

# 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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**#542674**



# Poll

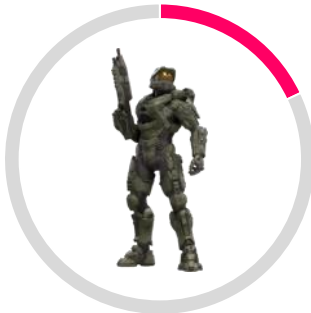
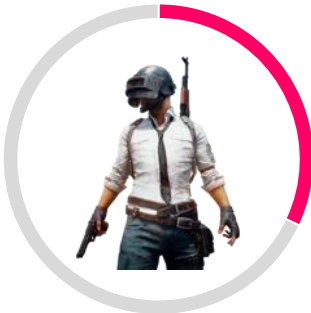
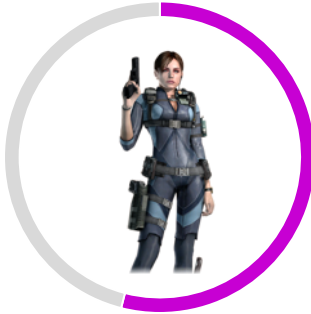
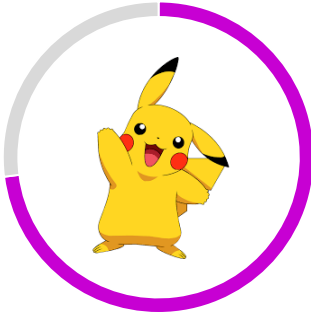
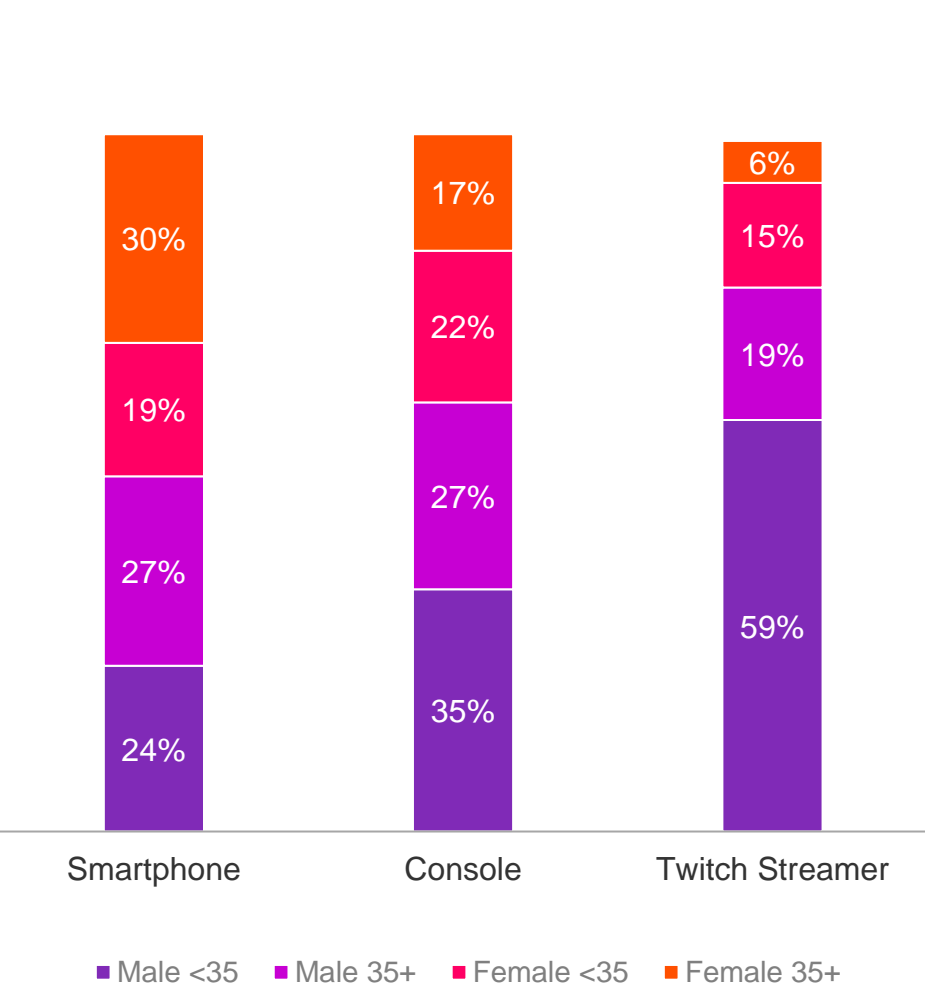
One word to describe a gamer...



Round 1

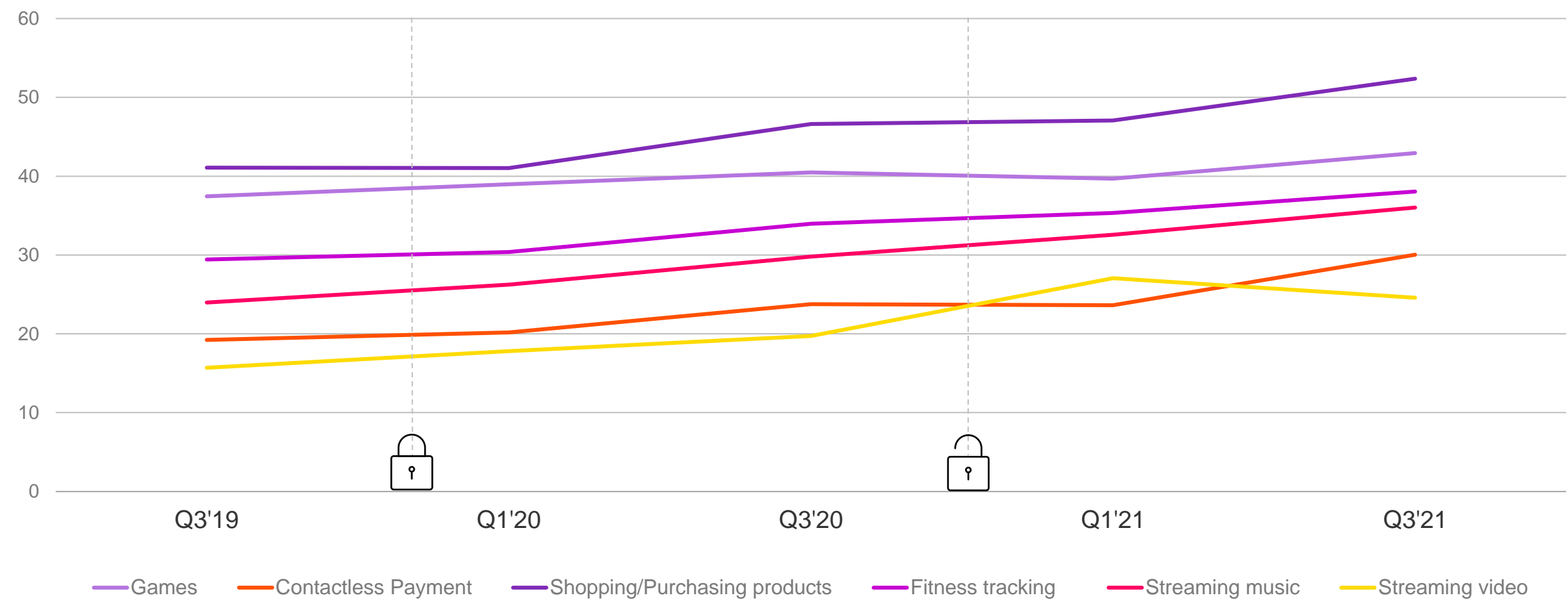


# Gamers come in lots of different shapes and sizes



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

Monthly Smartphone Usage Activities %





## Question

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

- A 510,000
- B 370,000
- C 680,000





# £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*

//

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.

//

**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*

# 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.

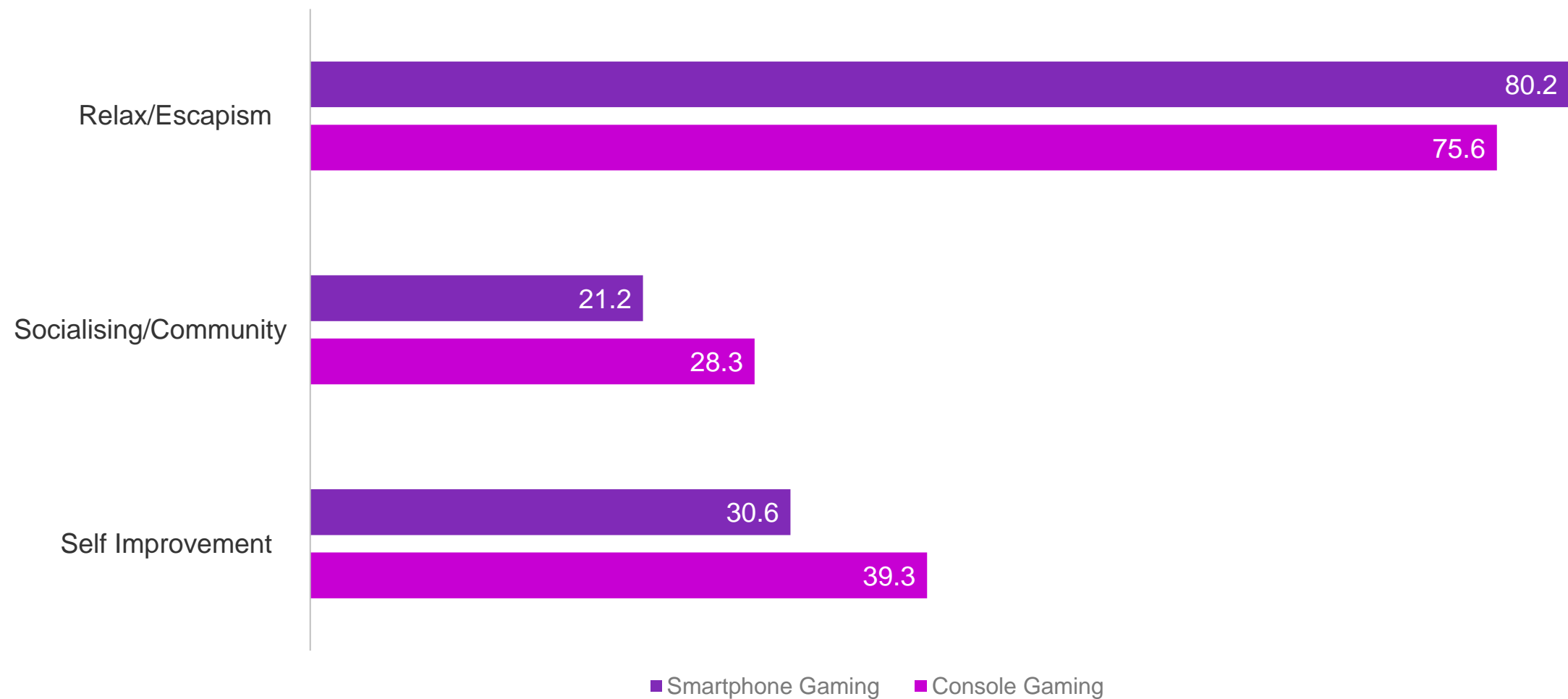
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**Vicky Crouch-Marlow**

*Director, the7stars*



# The danger of becoming a Space Invader



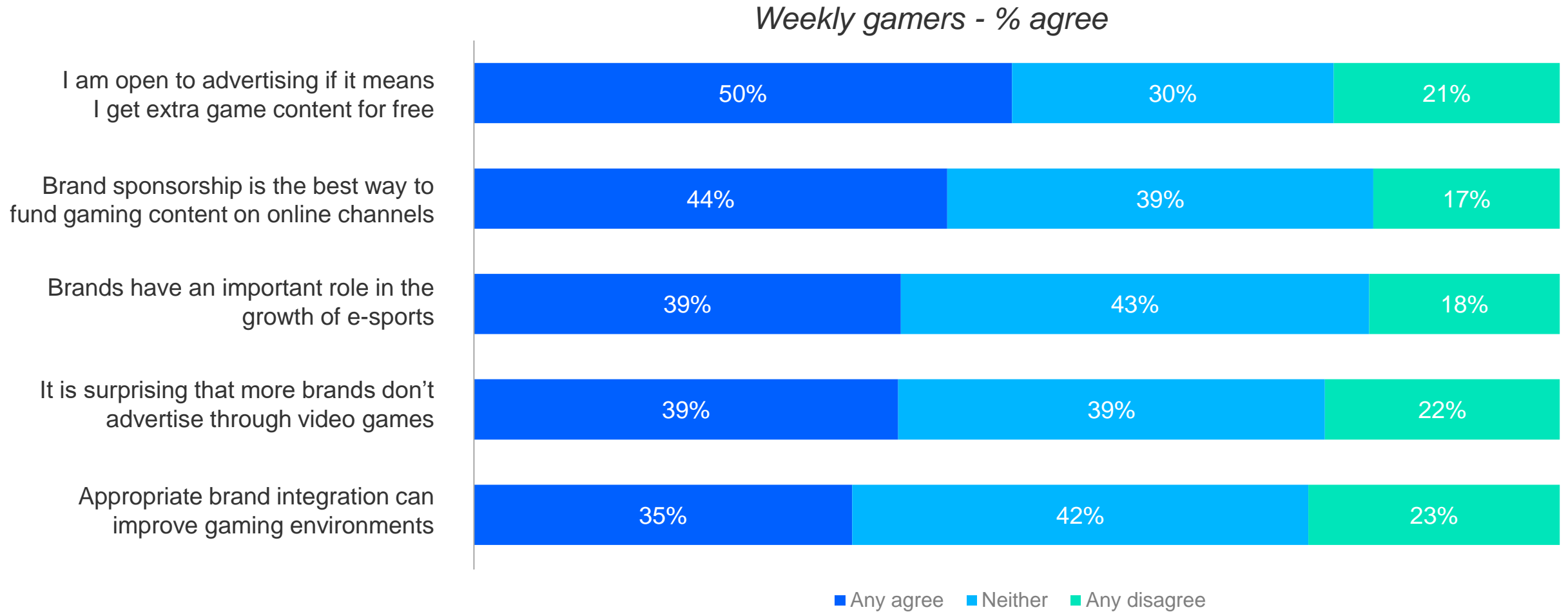


Round 2

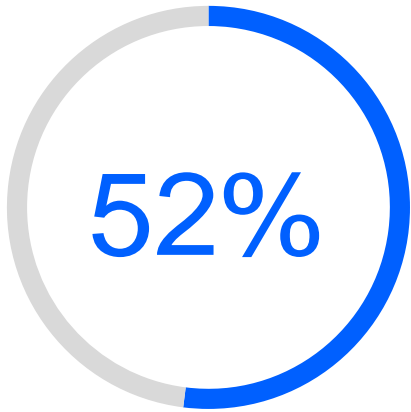




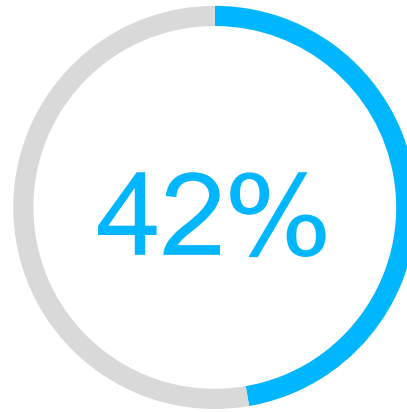
# Gaming can sound like an open goal for brands



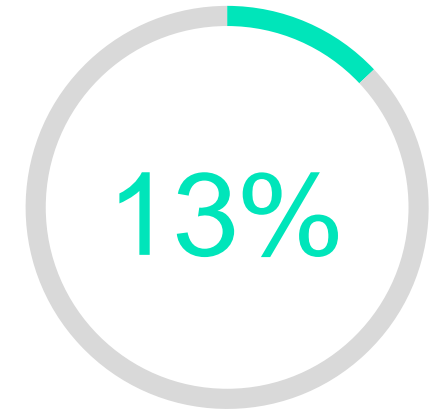
# Half of FIFA players said they recalled consumer brands in the gameplay



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

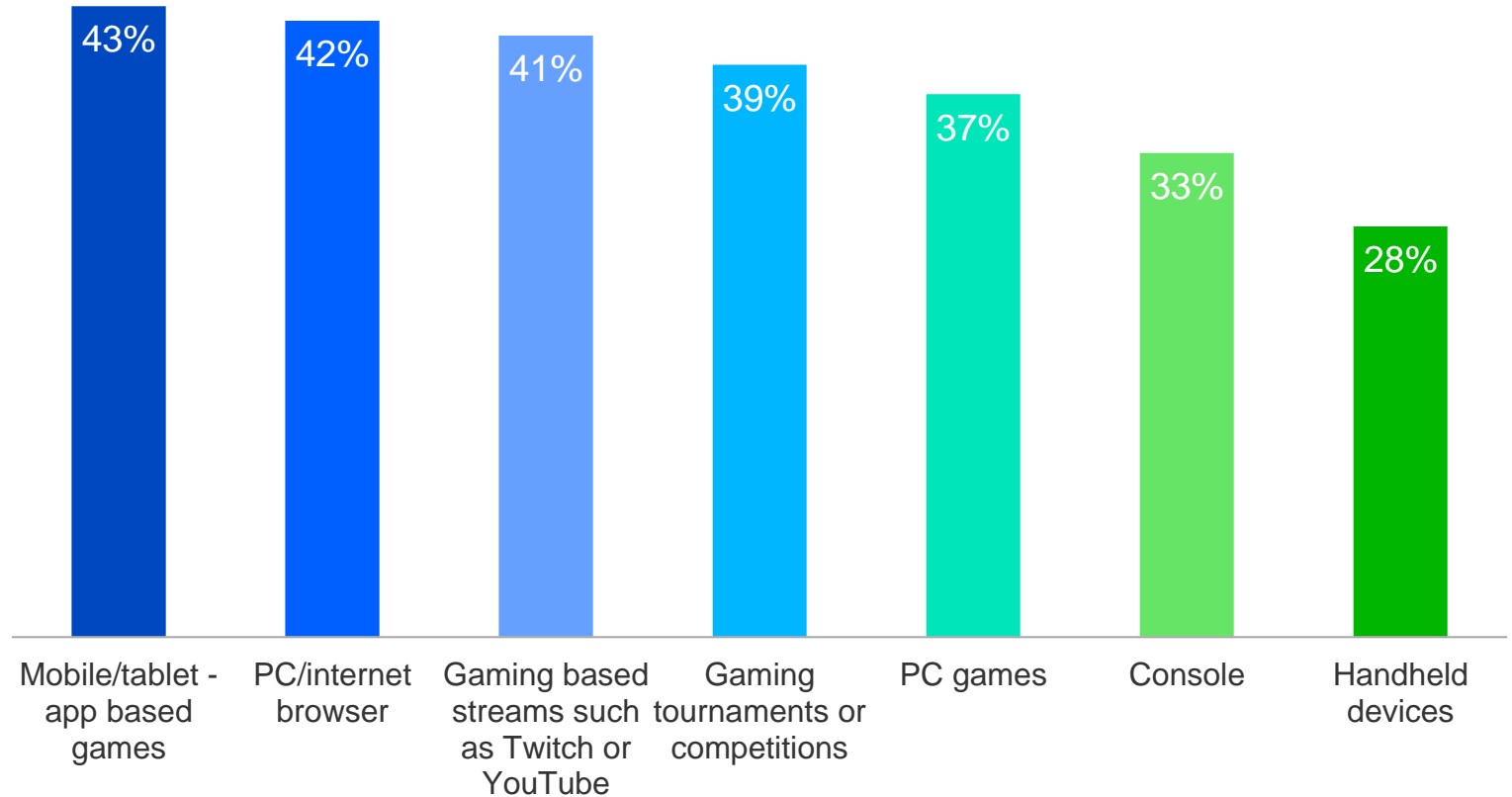


said it improved brand opinion, less than 1% saying it had a negative impact

41%

Weekly gamers  
willing to see  
brands in games

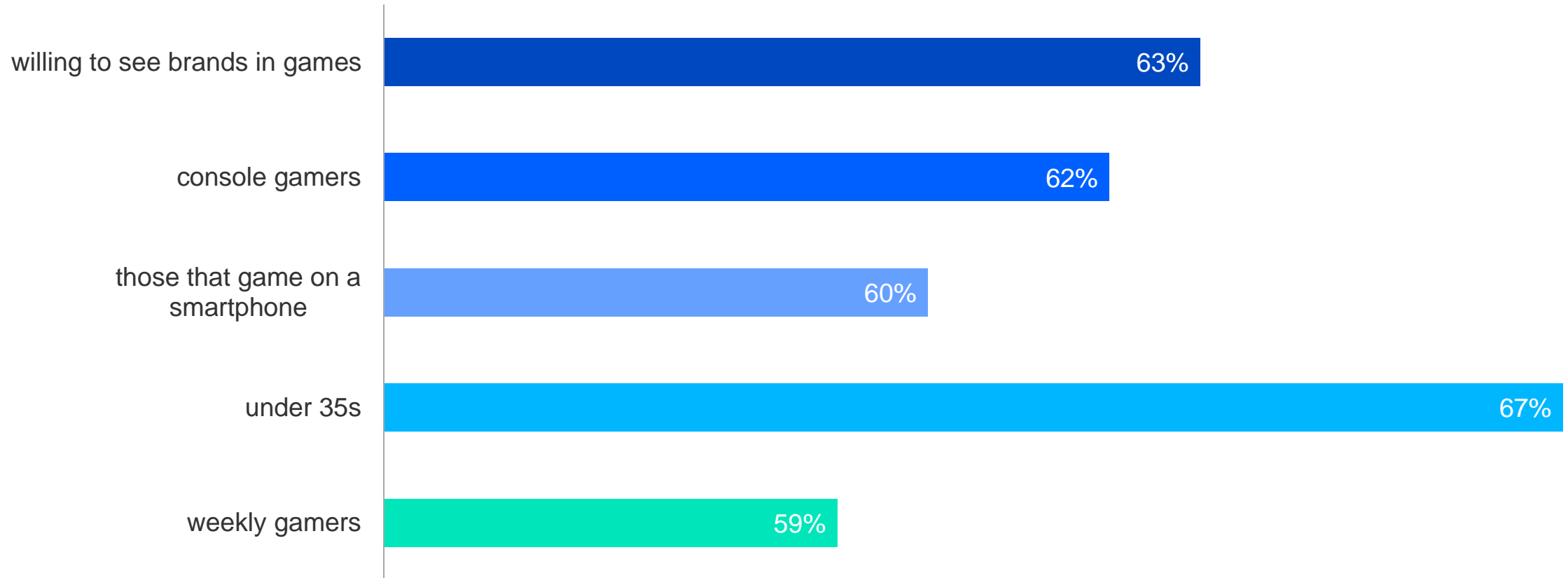
### Where are they most open to seeing brands...



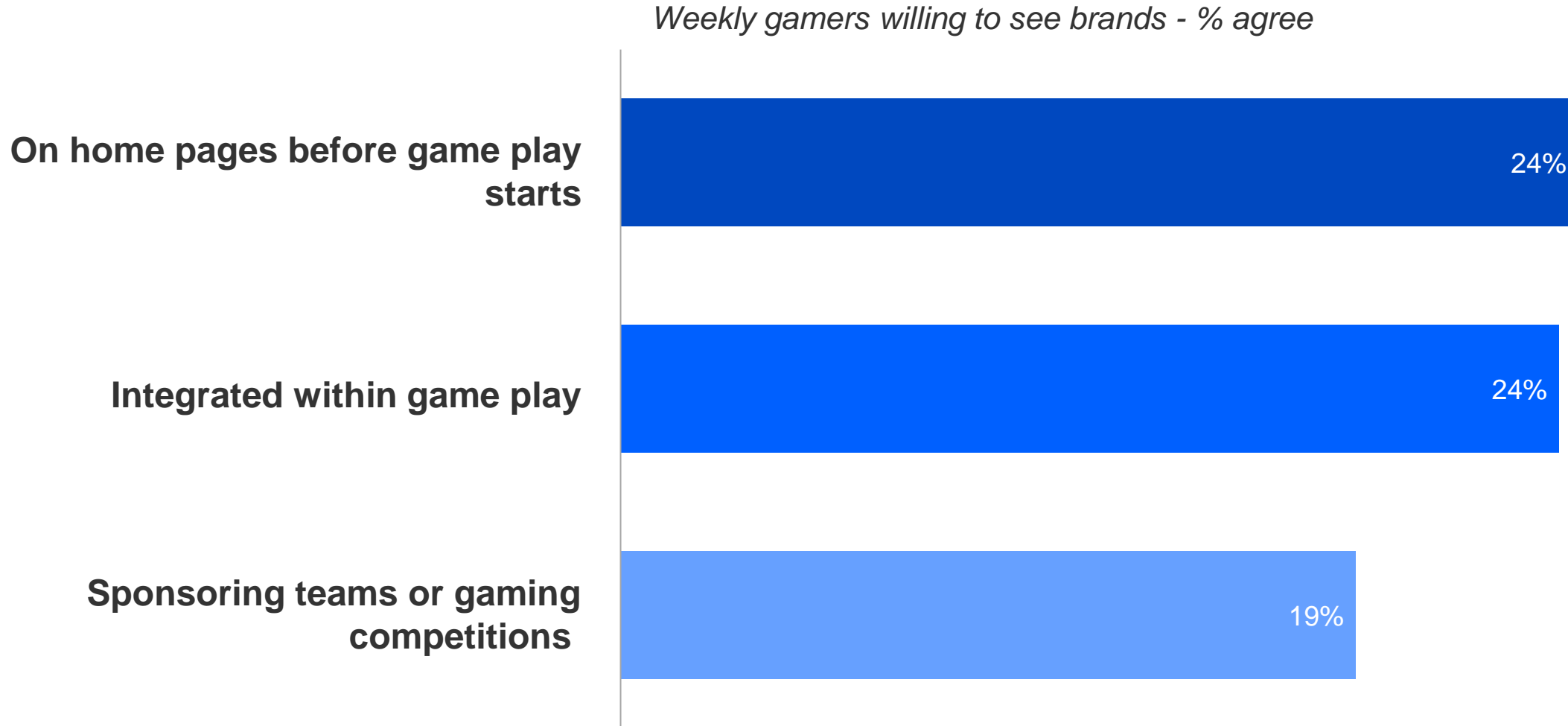
# The importance of relevancy

**“It is important that brands are relevant to the game if they are integrated into the play”**

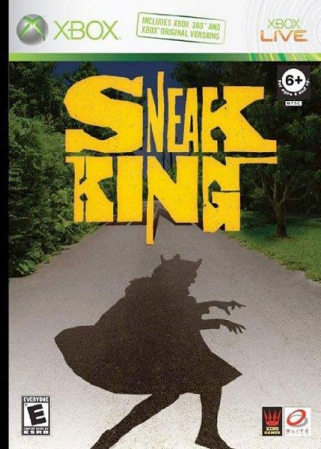
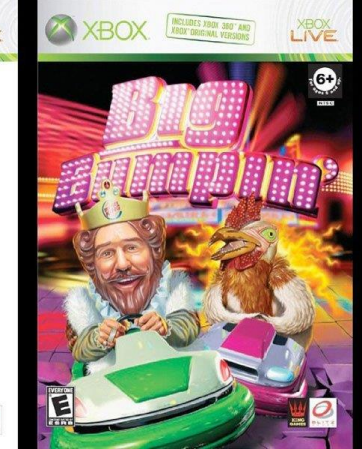
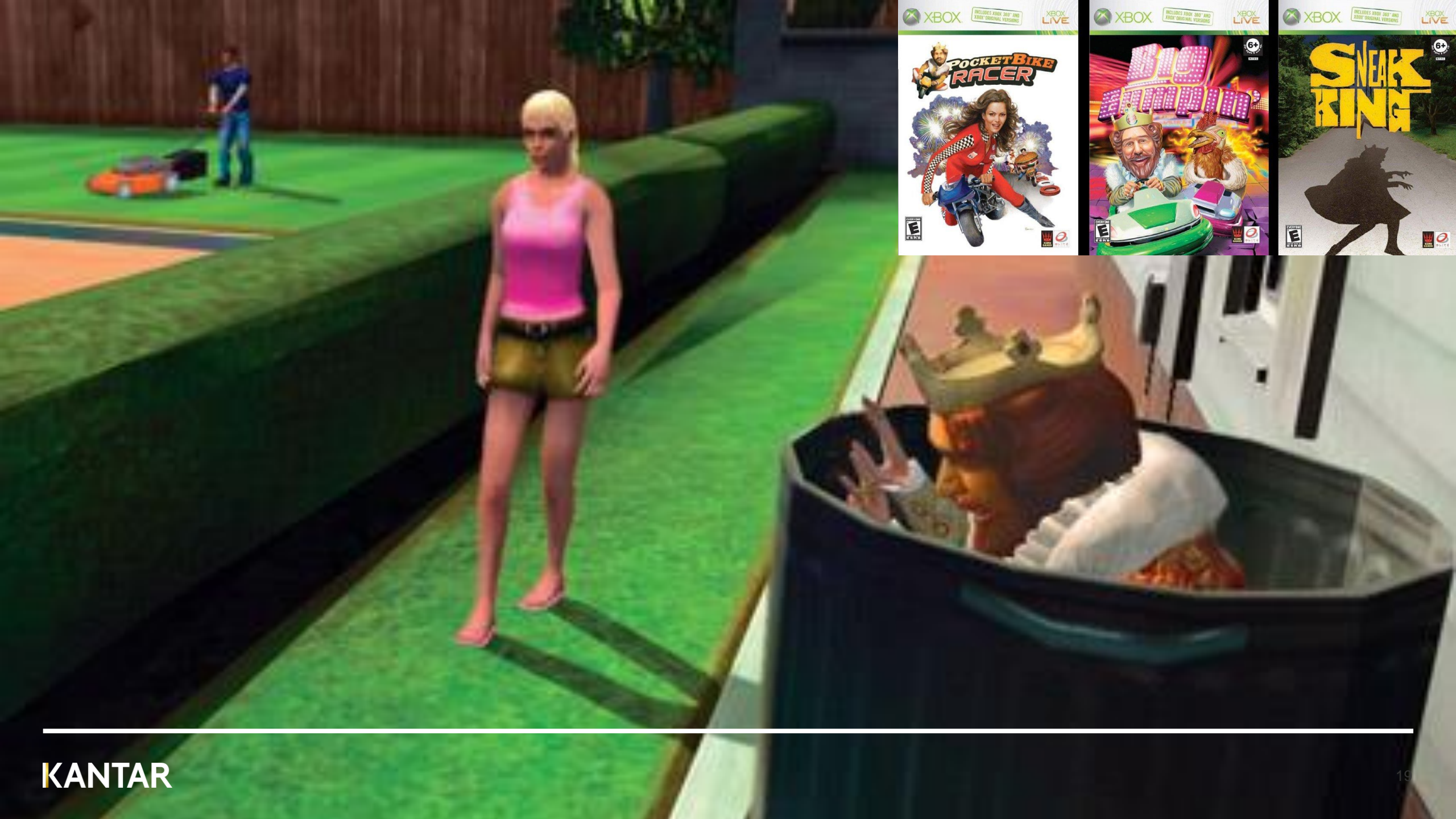
*Weekly gamers - % agree*



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













# Coca-Cola

## Real Magic™

“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

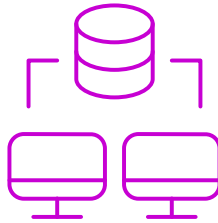


# What we need



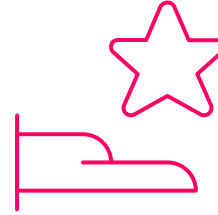
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Better ability to profile different types of gamer and drill into gaming titles



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Up to date data, released quickly



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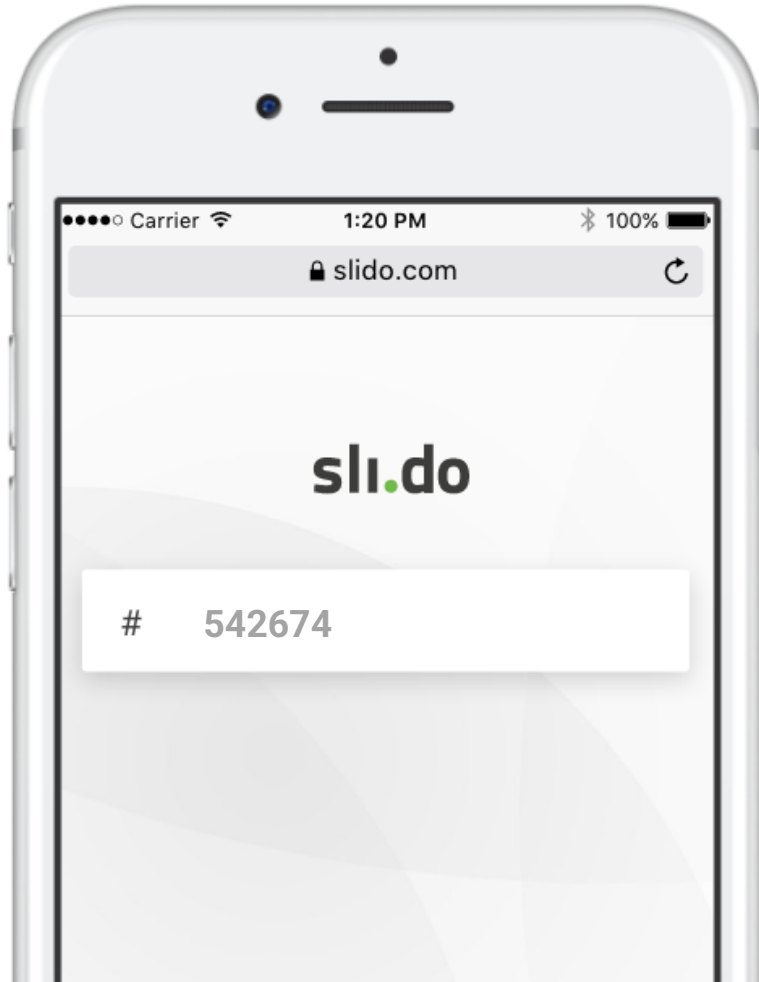
Insights that look beyond audience scale



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Cultural ambassadors





## Poll

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

- |                     |                        |
|---------------------|------------------------|
| <b>A</b> Mobile     | <b>E</b> Streaming     |
| <b>B</b> Console    | <b>F</b> ROI testing   |
| <b>C</b> PC/Browser | <b>G</b> Subscriptions |
| <b>D</b> Esports    | <b>H</b> Brand safety  |

Game over





# Understand People Inspire Growth

## About Kantar

Media Division in Kantar is a global leader in media intelligence, providing clients with the data they need to make informed decisions on all aspects of media measurement, monitoring and selection. Kantar provides the most comprehensive and accurate intelligence on media consumption, performance and value. For further information, please visit us at [www.kantar.com](http://www.kantar.com)