

HOW GAMING FOUND INCREASED PURPOSE IN 2020

SOCIAL CONNECTION IN A VIRTUAL WORLD



ACTIVISION | BLIZZARD
M E D I A



Introduction

In 2020 as the world changed, so too did people's entertainment habits.

With daily routines and habits disrupted as a result of the COVID-19 pandemic, there was a shift not only in people's behaviors around entertainment consumption, but the emotional need states that it fulfilled. In a world without physicality, people increasingly looked for ways to find social connection, joy and purpose through virtual means. Cross-platform media consumption was reinvigorated, a result of both the increased time at home and increased desire for connection and escapism through entertainment. Not only did people's entertainment usage change, but so did the role that it played in people's day-to-day lives.

For many individuals, gaming was a way to fulfill these emotional needs. While engagement with video games increased during 2020, gaming itself is far from a new phenomenon. For most people, this increased engagement with video games signified a return to gaming, or an opportunity to reconnect with a pastime they had previously enjoyed but lacked the time to spend with it. This report explores the impact of the COVID-19 pandemic on entertainment consumption, including engagement with gaming. It uncovers not just how individuals' entertainment habits changed, but why they changed. This research aims to better understand what these behaviors and emotional connections will mean long term for audiences and brands alike, providing insight into entertainment and gaming usage in a post-pandemic world.

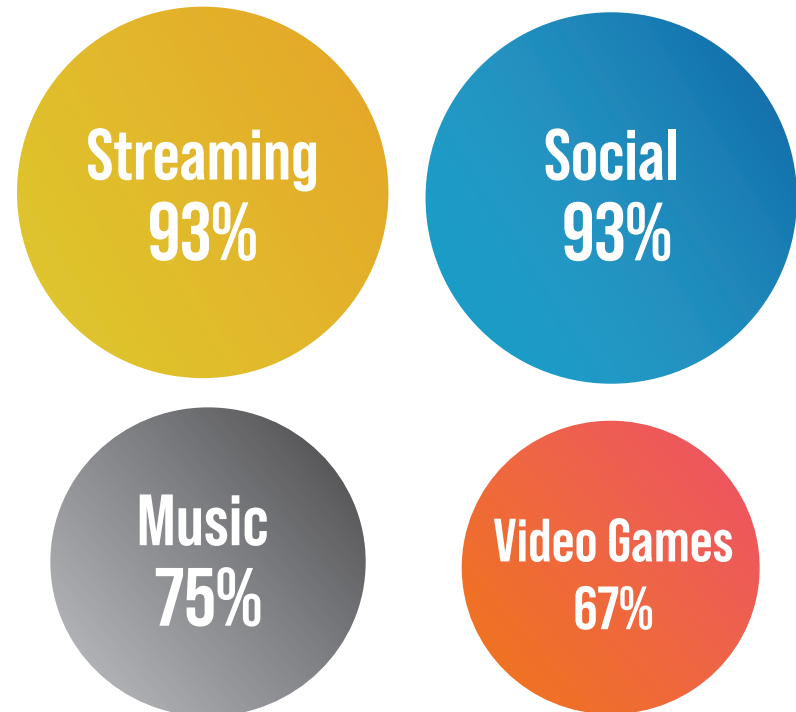
More Time for More Media

As individuals spent greater periods of time at home during 2020, their media consumption also increased.

With activities outside of the home restricted and commute times reduced or eliminated, people found themselves with additional time throughout the day and more opportunities to engage with digital entertainment. 91% of those surveyed reported greater usage across at least one digital entertainment media. While overall media consumption fluctuated slightly each month as localities toggled between opening and closing, the increase in digital usage was significant. For many, this digital entertainment helped fill the gap created by the difficulties in resuming previous work and leisure activities that were previously part of their day-to-day routine.

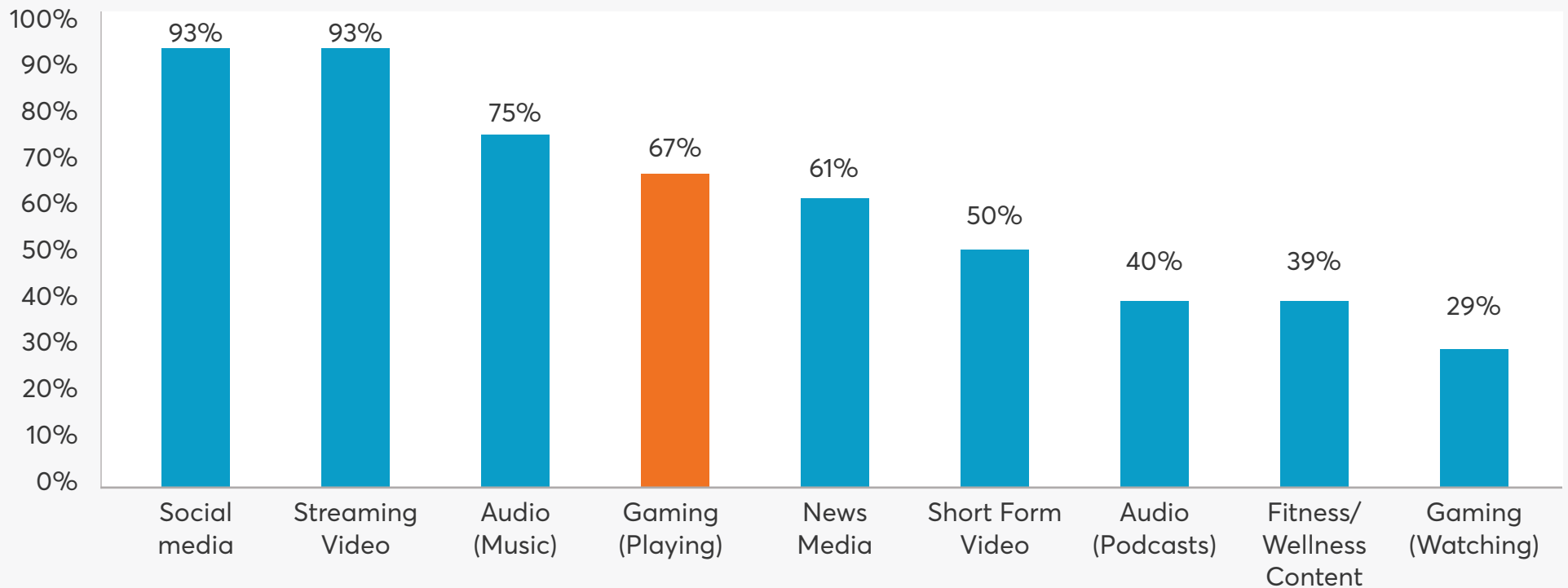
With most of the interaction with these different media types taking place in a solo environment, individuals were looking to engage with a form of digital media that could provide them with a sense of social connectivity, such as gaming.

The top forms of media consumed in a typical week included video streaming (93%), social (93%), music (75%) and video games (67%).



In a typical week, gaming was among the most popular digital entertainment platforms.

Digital Entertainment Apps & Services Used
% Used in past 7 days (including yesterday) – Q4 2020



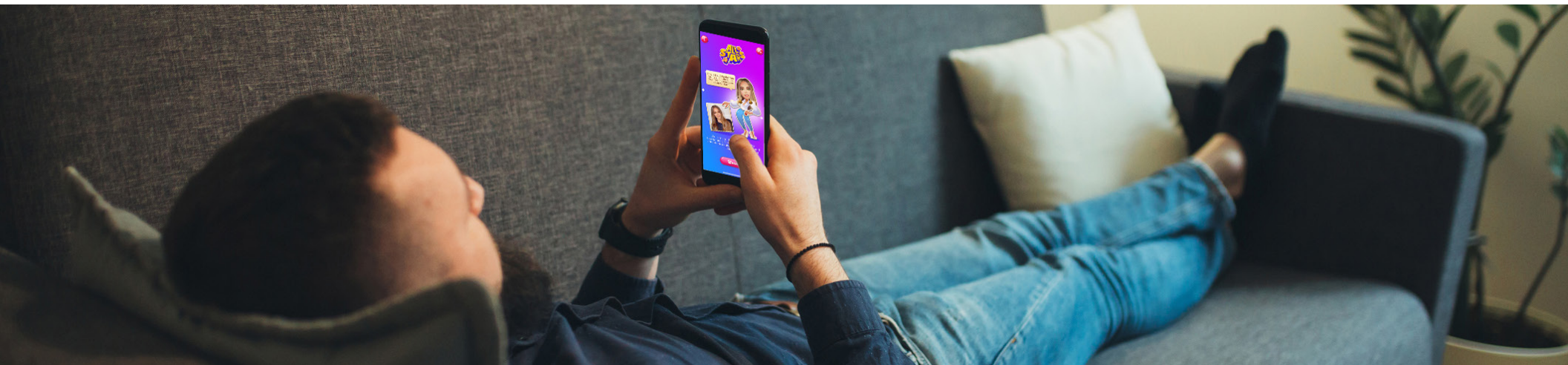
A New Kind of Second Screening

In a year of hyper-consumption of home media, second screening was indeed alive and well, but the trends in both OTT and gaming give reason to believe that how we second screen is shifting: Specifically, that OTT and mobile gaming are replacing the more traditional model of linear TV and social media.

Specifically, 77% of respondents noted that they had "revisited" OTT over the past eight months, while a nearly identical (76%) proportion of respondents said the same for gaming. The reasons for re-discovery amongst these platforms were nearly identical between OTT and gaming: feelings of "calm," "happiness," and "entertaining" were highest for OTT and gaming,

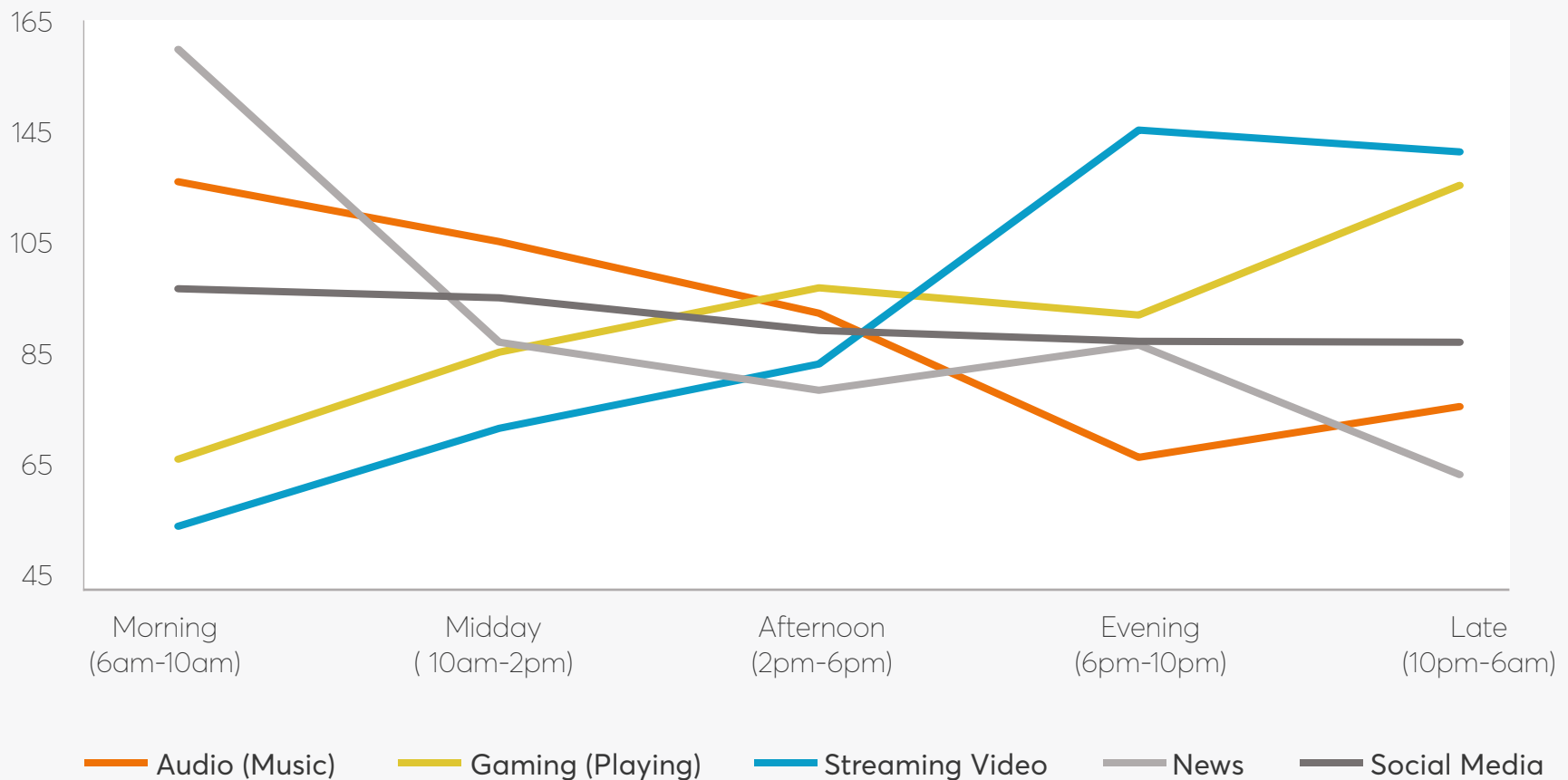
which were similarly tied for the highest platforms being attributed to "escaping reality" relative to platforms like social, music streaming, etc.

As such, there is not only quite a bit of alignment in terms of psychological needs between the platforms, but also a high degree of co-occurrence of the behaviors reported in the media diaries: second screening is very common, with both social media and gaming often occupying the same time block as OTT viewing. Game playing has a very high correlation with OTT for younger respondents, but very low with linear TV, indicating some potential generational differences in terms of second screening media habits.



Streaming video and gaming provide feelings of immersion and entertainment later in the day.

Time of Day by Digital Entertainment Platform
(percent of activity indices)



Playing Apart Together

Gaming's ability to provide social connection, especially during a time of restricted physical interaction, was a key motivator for many who reported increased video game usage during 2020. Around 40% of people who were new or returning to gaming identified social connection as a motivator for playing games, recognizing video games as social spaces where they could interact virtually. When compared to other forms of media, gaming scored third highest in motivations for "to stay connected with friends and family", sitting behind only "phone and video", and social media.

Games like Animal Crossing, Among Us, Jackbox and live events on Fornite and Roblox increased in popularity as ways for people to connect with friends and family in fun and innovative ways. Similarly, battle royale games such as Call of Duty: Warzone provided a sense of teamwork, purpose and achievement as people remained physically distant. The increased attention on co-op and multiplayer games shows little signs of slowing in a post-pandemic world.

Younger generations, including Gen Z, also relied on multiplayer games as platforms through which they could interact with their friends and family in a way that still fostered some degree of social connectivity.

The role of social connection in increased gaming consumption was also important for parents, who leaned into video games as a form of relaxation. For parents, gaming provided an easy entertainment solution and opportunity to bond and spend more time with their kids. With many balancing the stresses of lockdown, home-schooling, and other outside pressures, gaming was a form of media they could both consume alongside their child as shared entertainment, as well as solo to provide a sense of escapism.

“I also play multiplayer games as well, because me and my brothers have been kind of distant because of quarantining [...] things that you can do together.”

- Gen Z Female



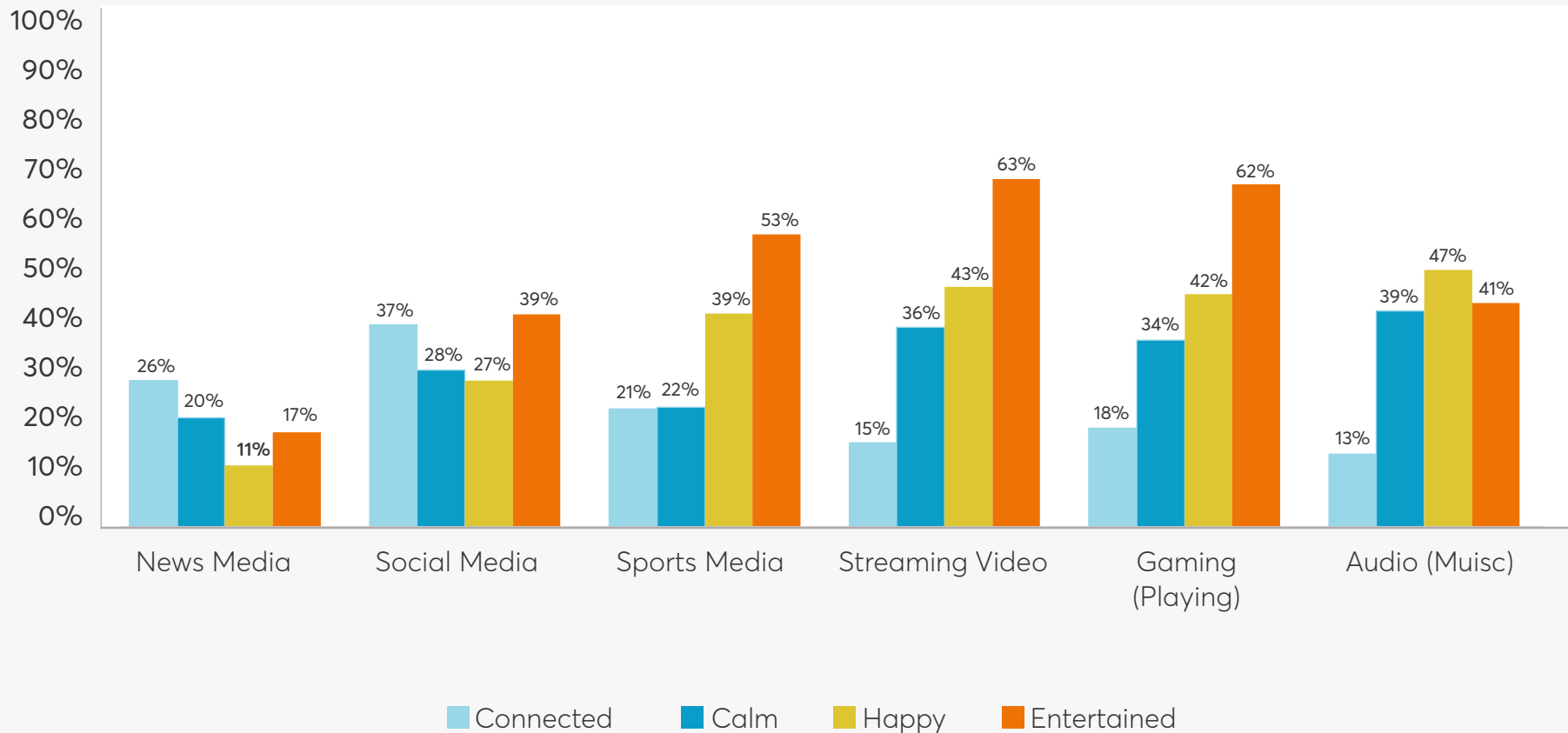
Fun By Design

Gaming and the other digital media platforms provided individuals with a variety of emotional benefits. On measures of emotions tied to media consumption, gaming scores amongst the highest for feelings of "calm", "happy" and "immersion", and is second only to streaming video in feelings of being "entertained". When viewing this in the context of 2020 and the feelings of stress and uncertainty that were present for many, gaming's value as a source of joy and way to unwind is clear.

These positive feelings remain constant throughout the time of day. For gaming, there are increases in feelings of "entertainment" and "immersion" for gaming particularly in the late night (10pm to 6am) hours, which points to the role gaming played as a form of escapism and release during the pandemic. Similarly, joy is also found in shared gaming experiences. **Almost half (49%) of people said playing gaming in a group brought them happiness, second only to listening to music (52%) and on par with streaming video (48%) and sports media (45%) as other shared activities.**



Some of the most popular platforms often fulfilled similar emotional needs.



What's Old is New Again

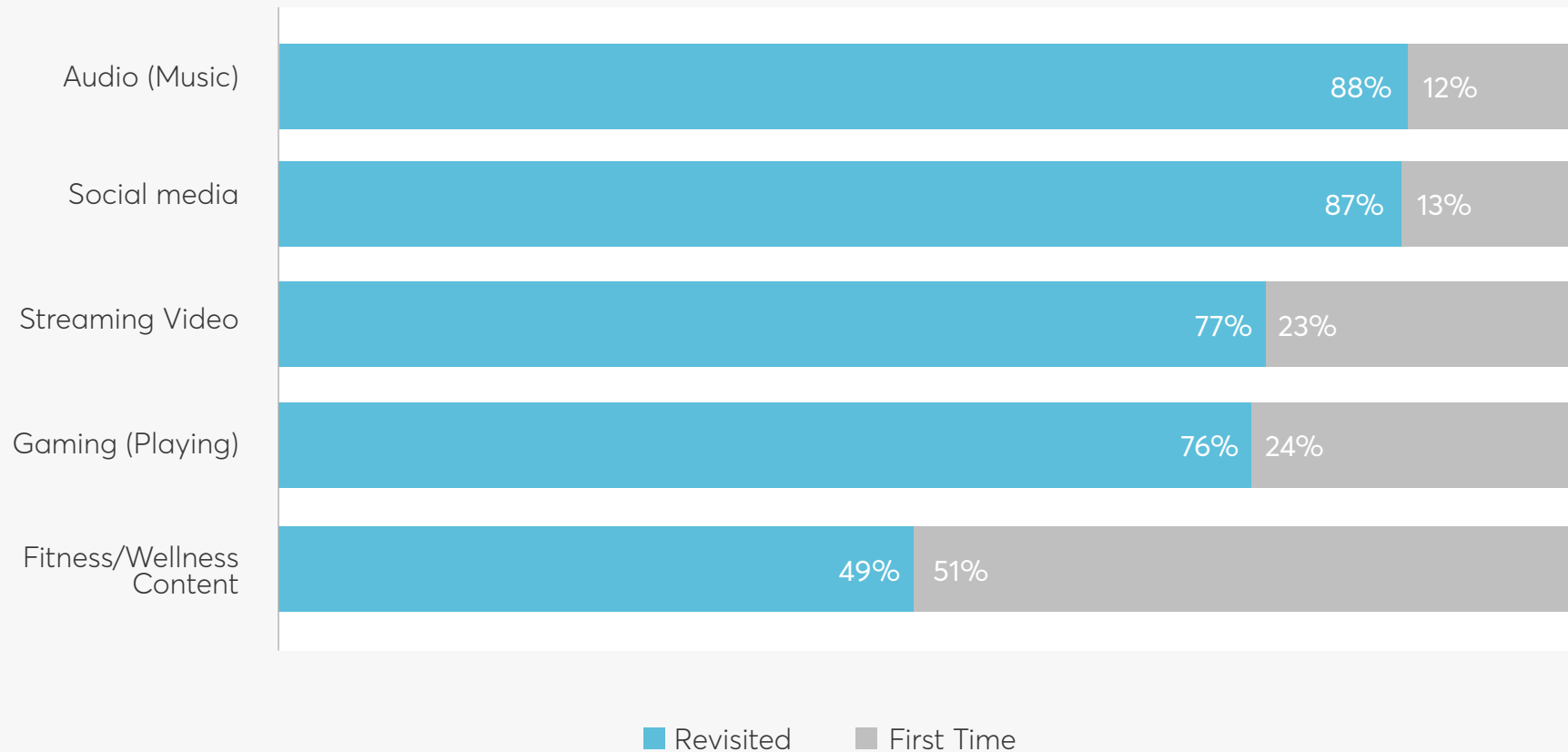
While more people were consuming more media during 2020, it was rare that any media consumption was new, rather for most people it was a return to something they had previously enjoyed. For almost every form of digital media, less than 5% of people said they had never used it before. Instead of discovering new media, people reinvested time in the platforms they already used.

This was especially true of gaming. Of the 27% of people who indicated that they newly picked up gaming during 2020, 76% said this was revisiting gaming, leaving only a very small portion of the audience saying they've never played a video game before March 2020. These weren't new players but instead people looking for additional means of entertainment. 2020 served to help individuals rediscover their love for gaming and strengthen their ties to existing media behaviors, encouraging revisitation.



Consumers reinvested time in platforms they already use.

% Using Revisiting Digital Entertainment Platforms vs. First-Time



“Back to Normal?”

What will entertainment habits look like in a post-pandemic world and will these behavior changes switch back once things are 'back to normal'?

The majority of individuals state they intend to use digital entertainment the same amount or more in the future. Music, podcasts, fitness/wellness content, sports media, streaming video and news media all rated highly when it comes to predicted future content consumption.

Looking specifically at gaming, 73% of people said they plan to play games the same amount or more.

While in 2020 the desire to connect has brought new players to interactive gaming platforms, it's the solo experience that continues to drive players' repeat engagement. The strengthening of existing entertainment behaviors during the pandemic, rather than the adoption of new platforms or habits, also suggests continued engagement. These 'new' consumption patterns are now part of consumer's entertainment habits, with video games expected to remain a core part of their media ecosystem.

“I have become accustomed to all of the activities, all forms of entertainment that I have been using. They are part of my daily routine. I love to use [...] and I will continue to use them.”

- Gen X Male

Gaming Is Not Just Here & Now, **It's The Future**

The patterns and behaviors that emerged as a result of the pandemic, including accelerated entertainment media consumption, are here to stay. As digital experiences continue to evolve, from in-game concerts and movie premieres to virtual sport competitions, we're seeing a glimpse into the future of entertainment. A future that has gaming front and center.

As noted above, more than half of individuals say they were gaming more than usual in 2020, and in a typical week, gaming was among the most used digital entertainment platforms. But importantly, they intend to continue to game the same or more in the future. Gaming isn't a new form of entertainment, it's a pastime that people have rediscovered, as the format itself continues to evolve and adapt. Individuals didn't just re-engage with gaming as a way to kill time, they found new meaning in an old hobby, with gaming fulfilling different emotional need states.

For brands and marketers, there is an opportunity to maximize impact by meeting these audiences

where they are increasingly spending their time. Understanding the motivations and emotional need states of gaming audiences, such as feelings of "calm" and "happy", allows brands to contextualize their messaging to the emotional benefits of the platform for a more authentic experience. Gaming has never been more prevalent, and it's never been a more powerful platform to reach and connect with key audience groups.

While increased media consumption was a hallmark of 2020, gaming was a standout, and these new entertainment habits and behavior patterns are set to continue into the future. Even as the world begins to reopen, gaming will remain an important part of the media ecosystem for individuals, as players continue to turn to it for relaxation, release and connection. The key for brands will be integrating in a way that is naturalistic to the platform and understands the motivations and emotional need states of the audience as they charter their new normal.

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Methodology

Following a 10-month COVID-19 tracker by Omnicom MediaGroup (OMG) Primary Research, Activision Blizzard Media and OMG partnered with MFour Mobile Research to conduct a four-part diary study in the United States among Adults 18+, November - December 2020. The diary study (n=407) was conducted for seven days alongside a pre & post-survey measuring the following: the typical week of a multi-media consumer; the adoption and revisitation of multi-media platforms due to the pandemic; the role of media in consumers' lives during COVID and motivations behind digital entertainment choices; how platforms like gaming (playing and watching) served as a safe place for brands and consumers alike, and opportunities for interactive platforms in the future. This research concluded with virtual focus groups (n=15).

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ABOUT US

Activision Blizzard Media

Activision Blizzard Media Ltd is the gateway for brands to the leading interactive entertainment company with hundreds of millions of monthly active users around the world. Our legendary portfolio includes iconic mobile game franchises such as Candy Crush™, esports like the Call of Duty League™, the Overwatch League™ and some of the top PC and console gaming franchises such as Call of Duty®, World of Warcraft®, and StarCraft®. The idea is simple: great game experiences offer great marketing experiences. Learn more at www.activisionblizzardmedia.com



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