

Five *Fast* Facts



What you need to know about new & emerging trends, platforms or technology

For the Love of Gaming





The gaming category has achieved massive scale and engagement with mobile and social video, in particular, creating opportunities for marketers to connect with audiences beyond GenZ and millennial males.

These *Five Fast Facts* size the gaming marketplace, device usage and demographics to help marketers identify the opportunities that exist, and the unique audiences that can be reached, within this highly engaging category.

1



The gaming category delivers **mass scale** and **high reach** with continued growing engagement across audiences as its popularity increased during the pandemic.



230 MM

Monthly unique visitors to gaming category websites



83%

Reach of Online Users*



+16%

Growth in Time Spent on Gaming Sites in June 2021 (vs. June 2018)

Source: Comscore, State of Gaming 2021, *Online Users represents P2+ desktop users & P18+ mobile users.

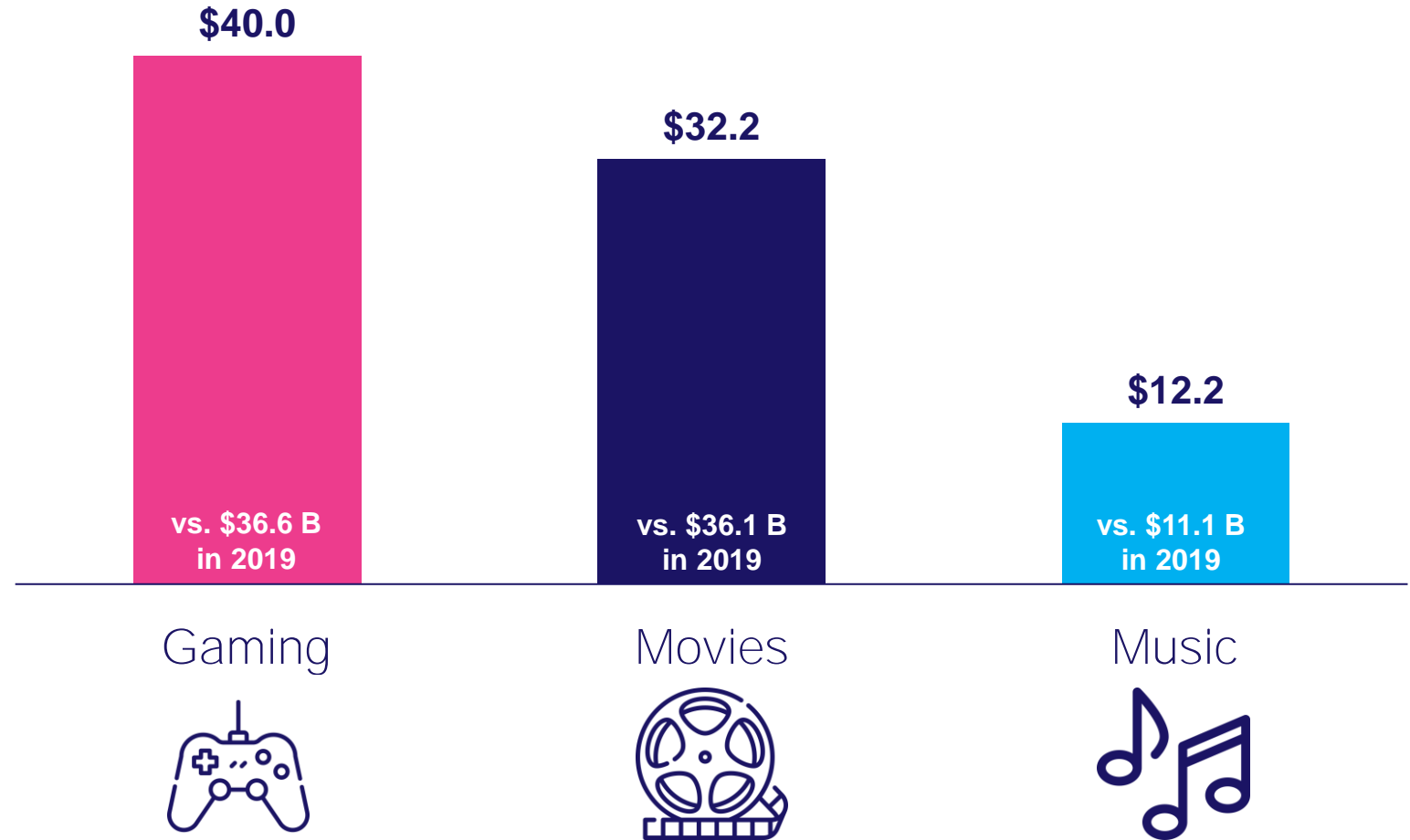
2

As people spent more time at home, doing fewer in-person activities, many consumers turned to other sources of entertainment like gaming, whose **growth accelerated during 2020**.

Globally, **48%** of gaming revenues are driven by **mobile gaming**, nearly doubling both console and PC.

2020 U.S. Annual Revenue by Source

\$ in Billions



Source: Gaming - Newzoo 2020 Global Games Market Report, includes mobile, PC and console gaming; Movies - MPA THEME Report 2020, includes Digital home/mobile (electronic sell-through, VOD, subscription streaming): \$26.5 B, Physical home/mobile (Blu-Ray and DVD rentals & sales): \$3.5 B, Theatrical \$2.2 B; Music - RIAA, Year End 2020 RIAA Revenue Statistics, includes Streaming: \$10.1 B, Digital Download: \$674 MM, Physical: \$1.1 B.

3

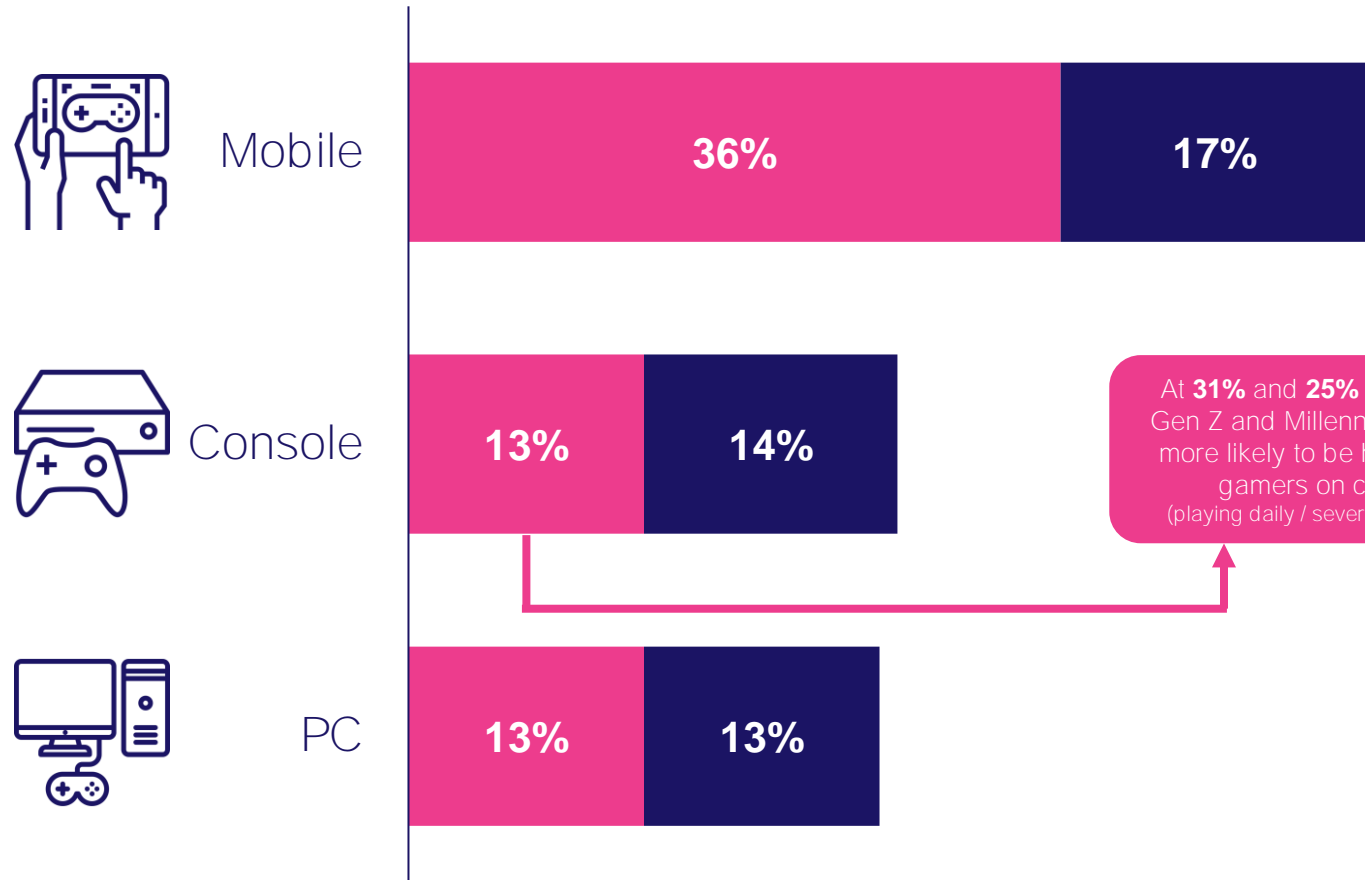
Gamers are most actively **engaged on mobile devices** with 53% playing on these platforms at least several times a week compared to 27% and 26% of people playing on consoles or PCs respectively.

Mobile doesn't only attract casual gamers as **71% of avid gamers** play on mobile as part of their 7+ hours spent gaming weekly.

Video Game Usage by Platform

Adults 18+

■ Play Daily/Several times a day ■ Play Several times a week



Source: Morning Consult, Video Game Landscape 2021. 'How often, if ever, do you play video games on the following?' Total respondents = 2,200 adults; poll conducted between October 4-6, 2021. Morning Consult, The State of Gaming 2021 – 'Console Is Still King', 'avid gamers' play at least seven hours of video gamers per week, 'casual gamers' play less than seven hours a week. Gen Z were born between 1997-2012; Millennials were born between 1981-1996.

4

Mobile offers marketers an opportunity to incrementally reach a gaming audience well **beyond Gen Z and millennial males** that play regularly.

Mobile-only gamers are **75% women** and 66% are between the ages of 35-65.

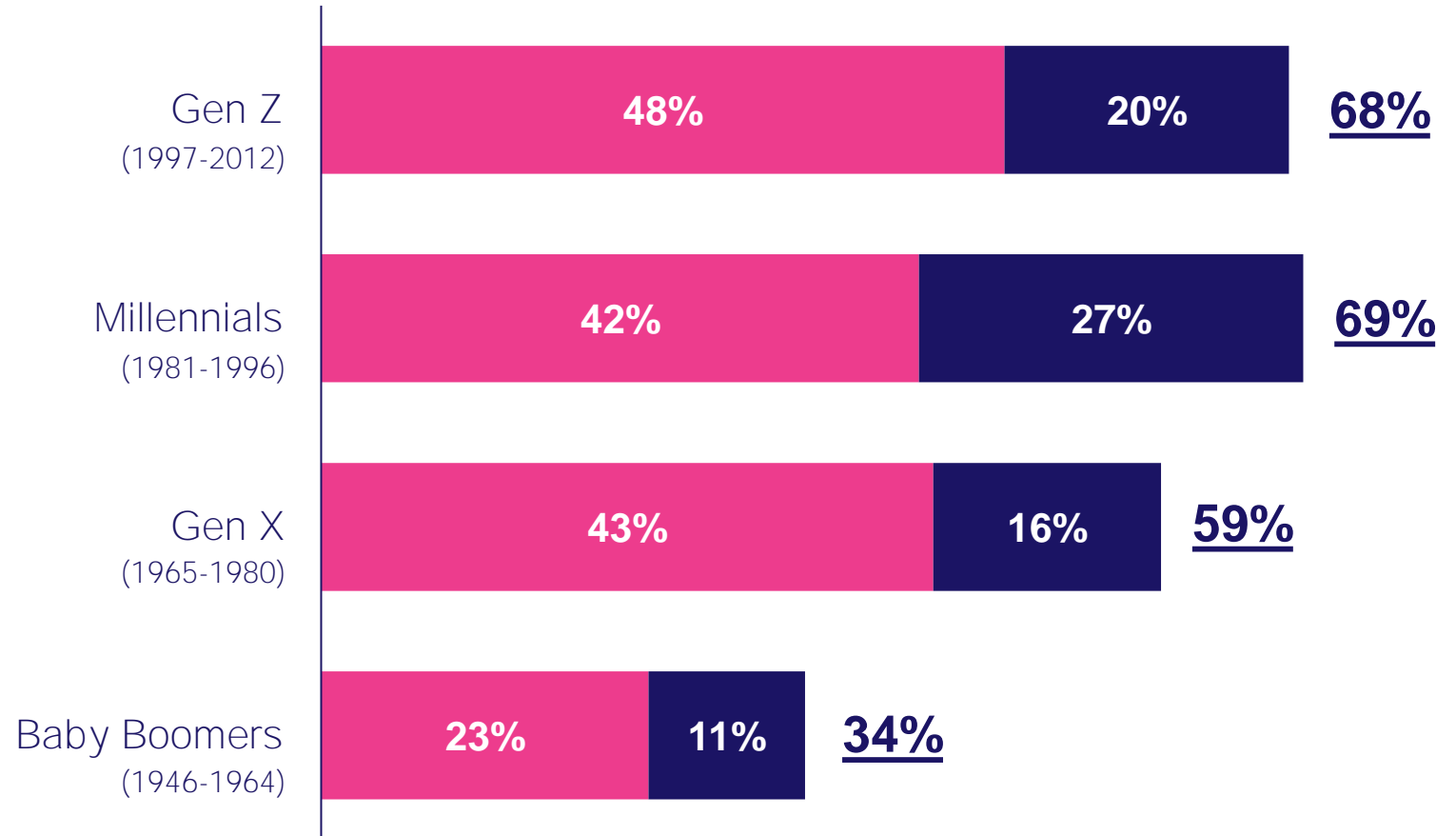
Mobile gaming represents gaming activity across mobile devices.

Mobile Game Examples:

Call of Duty Mobile, Pokémon Go, FIFA Mobile, Clash of Clans, Hearthstone, Angry Birds, Madden NFL Mobile, Candy Crush

Mobile Video Game Usage by Platform

■ Daily/Several times a day ■ Several times a week



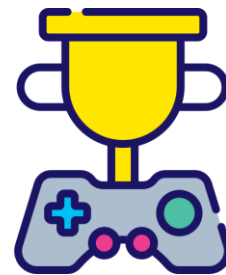
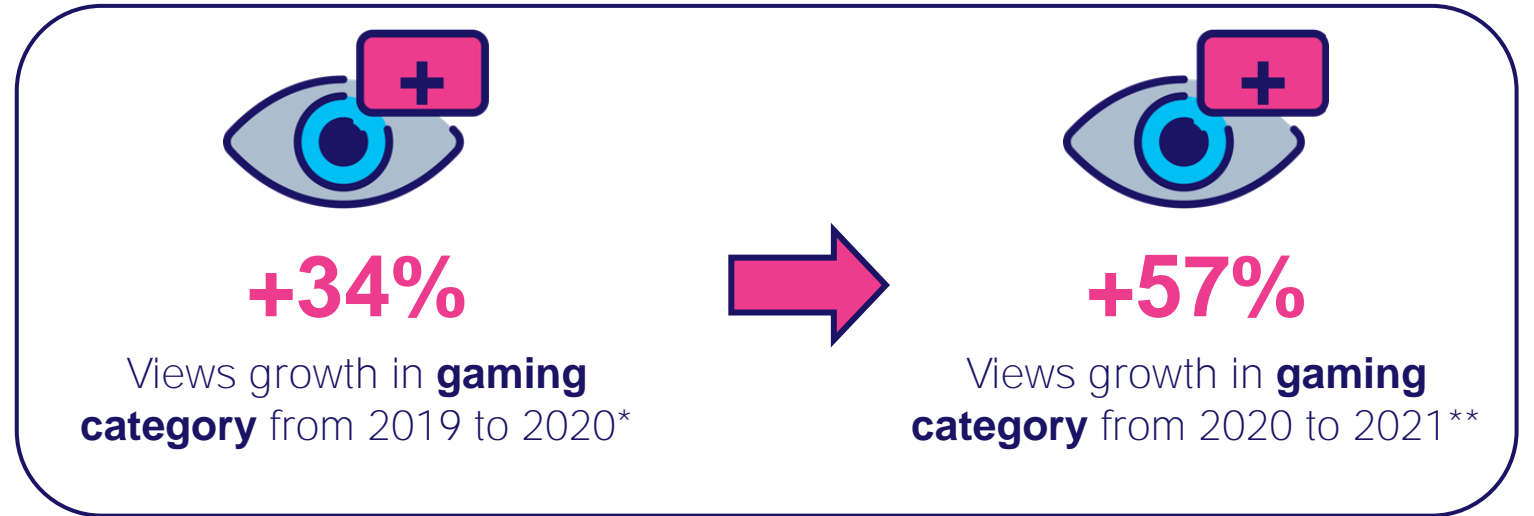
Source: Morning Consult, Video Game Landscape 2021. 'How often, if ever, do you play video games on the following?' Total respondents = 2,200 adults; Gen Z (n=201), Millennials (n=665), Gen X (n=514), Baby Boomers (n=730); poll conducted between October 4-6, 2021. Years represent birth year range for each generation. Comscore, State of Gaming 2021, used for mobile-only gamer statistics.

5



Beyond mobile, social video engagement continues to surge for gamers as it provided an opportunity to connect with gaming communities during Covid, which opened more opportunities for marketers **to reach highly engaged audiences** across additional platforms.

Social Video Views



+58%

Views growth in **esports content** from 2020 to 2021**

Source: Tubular, Ready Player Two: Gaming and Social Video, 'social video' represents YouTube, *Reflects August 2018-July 2019 vs. August 2019-July 2020 time frame. **Reflects August 2019-July 2020 vs. August 2020-July 2021 time frame.

What does this mean for marketers?

- ▶ **The pandemic accelerated gaming's already** surging growth making it a top entertainment choice with high reach and engagement across audiences
- ▶ Gamers are most actively engaged on mobile and their communities continue to grow through connection on social video platforms
- ▶ Mobile gaming provides opportunities to create engaging ad experiences in lean-in environments with audiences beyond young males

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