

THE TENTH MAN GAMING REPORT

HOW ESPORTS AND GAMING REWARDS BRANDS

PLAY TO WIN





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“It’s hilariously ironic that brands think it’s ‘so niche’. It’s like several multitudes the size of the film and TV industry.”

AOIFE
Game & Narrative Designer

INTRODUCTION

It is predicted that by the end of 2023, there will be more than 400 million new gamers worldwide, bringing the total number to 3.5 billion*. Data like this illuminates a space with endless opportunity for brands to play in – a space that is relatively undiscovered and uncluttered, a space where a vast number of consumers already are.

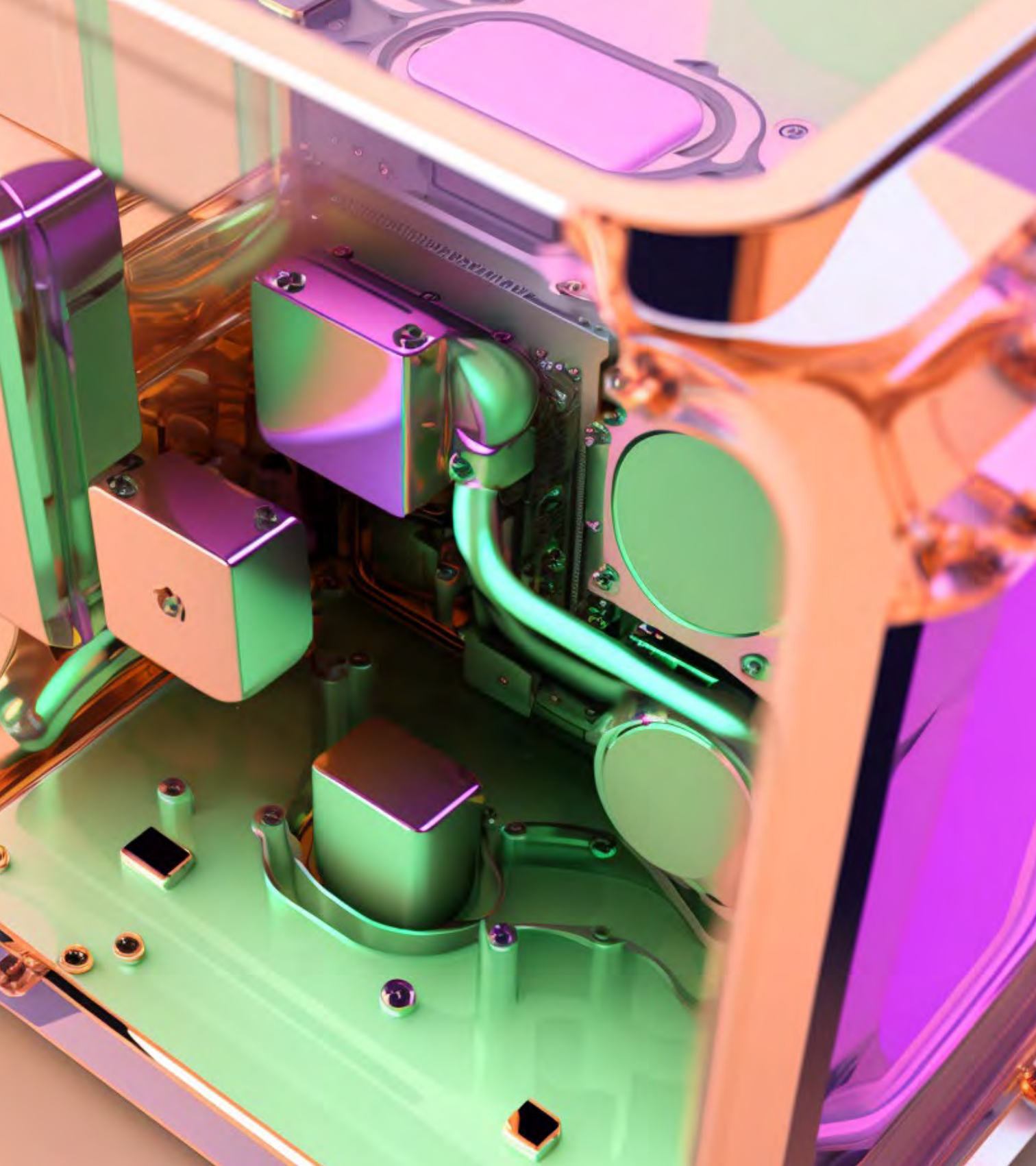
At The Tenth Man, we dedicate ourselves to understanding culture, immersing ourselves with the communities and the people we want to win with to identify the unseen, underlying and unifying insights we can leverage to enable great brands to grow further.

We’ve developed this report that focuses on gaming and eSports communities as a guiding insight for brands and marketers who have yet to dip into these lucrative worlds. Through these pages, we break down the why, how and what for those looking to leverage opportunity for their brands, with in-depth research from the communities themselves and actionable insights.

Gaming and eSports are innovating at lightning speeds – and the pandemic has only served to increase this velocity. In terms of development and delivery, what would previously have taken five years now takes two. Gaming and eSports is not a niche group of people playing in their bedrooms, or a subculture; it’s an industry that is even bigger and more powerful than film and television.

***Brands, it’s time.
Join the revolution so you don’t get left behind.***

* Source: Accenture



METHODOLOGY

We spoke with 11 national and international thought leaders in gaming and eSports to understand more about the sector, what's happening and how brands can win.

AOIFE GLEESON

Game & Narrative Designer

BEN FINNEGAN

Head of eSports & Gaming at EPIC Global

CHRIS SMITH

CEO of BGR

COLM ROCHE

Gaming and Sponsorship Consultant

DAVID CRONIN

Co-Founder of WYLDE

EMMET RYAN

Technology Correspondent

GIULIA ZECCHINI

Commercial Strategy Director at ESL FACEIT Group

OLLIE BARDER

Creative Director at Sola Digital Arts

REBECCA BROCK DIXON

Co-founder and CEO of the*gameHERs

RINGO LUNG

Head Of Partnerships at Talon eSports

STUART DEMPSEY

CEO GamerFest Dublin

A NOTE ON THE IMAGERY IN THIS REPORT

The imagery for this report was created using the AI powered image generator Midjourney. Midjourney creates original and dynamic imagery using natural language descriptions called “prompts” entered by the user. These images can then be refined further by adding or removing prompts as needed.

Although innovative in its functionality we found that when prompted to produce imagery related to gaming, Midjourney typically reflected the traditional stereotypes associated with the category, producing images of young males, playing alone, in dark rooms.

This shows that stereotypes around gaming are both deeply ingrained and pervasive, and not reflective of the realities of gaming and eSports. It's time for change.

Image made using Midjourney
with prompt: 'GAMER'



ONE

eSports Players,
Image from Unsplash

REALITY CHECK

GAMING AND ESPORTS: WHAT IT IS, WHO PLAYERS ARE AND WHY THEY'RE PLAYING – ALL WIDELY MISUNDERSTOOD.

Placing the perspective of those on the 'inside' (e.g. those involved in gaming and eSports) alongside those on the 'outside', shows us just how out of sync they are. To unlock the opportunity that exists within gaming, people and brands need to stop assuming and instead start to learn and understand the reality of gaming.

“Gamers and eSports players are often pigeonholed, viewed as antisocial, and disengaged from the outside world. The reality is very different.”

- Stuart, CEO GamerFest Dublin

WHAT IS GAMING?

The Perception:

“A form of kid’s entertainment, played to pass the time.”

The Reality:

“It’s more varied than ever, with the diversity of titles and the diversity of participants widening. My mother plays Candy Crush at 83 years of age. There is something there for everyone.”

– David, Co-Founder & Director at WYLDE

WHO IS PLAYING?

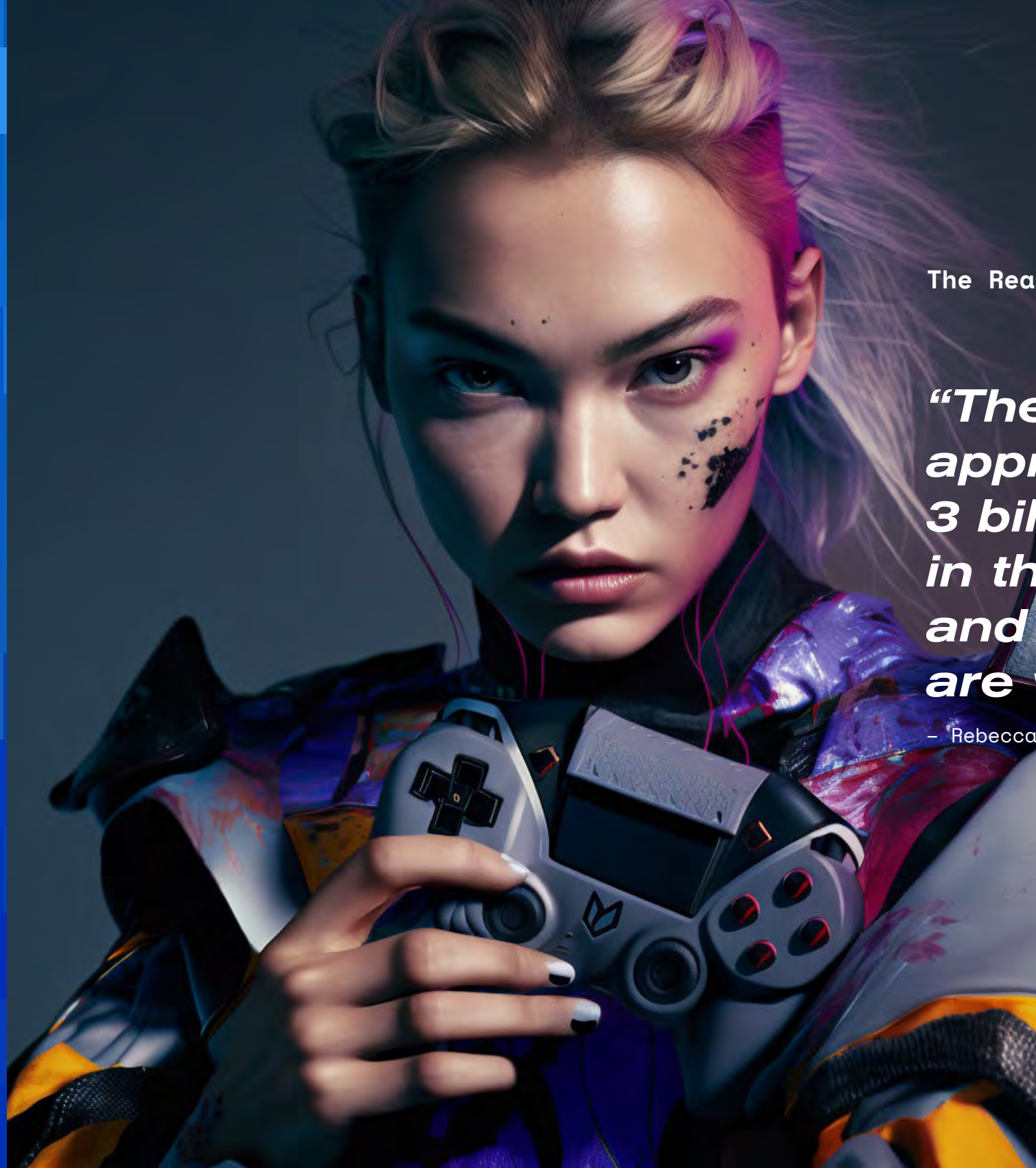
The Perception:

“A teenage boy sitting in his attic.”

The Reality:

“There are approximately 3 billion gamers in the world, and half of them are women.”

- Rebecca, CEO/Co-Founder of *gameHERs



WHY ARE THEY PLAYING?

The Perception:

“Shooting people and killing zombies.”

The Reality:

“Celeste is a game where your character is trying to climb a mountain that represents their anxiety. The game is very hard, however the point is this person is going through a difficult self development process and through interaction you are helping this character develop.”

– Aoife, Game & Narrative Designer

Spotlight Fact:
Gamers are turning to consoles to mentally decompress. According to Wunderman Thompson Intelligence’s “New Realities: Into the Metaverse and Beyond” report, 81% of global consumers say they “switch on” to unwind.

TWO

WHY PRESS PLAY?

GAMERS TODAY ARE PRESSING PLAY
FOR A VARIETY OF REASONS,
BEYOND SIMPLE ENJOYMENT.



Storytelling

“Gaming is a beautiful way to tell a story outside reality.”

- Emmet, Technology Correspondent

Spotlight Fact *Cognitive Improvement*

In Latvia, universities are using gaming as part of their education programmes. In January 2023, educators in Riga turned to the virtual world of Minecraft to involve young people in urban planning. Looking forward, Riga’s city council is looking for more ways to integrate Minecraft into the curriculum.





Storytelling

“When people play a FIFA video game, they do it because they want to feel like they are a famous football player. Another case is where the player gets to feel like a soldier in certain games without the danger of actually dying. Or, I can’t afford a Lamborghini, so I play Gran Turismo.”

– Ollie, Creative Director at Sola Digital Arts



THREE

LEVEL UP BRANDS

Across every sector, brands are recognising the opportunities that exist within these lucrative sectors. Gaming has begun surpassing entertainment subscriptions and eSports are overtaking traditional sports in terms of popularity – where smart brands go, smart consumers will follow.

To date, Irish brands have been slow to enter the space, but as gaming becomes even more prevalent, we expect this will change. Although some have already made the leap; from An Post partnering with Legion, to Riot Games officially opening Project Stryker; a new remote broadcast facility in 2022, looking to other regions reminds us how much potential exists within this space, and how far we have to go.



WHY GET INTO GAMING?

Your Consumer Is Here

Twitch is a gaming specific social platform that hosts multiple communities; from sci-fi fans, to avid knitters. This diversity shows us the breadth of people who are gaming today.

For consumers, content on Twitch is engaging and dynamic, in some instances even more so than what they're watching on Netflix. On Twitch, they're not watching one 90 minute football match and then turning off.

They're highly engaged, playing for extended periods of time, thus creating multiple opportunities for brands to gain exposure.

Spotlight Fact

According to a 2022 Twitch survey, 76% of Twitch users appreciate when brands help their favourite streamers achieve success. As of January 2023, Twitch has 140 million unique visits each month.

Spotlight Definition

Twitch

Twitch is an online live streaming gaming video platform. Users can watch and interact with other players or screen their own gameplay to the world. Broadcasting of eSports tournaments is also very popular on the service.

A Stepping Stone To The Future

Understanding what the Metaverse is and how your brand could be involved can be overwhelming. However, brands are starting to recognise that gaming platforms share similar characteristics to the Metaverse, and can serve as the ideal channel to learn in the space. The pre-existing and loyal user base already used to consuming within virtual realms are the perfect testing ground.



H&M x Roblox

Spotlight Brand

H&M x Roblox

In January 2023, H&M partnered with Roblox and Metaverse studio Dubit to create an interactive online experience called Loooptopia, allowing consumers to try out different style identities while discovering the world of digital fashion.

Spotlight Definition

Metaverse

According to the Harvard Business Review, the Metaverse includes any digital experience on the internet that is persistent, immersive, three-dimensional and virtual – as in, not happening in the physical world.



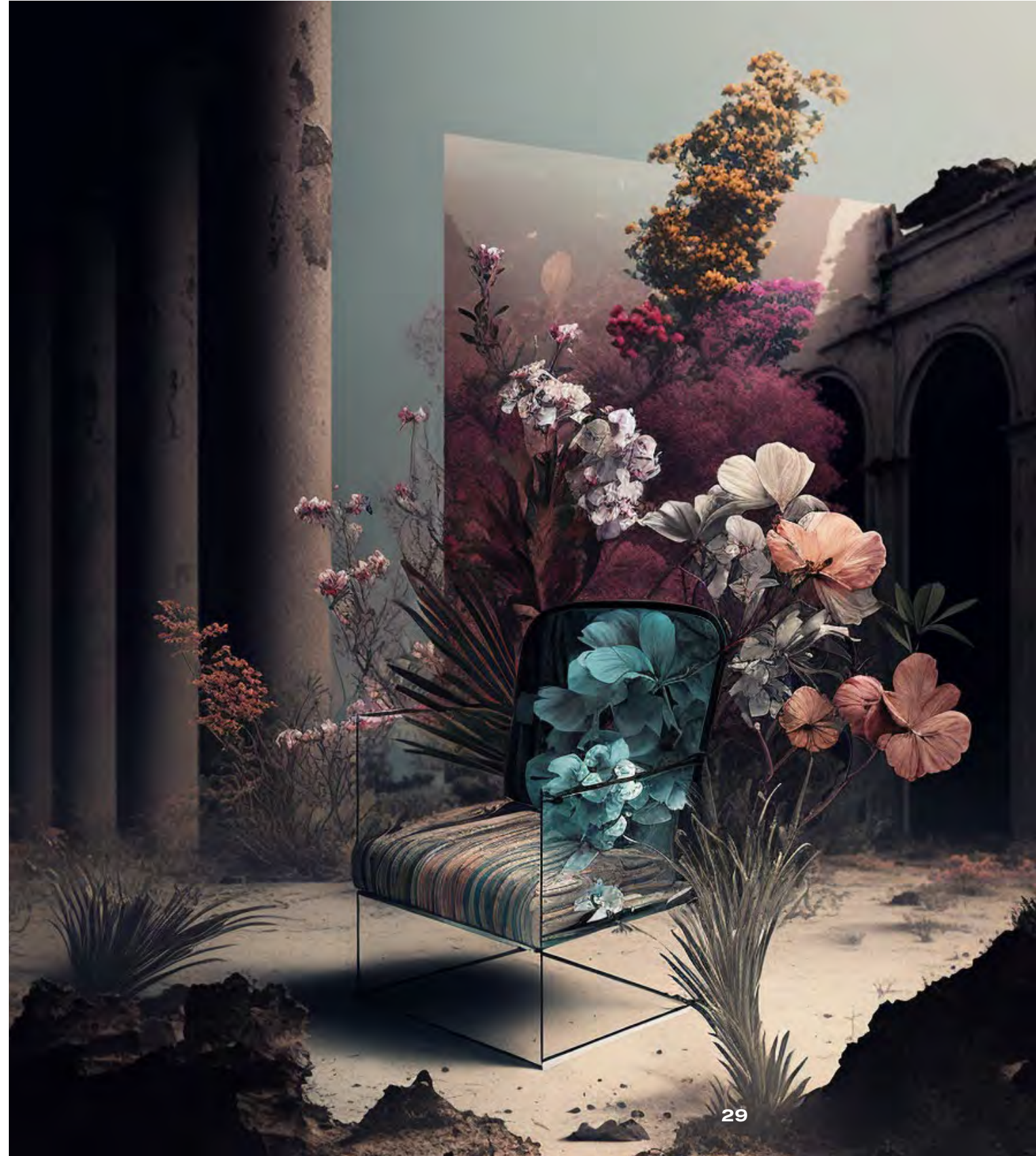
An Open Opportunity For Every Brand

As gaming and eSports start to become more prevalent in pop culture, new sectors are starting to emerge in the space. From luxury fashion to furniture brands making noise in the virtual playground, it appears there are few products that don't match the opportunity, making gaming an accessible and exciting space to enter.



Spotlight Brand *Playhouse*

In 2022, Robin Games added 'Playhouse' to their portfolio in a move that combined gaming and interior design. Playhouse takes lifestyle gaming to the next level – partnering with physical design and furniture brands such as Article, gameplay allows players to buy products for their physical homes as well as digitally.





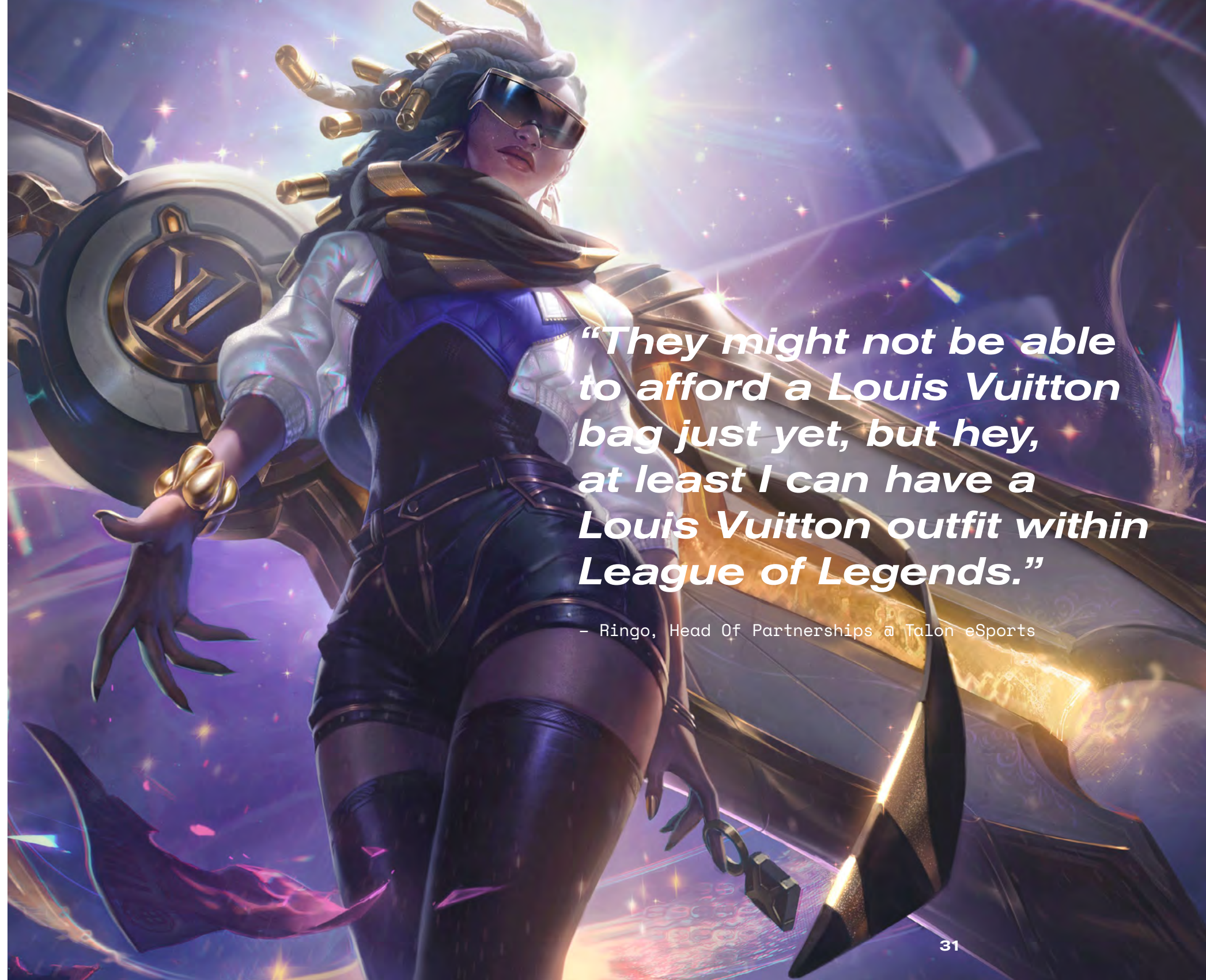
League
of Legends X
Louis Vuitton

Enhanced Accessibility

Through gaming, consumers can now interact with brands that they may not be able to in physical form due to expense barriers. For brands, this means that it is now possible to reach entire new demographics.

Through gaming and eSports, customers also have the opportunity to reach and interact with their idols in ways that are unimaginable in traditional sports. While it may be near impossible to connect with professional athletes on a physical pitch, connecting with your eSports idol or favourite Twitch star virtually is not beyond the realm of possibility.

Brands are now uniquely placed to connect customers with their heroes and deliver singular enhanced experiences.



“They might not be able to afford a Louis Vuitton bag just yet, but hey, at least I can have a Louis Vuitton outfit within League of Legends.”

- Ringo, Head Of Partnerships @ Talon eSports

HOW TO LEVEL UP

Go All In

Certain brands seem to fear the gaming category, particularly within Ireland.

As a result, they play it safe, operating through metric-driven lenses in their gaming advertising output, assuming anything outside the norm is a risk. The hard truth is that when you're playing at that 'safe level', you can only expect small returns.



Do the Due Diligence

The research and learning required to truly immerse yourself in this sector will take time, but the brands that do it will reap the reward and resonate.

Take learnings from experts, other businesses with knowledge of the sector, game creators and most importantly, gamers themselves – their immersion means they know this audience better than anyone else. Journalist Emmet Ryan put it succinctly when he said, "It's not just a case of writing a cheque – you've got to do real research. If your native knowledge isn't in that space, you better bring it in somehow."

Invite Fresh Perspective

In Ireland, younger generations understand, accept and play games themselves. However, older generations who are not as familiar with the sector tend to harbour preconceived opinions and misconceptions. With more senior executives in the boardroom as key decision-makers, this can result in missed opportunities.

Brands that succeed will be those who invite diverse perspectives from across generations – giving those who truly understand the potential of gaming and eSports a seat at the table.

Avoid Token Plays

Surface level attempts in gaming and eSports can do more harm than good. Some brands see a big audience and jump in, thinking success will happen overnight. However, getting into gaming and eSports should be understood as a journey and a long-term investment. This is not a one or two year engagement – brands must be willing to commit.

What's needed is more than just an out-of-home billboard. Brands must consider initiatives and sponsorships that contribute meaningfully to the gaming and eSports community and beyond, bringing initiatives full circle and driving real value for both players and wider society.



Spotlight Game

Terra Nil

Set to launch in early 2023, Terra Nil will instruct players to rebuild an ecosystem in the aftermath of a climate crisis event in order to restore nature. The game is reminiscent of SimCity's urban development model, with gameplay prioritising the environment over skyscrapers and infrastructure. Players have the power to turn a barren wasteland into an ecological delight through their creations.



Terra Nil Gameplay



Welcome Co-Creation

Brands can engage consumers on an entire new level by welcoming them to contribute virtually to the creative process.

From styling virtual ambassadors to enabling players to vote on future product developments, gaming provides an opportunity to brainstorm with your consumer interactively.




Spotlight Brand

Gucci x Roblox

Guccitown, Gucci

Gucci's latest instalment on Roblox of 'Gucci Town' has a 'Creative Corner' where users can discover the works of a visiting artist and be inspired to create compositions of their own. The town also has a 'Gucci Shop' where players can purchase digital Gucci apparel to style their Roblox avatars.

A woman with long dark hair is shown in profile, wearing a black headset with a microphone. She is sitting at a desk in a dimly lit room with blue ambient lighting. She is looking at two computer monitors. The monitor on the right is the primary focus, displaying a first-person shooter game with a character in a white shirt and a map in the bottom right corner. The monitor on the left shows a blurred game interface. Her hands are on a keyboard and mouse.

“Gaming is a pathway to numerous opportunities and careers. The military and medical worlds both use gaming, and the sports, fashion and entertainment sectors have ventured into it. In order to access these opportunities, women must be considered, acknowledged, and included. That’s what we’re working on.”

- Rebecca, Founder and CEO of *gameHERs

Ensure Equal Representation

When games first emerged, the majority of titles were primarily marketed towards males. However research shows us that today almost half the user base of gamers worldwide is female. Given this, It’s difficult to see why women are still being left out of the conversation. For example, still today nearly 90% of eSports scholarships go to men in the US. “The balance is there, but males are more visible,” says Gaming Designer Aoife Gleeson.

There are 1.5 billion female gamers crying out for equal representation in the games they play, presenting a huge opportunity for brands who make the effort to understand and represent the female audience.



Activate in Spaces Beyond the Norm

While online is gaming's natural habitat, brands can really win by showing up in physical spaces. Titles have built highly successful IRL occasions beyond traditional gaming events, such as gaming pop-up bars in London.

Provide Players With Meaningful Support

Gaming can be a high pressure environment, testing the mental resilience of players, in particular for eSports players. Brands entering the space should show awareness of these challenges and take meaningful action; whether through implementation of mentorship programmes or highlighting responsible gaming practices. In this way, brands can proactively support the next generation of talent. Players can suffer from burnout, particularly in the professional space. Brands need to back the entire ecosystem from grassroots up.

Acknowledge Player Dedication

The skill required to game for a living is on par with professional athletes. In Asia, esports teams live, train, eat and sleep together for ten months of the year. Ringo Lung, Head Of Partnerships at Talon eSports explained; “It really has become aspirational. You can imagine, as a 16, 17, 18-year-old kid, all of a sudden having the ability to feed a village. A lot of these families are then relying on the income of these young players.”

People that work in gaming, especially developers, invest a lot of emotional and intellectual time into their practice. Brands should be aware of this drive and dedication and not dismiss it. Chris Smith, CEO of BGR spoke about the lack of recognition of talent in universities. “In Australia, an eSports player qualified for a global finals series but had an exam and the university wouldn’t give him a sports pass because it wasn’t recognised as a sport by the government. However, if he played the violin and you’re going over to Germany, you could be recognised. Why is playing the violin more important than playing in front of 4 million concurrent viewers plus, or up to 40 million concurrent viewers playing League of Legends?”

In Ireland, traditional sports like rugby, football and the GAA are well-established and supported by fans and brands alike. Almost everyone has a family member that plays. But another reality exists concurrently. Everyone most likely also has a family member who is a gamer.

Gaming talent in Ireland cannot succeed without support. There is huge opportunity for Irish brands and organisations to recognise, platform and support these players.

“When I say to people, I’m in eSports, they say, “What?”

- David, Co-Founder at WYLDE



Talon eSports

FOUR

***LEVEL
PASSED
LEVEL
FAILED***

**BRANDS THAT DID WELL,
AND BRANDS THAT DIDN'T.**



LEVEL PASSED



Fast food industry giants have made strides, from KFC launching the KFCConsole to Wendy's using gaming as an opportunity to teach users about their production processes.

Luxury fashion brands have also found innovative ways into the sector. A collaboration between Louis Vuitton x League of Legends led to the creation of an in-game skin line and a physical collection of clothing and accessories.

Gucci tackled the issues of high pressure environments and online scrutiny in gaming and eSports. The luxury brand partnered with eSports tournament organiser FACEIT to create an initiative that was the first of its kind, 'The Gucci Gaming Academy.' They worked with the World Health Organisation to find ways to support gamers around the world to support player health, safety and gameplay.

"Everyone just started destroying the freezers, and they got their message across that they use fresh, not frozen. I would never have been able to tell you that Wendy's doesn't cook frozen meat, but now because of gaming I can."

- Ben, Head of eSports & Gaming at EPIC Global



Wendyverse, Wendy's

P&G giants Always and Tampax partnered with eSports firm Gen.G and gaming community Galorants to tackle gender discrimination in gaming. Together they hosted Astral Clash – a series of tournaments welcoming some of the best female-identifying gamers in the US.

In a bid to make gaming more accessible, Sony launched a new round-shape console, designed to lie flat on table top or wheelchair tray.

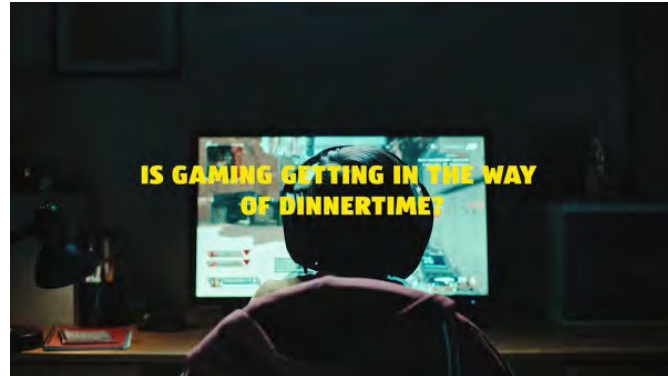
These brand succeeded because they were informed and authentic in their practice, fearless in tackling tough conversations and committed to long-term rollouts.



Astral Clash, Tampax and Always



LEVEL FAILED

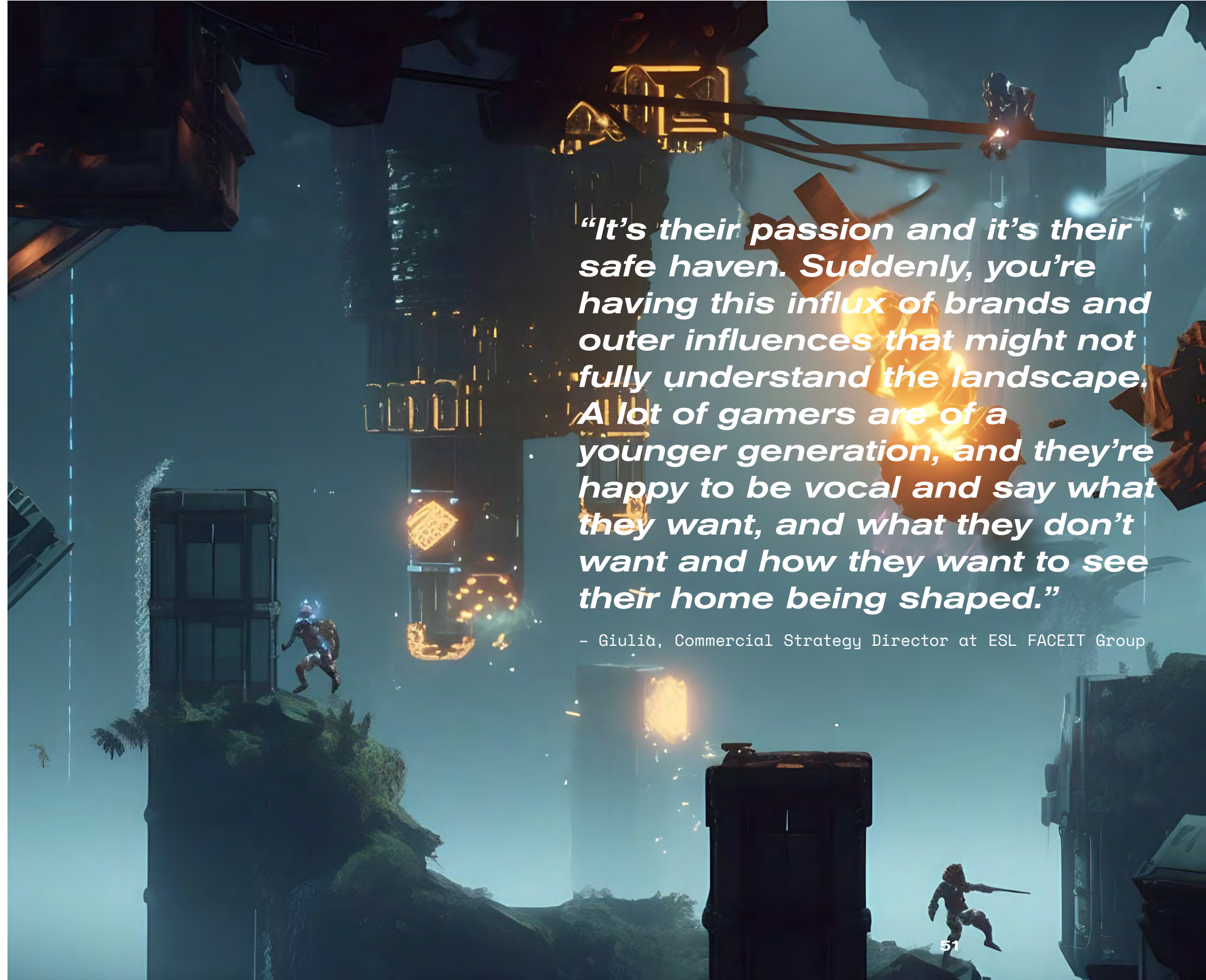


TeaTime Warrior Campaign, Aldi

Aldi's TeaTime Warrior campaign, aimed at getting families together for meal times, resulted in significant backlash from the gaming community. Playing into traditional stereotypes, the ad showed a young male, sitting in a dark room, angrily shooting people in the latest war style game. For many, this felt like a false representation of the community.

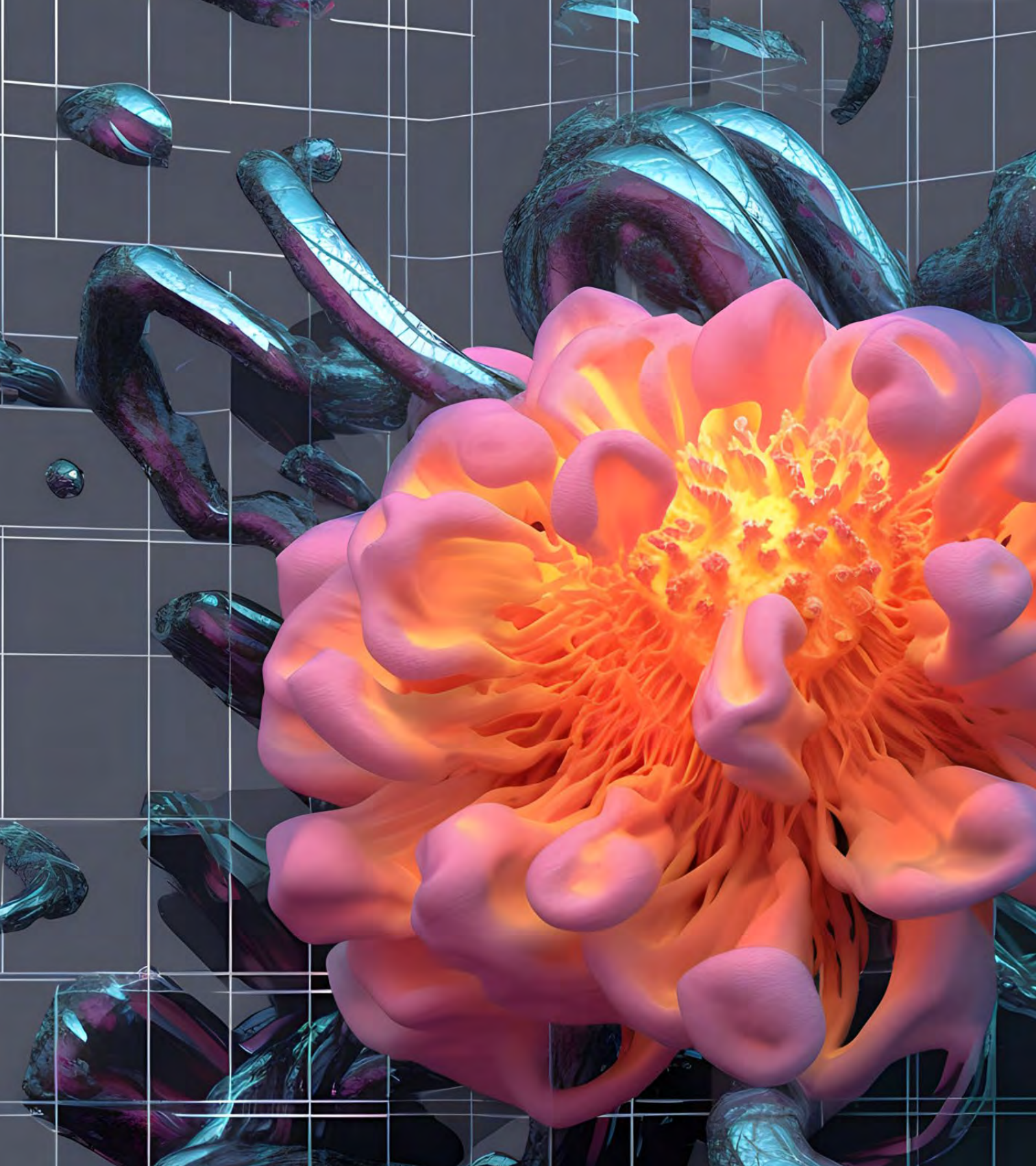
Another concept that failed to accurately reflect the gaming and eSports audience was Coca-Cola's 'Real Magic' gaming platform. The community felt the ad was not genuine as it suggested gamers live disconnected lives and that conflict is at the core of gameplay.

For those who play, gaming is often a sanctuary, a happy place. Representing this accurately matters.



"It's their passion and it's their safe haven. Suddenly, you're having this influx of brands and outer influences that might not fully understand the landscape. A lot of gamers are of a younger generation, and they're happy to be vocal and say what they want, and what they don't want and how they want to see their home being shaped."

- Giulia, Commercial Strategy Director at ESL FACEIT Group



FIVE

SO WHAT'S NEXT?



Until now, gaming has received little consideration from brands, particularly in Ireland. But, as this report shows, this space is full of opportunity for brands willing to take it.

We believe that those who start marketing to gamers **in the right way, right now** can gain a first-mover advantage, broadening their audience and building loyal consumers, particularly among coveted younger cohorts who are becoming increasingly difficult to target through traditional advertising methods.

The 'ways in' are endless from creating in-game advertising, to partnering with gaming organisations, to working with gaming and esports influencers, sponsoring gaming and esports events or even creating their own games. Even products and brands that might initially seem off the table; from food and drink, to insurance and health can be adapted to fit the gaming space, as evidenced in the innovative examples we've seen from Wendy's and Tampax.

Our advice to brands – **ACT NOW**. This 3.5 billion user demographic consists of some of the most highly engaged consumers out there and for companies who reach these consumers now, they have a higher chance of retaining them for life.

Rebecca Brock Dixon, CEO/Co-Founder of *gameHERs put it perfectly when she said:

“If you want to sell your products, you need to know where your customer is. Your customer is most likely playing video games, so you should meet them where they are.”

***TRUTH is The Tenth Man's
research and strategy division;
dedicated to understanding
what matters to people and why.***

Truth was born from a dissatisfaction with 'traditional' market research and the creative outputs it delivers - brands and campaigns which speak to their audience; built on surface level insight that never quite cut through the noise, or create real meaning for people.

This failing proves that all the research in the world means nothing if you cannot uncover real insight and if you don't know what to do with it, when you do.

Our focus at Truth is to understand culture; immersing ourselves with the communities and the people we want to win with, to identify the unseen, underlying and unifying insights that we can leverage to enable great brands to grow further.

Through bespoke qualitative research we unearth insights that help shape client's thinking and approach. We translate this understanding into creative strategies that propel brands and businesses forward; enabling them to create fearless campaigns, launch game changing products and devise best-in-class business propositions.

To date, we've done this for some of the world's biggest brands; from Irish icons like Jameson, eir, Bewley's and Life Style Sports, to global leaders like Lidl, Guinness, Carlsberg and Red Bull.

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