



In-Game Advertising

Advertising & Video Game, 2009-2013

**Market &
Data
Reports**

In-Game Advertising, or IGA, is a fast-growing market that is expected to increase from 716 million euros globally in 2009 to 1.4 billion euros in 2013. This report, which provides a detailed view of how the market is structured and the strategies being employed by the players, sheds new light on the market's promising outlook, its inherent challenges and the medium-term growth levers.

Key questions

- What momentum for the different market segments: In-Game, Around-Game Advertising and Advergaming?
 - How can advertising adapt to the immersive and interactive nature of video games?
 - Are the tools used for measuring in-game advertising efficient?
 - Are gamer profiles and their consumption of digital entertainment growth levers for in-game advertising?
 - How do gamers view the arrival of in-game advertising?
 - What are the issues for the stakeholders: advertisers, in-game advertising companies, publishers, platform manufacturers, developers, technology providers, etc.?
- > In-game advertising market forecasts up to 2013, by platform (home console, handheld console), PC (offline and online) and mobile phone.





In-Game Advertising

Advertising & Video Game, 2009-2013

Contents

1. EXECUTIVE SUMMARY

2. METHODOLOGY

3. IN-GAME ADVERTISING MARKET

3.1. Market overview

3.1.1. The shrinking TV audience

3.1.2. Video games: growing competition

- The Apple ecosystem: iPhone/iPod + App Store

- MMORPG on handheld devices

- Dematerialised distribution

- On-demand gaming platforms

- Free2play: the success of dematerialisation

3.1.3. Definition of IGA

3.1.4. Advertising and video game segments

- In-game advertising

- Around-game advertising

- Advergaming

3.2. Product/service trends

3.2.1. IGA formats

- Advergaming

- Dynamic advertising

- Advertising inserted between levels

- Game skinning

- Advertising before the game starts

- Advertising after the game is over

- Product placement

- Sponsoring

3.2.2. Still largely static multi-platform services

3.2.3. Internet connection, IGA lever

- Assets of dynamic IGA

- Internet-ready consoles becoming the rule

- Casual gaming + Free-To-Play + Advertising: a winning trio

- MMO games and persistent universes, a broad field for advertising to explore

3.3. Usage

3.3.1. Extremely diverse gamer profiles

- In the United States and in Europe

3.3.2. Casual vs. hard core gamers

3.3.3. Effectiveness of IGA

3.4. Current market estimates

3.4.1. Video games: a thriving market

3.4.2. Advertising: lessons from the recession

3.4.3. In-game advertising: a nascent market

- Global market: + 39% since 2006

- Advergaming: 30% annual growth

- IGA: number one video game advertising segment

3.5. Key factors

3.5.1. Key technologies

- "In-house solutions"

- Contribution of standardised tools

- IGA formats

3.5.2. Regulatory environment

4. PLAYERS & STRATEGIES

4.1. Industry structure

4.1.1. Player profiles

- Advertisers

- In-game advertising companies

- Gaming platform providers

- Marketing agencies

- Game publishers

- Developers

4.1.2. Value chain

- Ad market players

- In- and around-game advertising value chain

- Advergame value chain

4.1.3. Competition structure

- Player specialisation by platform

- Entry barriers on certain platforms

4.1.4. Business models

- Static advertising: one-shot agreement

- Dynamic advertising: like an online ad broker

4.2. Key players

- Profiles of the key players

4.3. IGA short-term issues

- A segment unto itself

- Converting gamers

- Convincing advertisers

4.4. Growth enablers

4.5. Growth impediments

4.6. Keys to success

5. MARKETS & FORECASTS 2009-2013

5.1. Forecast hypotheses

5.2. Forecasts by geographical area

- North America • Latin America

- Asia-Pacific • EMEA • World

5.3. Forecasts by segment

- Static advertising

- Static advertising

5.4. Forecasts by platform

- Home console

- Handheld console

- Computer, offline

- Computer, online

- Mobile phone

Actors analysed

Blockdot • Double Fusion • Google / Adscape Media • Greystripe
IGA Worldwide • Jogo Media • Massive Incorporated • Neo Edge
Onlive Gaikai • SL Business Directory • WildTangent • Yahoo

100 pages

Paper: 2 900 Eur

PDF (+ Excel): 3 500 Eur

November 2009

To order,
please contact :

Isabel JIMENEZ
i.jimenez@idate.org
tel: +33 (0)467 144 404

Project Manager

Laurent MICHAUD

l.michaud@idate.org

tel: +33 (0)467 144 439

Related IDATE reports:

• Serious Games

• Casual Gaming

• World Video Game
Market

• Ad Online

• Web 3D

www.idate-research.com