



**fifty.**

**GAMING 2023  
AUDIENCE REPORT**

# The Soaring Growth of Gaming

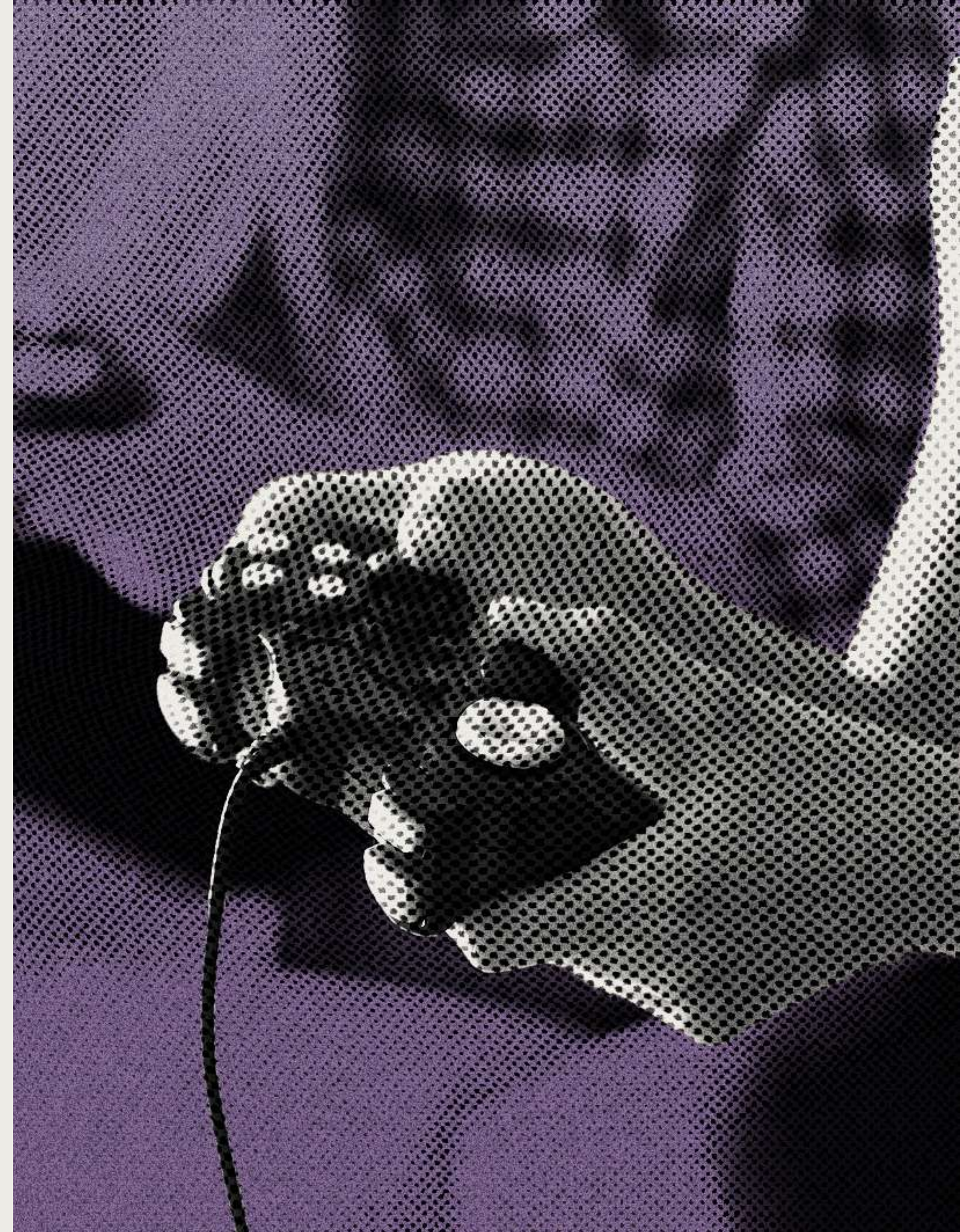
The audiences enthralled  
by gaming and ready to be  
engaged **now**

# The Objective of this Report

To equip developers and publishers with a deeper understanding of the global gaming audience landscape.

We will uncover the audiences of popular gaming genres, world-leading games and deep dive into the world of BattleBit Remastered.

The key to growing your audience is by truly understanding the various nuanced and distinct gaming audiences - and targeting them effectively.



# Discover the Tribes engaging with Gaming

Our network visuals offer an at-a-glance view of the gaming audience and their interconnectivity.

These five tribes all have their own targetable interests, yet have distinct traits. Most importantly, they are linked by one distinct passion: gaming.

This is a diverse audience that cannot be engaged with a one size fits all approach.



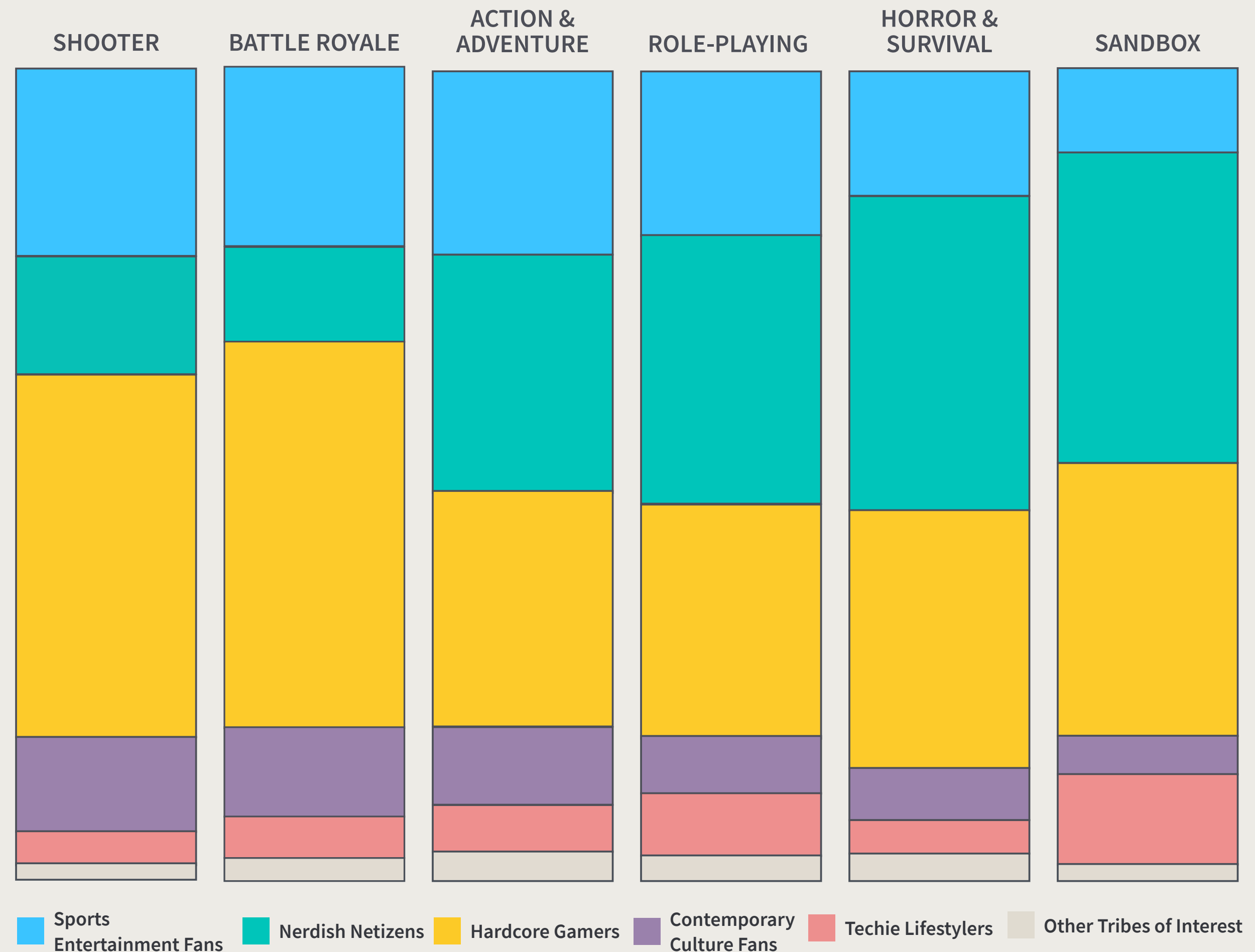
# The Genre Preferences for Key Gaming Audiences

Comparing the audience makeup of each gaming genre, showcasing where their passions lie.

## KEY INSIGHT

Within most of genres we analysed, **Hardcore Gamers** were the biggest tribe. Interestingly, the secondary tribe for nearly every genre is either **Sports Entertainment Fans** OR **Nerdish Netizens**.

Contemporary Culture Fans and Techie Lifestylers are more niche, however still found consistently across the industry.



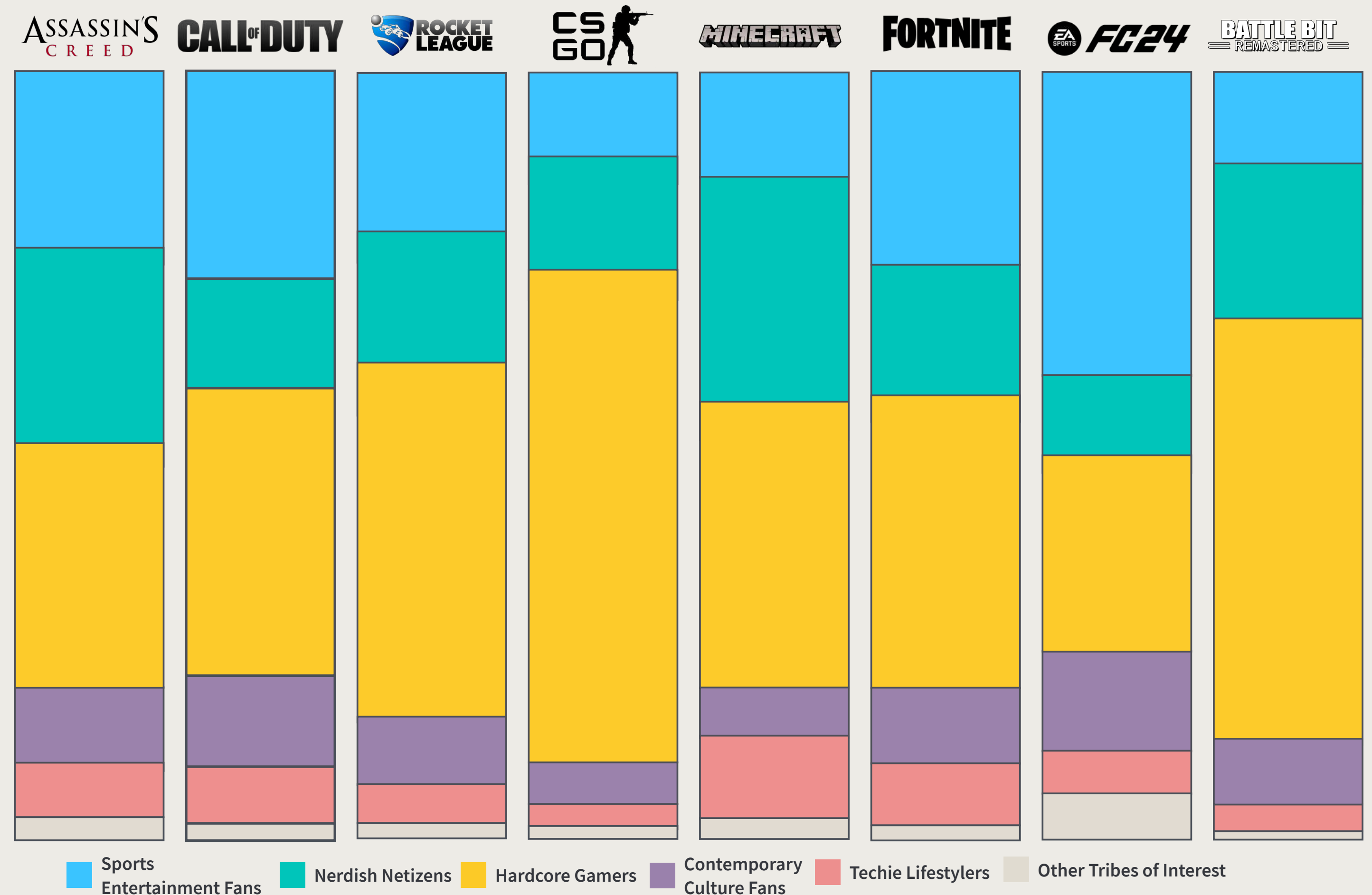
# The Audiences Engaging with Global Games

Comparing the makeup across a selection of major video games' audiences, indicating whether a game has a particular audience skew.

## KEY INSIGHT

It is fascinating to see these 5 Key Tribes make up >90% of each of these major games. However, the variety in their % breakdown is equally fascinating.

Here lies a clear opportunity for developers and publishers to start appealing to these untapped audiences who are clearly highly engaged.



---

# BATTLE BIT

## == REMASTERED ==

### ANALYSIS



# BattleBit Remastered:

## Why has it done so well, and where does it go next?

BattleBit Remastered is a low-poly, massively multiplayer shooter that has sold millions of copies since it's launch - and won its players' hearts.

One of the key reasons for BattleBit's success is that it feels like a game made by gamers for gamers, with it's unique design.

We will focus on the audiences that have made BattleBit so successful, then using data from their own and other games, we will identify the tribes they should target next.

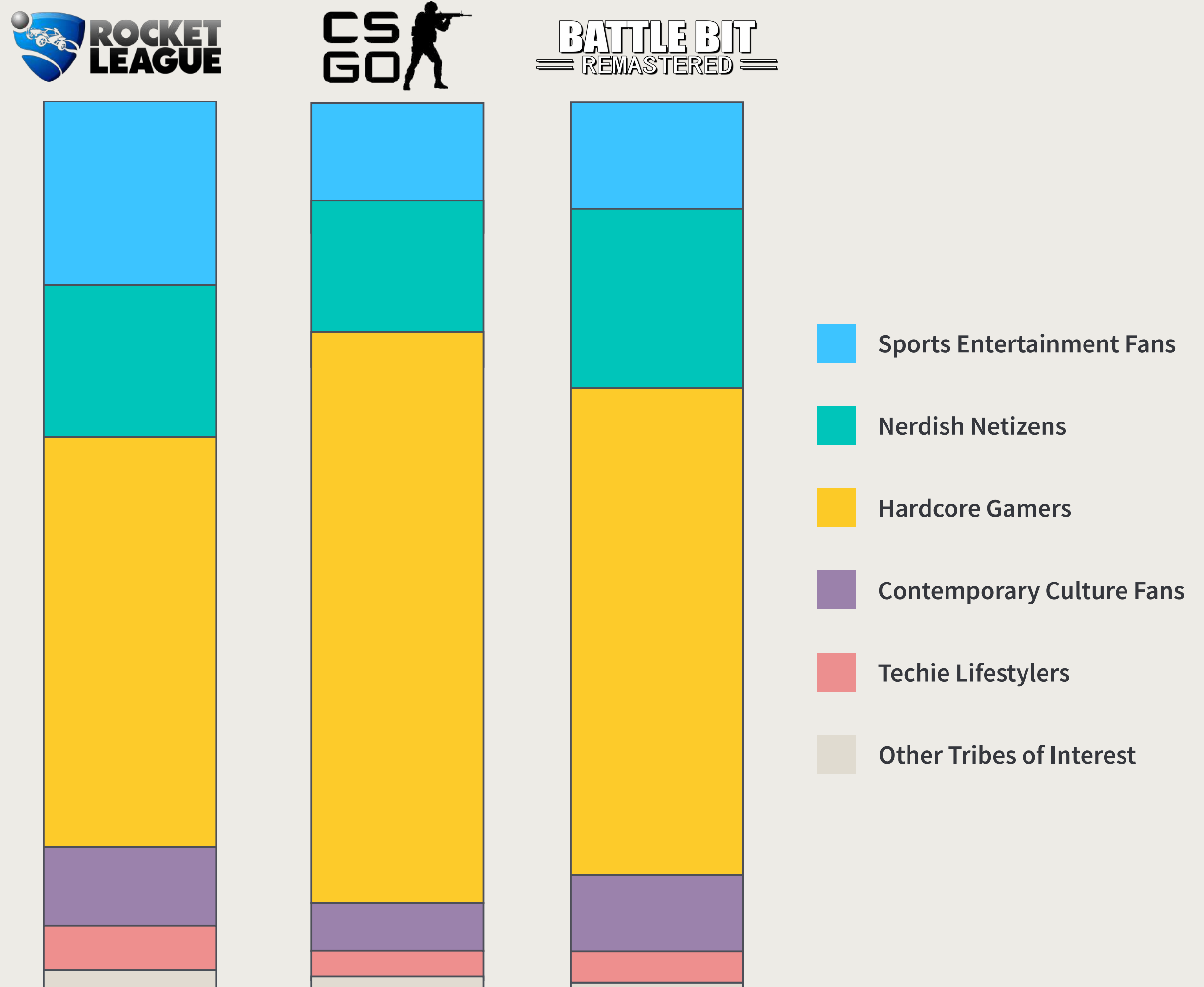


# Biggest Tribe: Hardcore Gamers

## KEY INSIGHT

Courtesy of **GameDiscoverCo's** tech, we know BattleBit players are much more likely to play **CS:GO** and **Rocket League**. These games all have very strong affinities to **Hardcore Gamers** - people who love watching and creating streams, and for whom gaming is their **main passion**.

This tribe is a key fan-base that will **underpin the success of the game**.



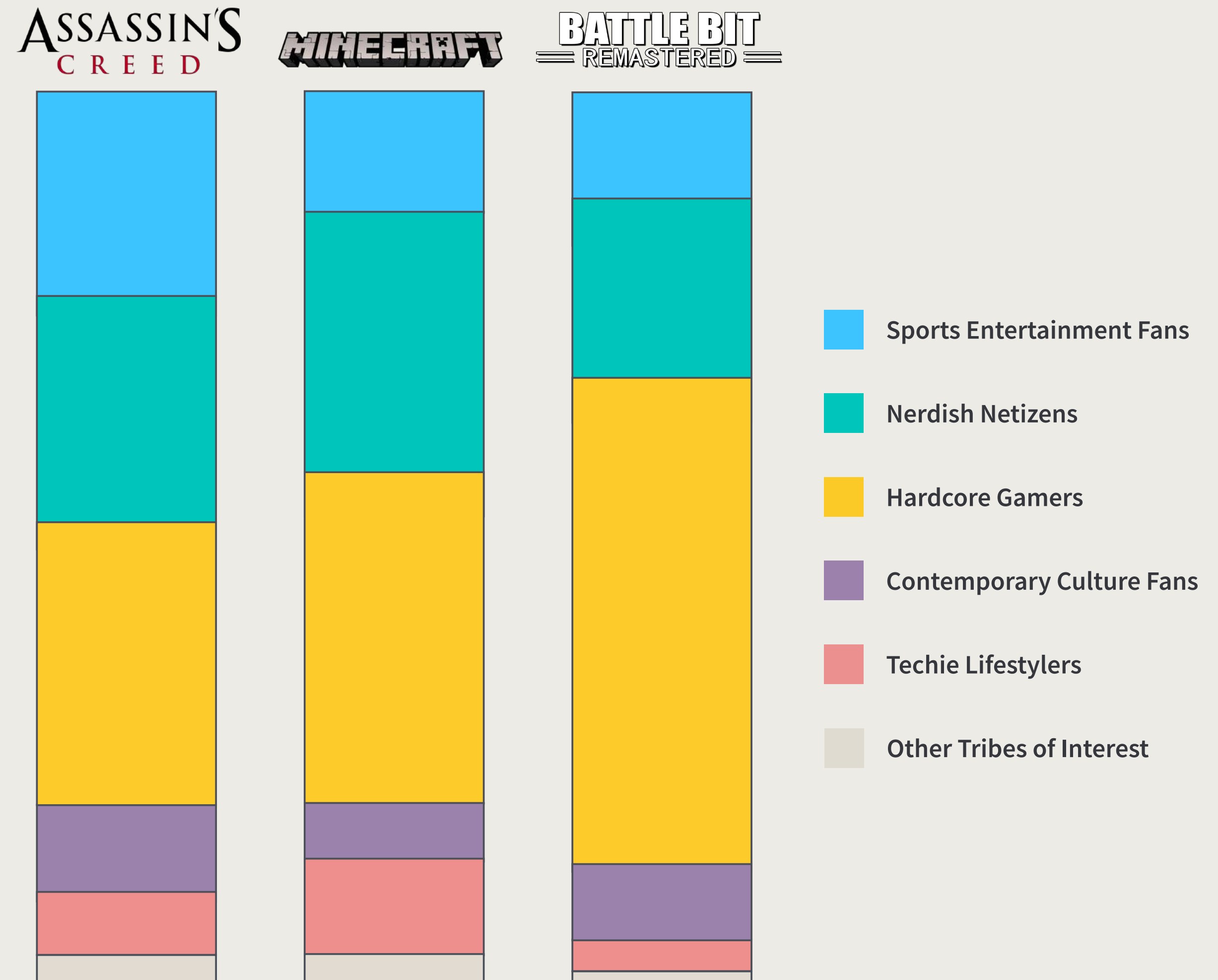


# Nerdish Netizens

## KEY INSIGHT

Courtesy of **GameDiscoverCo's** tech, we know BattleBit players are **more likely** to play **Assassin's Creed** and **Minecraft** than other games, but not as much as CS:GO and RL. AC and Minecraft have a strong affinity with **Nerdish Netizens**, people who love the visual and design side of gaming. They are the **low-hanging fruit** that are key to growing BattleBit's audience further.

BattleBit's unique game design attracts **Nerdish Netizens**, but there is an **opportunity to attract more**.



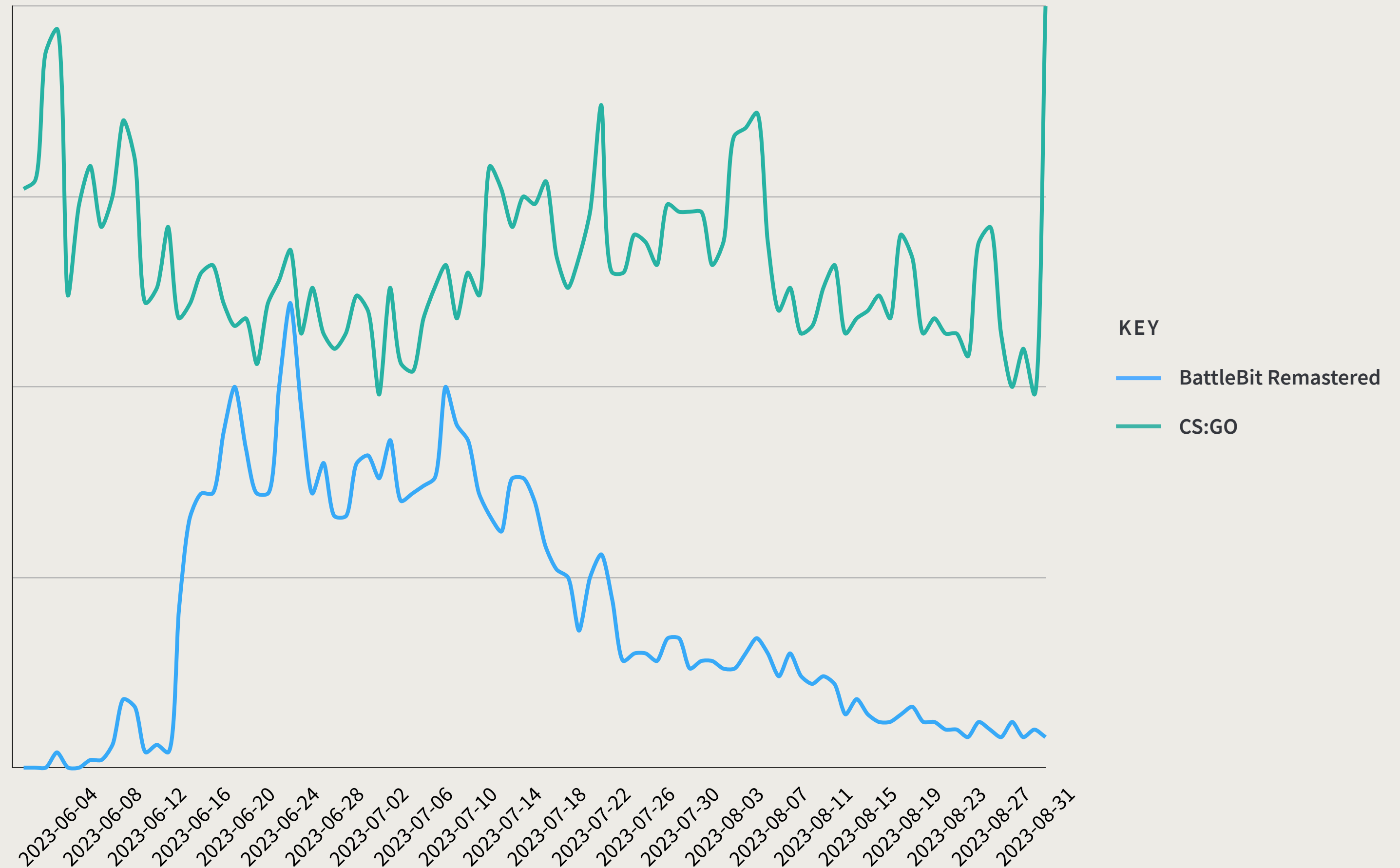
# How Is Battlebit Trending Online?

US Google Trends data from June-August 2023 shows the growth trajectory of BattleBit in comparison with CS:GO.

## KEY INSIGHT

By shifting their focus from the Hardcore Gamers that love CS:GO to the Nerdish Netizens that haven't committed to a particular FPS, BattleBit's engagement levels can rise again.

BattleBit's sudden growth in Google searches relative to CS:GO's reflected the hugely popular game's audience shifting to its indie compatriot. However, the recent dip shows its players are potentially moving back to their favourite game.



# Grow BattleBit's users by targeting Nerdish Netizens

Fifty's **OmniAudience AI** is a unique tool that takes our data on **Nerdish Netizens** and finds the most appropriate addressable audiences to target them across all digital channels - this is shown on the right.

For example, our data uncovered this tribe's love of **Reddit**. Using **OmniAudience AI**, the users can be targeted based on their interest in the most relevant subreddits in **real time**.

**Find your next customers on the channels they love the most.**



BattleBit can capitalise on its dominating **Hardcore Gamer** audience, with both its potential for community-based growth and a bulletproof paid marketing strategy.

It can learn from the audiences of other games to target its growing **Nerdish Netizens** audience, and other highly valuable tribes.

# Gaming Tribes Deep Dive



# HIGH VALUE TRIBE #1

## Hardcore Gamers

The ‘Hardcore Gamer’ within these games is an active participant in online multiplayer games, where they collaborate or compete with players worldwide. They value the camaraderie and competition these games offer, and they may be part of gaming clans or guilds. They may also participate in esports, either as spectators or competitors, appreciating the skill and strategy that professional gaming involves.

Many Hardcore Gamers have high-end gaming equipment, play across several platforms and often create amateur content, streaming or on social media.

This is a hyper-engaged audience, often creating fan materials and media, driving higher organic interest.

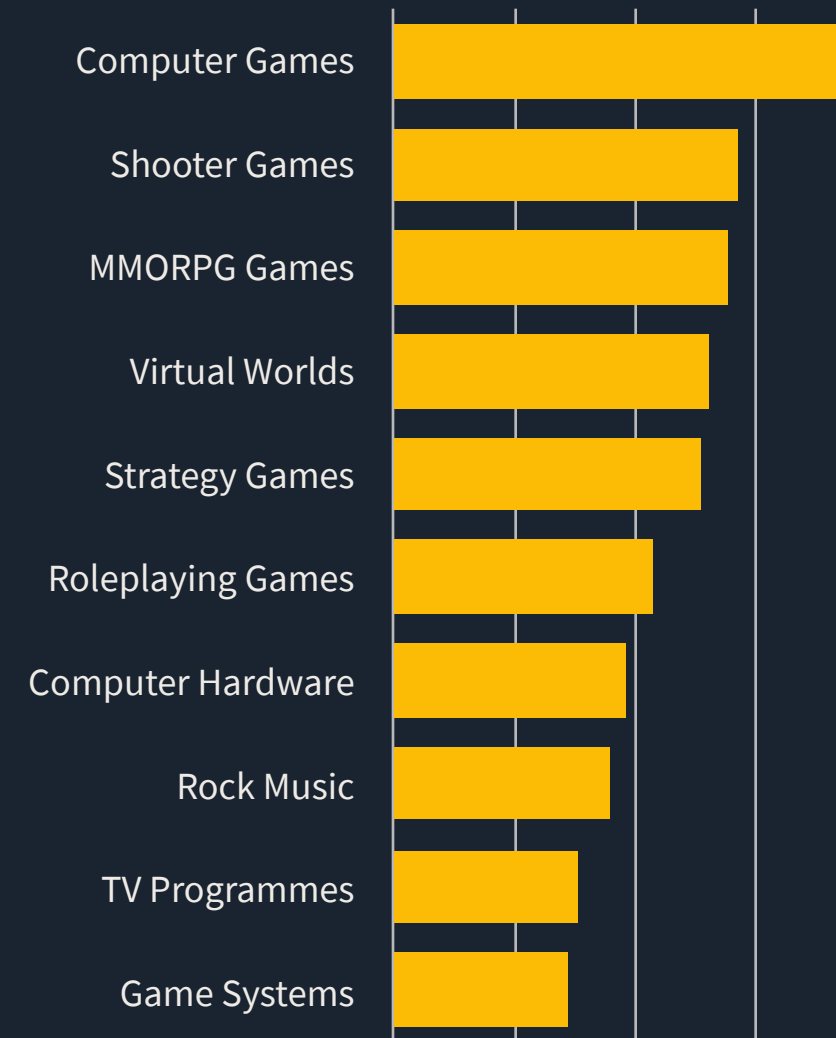
AUDIENCE SIZE

35%

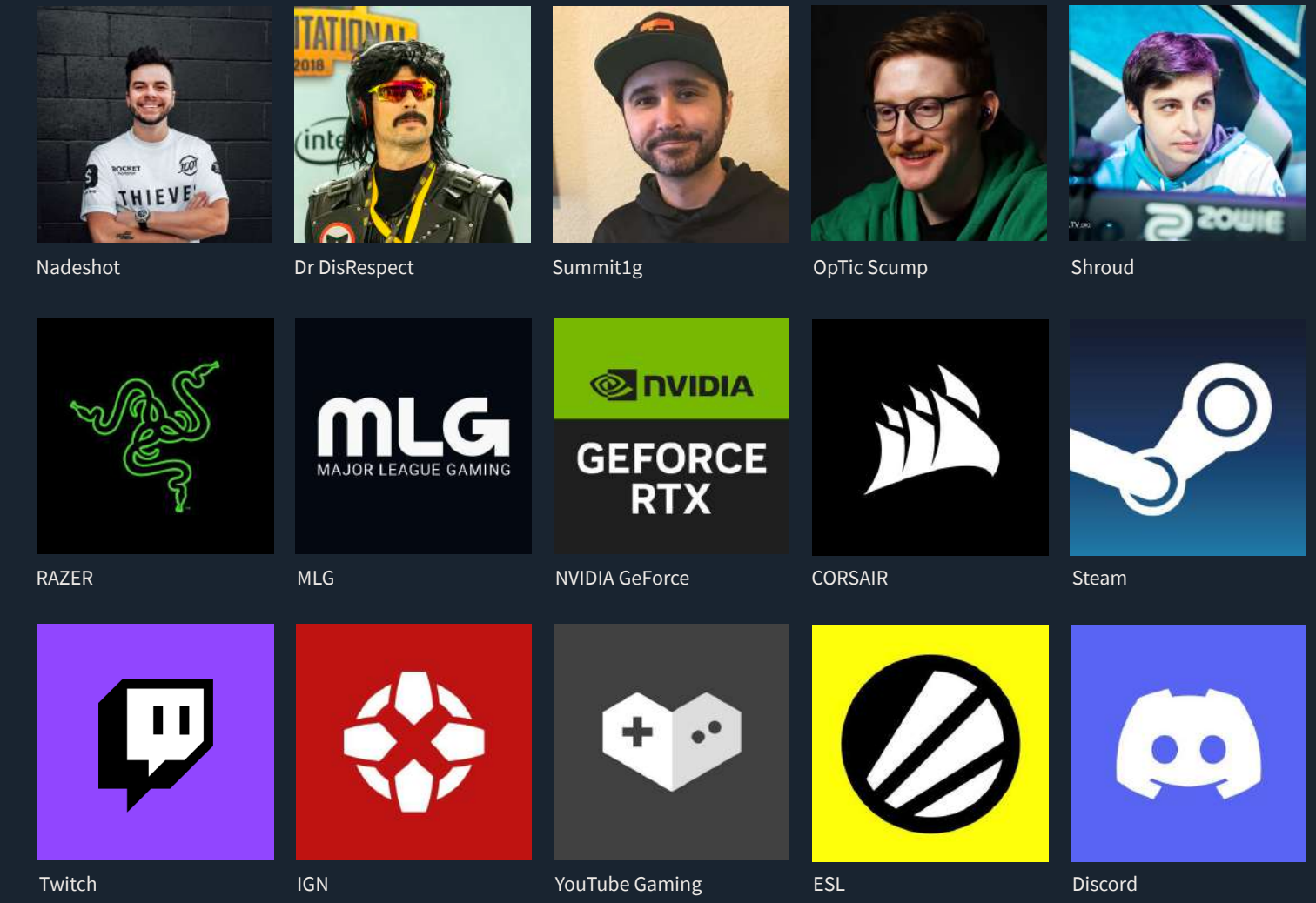
Tribe Share of Gaming Audience

AUDIENCE DEFINITION

Key Interests



Top Influencers



Gender Split



# HIGH VALUE TRIBE #2

## Nerdish Netizens

This tribe represents the fan known for their active online presence, often participating in forums, social media platforms, and online gaming communities. They value creativity, wit, and intellectual curiosity, and they appreciate influencers and brands that engage with them in a genuine, authentic manner.

They are not just consumers, but also contributors to the culture they love, often creating fan art, fan fiction, and other forms of user-generated content.

Their passion and thirst for knowledge drives them to platforms like Reddit, and Discord, niche-specific forums are common spaces where they interact, share information, and engage in discussions.

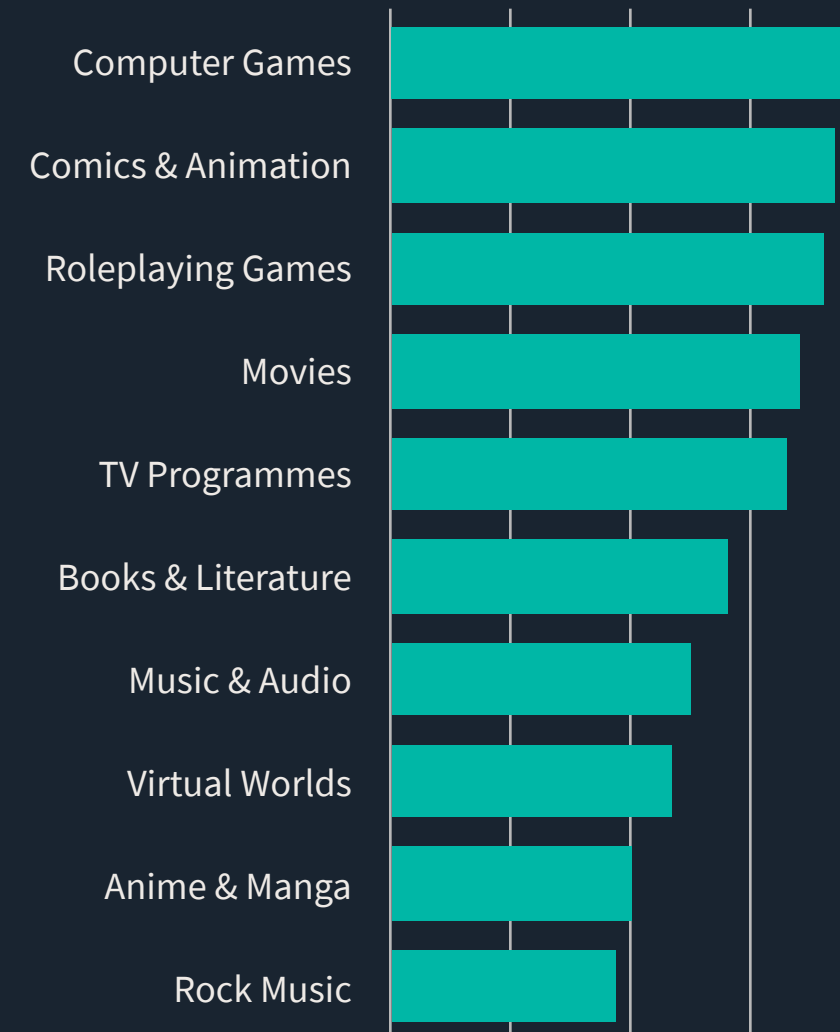
AUDIENCE SIZE

27%

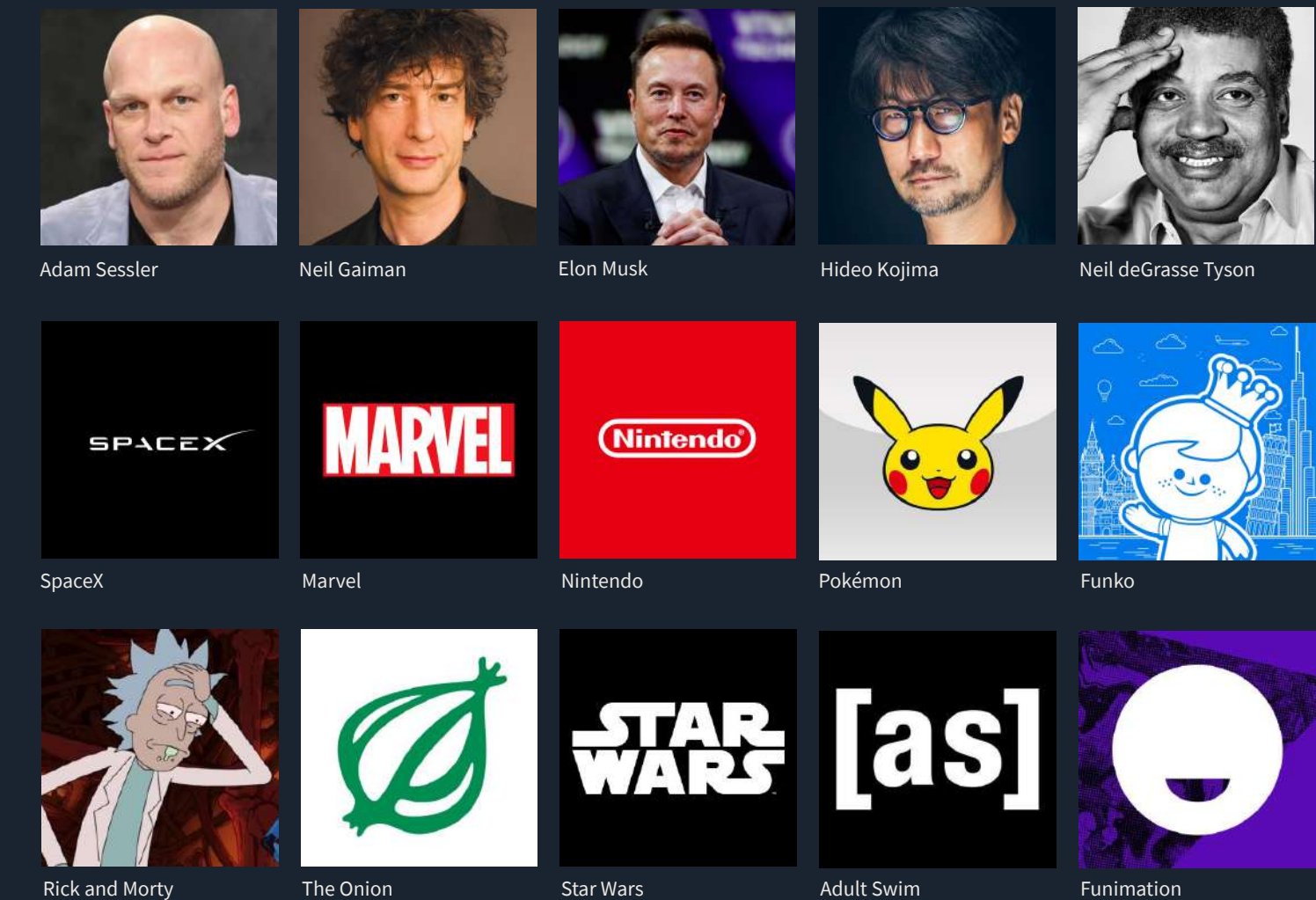
Tribe Share of Gaming Audience

AUDIENCE DEFINITION

**Key Interests**



**Top Influencers**



**Gender Split**



## HIGH VALUE TRIBE #3

# Sports Entertainment Fans

This tribe's love for sports and sports entertainment is a significant part of their identity and daily life. They are deeply engrossed in following major leagues like the NFL, NBA, MLB, and NHL, as well as WWE. When unlocked, this tribe's loyalty is unmatched.

They enjoy the unfiltered comedy of Barstool Sports, mixing humour alongside analysis. This also extends to gaming and fantasy sports leagues, where they actively play popular sports games like Madden NFL, FIFA, NBA 2K, and MLB The Show.

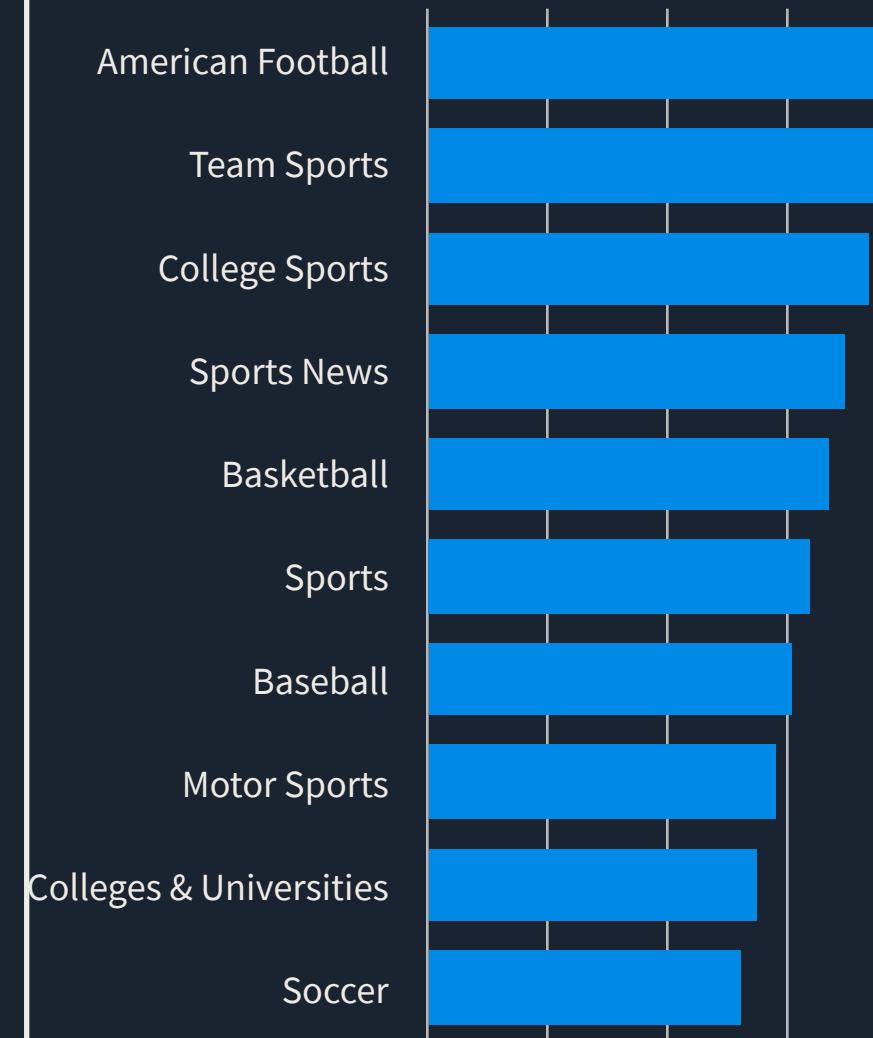
AUDIENCE SIZE

20%

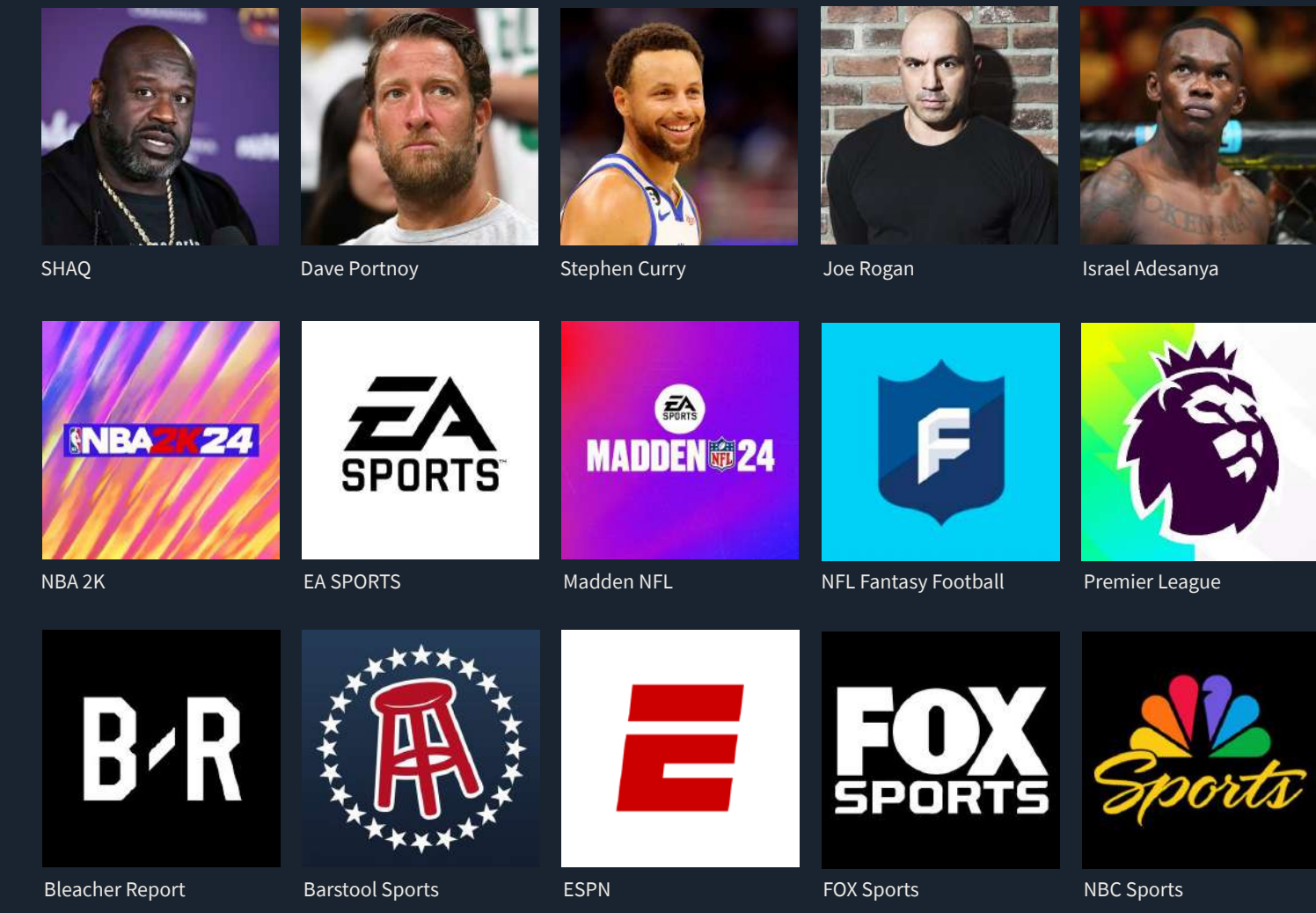
Tribe Share of Gaming Audience

AUDIENCE DEFINITION

### Key Interests



### Top Influencers



### Gender Split





## HIGH VALUE TRIBE #4

# Contemporary Culture Fans

This tribe captures the trendsetters of today, a youthful and engaged audience who drive their culture further forward.

In the internet age they have found their digital playground in spaces such as YouTube, Instagram and TikTok. Creating and consuming content and expressing their voice and views in online communities.

Music, sports, fashion, and entertainment, are the pillars of their passion. When games and franchises collaborate with recognised brands in these spaces, their heads turn - and new audiences are untapped.

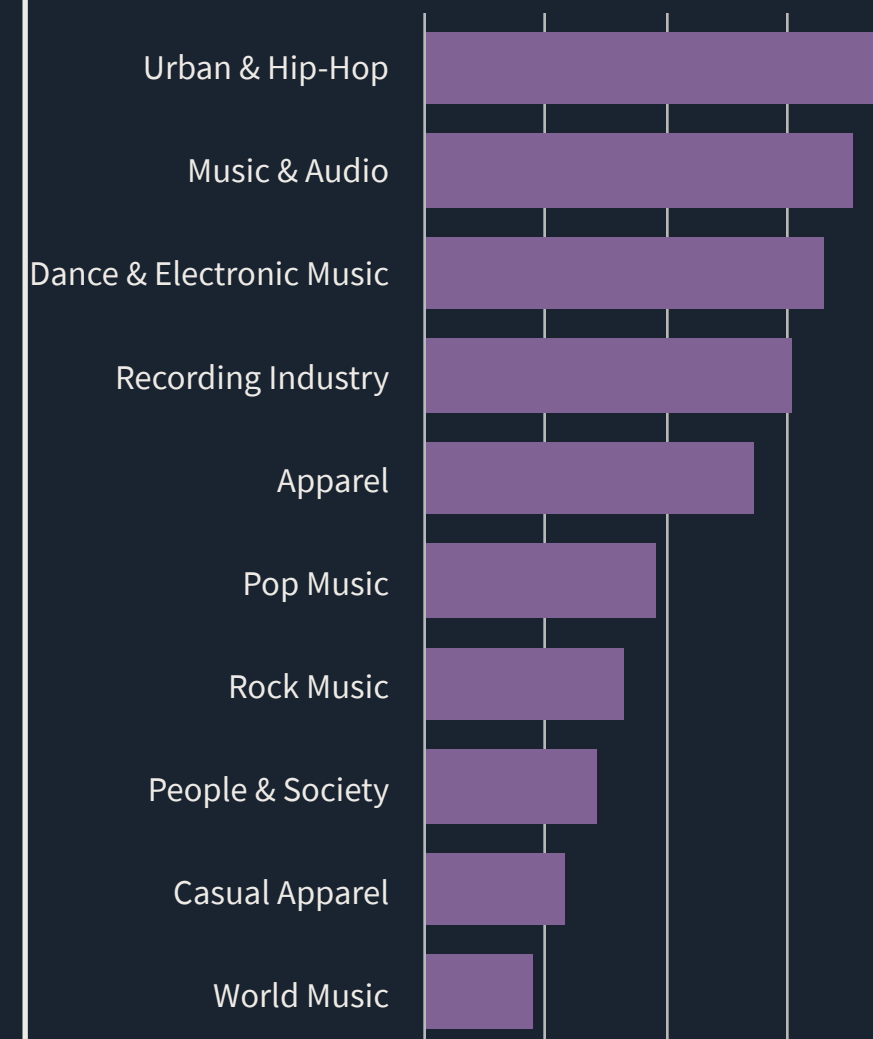
### AUDIENCE SIZE

9%

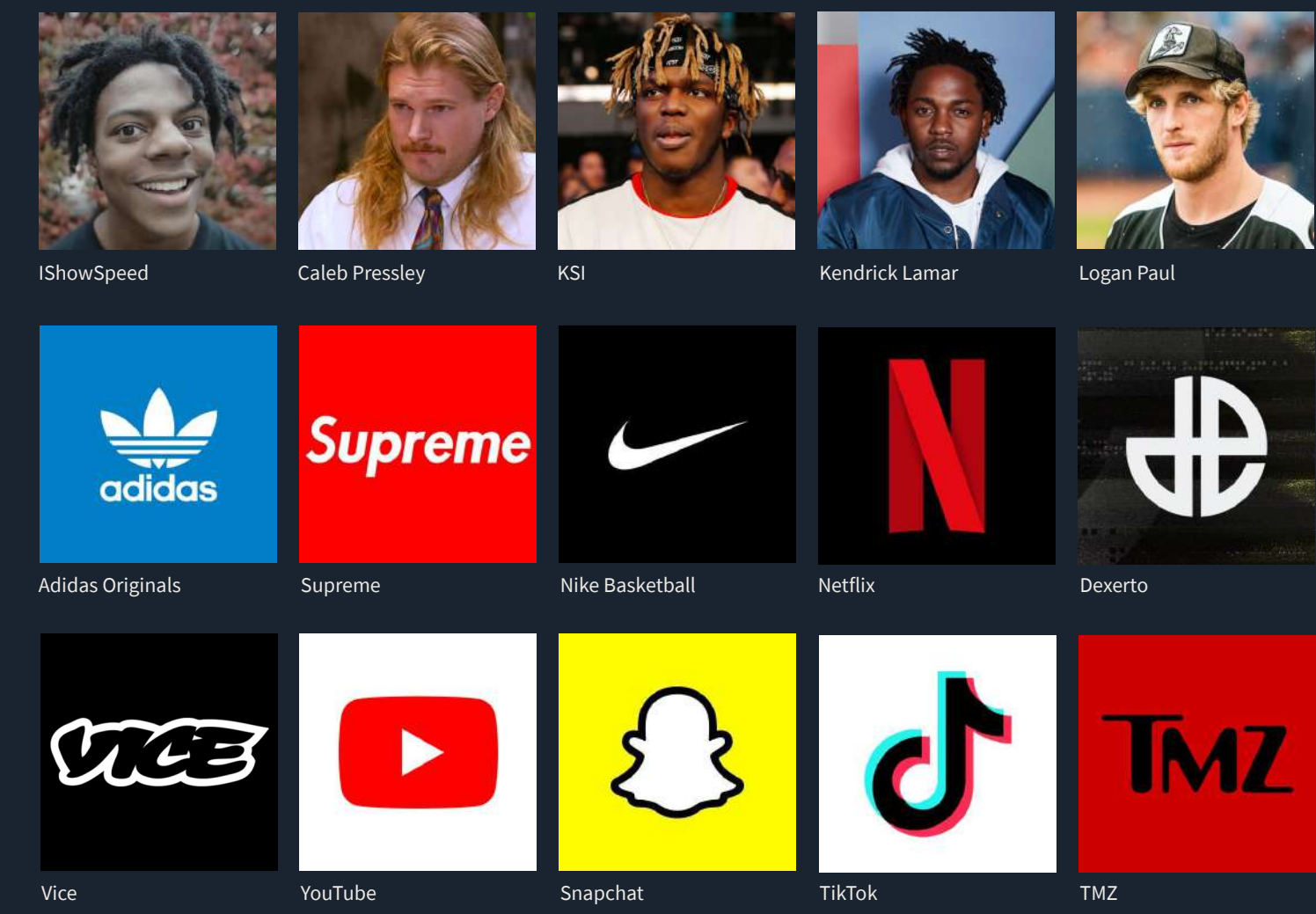
Tribe Share of Gaming Audience

### AUDIENCE DEFINITION

#### Key Interests



#### Top Influencers



#### Gender Split



# HIGH VALUE TRIBE #5

## Techie Lifestylers

Techie Lifestylers are tech-savvy individuals, always staying updated with the latest tech news and trends. They are always quick to be among the first to own the latest gadgets and devices.

An audience who often shares a professional interest with their passion, with top interests lying in Programming, Computer Science and Computer Security.

Though beyond that they are curious, innovative, and always eager to learn. They will often be an early adopter with new technologies, probably currently finding themselves down the rabbit hole of everything AI. Once engaged, this tribe will remain on the pulse with every latest release.

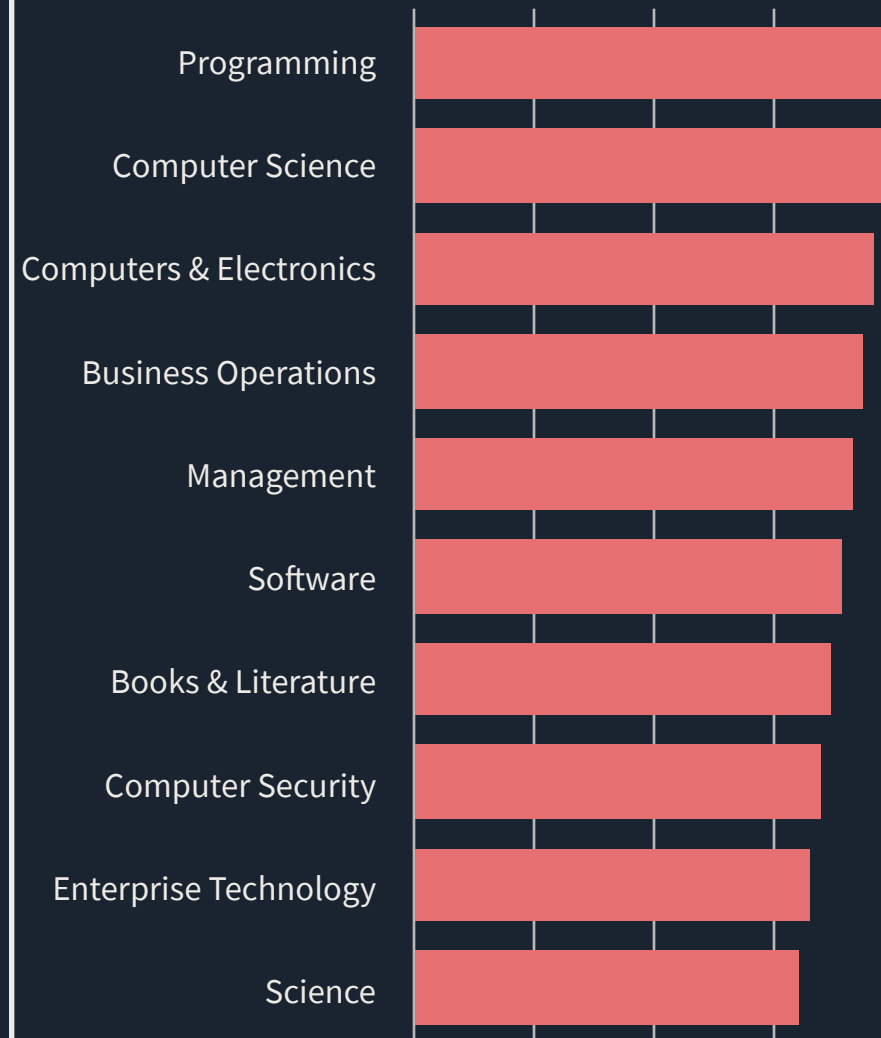
AUDIENCE SIZE

7%

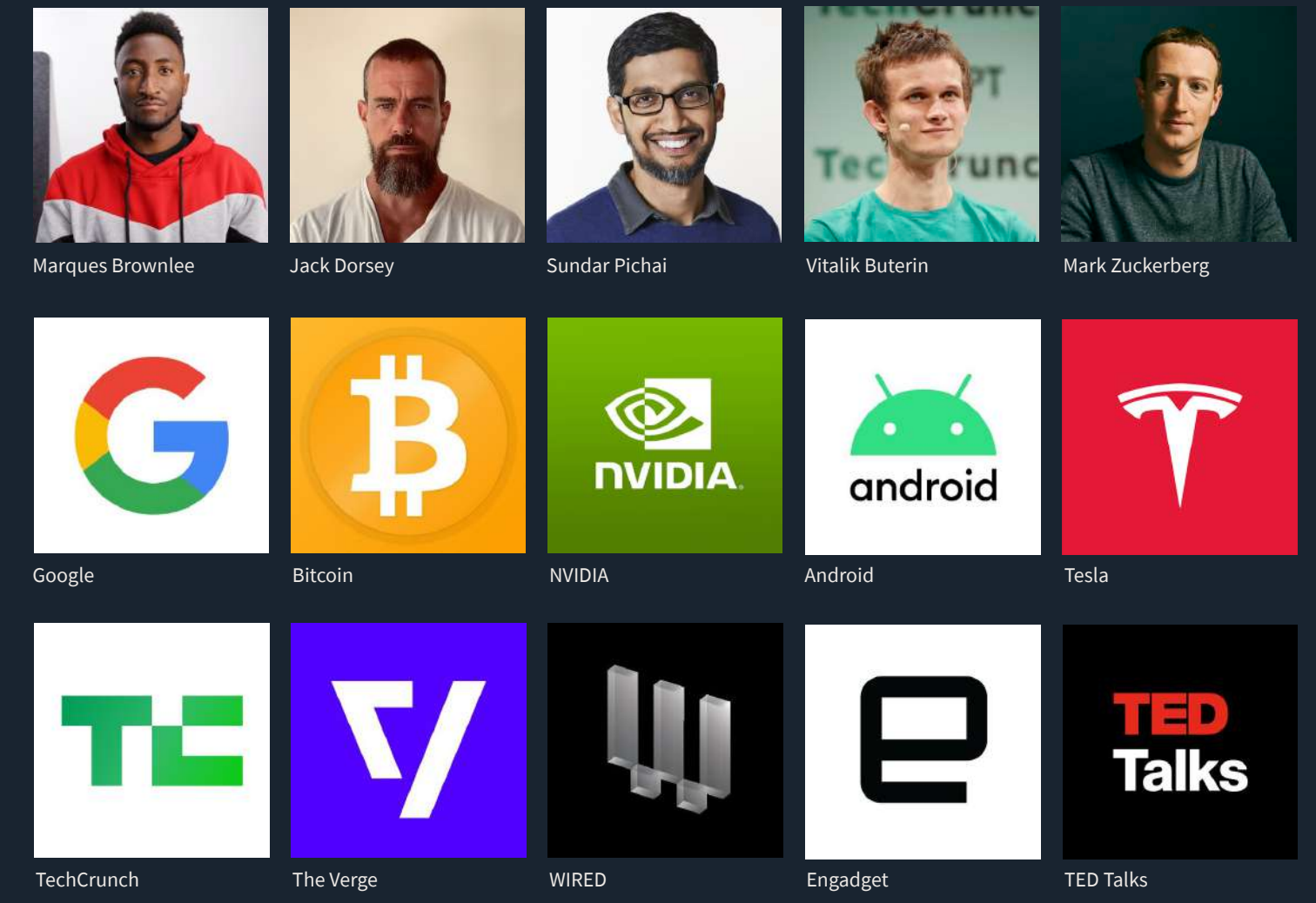
Tribe Share of Gaming Audience

AUDIENCE DEFINITION

**Key Interests**



**Top Influencers**



**Gender Split**



# Tactical Takeaways and Audience Strategies

# 01

## Understand Your Audience

5 key tribes make up most of the audience of the 8 games we analysed. Understanding the nuances of different gaming audiences is key to knowing who's best to target next.

# 02

## Reach Audiences That Matter

As conversation around BattleBit starts to wane, they have an opportunity to target other highly engaged gamers, like **Nerdish Netizens** that will appreciate the game's unique design.

# 03

## Work Smarter Not Harder

Understanding your audience and using Fifty's **OmniAudience AI** to directly target audiences can help the fragmentation problem faced by the gaming industry.



**fifty.**

**GAMING 2023  
AUDIENCE REPORT**

**Thank you**

**MAZ KAMYAB** | COMMERCIAL TEAM  
[maz@fifty.io](mailto:maz@fifty.io)

**BEN MONTAGU-SCOTT** | INSIGHTS MANAGER  
[ben@fifty.io](mailto:ben@fifty.io)

Special thanks for their contributions

**SIMON CARLESS** | GAMEDISCOVERCO

**ROB STEVENSON** | CREATIVE RESOURCES AND PROJECTS