occasion (3-8)
Where	In home or friend's home	In home	In home, at work	In home or friend's home	While travelling or waiting for friends	In home or friend's home
Why (key needs)	Escape/play Bonding Recognition (m) Self-expression (f)	Stress relief Self-development Control Achievement Solidarity	Escape Boredom relief Exploration Chill out	Bonding Thrill seeking Solidarity Recognition Shared escape	Boredom relief Escape Stress relief Time kill	Bonding Thrill seeking Solidarity Stress release
Length of occasion	0.5-1.5 hours	1.5-2.0 hours	10-60 mins	1-3 hours	5 mins-2 hours	2-8 hours+
Frequency of occasion	5 days a week	2-3 nights a week	Up to 3-4 times per day	Once a week (boys) Once a fortnight (older boys)	Varies from 2-3 times a day to once a week	Once a week (boys into gaming, Occasional (older boys into gaming)



**Gameboys:** mainstream gamers at the younger end of the spectrum, aged 8–13 years old

Nintendo's Game Boy are especially popular with this young audience, as it means they can play on the move, like when they're travelling home from school in their mum's car.

Gameboys enjoy fast action games like *Sonic* and *Mario* and they are admittedly interested in games that flirt with sex and violence. There's also a lot of playground kudos attached to owning the latest hardware, like Sony's PSP or Nintendo's DS. There's even currency in owning all the accessories that come with games console platforms, from game cartridge cases to belt pouches to carry a gaming device.

## 6. Girls into gaming

These are the Gameboys' female counterparts. 'Girls just want to have fun – that is why more and more of us are getting into gaming,' says one. For them, gaming is social and competitive. They like to gather with friends around a PlayStation 2 to play creative strategy games like *The Sims* or action adventures like *The Legend of Zelda*. Or they'll get out the dance mat and compete for the highest score with the latest moves on *DDRMAX: Dance Dance Revolution*.

## 7. Time poor

These are normally the dads who, as they told us, 'love playing games but don't real-

ly get the time to play any more'. Consider David, a 44-year-old accountant who owns a laptop and has bought his children an Xbox 360. He plays games only occasionally and doesn't take them too seriously. However, he's secretly getting into *Halo: Combat Evolved* after playing it to spend more time with his kids.

Time poor's gaming sessions are short, normally less than an hour. Sometimes though, when his wife's out and the kids are in bed, he might have a longer spell in the virtual cockpit of his favourite flight simulator game. He also enjoys a simulated game of golf. Indeed, he is considering investing in a Gametrak controller and copy of *Real World Golf* so he can hook his golf clubs up to the computer and improve his swing.

## 8. Quick fun and play

This group fall into the broad age bracket of 35–65 years old. They use gaming as a break from the routine. It is a quick thrill and a way of killing a few dull moments. It could be a quick game of *Solitaire* on the office computer during a lunch break or a hand of poker at an online casino.

Mobile phone games can also distract them during the daily commute on the train or while waiting at the airport before a holiday. As one of them said: 'I get really bored when I'm hanging around or travelling; playing games gives me something to do.' One of the most popular games with Quick fun and play is the simple but addictive *Hearts*, a card game that comes with almost every new PC.

## Gaming occasions

The different types of gamers described above are not set in stone for a lifetime. They are fluid. (see Figure 3) While Gameboy may grow up to become a Clansman, a Master of the universe may fall in love, get married and become Time poor. However, what's crucial is that there is no marked decline in gaming as they age; they simply drift from one type to another. This means that an investment in gaming is not merely a means of targeting youth for brands. It can become an opportunity to remain relevant over a whole lifetime (see Table 1).

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## Conclusion

We believe that gamers will evolve further away from the stereotype of the overweight, friendless nerd. Gaming will become increasingly socially acceptable and will be viewed as a more dynamic way of spending time than listening to the radio or watching TV.

Gaming will move into the cultural mainstream. This process will be accelerated by the convergence of film, music, TV and gaming properties. Already the gaming industry, with a market value of over \$25 billion, outstrips the value of the \$10bn film industry, the \$15bn music industry and the \$20bn home video industry. Indeed, according to PricewaterhouseCoopers, worldwide game industry revenue is set to rocket to \$55bn by 2009.

Imagine the scale of the opportunity for brands. Yet few have spotted the potential of the new medium. Those brands brave enough to seize the day, and savvy enough to court their media-literate gaming audience with respect and creativity, will be rewarded. The gaming phenomenon is something no brand owner, marketer or advertiser can afford to ignore for a moment longer. ■



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