Welcome to the future.

This is what is going to happen…

More people will be playing more games more often, getting deeper into experiences on smarter devices.

More access by more people more often will make gaming a permanent fixture on cultural landscape.

Eventually gaming will start to swallow and contain all other media.

It will cease to be about gaming or computerised competition. Instead we will see the rise of Immersive Culture.

And there will be a myriad of ways for brands and businesses to be involved.

So get ready…..

OMG

We've come from this….

1996

2020

…to this.

OMG

Each new media form swallows the previous and contains it.

WRITTEN

RADIO

TV

INTERNET

GAMING

Gaming will become the channel of channels and a permanent part of our culture

OMG

"

Every age has its storytelling form, and video gaming is a huge part of our culture. People are enthralled with video games in the same way as other people love the cinema or theatre.
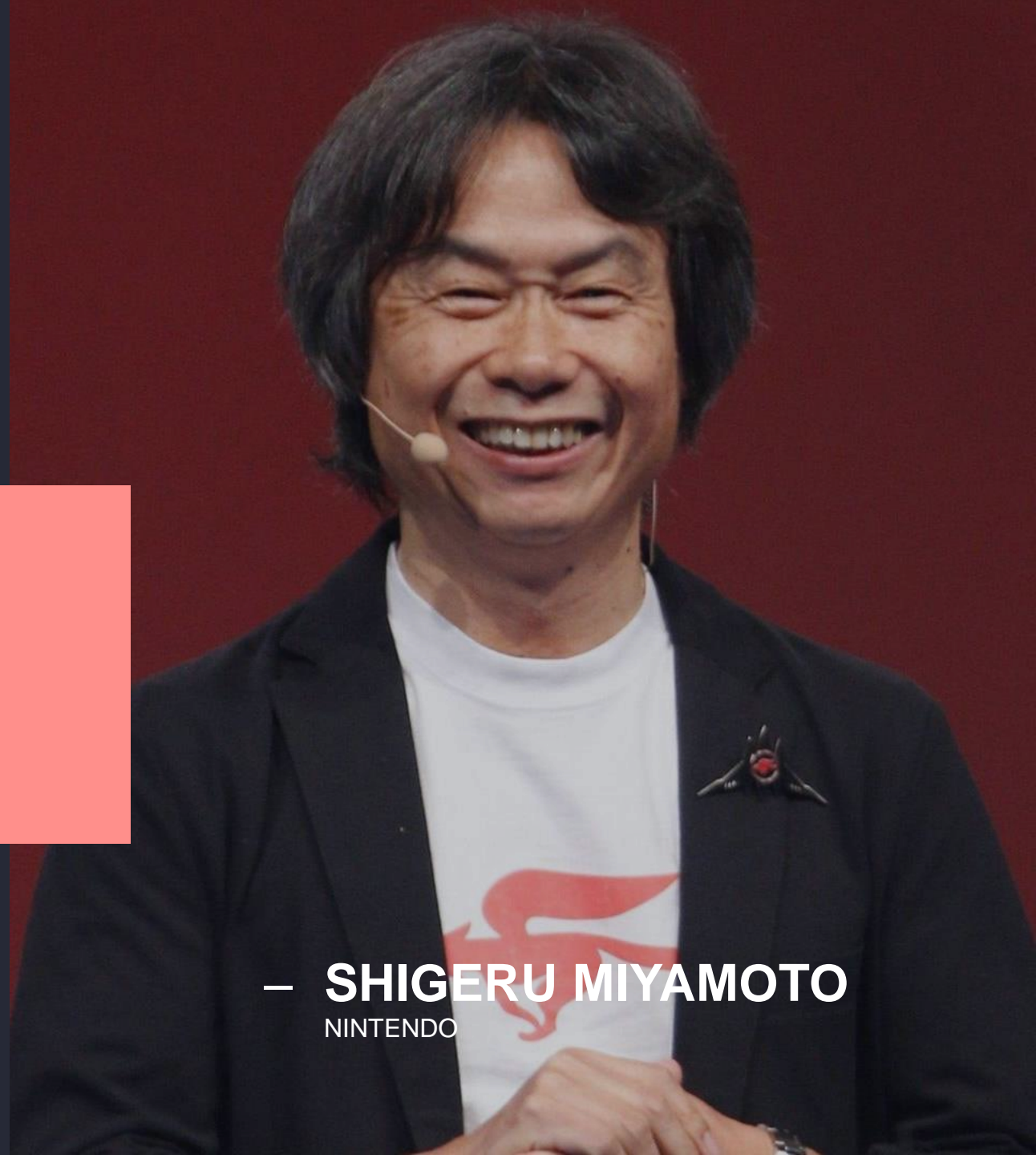
"

— **ANDY SERKIS**
ACTOR, PRODUCER

OMG

> "Video games are bad for you? That's what they said about rock and roll."

— **SHIGERU MIYAMOTO**
NINTENDO

OMG

Who Have We Spoken To?

Gamers

Game Platforms

Game Research Companies

Game Start-Ups

OMG

Level Up: Contents

#1

#2

#3

#4
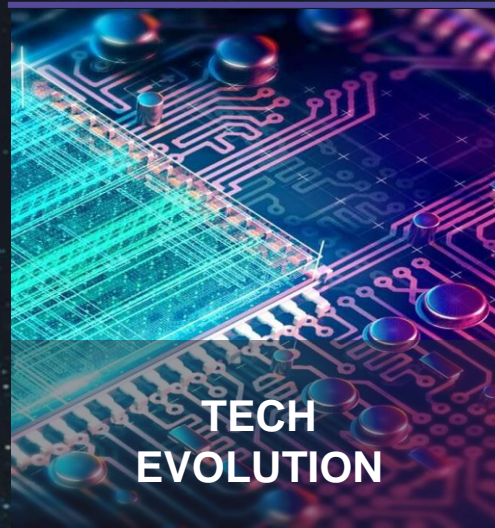
THE GAMING EXPLOSION

TECH EVOLUTION

CULTURAL EVOLUTION
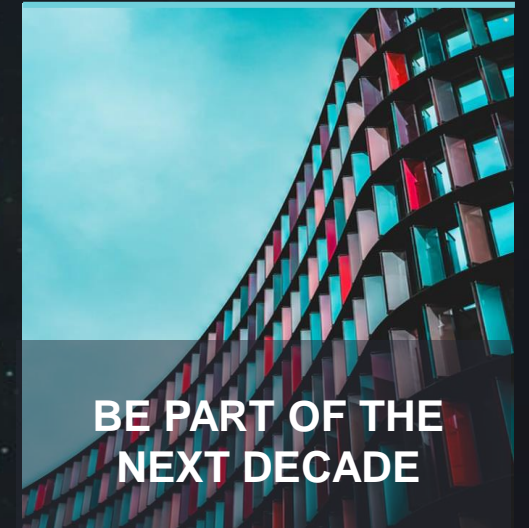
BE PART OF THE NEXT DECADE

THE NOW

THE WOW

THE HOW

OMG

#1

THE GAMING EXPLOSION

THE RISE OF GAMING IN NUMBERS

OMG

The Gaming Universe In One Chart

Games Genres*

| Racing / Driving | RPG / Adventure | Fighting / Shooting | Simulation / Strategy | Arcade / Puzzle | Sport |

Played on

| Mobile | Console | PC | AR / VR |

👁 Viewed across   ▶ Video   👍 Social   👥 Event

£ Ad funded via   Native Advertising & Game Integration   *Ads inside games*

£ Ad funded via   Team Sponsor   League Sponsor   Event Sponsor   *Partner with esports/ players*

£ Ad funded via   Broadcast Partnerships   Influencer & Presenter Endorsement   *Partner with broadcast of games*

OMG

*not exhaustive

Global Gaming in 2020

2.7bn
players across globe

3bn by 2023

Industry worth
$200.8bn
by 2023

Mobile gaming revenue growing fastest

Smartphone
40%
vs console
28%

ME, Africa & Asia-PAC fastest growth area

Europe is slowest as gaming reaches saturation point

Esport audience:
495m

Worth
$1.1bn

OMG

Source: Newzoo

UK Gaming in 2020

Gaming Population:
38million

75%
Reach Highest in EU5

Revenue:
£4.4 bn

£5.3bn by 2023

OMG

Source: Newzoo

UK Gaming in 2020

UK Gamers are 35 years old **on average**

44%

UK Gamers are **over** 35 years old

52%

spend 4 or more hours per week gaming

Average number of UK hours is: **6.89 pw**

Broad gender parity, but ..

Casual gamers more likely to be **female**

Hardcore gamers more likely to be **male**

UK gamers most likely to be '*Lapsed Gamers*' or '*Time Fillers*' rather than '*Ultimate Gamers*'*

UK Gaming in 2020

Generally, more UK hours are spent on casual, solitary gaming interactions*. Also, these are more likely to be novices.

1. Casual Single Player *eg Candy Crush*
2. Single, First-Person Shooter *eg Call of Duty*
3. Casual Multiplayer *eg Scrabble*
4. Single Player Role Player *eg Elder Scrolls*
5. Battle Royale *eg Fortnite*
6. Massive Arena Battle *eg League of Legends*
7. Massive Multiplayer Role Play *eg World of Warcraft*

£

More likely to be in the higher income bracket.

Spending on average per year:

£190

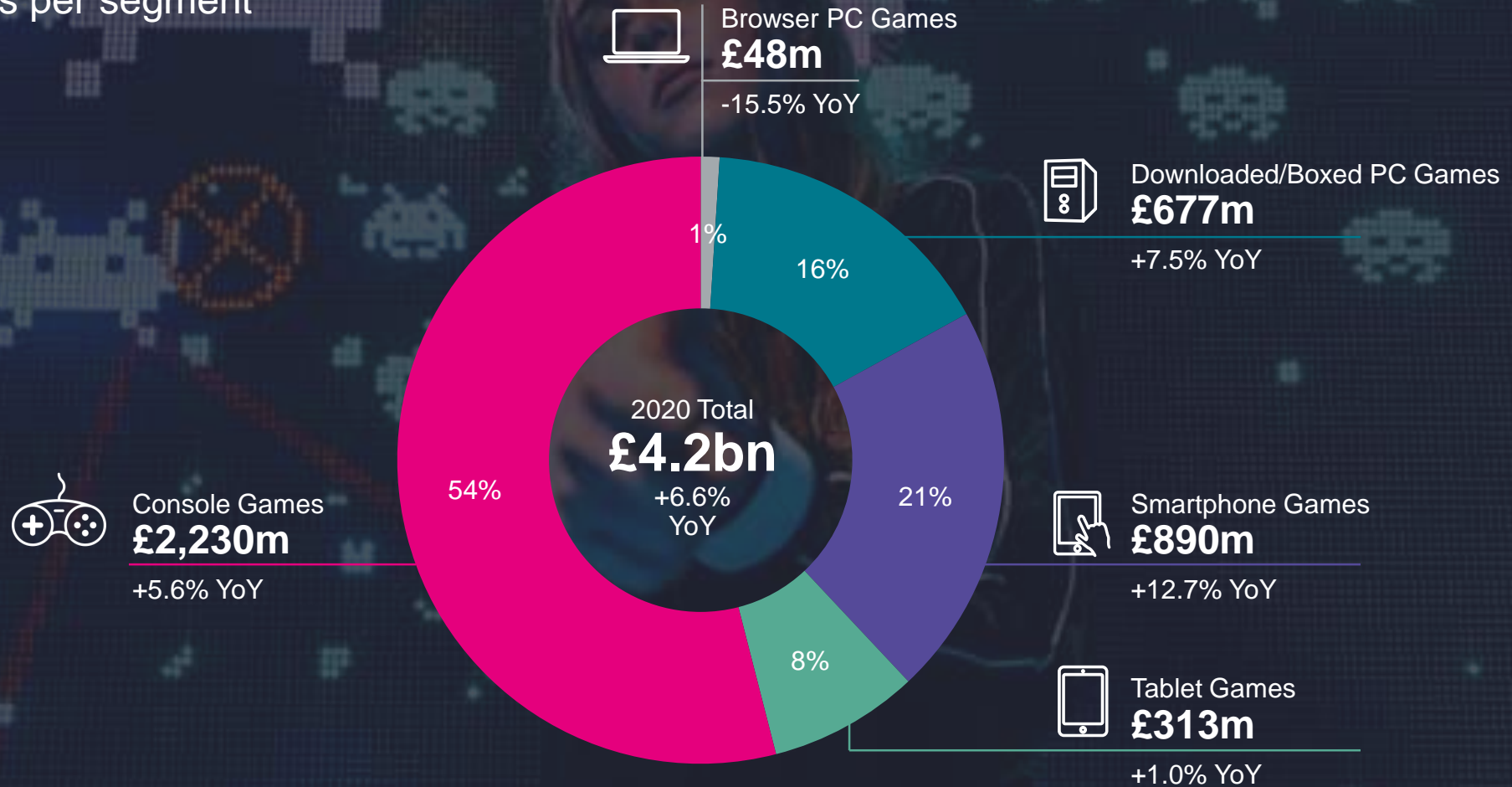Gamers spend most on consoles, but mobile revenue is the **fastest growing**

Source: Newzoo / Limelight
*Styles of interaction popularity by hours spent playing:

OMG

UK Gaming in 2020

2020 revenues per segment

Browser PC Games
£48m
-15.5% YoY

Downloaded/Boxed PC Games
£677m
+7.5% YoY

1%

16%

2020 Total
£4.2bn
+6.6%
YoY

54%

21%

Console Games
£2,230m
+5.6% YoY

8%

Smartphone Games
£890m
+12.7% YoY

Tablet Games
£313m
+1.0% YoY

OMG

Source: Newzoo / Limelight

The UK Gamer: to put it another way…

It's difficult to claim there is such thing as an 'average gamer', but generally, they are:
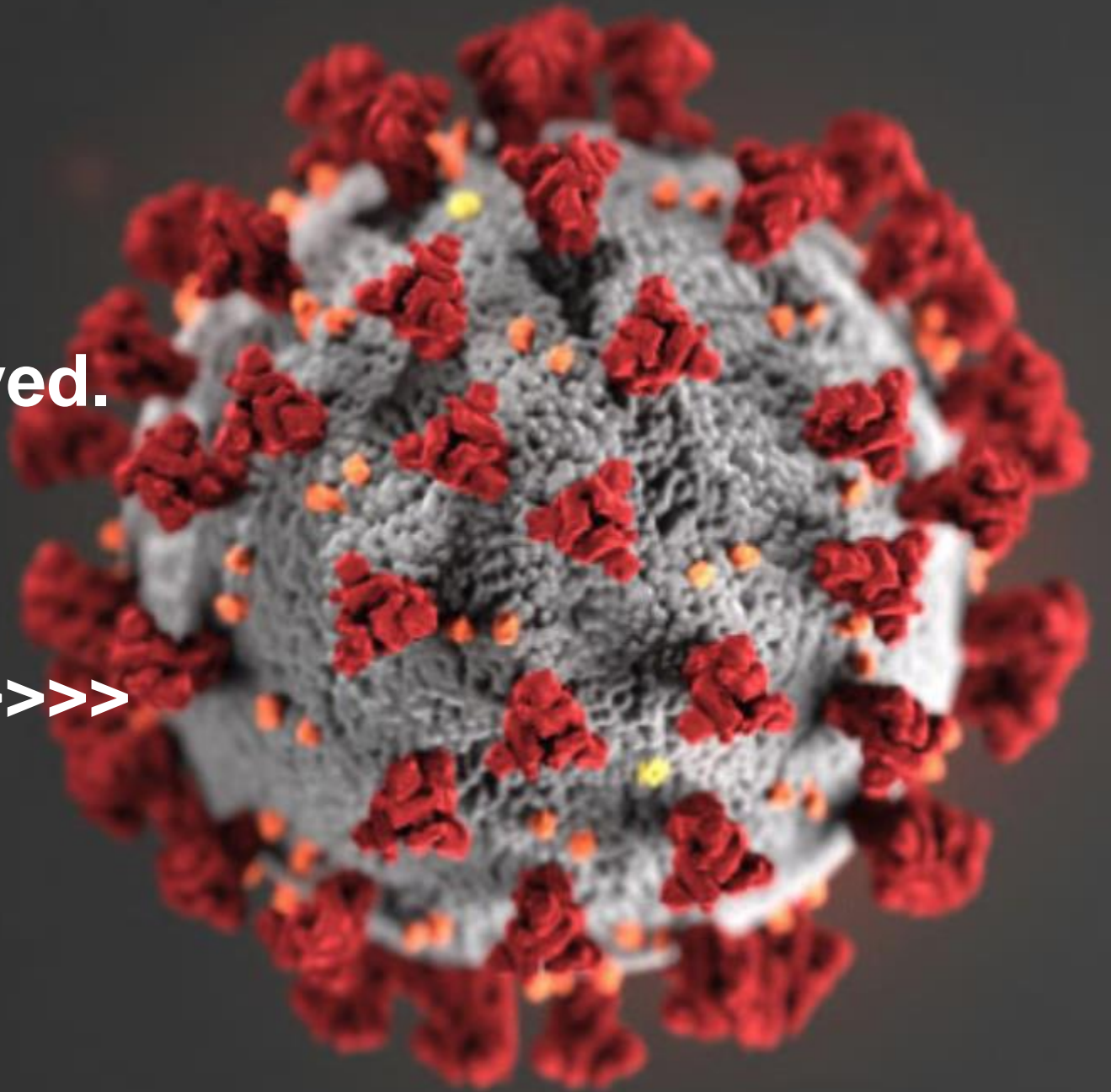
Older than you might think

More casual about 'gaming' than you might think

More affluent than you might think

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Then, the pandemic arrived.

So what happened?

Everything accelerated >>>>

Gaming On The Rise Since COVID-19

Anticipated drop in 'big ticket' items, e.g. new consoles & 'packaged' games in favour of free-to-play as people try to save money

Like Hollywood films, frustrating delays in big gaming titles, e.g. *Halo Infinite* and *Last of Us II*

Verizon reported **75% increase** in gaming traffic

Comcast reports **50% increase** in game downloads

Unity reported **84% more app installs** yoy

In app revenue up **20-30%**

Twitch saw 195% increase in f**irst time viewers** over lockdown

Steam **users broke record** during first week of April: 24.9 million
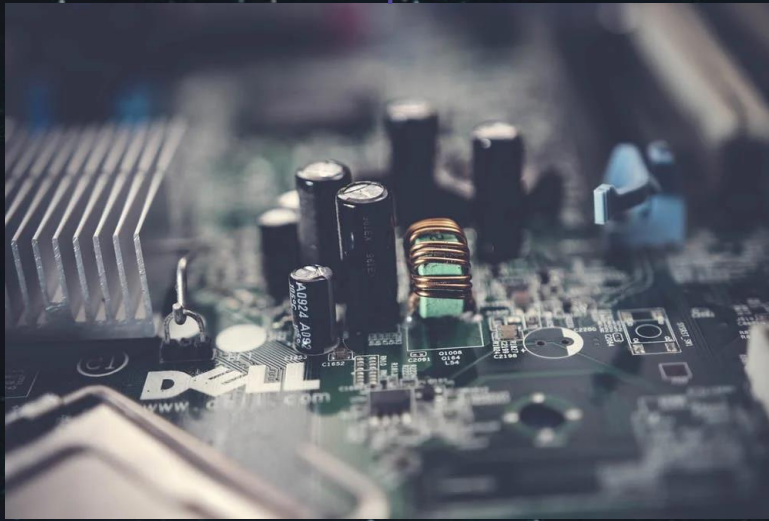
Animal Crossing broke sales records in Japan

Doom Eternal doubled launch revenues vs previous instalments

OMG

Source: Newzoo

SO WHAT'S NEXT?

HIT START >>>>>>

OMG

Tech evolution driving cultural evolution. Which is driving tech evolution

is driving

is driving

TECH EVOLUTION

CULTURAL EVOLUTION

OMG

#2

TECH EVOLUTION

MOBILE GETS A POWER UP
CONSOLES WILL GO FOR THE LOCK IN
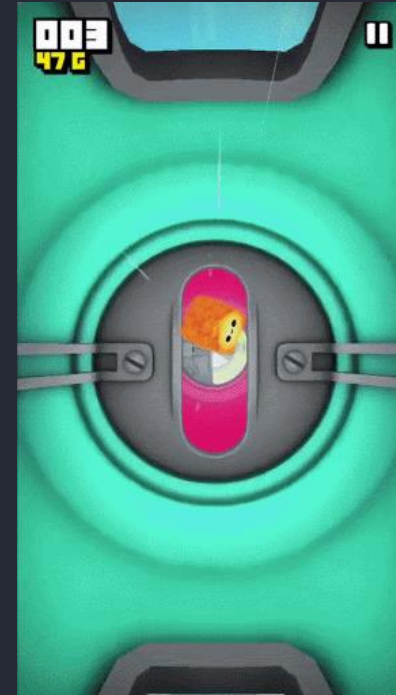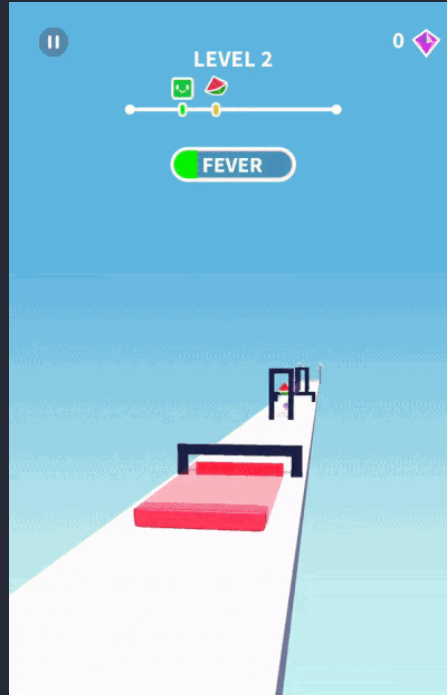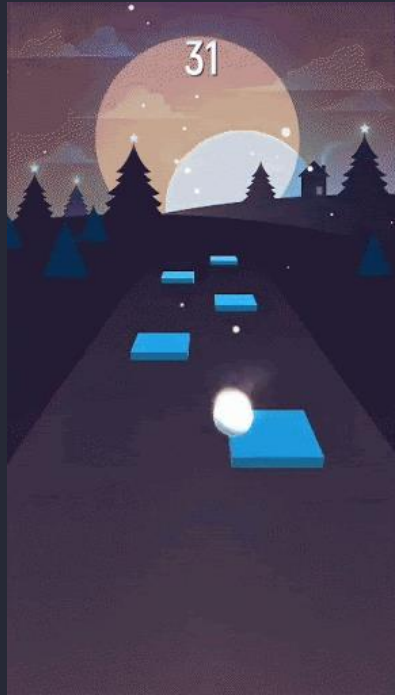EXTENDED REALITY BITES
ACCELERATION WILL ASTOUND

MOBILE GETS A POWER UP

MORE CASUAL GAMING, MORE OFTEN

OMG

Hypercasual Gaming Will Mean More Gaming More Often By More People
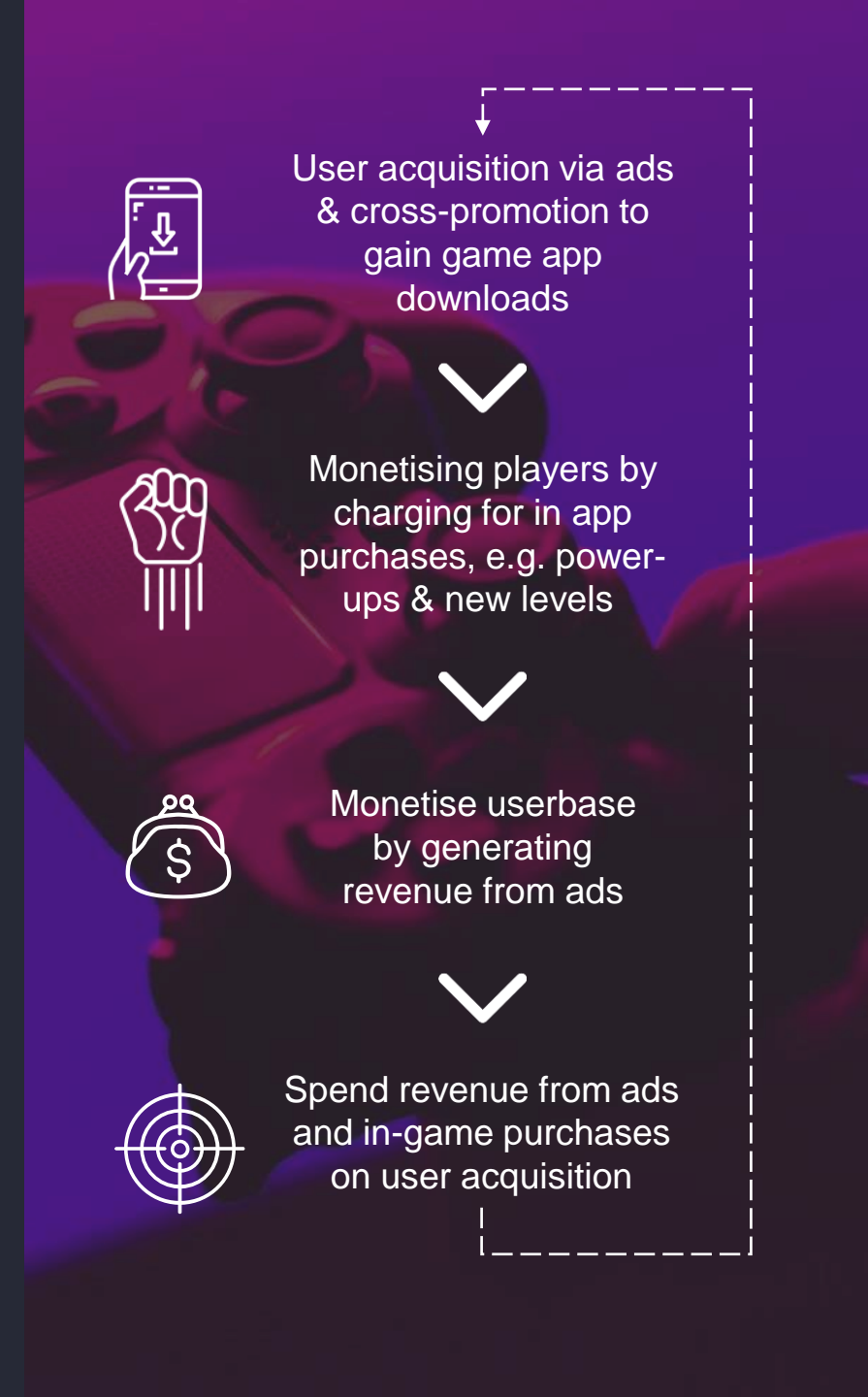
OMG

Simple, addictive games dominate the gaming sphere

- Addictive mobile apps with simple interactions now make up the majority of gaming hours

- A diversion for those who consider themselves 'non-gamers', a quick fix for hardcore gamers and a re-entry point for lapsed gamers

- More people, playing more games, more often, making more revenue for gamemakers to make more games

OMG

HyperCasual Will Become Even More Profitable

- Cost of game app development is lowering due to sophisticated 'game building tools' and competitive market.

- Algorithms increasingly successful at targeting ads and acquiring users.

- If economics and performance are correct, games can be increasingly low-use - once or twice max - and still turn in a profit.

- Mobile equivalent of disposable tents at Glastonbury.

User acquisition via ads & cross-promotion to gain game app downloads

Monetising players by charging for in app purchases, e.g. power-ups & new levels

Monetise userbase by generating revenue from ads

Spend revenue from ads and in-game purchases on user acquisition

OMG

5G Will Make Games Slicker, Quicker. And Beautiful.

- Rise in 5G will mean processing work is outsourced to the Cloud.

- Smartphones will be approaching the power of a console.

- One-Plus already have a 90FPS phone in market, specifically for gaming. EE pushing their 5G Network hard.

- Ever-more complex interactions in ever-more complex worlds will now be possible in the palm of your hand.

- More luscious graphics. More addictive games. More real-time feedback from gamer's performance.

- Consoles games makers may port more games over to smartphone.

Download speeds: 4G > 10mb per second vs 5G > 100mb per second | Latency: 4G > 10 milliseconds vs 5G > 1 millisecond
Source: Android Authority
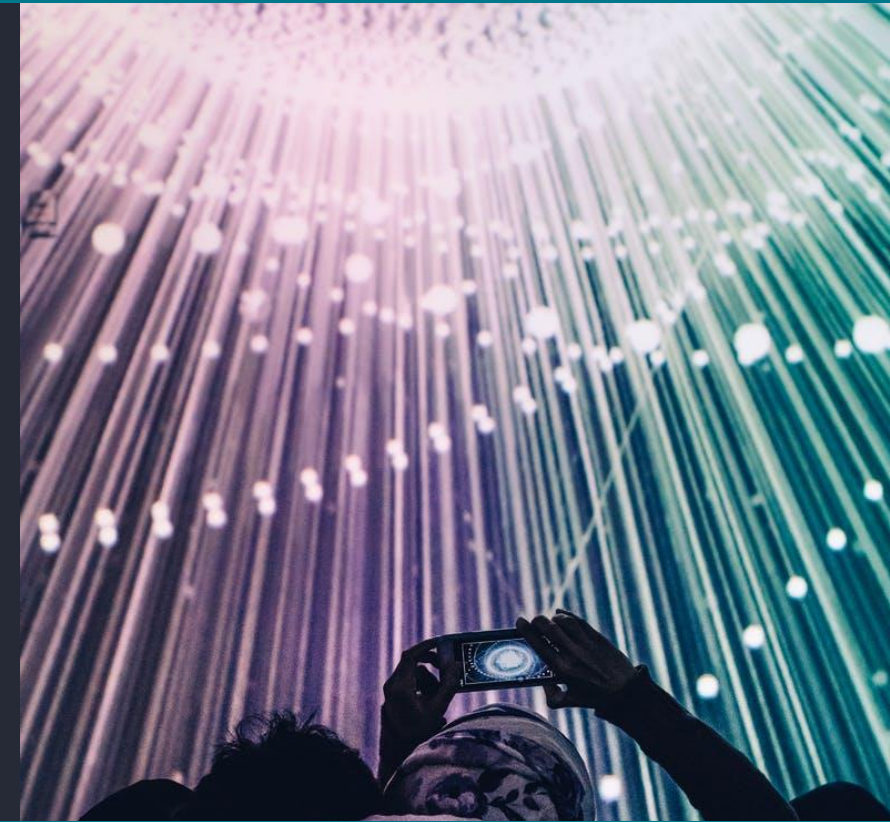
The length of time it takes to download games was noted as the top gamers complaint globally, with 32 percent noting this as their primary issue.
Source: Limelight Report

OMG

How to Access This TODAY

Already platforms operating in this space

China Will Be World Leaders In Mobile Gaming

- Fastest new smartphone acquisitions in emerging economies. Free-to-play games will be all the rage on newly-affordable smartphones.

- China increasingly terrifying prowess in game development - particularly mobile.

- Opening up new studios outside China to tap in on the new emerging economy audience.

- Will reach UK – but provoke TikTok / Huawei-style debate.

Tencent and NetEase own over 60% of China's mobile gaming market combined. China will have 70% of its online gaming market taken by mobile games in 2020.
Source: Analysys

OMG
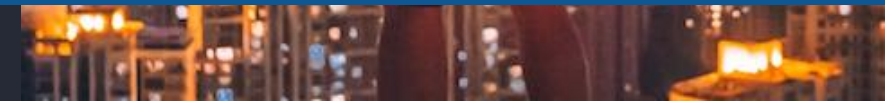
CONSOLES WILL GO FOR THE LOCK IN

BIG GAMING TECH COMPANIES WILL PIVOT

Games Will Go Deeper & Longer

- New generation consoles on way – Playstation 5 and Xbox Series X – but timing is not good.

- Shifting towards free-to-play. 5G is in ascendancy. Hardware and 'packaged' games are expensive… and there's the pandemic.

- Solution: creating a deeper relationship with a game title as away of generating loyalty and revenue.

- Not like hypercasual, which is a string of brief 'one night stands'.

OMG

Consoles Will Fight For Longevity

- Consoles and their publishers (e.g. XBOX & PS) will seek to monetise and increase engagement on existing titles by update and upgrade titles digitally.

- Extend the lifetime value of the game via new weekly challenges or unlocking special upgrades or level-ups.

- Their aim will be exclusivity, but…

- We're also seeing increasing cross-device play – e.g. accessing the same gaming titles / environments from competing systems…

- …however, inconsistency of experience between rival systems in a shared environment makes this challenging for players.

- But might this change in future?

Over 10 million people currently subscribe to GamePass on Xbox.
Source: The Verge

OMG

The End of Hardware? Well, Not For A While…

- Crystal ball gazing conversations around the idea that physical hardware will one day be obsolete.

- Could cross-platform games and 5G mean the black box under your TV has little life left?

- See Google Stadia – a cloud-based gaming platform with no console, just a controller, accessing games through Chrome / Android touchpoints.

- …and it failed. Reasons: 100% cloud processing vs slow internet >> multiplayer experiences hampered >> lack of confidence from developers.

- But will 5G solve this issue? For every Tesla, there's a DeLorean…

Google Stadia is a total bust. What went wrong?

OMG

GAMEFREAKS365

EXTENDED REALITY WILL BITE

VR WILL GO DEEPER. AR WILL GO WIDER.

VR Will Go Deeper

- VR has had a rough ride recently. Google has dumped Daydream. Samsung has dumped Gear.

- It's not that VR is dead. It's just not mass media. Like Hypercasual.

- VR gaming platforms like Oculus Quest & PSVR are doing well with hardcore gamers.

- Hardcore gamers commit. Invest in the equipment and make time.

- However, VR is still not relatively widespread among the gaming community...

OMG

Waiting For The Killer VR Game....

- It's Chicken and Egg. Gamers waiting for truly brilliant games before investing in expensive kit. Developers are waiting for audience base before building games.

- VR needs its killer app. Might this be Half Life Alyx?

- ...probably not. But Steam still made it cross-platform, e.g. Oculus & Index - to get people to play it.

- Also see the development of high end headsets for training & education - Varjo & VRgineers.

- But, in short to mid-term, VR remains on the heads of enthusiasts, staying the preserve of hardcore gamers and industry / education.

HALF-LIFE
ALYX

'Half-Life: Alyx' added nearly 1 million VR users to Steam

It's still a tiny portion of Steam's user base, but it's a start.

engadget

OMG

AR Will Go Wider

- In next decade AR will broaden in its appeal.

- Integration of Google Lens across Android devices. Increasing sophistication of AR lenses and filters are easy entry point.

- DIY AR - ability to perform volumetric scans of rooms objects - in conjunction with AI.

- Fuel hybrid gaming relying on physicality of real-world location, blended with AR overlays to make experiences more tangible, e.g. Pokemon GO.

In 2020, there are 1 billion augmented reality users. AR revenues will surpass VR revenues in 2020.
Source: TechJury

67% of media planners and buyers want AR/VR ads in digital marketing campaign.
Source: TechJury

OMG

Big Tech Backing AR

- Big software companies supporting AR versions of popular titles.

- Big social media giants supporting AR via lenses - SnapChat, Instagram, Tik Tok.

- We've seen failure of Magic Leap, but hints at the ascendancy of Apple AR and a possible renaissance of HoloLens.

OMG

How To Access This Today

Many companies offer scalable, affordable entry points into AR:

Bespoke lenses, AR Banners, on-pack activations, DOOH integration

OMG

ACCELERATION WILL ASTOUND

TECH ADVANCEMENT WILL MAKE EVERYTHING FASTER, DEEPER & CHEAPER

OMG

We Are Witnessing Rampant Technological Progress

1996

1.8 trillion calculations per second

ASCI Red, Mexican supercomputer
size of a tennis court

2020

12 trillion calculations per second

Playstation 5
games console

OMG

We'll See Mindblowing Fidelity

- Advancements in hyper-realistic imagery and 3D binaural sound will mean fidelity of gaming experience will soon reach mind-blowing levels.

- Photogrammetry – the act of rapid, high definition volumetric scanning – is accelerating due to the influence of AI.

- Raytracing – the ability of machines to understand, predict and recreate complex light and shadow patterns.

- Digital Twins – companies like 3Lateral and Soul Machines will be able to recreate any human, alive or dead.

- In 2000s, advancements led to 'old media' being digitised. In the next decade any person or object will be 'virtualised'.

"Imagine having cutting edge Hollywood CGI in your games at home"

Phil Scott, Head of EMEA developer relations at Nvidia

OMG

We'll Encounter Artificially Intelligent Games

- AI will work subtly in the background to improve a gamer's experience.

- Accelerations in Machine Learning will lead to advances in graphics and speech synthesis for NPCs or non-player characters – any character not controlled by the player.

- AI will bestow semi-sentient life on 'digital humans' giving them a frightening level of realism.

VentureBeat

AI startups raised $18.5 billion in 2019, setting new funding record

OMG

We'll All Become Creators, Builders and Artists

- Gaming increasing sophistication will allow us to go 'deeper for cheaper', democratising DIY creativity through easy-access tools.

- PS Dreams allows users create user-generated content: fully-fledged games, music videos, 3-D art, which can be shared or remixed to be used in others' creations.

- Imagine a Youtube-style model applied to this: sharing, engaging, monetising spatially interactive content.

OMG

Tech Evolution Will Lead To…

more people > playing more often > getting deeper into experiences > on smarter devices

OMG

Tech evolution driving cultural evolution. Which is driving tech evolution
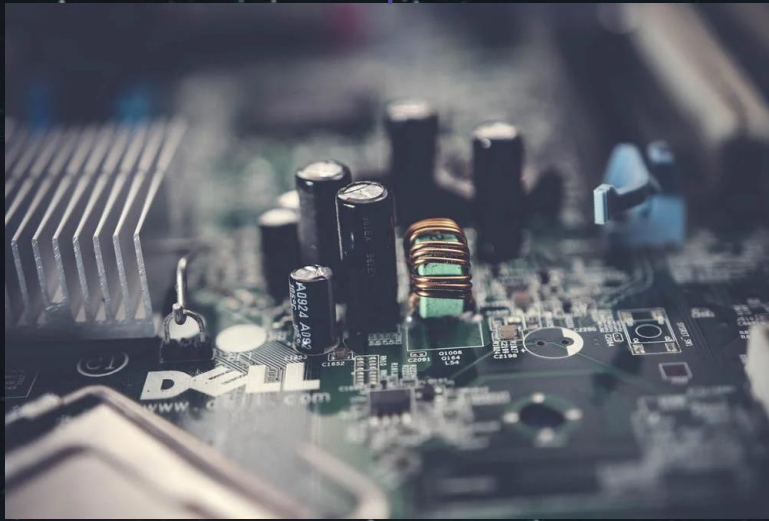
is driving

TECH EVOLUTION

CULTURAL EVOLUTION

is driving

OMG

#3

CULTURAL EVOLUTION

GAMING CLAIMS ITS LEGITIMACY

OMG

Surveying The Cultural Landscape

- Pastime or a profession generating content & experiences for an audience.

- Some of us partake in it, some of us spectate, some of us talk about it and make culture about culture.

- We can set our watch and organise our calendars around it. We look forward to new iterations of it.

- There are those who are renown for it and cross cultural boundaries because of it.

- This will be true of gaming...

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Technological Evolution Will
Drive Cultural Evolution

- Traditional gaming culture has been with us for 40 years… but it's changing.

- Gaming is expanding its remit. It's not just computerised competition, it is shifting into another space.

- No controllers, no quests, no levels, no competition. It's not completely virtual either, leaking into the real world.

- Soon gaming will need another name as it will be a home for all other media. A 'third space', or a 'channel of channels'.

- More access by more people more often will make gaming a permanent fixture on cultural landscape… and it will eventually swallow everything else.

OMG

Think Of It Like This
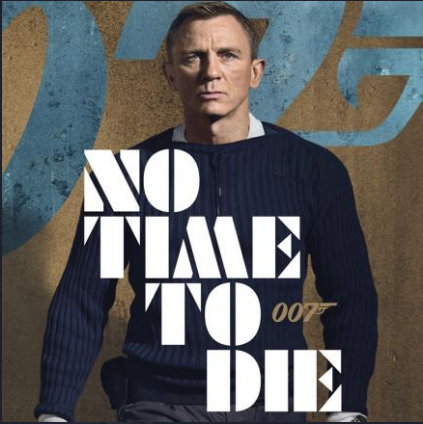
FILM + **MUSIC** + **SPORT** + **SOCIAL**

Not because gaming is bigger than those things, but because it will CONTAIN those things.

To understand the opportunities, think about how you would integrate your brand around these cultural platforms.

OMG

GAMING IS SPORT

Gaming Is Sport

- Like sport, gaming is not just about people who play.

- It's about people who are really, really good playing at a professional level…

- ...and it is about people who watch and comment on those who play at a professional level.

- Esports still makes up a small part of the gaming sphere. $1.1bn in value, the majority coming from corporate sponsorship.

- Esports has taken a hit over the pandemic, but…

OMG

Gaming Is Sport

It's growing!

Prominent Influencers

Influencer 'Ninja' has net worth of $6m and made headlines after his record breaking Fortnite battle with rapper Drake

Prominent Teams

Team FNATIC has a multi-year partnership with BMW

Prominent Reach

Dedicated channels built to discussing it - Youtube, Twitch, and even BBC

League of Legends game saw 137m hours of streaming in 2019

OMG

How To Access This Now

League sponsorship

Team sponsorship

Influencer & player deals

Broadcast sponsorships

Brand alignment

FUSE   DRUM

OMG

GAMING IS TV & FILM

Gaming Is TV & Cinema

- Films of games and games of films – now games are films.

- Extended universes are now expected part of a franchise, and an extra revenue stream for the studios.

- Immersive gaming surfaces new characters, new plots that become 'canon' to fans, e.g. Alien / Star Wars.

- Using same tools to make films and games - Unreal Engine 5.

- Production staff spanning both genres.

OMG

Gaming Is TV & Cinema

- Emulate the conventions and rhythms of the movie industry: teasers, trailers, launches, PEGI certificates.

- Attracting Hollywood talent to 'star', e.g. Keanu in Cyberpunk 2077, Mads Mikkelsen in Death Stranding.

- Hollywood composer Hans Zimmer has provided soundtracks.

- Fortnite hosted a Christopher Nolan film season – screens within screens (or 'screen-ception').

- Small screen content also within immersive environments, e.g. Animal Crossing has hosted a chat show.

- BigScreen allows a virtual cinema visit. BBC Together, Netflix VR & Prime extensions available for virtual viewing.

Star Wars:
The Force Awakens | Time to hit **$1bn– 12 DAYS**
Grand Theft Auto V | Time to hit **$1bn – 3 DAYS**

OMG

How to Access This TODAY

- Admix allows advertisers to place ads seamlessly into game environments (VR, Consoles and In-App).

- Use IAB standard display, video [screens in screens] or…

- Bespoke virtual objects created for specific environments, e.g. fully interactive 3D characters or objects.

- Users can be targeted and retargeted using account login emails and device ID.

- Think of this like the gaming equivalent of OOH or perimeters at a sports match.

- But…you can go further in this world…

ADMIX

TechCrunch

Admix raises $7M to bring more ads to games, VR and AR

OMG

Animal Crossing Native Integration

Hellman's promise to donate real food to the real-world needy for every 'spoiled' food in Animal Crossing.

Louis Vuitton virtual clothing for Animal Crossing avatars – but designed by users!

Authentic involvement, enhancing the experience.

OMG

But There's Also A Way To Do It Wrong

‘Death Stranding’ Shamelessly Bombards You With Corporate Product Placements

Forbes

Users unconvinced that in an apocalypse vending machine stocking only Monster energy drink would be left still standing.

Twitch: The streamers furious at Burger King

BBC NEWS

Twitch allows spectators to donate to an influencer's stream in return for a 'live read' message. Burger King donated in an attempt to encourage the streamer to 'live read' offers and product deals. It did not go well.

OMG

GAMING IS MUSIC

Gaming Is Music

- Increasing number of crossover points between music and gaming.

- Gaming becoming a legitimate source of music discovery.

- Travis Scott performed a virtual gig inside Fortnite, with Nike providing the (giant) shoes – 28 million viewers.

- Death Stranding commissioned Chvrches to record its soundtrack.

More than half of South Korean gamers say they listen to a wider variety of music due to the exposure to different genres through the gaming platform.
Source: The Harman Future of Listening

OMG

Gaming Is Music

- Sony have set up a division dedicated to reimagining and supplying music for immersive environments.

- Cross-media ownership in the entertainment world is raising eyebrows.

- TenCent owns a % stake in Universal Music Group and owns a % in Epic. And Epic owns a % of 3Lateral – a digital twin company.

- Where is all this going…virtual pop-stars?

Why the Music Business Should Be Looking Closely at Fortnite and Epic Games

What Fortnite's parent company Epic Games — and its complex business model — tells us about the future of music, rights and artists

RollingStone

League of Legends opening ceremony featured live 'real-world' singers synchronised with augmented reality dancers.

OMG

How to Access This TODAY

- Many gamers dislike interruptive messaging experiences, e.g. a mid-level pre-roll.

- But in-game audio ads could trade on the benefits of radio ads – soundtrack tasks rather than interrupting tasks.

- New start-up Audio Mob integrate non-interruptive audio ads into game soundtracks allowing players to continue on their quests whilst absorbing the messaging.

- Early days, but imagine being able to target an audio ad for a local test drive during the pitstop of a racing game, or an audio ad for an energy drink as your character grabs a power up.

OMG

Audio Mob

GAMING IS SOCIAL

Gaming Is Social

- Keep an eye on Twitch, Steam and Epic as they morph into pseudo social media platforms. They have all the tools necessary.

- Profiles showcasing personality and preferences.

- Ability to perform and express via posting, streaming, sharing, creating.

- A space to 'meet', exchange and connect, e.g. in-game voice chat.

- Home of everyday citizens AND celebs and influencers - equal access.

- Monetises content and usership via ad revenue.

Fortnite was 2018's most important social network

The game is an excuse to stay connected

THE VERGE
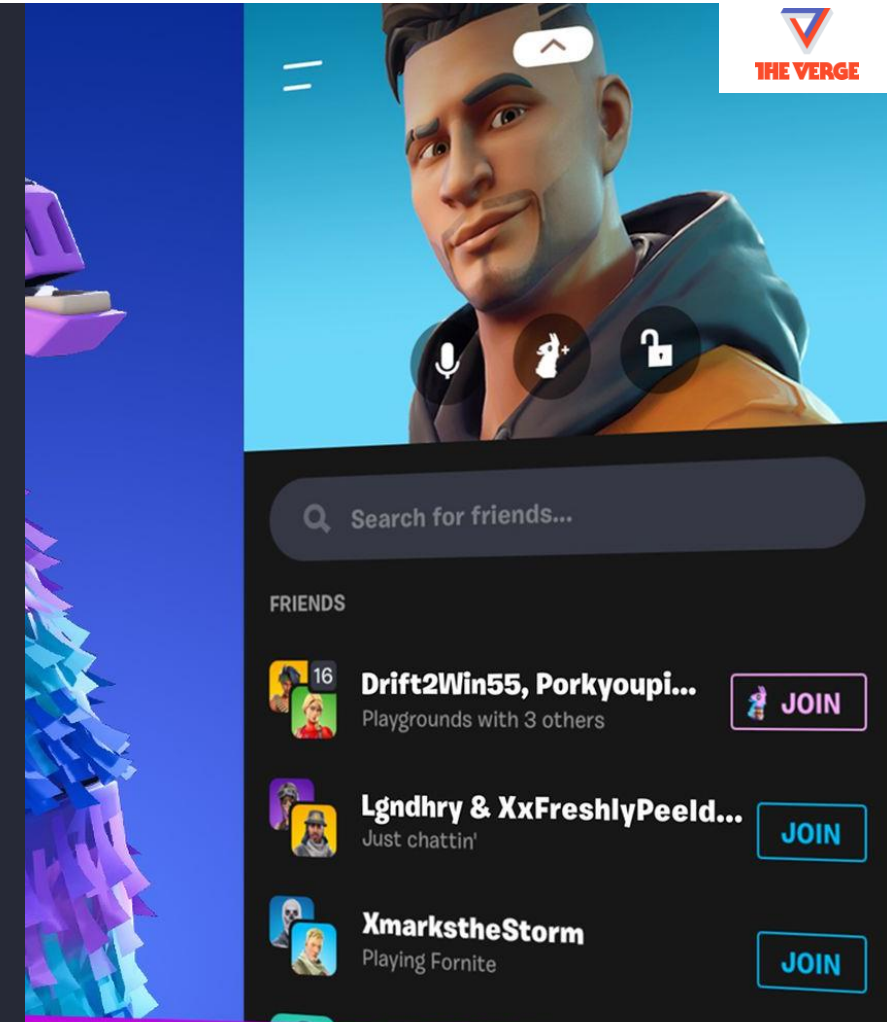
PartyHub is Fortnite's cross between a green room and a social network where players meet and chat – via text or voice – before they head into battle.

OMG

How to Access This TODAY

BILLIONS OF HOURS OF CONTENT

- Streaming live gaming.

- Streaming commentary, discussion and content on gaming.

- Streaming commentary, discussion and content on **non-gaming** – from members of the public and celebrities / influencers.

- Streamed Premier League football matches over lockdown.

SUPPORTED BY

- Pre-roll, banners and native integrated formats.

- Influencer and affiliate marketing.

- Bespoke ad-funded content.

GAMING IS EDUCATION

Gaming Is Education

- Education will be a new battleground in an emerging innovation way between China and the West. Technology will be central to our ability to upskill at scale.

- Technology means we're moving from 'sage on the stage' to 'guide on the side'. Education will be collaborative and practical.

- COVID highlighted danger of charging students for learning that could be done from home.

- Huge crossover between the idea of EdTech and gamification - scores / 'levelling up' / unlocking achievement.

Harvard Business Review

Harvard goes online, tuition costs unchanged

OMG

Gaming Is Education

Many educational environments replicable in an immersive space.

History lessons in gaming, e.g. Minecraft

Maths lessons in AR apps, e.g. Maths Ninja

Collaborate on science experiments, e.g. Labster

LinkedIn, Google, Microsoft and Apple all moving into the EdTech space

OMG

How to Access This TODAY

- Future Visual deliver 'immersive room' experiences for industry, education and training.

- Users can join on any device – VR, AR, Desktop & Mobile – and virtually meet in a fully-interactive, collaborative environment to build, create, discuss and learn.

- Use for lessons, lectures, forums, workshops, design meetings.

GAMES ARE CULTURE NOW.
BRANDS SHOULD EMBRACE CULTURE

OMG

…but there will be debate about the effects on society

Does playing violent video games cause aggression? A longitudinal intervention study

nature
International weekly journal of science

Game or be gamed: Douglas Rushkoff on prototyping democracy through play

Can gameplay bring a new society out of beta?

THE VERGE

How the digitalisation of everything is making us more lonely

THE CONVERSATION

OMG

#4 BE PART OF THE NEXT DECADE

WHAT TO DO ABOUT ALL THIS…

How Might It Look?

NATIVE
Non-disruptive messaging blended naturally into gaming environments

Simon, 34, is patched into an Oculus VR game. As he navigates a rain soaked, tech-noir-ish street, he glances up to his left to see a holographic projection of Nike emblazoned on to the side of a skyscraper.

PARTNERSHIPS
Brands building associations with virtual properties for value-exchange

Antony, 23, is playing a new AR-based game called 'AR BRAWL' – like Pokemon Go meets Tekken. There's an official league with official teams who meet on real street corners to fight one another in overlayed AR space.

Paddy Power has partnered with Team IronFist, sponsoring their shirts and deploying them as influencers across social.

CULTURAL INTEGRATION
Building long lasting structures within culture

Ben, 40, is doing a phD in aerodynamics and avionics. He takes a supplementary course at Airbus's Virtual Engineering Academy.

In virtual space, prominent and prestigious Airbus engineers demonstrate how to optimise the design of an aileron. Gamified interactivity allows students to craft their own aileron design, often in collaboration and competition with other students from across the globe.

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ACTIVATING IN MEDIA: 7 POINT PLAN

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1. Locate Your Audience Across Gaming

- Don't think about whether or not your customers are gamers. Start thinking about where to find your customers across gaming.

- Understanding more about their age, gender, life stage and gaming habits, e.g. hypercasual vs mid-core vs hardcore will help clarify the specific opportunities available.

- Gaming must become a permanent fixture on your plans, like TV, Digital & OOH.

- **Ask:** how can we reach our target market through gaming environments?

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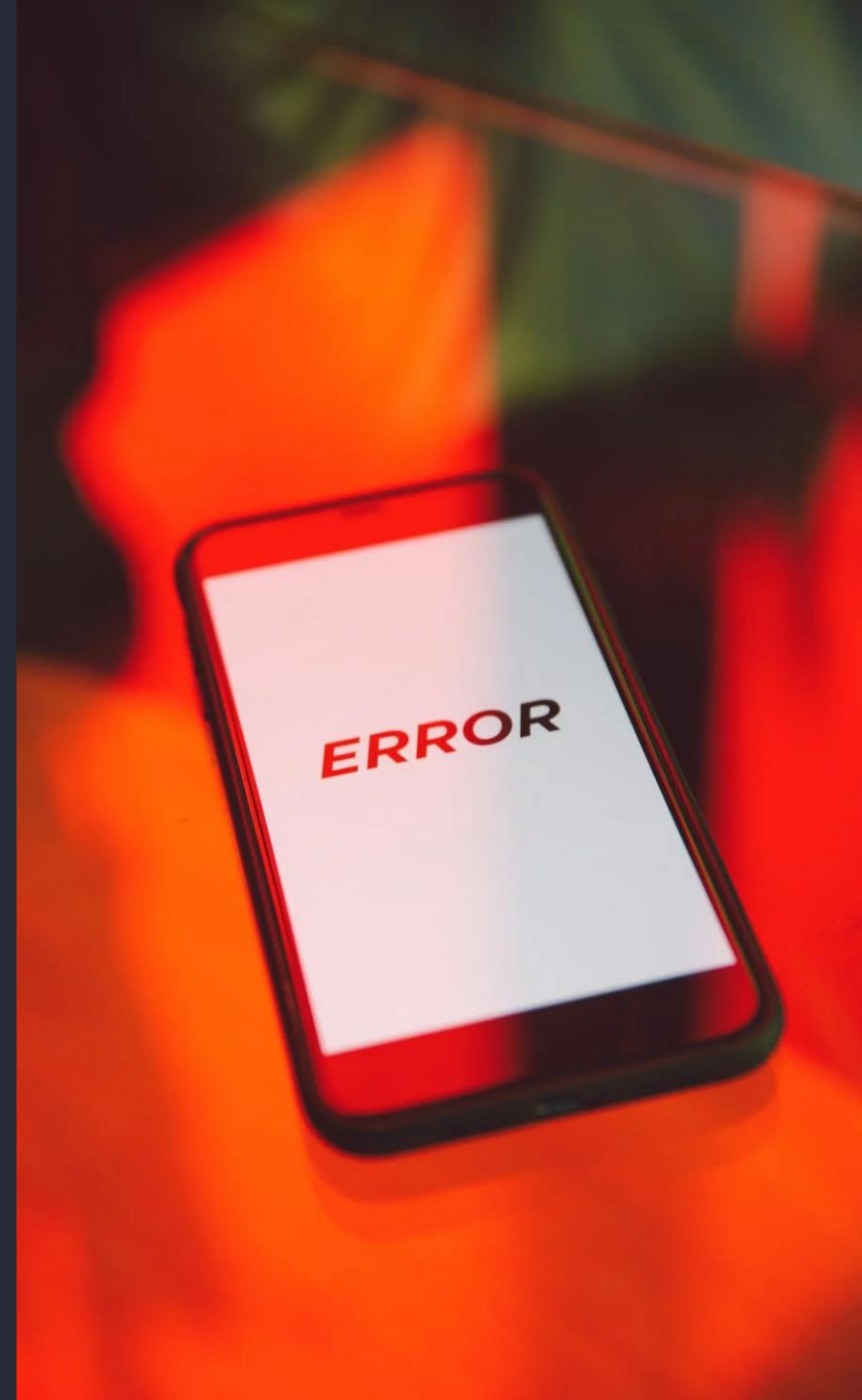
2. Integrate Your Customer Journeys

- Consider how creative assets and partnerships can be ported across into gaming environments.

- Native in-game banners are scalable, affordable reach & awareness builders to work along side any digital banner you are planning.

- In-game placement, influencer deals and content partnerships are a natural extension of any more emotionally-driven engagement you wish to drive.

- Every channel – a/v, audio, OOH, content, social – has an equivalent within gaming. See overleaf >>>

- **Ask**: How do those assets all work in tandem? How does the campaign mesh together?

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3. Extend Your Social Presence

- Whilst planning your Facebook, Instagram, Twitter and TikTok strategy… think gaming!

- At the moment, this is likely to be Twitch – but we sense more platforms will follow (…imagine what a Fornite social media network would look like!)

- Twitch has a wide range of genuinely new original highly-integrated social formats not available on any other social network that require no, or few, new assets.

- A cost-efficient extension of a social campaign, talking to an audience in a different mindset.

- **Ask:** Have we considered Twitch as part of our social strategy?

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4. Master Simple Native Advertising

- Extend digital reach of your campaigns via scalable, affordable native integrations within gaming.

- Think about platforms like Admix and Audio Mob. See how their offering is seamlessly and authentically stitched into gaming environments.

- Think about how your messaging and creative could be adapted for the gaming need state and understand how your brands and products can be additive and enhancing to gameplay.

- **Ask**: Where will our digital advertising appear most natural within this world?

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5. Forge Deeper Partnerships

- When you have located your entry points and have had success integrating assets natively into campaigns, think about opportunities for deeper partnerships.

- Look to build your credibility by slowly building authentic credentials within gaming and virtual culture, e.g. Nike is associated with sport, 02 is associated with music, Audi is associated with film.

- Identify properties sharing your brands values. Think about how leverage those assets across your media mix.

- **Ask**: Which influencers deals, team / league sponsorships, content & broadcast partnerships could we benefit from?

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6. Build For Virtual Culture

- Think about the content experiences and in-game gaming artefacts you could construct to deliver the next level of authentic interaction, e.g. Travis Scott gig.

- How can your product be encountered in an immersive space? Can your product be rendered in 3D and can it be interactive? Imagine how your product can be used when the laws of physics do not apply and you do not have real-world constraints?

- **Ask:** What can we build for gamers? How can we dominate a media that will contain all other media?

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7. Develop Your Capability Long-Term

- Plan for the decade, execute by year, act by quarter. Define your entry points, stretch goals and moon shots.

- Roadmap your route to the future using OMG's Innovation System – innovation approach built on incrementalism.

- Start with immediate, scalable, affordable solutions and accelerate towards the horizon.

- **Ask**: How do we plan for this journey and where do we start?
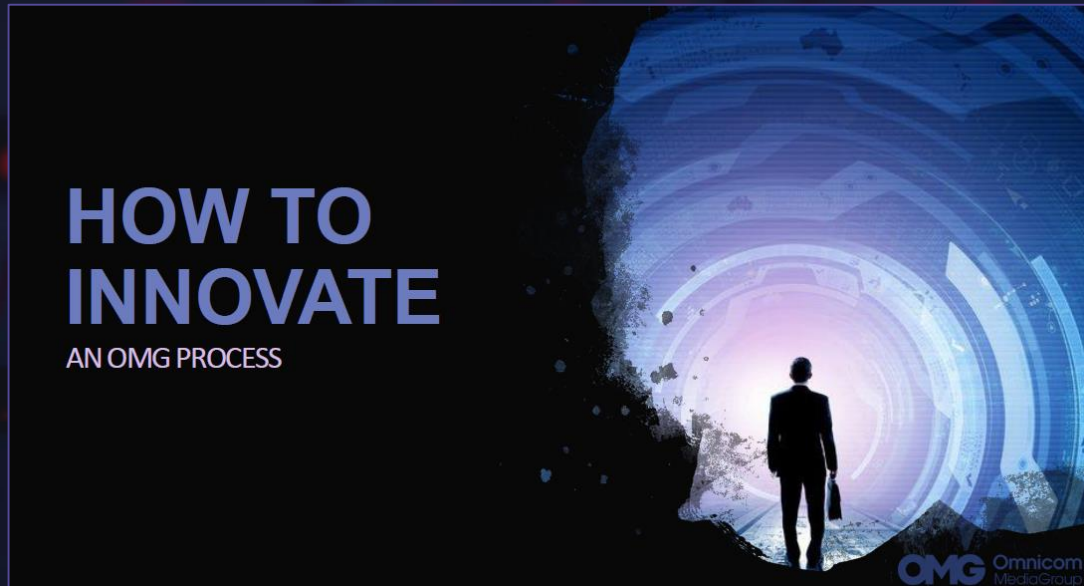
OMG

Those 7 Points Again

1. Locate your audience across gaming

2. Integrate your customer journeys

3. Extend your social presence

4. Master simple native advertising

5. Forge deeper partnerships

6. Build for virtual culture

7. Develop your capability long-term

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WE MIGHT BE FUTURISTIC BUT WE'RE ALSO REALISTIC.

AFTER THE WOW, COMES THE HOW

OMG

We Have A Tried And Tested System

Worked well for a host of clients including Unilever, GSK, VWG

We Group Innovation Into Action Buckets

DO

PROGRESS

PIONEER

New approach
to old

New to market

New to brand

New to
industry

New to
advertising

Mastery of existing innovations
as a best practice requirement

Progressive innovations stretch
brand capabilities and nudging
the brand into new territory

Game-changing innovations and
cutting-edge disruption

OMG

A Gaming Innovation Agenda Could Look Like This

DO   **PROGRESS**   **PIONEER**

New approach to old → New to market → New to brand → New to industry → New to advertising

SIMPLE NATIVE
Make scalable, affordable native integrations within gaming, *e.g. Admix / AudioMob*

SIMPLE SOCIAL
Extend your social media campaigns into social gaming channels, *e.g. Twitch*

SIMPLE PARTNERSHIPS
Sponsored streams, sponsored content, *e.g. Twitch*

PROGRESSIVE NATIVE
Build and integrate artefacts in-game delivering authentic interaction, *e.g. Animal Crossing*

PROGRESSIVE PARTNERSHIPS
Deep partnerships with multi-media properties, *e.g. esports sponsorships / influencers*

PROGRESSIVE EXPERIENCES
Create and own content-led experiences that entertain and engage a passionate community, *e.g. HP OMEN*

PIONEERING IN CULTURE
Creating virtual moments that echo through real world culture, *e.g. Travis Scott / Fortnite*

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Roadmap And Build Your Involvement And Capability In Increments

DO

- New approach to old
- New to market

PROGRESS

- New to brand
- New to industry

START HERE

Work out your DOs and your PROGRESSes

Roadmap your route to the future

Work with OMG and its agencies to build capability over time

Here's how >>>

OMG

Using OMG's services

Work with **OMG Futures** to build your gaming roadmap, locate your entry points, build your core competencies over time and provide deep dives into specialisms

Use **OMG Digital** to plan and buy and manage accessible, affordable native gaming formats as part of campaigns

Use special business units, **Fuse** [for partnerships & experiences] and **DRUM** [content & creative] to fulfil deeper sophisticated opportunities eg partnership & content creation

Here's an example >>>

OMG

Fuse – Partnerships & Experiences

Fuse specialise in partnerships and experiences eg - rights negotiation, sponsorship evaluation, proposal valuation - across the areas people are passionate about: sport, entertainment, cause and culture

- Fuse created and activated a UK esports strategy to make HP's *OMEN* the number one PC Gaming brand in the market

- Strategy integrated HP Omen across the key pillars of esports: a team, a league and broadcast

- Worked with client and esports company FACEIT to create OMEN UK Open, a 6-week white-labelled tournament for amateur Counter Strike: Global Offensive players

- Fuse can provide support with: positioning in the space; relevant routes in; identification, valuation and negotiation of deals; plus ongoing management and measurement.

FUSE

DRUM – Content & Creative

DRUM builds branded content and creative partnerships, helping ambitious brands create their own cultural signals; things with real value for people that cut through the clutter.

- DRUM were tasked with a way to activate the HP OMEN partnership

- Created OMEN ESPORTS REPORT - 'Top Gear' for gamers, a 50-minute monthly entertainment, co-created with gamers

- Broadcast live on Twitch to an EMEA-wide audience. Show now entering season three

- Awareness of OMEN by HP amongst core audience increased by 10% from 15% to 25%, helping to continue establishing OMEN as a major player in the Esports World

Further reading

FUSE

GAMING & ESPORTS OVERVIEW

2020

Fuse Gaming and ESPORTS REVIEW

THE SIGNAL: CULTURAL INSIGHT FROM DRUM

AN OVERVIEW OF VIRTUAL ENVIRONMENTS

JUNE 2020

DRUM

DRUM's overview of Virtual Environments: Download here:
https://drum.co.uk/the-signal

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Get Ready For The Future

- More people gaming more often on smarter devices means gaming will become a permanent fixture on the cultural landscape informing our language, our art, our society.

- Gaming will join other media channels, but also fold in all those other media channels – and will become less about computerised competition but a third space for people to meet, consume, create and educate.

- Brands and businesses should no more ignore this than they should ignore any media.

- There are easy entry points into these technologies that could be put on plans today to help you build capability ready for the future.

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GET READY TO LEVEL UP

THANKS

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