## KANTAR

# Disruption & Dragons

Revealing the opportunities for platforms and brands at the next level of gaming

James Burke, Director

# Making the most of our time at home



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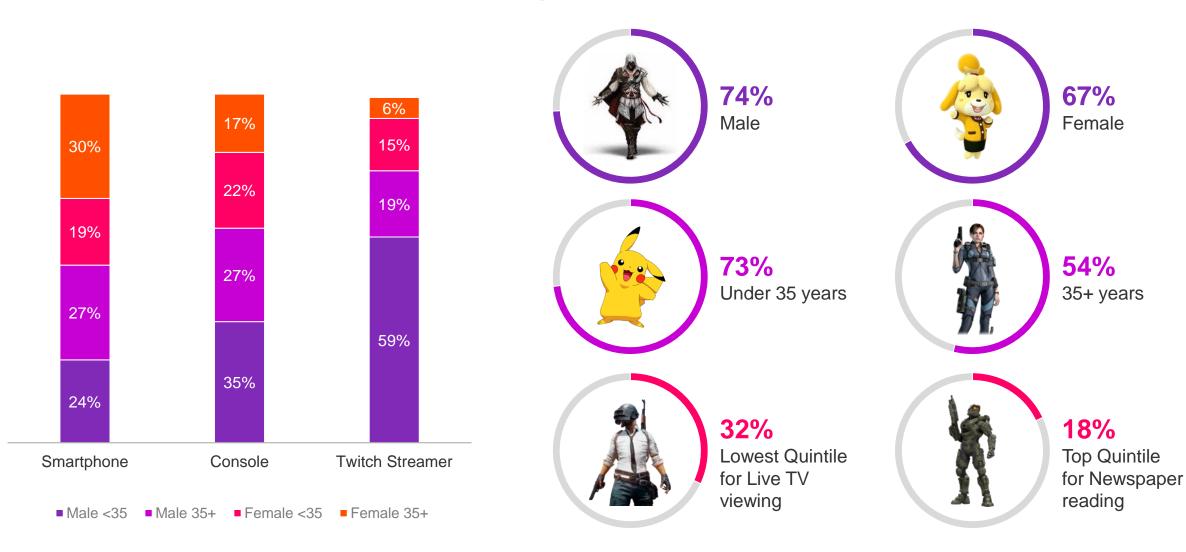
## Poll

One word to describe a gamer...

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#### Gamers come in lots of different shapes and sizes





Smartphone: Please tell us how many times you used each of these services on your mobile phone within the last month? Played Games Console: Please tell us which of the following you have done in the last month? Played games via a console Twitch Streamer: Please tell us which of the following Amazon Prime services you have used in the last month? Twitch Sample: EoD Great Britain; Data to September 2021

Source: TGI GB 2021 October Base: AsCr 2,182, AnCr 1,019, Po 1,164, ReEv 1,708, PU 622, Ha 1,004

6

### The pandemic led consumers to rely on their Smartphones more than ever

#### Monthly Smartphone Usage Activities %





Please tell us how many times you used each of these services on your mobile phone within the last month? Sample: EoD Great Britain Data to September 2021

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## Question

Increase do you think we saw in consumers console gaming from Q3' 19 to Q3' 20?



# **£7billion**

UK market for video games in 2020

A person who was playing zero hours a week and they're now playing one or two, you may have won them over forever.

### //

#### **Michael Pachter**

Analyst Wedbush Securities



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The reality is, even though we're coming out of Covid now, people have that hardware that they've invested in and therefore, the software and the games are going to be continued to be bought across their platforms because people have spent the upfront investment on them.

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#### **Vicky Crouch-Marlow**

Director, the7stars

People who never played video games before picked up controllers. A good percentage of those will continue to play video games but the big question is **how regularly** will they keep playing and **at what level** of involvement within gaming do they become a gaming audience.

#### Chris

Business Director, Once Upon A Time

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#### **Mindsets driving gaming**



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Human behaviour didn't change, it's just the way they acted out our normal rhythms and rituals.

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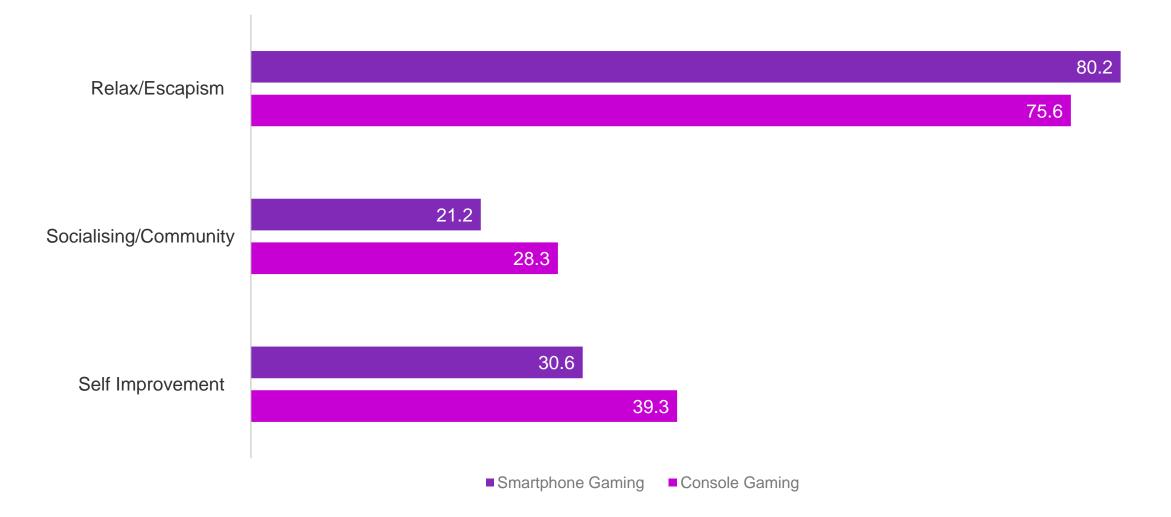
#### Vicky Crouch-Marlow

Director, the7stars



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#### The danger of becoming a Space Invader





Asked to Monthly Gamers: Thinking about gaming, please select all statements that apply to you. Sample: EoD Germany Data to September 2021

## Round 2

A Part of the second

### Gaming can sound like an open goal for brands

I am open to advertising if it means I get extra game content for free

Brand sponsorship is the best way to fund gaming content on online channels

Brands have an important role in the growth of e-sports

It is surprising that more brands don't advertise through video games

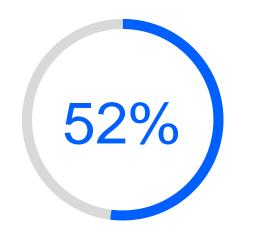
Appropriate brand integration can improve gaming environments

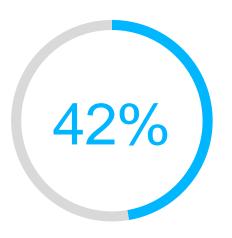
50%		30%	21%
44%		39%	17%
39%		43%	18%
39%		39%	22%
35%		42%	23%
	Any agree Nei	ither Any disagree	



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Excludes NA responseas Source: TGI GB 2021 October monthly topic BASE: weekly gamers 9,336 Half of FIFA players said they recalled consumer brands in the gameplay



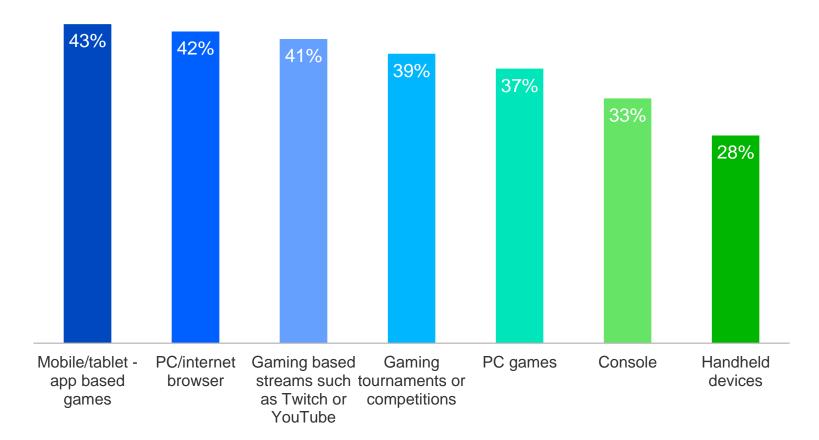


13%

of those that recalled seeing the brand said it was appropriate for the brand to be there agree with the statement that they would be more likely to buy from a brand than sponsors gaming content said it improved brand opinion, less than 1% saying it had a negative impact



Where are they most open to seeing brands...



## 41%

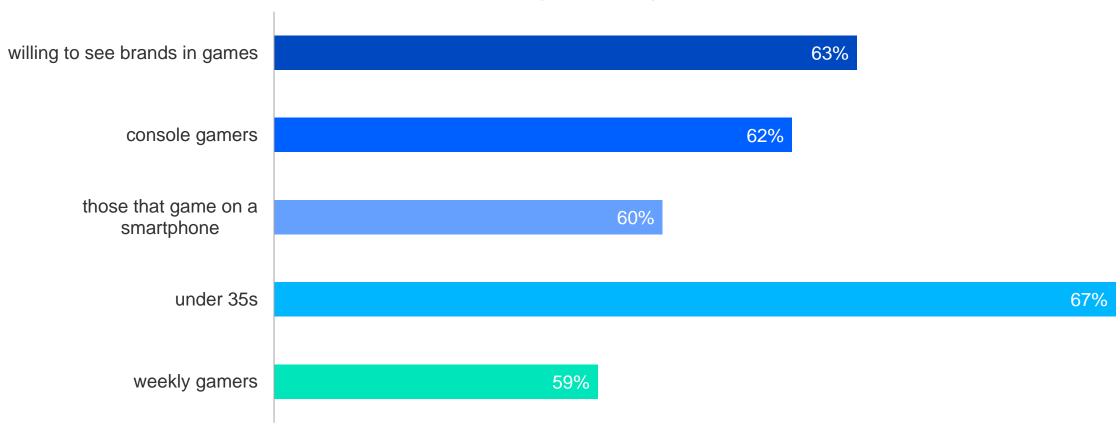
Weekly gamers willing to see brands in games

#### KANTAR

Excludes NA responses Source: TGI GB 2021 October monthly topic BASE: weekly gamers 9,336

#### The importance of relevancy

"It is important that brands are relevant to the game if they are integrated into the play"

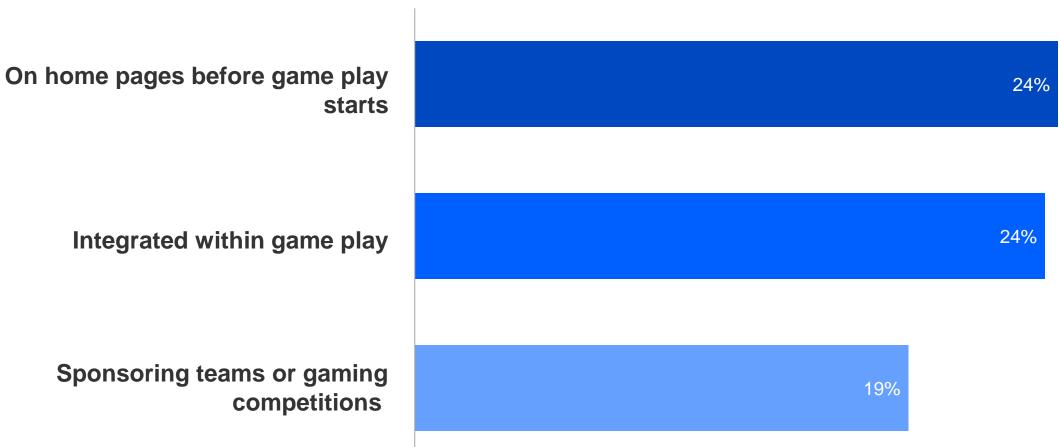


Weekly gamers - % agree

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Excludes NA responses Source: TGI GB 2021 October monthly topic BASE: weekly gamers 9,336

#### Seamless integration or outside the play are the best positions for brands



Weekly gamers willing to see brands - % agree









## Real Magic

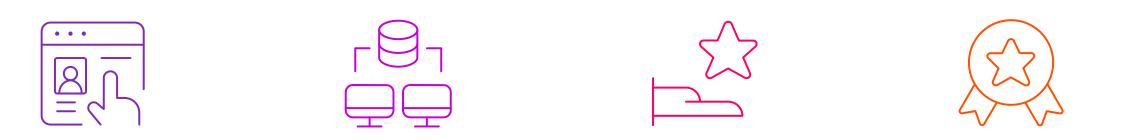
Carlollo.

"It's just funny they get so many aspects wrong, it just shows how alienated they seem to be" Sam gamer and paid streamer



## Round 3

#### What we need



Better ability to profile different types of gamer and drill into gaming titles Up to date data, released quickly

Insights that look beyond audience scale

Cultural ambassadors



## Poll

Which aspect of **gaming** do you think the research industry should be focusing on next?



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## Game over

#### Understand People Inspire Growth

#### **About Kantar**

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