

# Choose Your Character!

## A Guide to Getting Gamers

FULL HEALTH 



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**Fahrenheit212**  
Part of Capgemini Invent



# Gaming is big, and will only get bigger.

**\$200B**

Expected value of the video games market in 2023

**\$1.5B**

Estimated global market size of esports in 2023

**75%**

Increase in gaming internet traffic since stay at home mandates

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**\$30M+**

Prize money for The International 2019, a leading esports tournament

**2.7B**

Number of gamers worldwide

**900M+**

People watching gaming content videos

# Gamers are young, digitally inclined, and highly engaged in their online channels and communities.

**~40%**

Of gamers are ages 18-35

**26**

Average age of an esports fan

**15B+ hrs**

Of gaming content was watched in 2019 by gamers worldwide

**1-3 hrs**

Average gaming session

**~51%**

Of gamers play everyday

**52%+**

Of everyday gamers play 3-5+ hours

**~75%+**

Of everyday gamers are active in online communities (e.g. reddit) or watch video gaming content online

**64%**

Of all gamers purchase games online, not in person



Brands outside of gaming – especially CPG brands – see it as a new channel to unlock with unique consumers to capture. This is particularly true with the recent uptick in gaming due to social distancing.

To date, their efforts include new product development, partnerships & sponsorships with influencers and leagues, and even bespoke content.

#### NON-ENDEMIC BRANDS IN GAMING

AXE	Bud Light	Pringles
Gillette	Pepsi	Hershey
Walmart	Nike	H&M

#### MORE STATS

**\$3.5B+**

Forecasted spend on ads placed within video games on mobile, desktop, or console platforms.

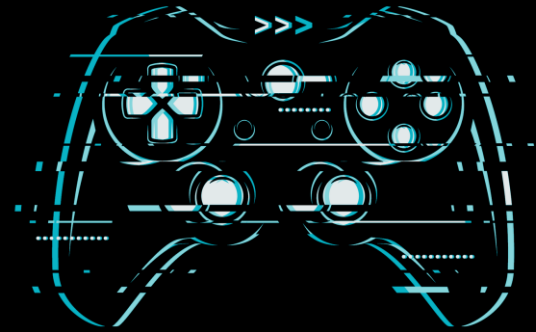
**75%**

Of total esports revenue came from media rights and sponsorships.

# Examples of CPG brand efforts within gaming:

## PRINGLES

As part of its partnership with ESL Hamburg, Pringles created personalized team-themed cans for the 20,000 fans who watched the ESL match over two days in the Barclaycard Arena. This sponsorship had Pringles' logo shown to 25 million unique viewers around the world.



## BUD LIGHT

The Bud Light Beer League, which is an amateur Tekken tournament, provides up and coming gamers a chance to become a pro esports athlete and compete at the Tekken grand finals in Bangkok.

## HERSHEY / REESES

To promote the Hershey x Reese's mash-up bar, the brands created a celebrity mash up of their own, pairing together two streaming legends – Ninja and DrLupo – for a can't-miss Twitch stream ahead of TwitchCon 2018.

## MOUNTAIN DEW

Game Fuel is Mountain Dew's energy drink designed for gamers, and is their entry point into the energy beverage category. Everything about the drink is designed for gamers, from its resealable cap to its charged flavors for increased performance.

## NIKE

Fortnite partnered with Nike Air Jordans for an in-game collaboration, allowing gamers to purchase exclusive Air Jordan outfits as well as participate in a limited time parkour style challenge in-game for additional, exclusive content.

Playing successfully in gaming as an outsider brand is no easy feat. In fact, gamers prefer sponsorships from brands within gaming. If done in an authentic way, the brand loyalty and gamer reach can be great, but if seen as exploitative, the backlash can be harsh.

The first step to being authentic is knowing who gamers really are, and how they differ from one another. The following Gamer Personas can help you get there.



# The Gamer Personas



This document contains five distinct Gamer Personas.

They will give you an understanding of how gamers differ from one another, both in the games they play and their activities off the “digital field.”

Each persona also includes a few thought starters on how brands and retailers might unlock them - just to get the juices flowing.





# We used the following qual criteria to develop our personas:

## Gaming Motivation:

Why they play video games in the first place

## Preferred Style of Game:

What type of games they like

## Sample Games & Genres:

Examples of games and genres they play

## System Preference:

What system(s) they play on

## Play Periods:

How long they play for

## Play Frequency:

How often they play

## Skill Level:

Relative talent to the average gamer

## Community Engagement:

How much they participate in or contribute to gaming culture

## Watching Behaviors:

What they watch online / offline and how often

## Purchasing Behaviors:

What gaming content they buy online / offline



# Gamers at a Glance

Mindless Mobilers



Pick-Up Players



Immersion Artists



Adrenaline Junkies



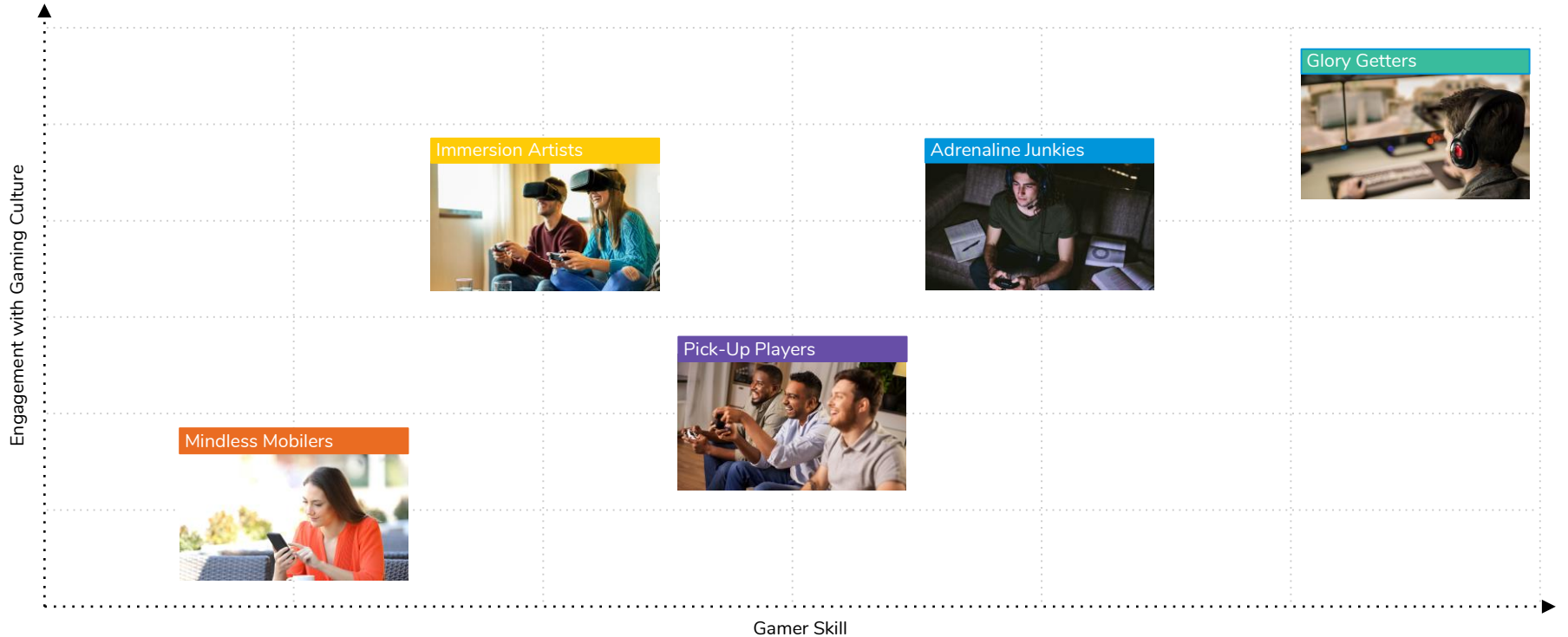
Glory Getters



## Key Point

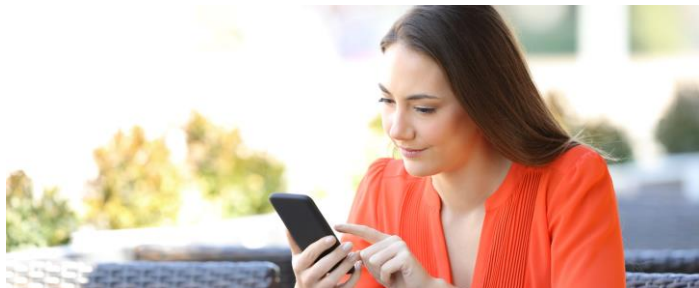
While Gamers can flex between personas, they tend to identify with one in particular.

# Gamers at a Glance | Relative Assessment



# Mindless Mobilers | ~46% of gamers

## ABSTRACT



Mindless Mobilers is the largest, fastest growing portion of the population and tend to skew older and more female than other personas. With the introduction of the mobile app store, their gaming world opened up, pushing the largest studios to produce mobile games. They mostly play games in the 5-10 minutes of downtime they have throughout their day, both because they have time to kill and the game itself is designed for that.

If you ask this person if they are a gamer, they will likely say no, as that term is reserved for boys in a basement playing on a console. They have likely been playing the same game for a long time and occasionally try the newest flavor of the month game before defaulting back to their old time favorites.

## GAMING BEHAVIOR

### Gaming Motivation:

Passing time

### Preferred Style of Game:

Abstract games that are a recreation of board games

### Sample Games & Genres:

Puzzle Games, Word Games, Arcade Games

### System Preference:

Mobile

### Play Periods:

15-minute intervals, usually during a commute or downtime

### Play Frequency:

Daily, especially on weekdays away from home

### Skill Level:

Low, in the grand scheme of gaming

### Community Engagement:

Does not extend beyond gaming moments. Rejects or unaware of gamer culture

### Watching Behaviors:

No video game watching online, likely unaware of the large community of content creators online

### Purchasing Behaviors:

May spend on in-game tokens – power up & lives – as the games they play are likely freemium model

## GAMES THEY PLAY

Candy  
Crush

Clash of  
Clans

Angry  
Birds

Dots

# Mindless Mobilers | ~46% of gamers

## OUT OF GAMING BEHAVIOR



## THOUGHT STARTERS

What if brand or retail engagement gave consumers an extra life for their favorite mobile games?

How could you recreate gamers' love of achieving high-scores during the shopping experience?

How could retail environments become new channels for discovering and downloading games?

# Pick-Up Players | ~17% of Gamers

## ABSTRACT



Pick-Up Players are here for the quick hit of competitive, fast-paced fun that video games can provide. They're not focused on immersion within a new universe, they're focused on beating their friends in a button mashing match of FIFA. Video games are simply an extension of their favorite beach sports or bar games, just with a virtual setting instead.

To Pick-Up Players, games provide another form of entertainment that their friends can rally around to kill some time or blow off some steam. For them, games offer a more convenient avenue to experience exciting moments in sports or give them another set of bragging rights.

## GAMING BEHAVIOR

### Gaming Motivation:

Fueling competition and connection

### Preferred Style of Game:

Games that are grounded in reality and easy to understand with little to no story

### Sample Games & Genres:

Sports, Arcade, Fighting

### System Preference:

Xbox, Playstation, Switch

### Play Periods:

20 or less minute matches; 1-3 matches per session

### Play Frequency:

Whenever friends are over or available online

### Skill Level:

Varying levels of skill; all dependant on past gaming experience

### Community Engagement:

Does not extend beyond gaming moments with friends (no Reddit, no YouTube); likely to reject or ignore gaming culture

### Watching Behaviors:

Little to no video game watching online, as they'd prefer to watch real-life clips (e.g. sports highlights)

### Purchasing Behaviors:

Little to no online purchasing; not invested enough to care and view gaming merch as a lesser version of sports merch

## GAMESTHEY PLAY

Mario  
Kart

FIFA

Rocket  
League

Super  
Smash Bros.

# Pick-Up Players | ~17% of Gamers

## OUT OF GAMING BEHAVIOR



## THOUGHT STARTERS

What if retailers created high-comfort gaming lounges as a restful amenity for tired shoppers?

How could brands formalize casual competition (in gaming and beyond) among friends?

# Immersion Artists | ~19% of Gamers

## ABSTRACT



Immersion Artists are passionate about storytelling and the potential to be transported to a different world. Like Westeros in Game of Thrones, Immersion Artists are looking for deep, rich gaming universes that transport them whenever they boot up. For them, exploration and side quests make the experience, and the relationships they actively build with characters in-game are more meaningful than passively following characters on a TV show.

Whether it's buying nostalgic knick-knacks or purchasing game add-ons, these gamers are focused on extending the worlds that they have come to love and are always hungry for more.

## GAMING BEHAVIOR

### Gaming Motivation:

Immersion that is an escape from daily life – this is their bottle of wine or version of watching movies or TV

### Preferred Style of Game:

Cult stories that include heavy elements of decision making and customization

### Sample Games & Genres:

MMORPG / RPG, Action-Adventure, Platformer

### System Preference:

Xbox, Playstation, Switch, PC

### Play Periods:

1-3 hours

### Play Frequency:

Most evenings after work or school

### Skill Level:

Proficient but not competitively skilled

### Community Engagement:

Might produce content if deeply invested in certain games, but more often are consumers of content. Will attend IRL gaming activities if convenient

### Watching Behaviors:

Watches content online for game help or entertainment (spoofs, memes, jokes)

### Purchasing Behaviors:

More likely to buy physical merchandise or DLC (downloadable content) for their favorite / most nostalgic franchises

## GAMESTHEY PLAY

Legend  
of Zelda

Final  
Fantasy

The Elder  
Scrolls

Super  
Mario

World of  
Warcraft



# Immersion Artists | ~19% of Gamers

## OUT OF GAMING BEHAVIOR



## THOUGHT STARTERS

How could brands sell products within video game levels, maps, and worlds?

What if gamers could do missions or tasks for your brand in exchange for credit?

What if real-world purchases could be consumed offline and online – both by customers and their favorite gaming characters?

# Adrenaline Junkies | ~12% of Gamers

## ABSTRACT



Adrenaline Junkies get a kick from games that provide high-octane clutch moments. Whether it's beating the clock or getting the last kill, those pressure moments and leaderboard rankings make or break an evening after work.

For Adrenaline Junkies, working out at the gym and building their skills in a game are both about making progress. Games give them the fix that gambling or betting can often bring, but instead of pure luck they dedicate time and effort into putting in reps and getting good at the latest competitive thrill.

## GAMING BEHAVIOR

### Gaming Motivation:

Non-professional competition — more interested in clout than career

### Preferred Style of Game:

High intensity, fast paced games with a ranking system or ladder

### Sample Games & Genres:

First / Third Person Shooters, Battle Royales, Sports Games

### System Preference:

Xbox, Playstation, Switch, PC

### Play Periods:

1-3 hours

### Play Frequency:

Most evenings — after work or gym

### Skill Level:

High skill levels in order to compete online

### Community Engagement:

More fanboys than they are contributors, but may be creating memes on Instagram and Reddit

### Watching Behaviors:

Watch skill videos, montages, tips and tricks; also follow their favorite competitive gamers

### Purchasing Behaviors:

May have bought a couple of gaming performance accessories or chipped-in to an exclusive strategy & skills session with their favorite streamer. Sometimes buy skins for in-game flair

## GAMESTHEYPLAY

Call of  
Duty

Fortnite

CS:GO

PUBG

Overwatch

# Adrenaline Junkies | ~12% of Gamers

## OUT OF GAMING BEHAVIOR



## THOUGHT STARTERS

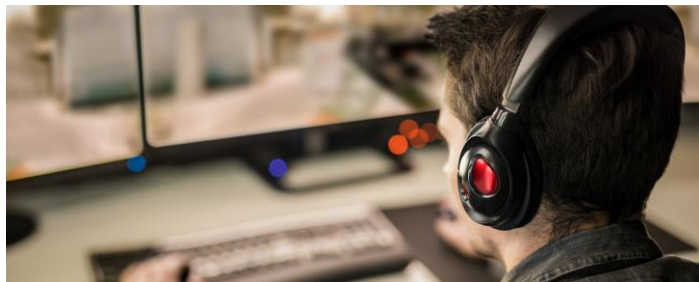
What if real-life purchases could unlock unique online content?

What if online achievements granted access to exclusive real-world items?

What if retail utilized amateur competition to drive traffic and create community?

# Glory Getters | ~6% of Gamers

## ABSTRACT



Glory Getters live, breathe, eat, and “don’t sleep” gaming. Either gaming is a way they make income, or they make income so that they can game. For this person, it’s all about “the grind.” You don’t get better by just playing, you need to practice and practice right, doing drills, handicapping yourself in some way, and doing challenges.

Their gaming is a means to an end. Their overall aspiration is to make a living on gaming either through going pro, or streaming to a wide audience. They are always trying out the newest, most popular games but often have a genre that they think of as their bread and butter. Being the best is their goal.

## GAMING BEHAVIOR

### Gaming Motivation:

Aspiration to make it a career; deep passion

### Preferred Style of Game:

Competitive team or solo based games that have a winner and a loser

### Sample Games & Genres:

First / Third Person Shooters, MOBAs, Battle Royales

### System Preference:

PC

### Play Periods:

Hours at a time, as often as possible.  
May be a full time job

### Play Frequency:

Daily

### Skill Level:

Expert

### Community Engagement:

Engage highly with the community, and is likely an active participant making their own content

### Watching Behaviors:

Watch content any time they are not playing; look for entertainment and tips / strategies on how to improve

### Purchasing Behaviors:

Spends a lot of money on gaming equipment. Likely buys skins and emotes to “flex” on opponents and often attends esports / gaming events and conventions

## GAMESTHEY PLAY

League of Legends

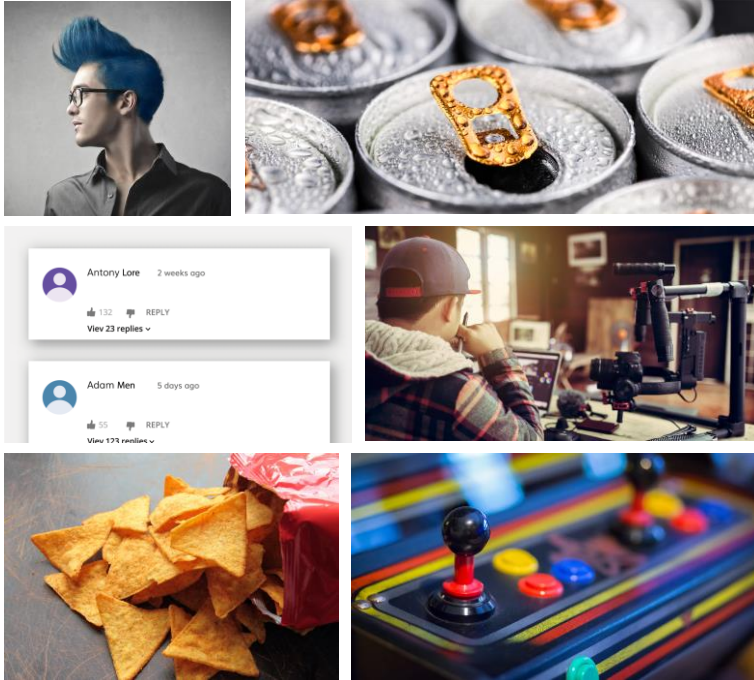
DOTA 2

CS:GO

Overwatch

# Glory Getters | ~6% of Gamers

## OUT OF GAMING BEHAVIOR



## THOUGHT STARTERS

What if retail became an in-person training ground for elite and aspiring gamers?

What if gamers could browse and shop during online video game waiting lobbies?

What if brands created their own live stream with a “fictional” character?

# These personas exist today, but will shift as the gaming industry continues to change.

## MAJOR GAMING SHIFTS

Digital marketplaces have disrupted the traditional retail model.

Gamers are now subscribing to gaming libraries versus purchasing games.

Pay-to-play games are becoming more like movies, while free-to-play games are more bite-sized and shareable.

In-game purchases have extended game lifespans, decreasing the sale of new games.

Cloud gaming "consoles" will lower the barriers to play.

Professional competitive gaming is gaining mass acceptance and influence, opening new careers and opportunities.

The worldwide audience of gaming content exceeds HBO, Netflix, and Hulu combined.

Online games have become digital playgrounds where gamers hang out and even "watch concerts & movies."

Gamers are frequenting locations where they can have casual-competitive play in real life.

The acceleration of gaming and changes in other industries due to COVID.

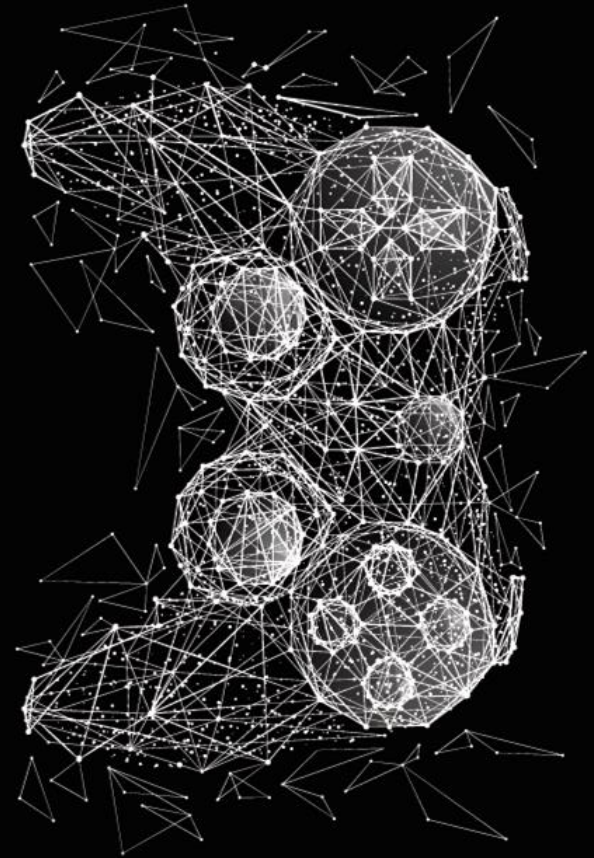




Do you want to establish a long-term relationship with gamers in a rapidly growing and changing industry?

Do you want to know what types of gamers you currently serve, could potentially serve, and how to serve them?

We do too. [Let's talk.](#)



## About Capgemini Invent:

As the digital innovation, consulting and transformation brand of the Capgemini Group, Capgemini Invent helps CxOs envision and build what's next for their organizations. Located in more than 30 offices and 22 creative studios around the world, its 6,000+ strong team combines strategy, technology, data science and creative design with deep industry expertise and insights, to develop new digital solutions and business models of the future.

[capgemini.com/invent](https://www.capgemini.com/invent)

## About Fahrenheit 212:

Fahrenheit 212 is the Innovation arm of Capgemini Invent: an innovation consultancy creating new products, services and business models that deliver sustainable, profitable growth for the world's most ambitious companies.

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## Citations:

### Data sources by page:

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