



THE ENGAGEMENT GAME

How Gaming Has Transformed Entertainment Consumption

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Gaming's Influence is Growing

Gaming has long played a critical role in shaping the way audiences interact with and think about consumer technologies. It has helped consumers contextualize emerging products, from computers to mobile devices, while also introducing new ways for people to engage with and consume entertainment.

Though often attributed to the global pandemic, gaming's growth is more accurately a result of more inclusive and accessible design methodologies and a generational impact with today's heads of households having themselves grown-up gaming.

Today, gaming's impact on audience behavior can be seen in the way everyday media consumption habits have changed. No longer is entertainment something consumed only during 'prime time' or an activity enjoyed in exclusivity. Now audiences are



enjoying entertainment throughout the day, often across multiple devices at a time, with the second screen now acting as the primary focal point.

This report examines gaming's role in daily life and its place among other popular entertainment activities. It charts both gamers' and non-gamers' entertainment habits to understand how these routines have evolved, from time of day engagement, generational influences, second screening, and ad avoidance.

By better understanding gaming's influence, marketers will gain insight into future media behaviors and be well equipped for a gaming-centric future, one which places audience behaviors and motivations at its core.

Key Takeaways

01 - Gaming is an all-day affair

Two-thirds of consumers report that gaming is a regular part of their weekly media and entertainment diets. For this group, gaming is not just a prime time activity. It is an integral part of their everyday lives and is one of the most engaged with entertainment activities ahead of Live TV, Streaming TV, and Streaming Video — even during traditional prime time hours.

02 - Gaming engagement varies by generation

The majority of today's audiences grew up gaming, and, as such, there is a significant generational impact on their engagement with gaming. While all ages enjoy gaming, it is the 18-34yr that show the strongest interaction with gaming at different touchpoints throughout the day..

03 - Gaming is a second screen staple

With more consumer control over entertainment choices than ever before, people are increasingly engaging with multiple forms of entertainment simultaneously and switching between experiences ad-hominem. 85% of people are watching TV with another device in hand, with more than half of gamers who are second screening using that device to game.

04 - Gamers want fluid entertainment experiences

As audiences become increasingly ad-aware, their expectations for seamless entertainment experiences across all platforms increase. This is especially true for gamers, who are significantly less likely than non-gamers to subscribe to ad-supported TV formats and are more likely to skip TV and Streaming Video ads whenever possible.

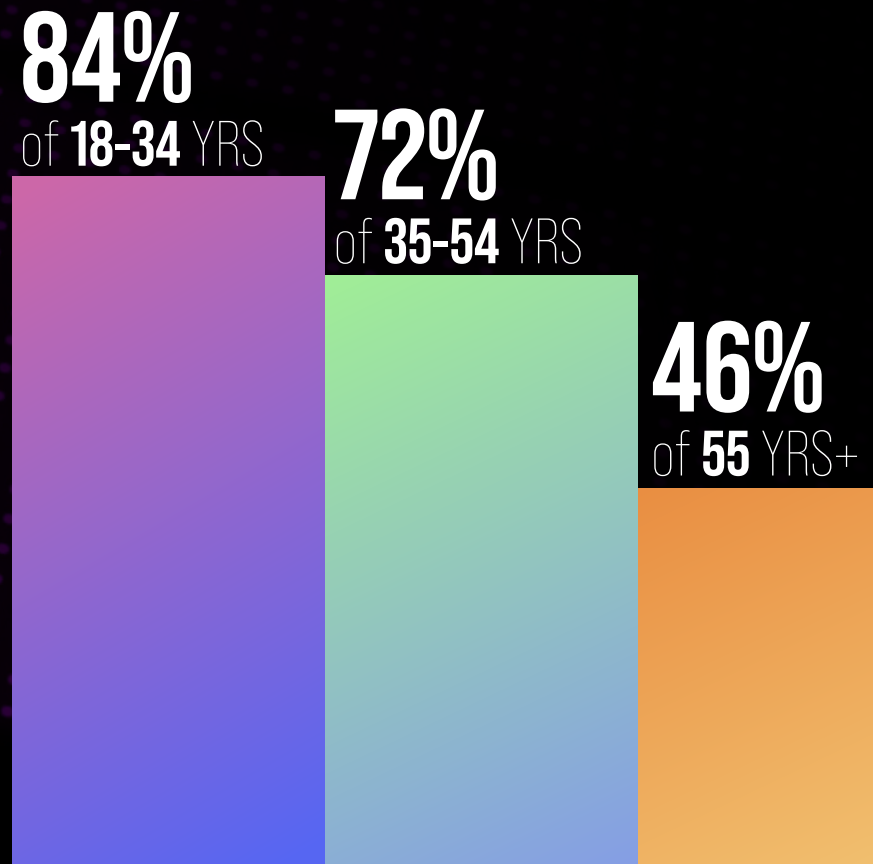
Gaming is an All-Day Affair

As gaming's impact continues to grow, so too does its place as a source of joy, entertainment, and escapism in people's day-to-day lives.

Gaming is an entertainment experience enjoyed by the majority, with two-thirds of audiences reporting engagement with gaming at least weekly. And this high engagement with gaming is even more pronounced amongst younger audiences, including those who 'grew up gaming' in the 18-54yr age range.



Percent of Audiences Engaging with Gaming Weekly



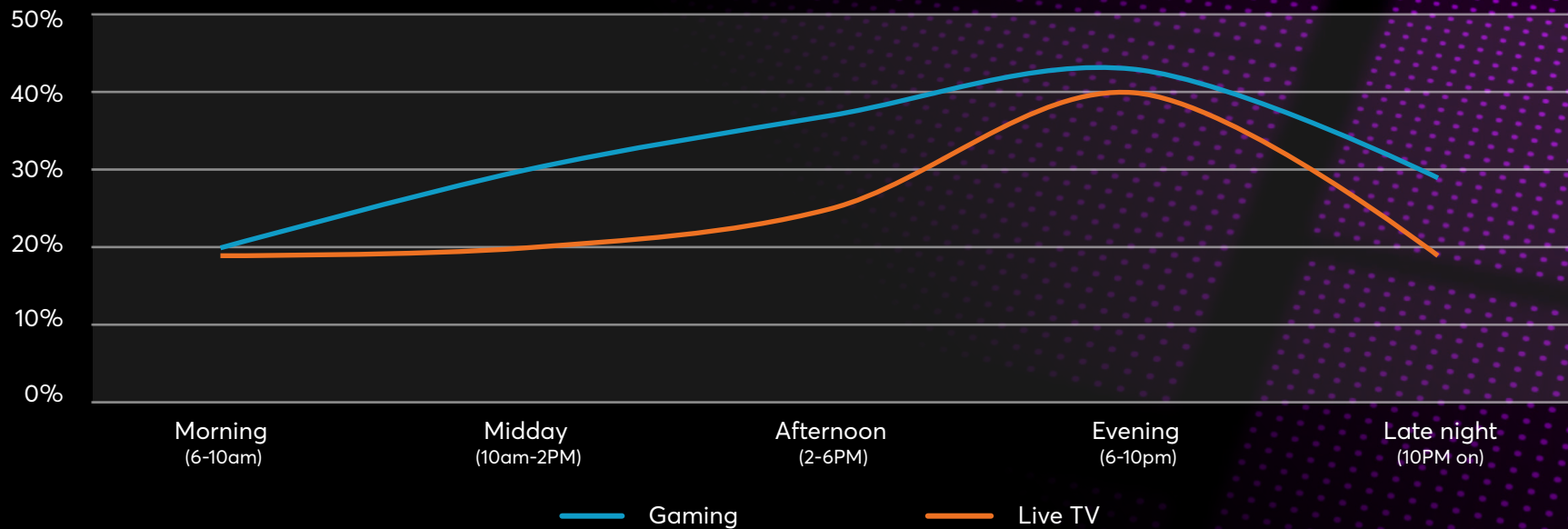
While some of this engagement with gaming has been attributed to the pandemic, it's a behavior that is here to stay, with 87% of people who found themselves gaming in the past 12 months planning to game the same amount or more in the next 12 months.

And for those that game, it is an activity that is enjoyed all the time, not just in prime time. While daily entertainment habits previously revolved around moments after work and before bed, the accessibility of entertainment options across

multiple devices has enabled audiences to access moments of play whenever and wherever they choose. As a result, all waking hours have emerged as opportunities to play.

Gaming's function as an all-day entertainment source is evident when compared to traditional entertainment sources such as TV. Gaming is one of the most engaging entertainment activities throughout the day for gamers, ahead of Live TV, Streaming TV, and Streaming Video, and only sits behind Social Media during the morning hours of the day.

M-F Media Consumption: Total Audience

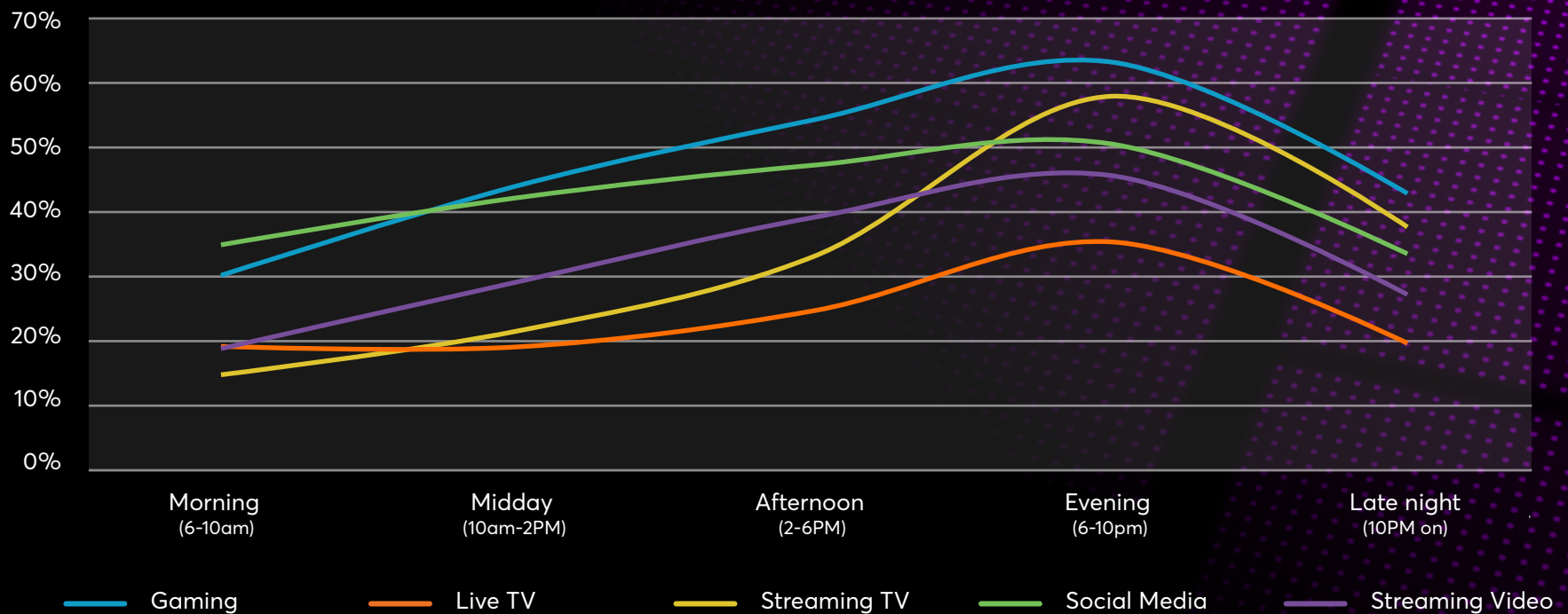


Looking at all audiences, not just those who game, Streaming TV exceeds Gaming by a small margin (57% vs. 43%) during prime time hours and in the late evening. However, gaming activity exceeds streaming at all other times. Gaming also remains a consistent media activity before, during, and after prime time ads.

It's escapism for me. When I get angry or when I've got a lot going on I go to my games and relax."

— Female, 50+

M-F Media Consumption: Weekly+ Gamers



Gaming Engagement Varies by Generation

The way that audiences interact with gaming throughout the day is significantly impacted by their generation. There is no one-size-fits-all approach to understanding gamers' entertainment behavior, but there are similarities across age demographics and groups.

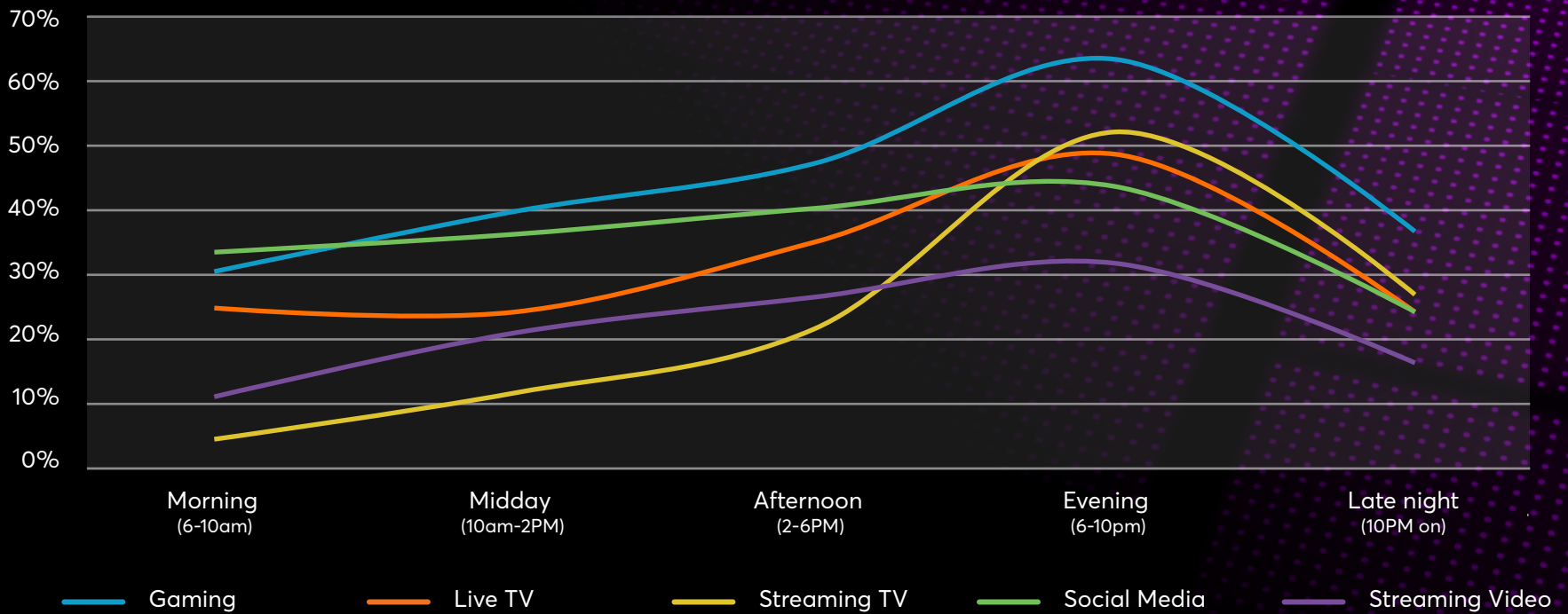
For those that grew up gaming, including audiences in the 18-34yr and 35-54yr age groups, this translates to higher engagement with, and appetite for, gaming in their day-to-day lives, especially in comparison to traditional media such as TV. The gap between gaming and streaming gets much smaller among younger audiences as the Live TV gap widens. And this is not just a trend reflective of the youth. It also provides an important glimpse into the future of media adoption and evolving entertainment consumption habits.



For instance, the 55+ generation reports less engagement with gaming and other entertainment forms throughout the day but demonstrates a larger spike during prime time hours, with Live TV and Streaming TV reaching their peak.



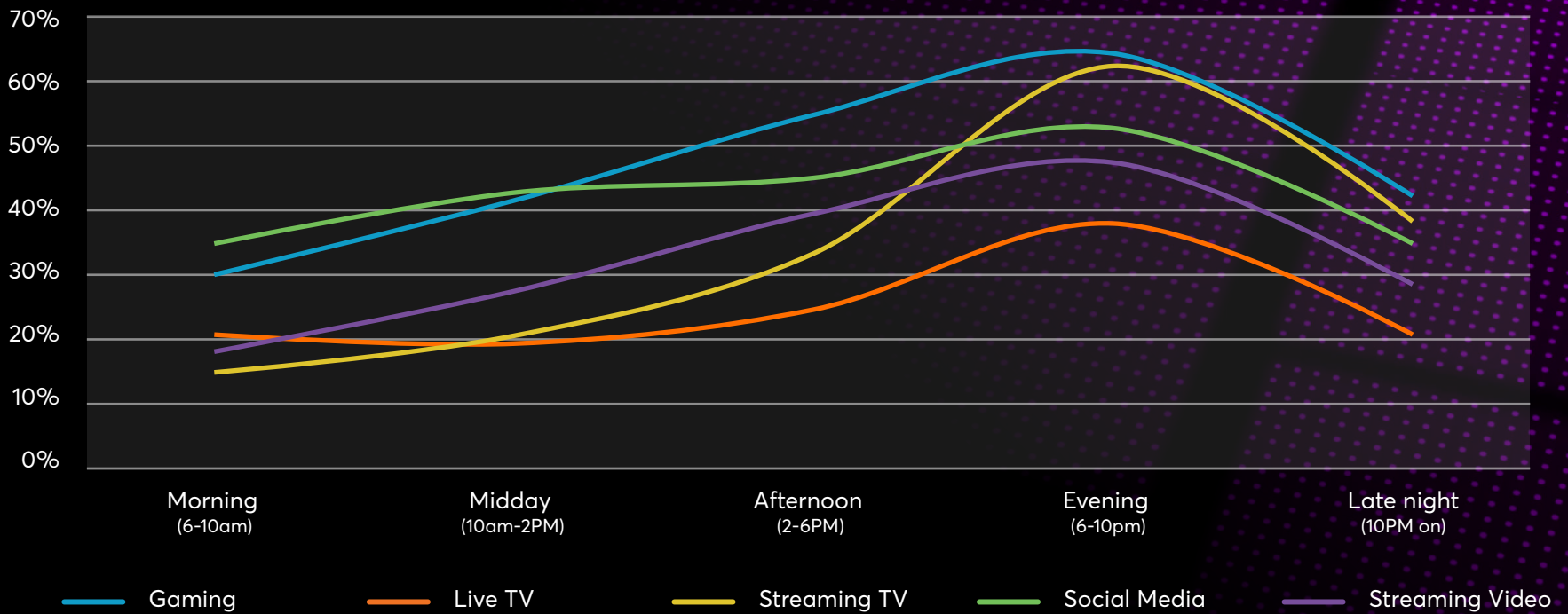
M-F Media Consumption: Gamers 55+



For 35-54yr old gamers, a generation that has also grown up with gaming, Gaming and Social Media are the top two activities throughout most of the day, with Streaming TV overtaking Social Media during prime time hours but falling short of Gaming even at its peak.



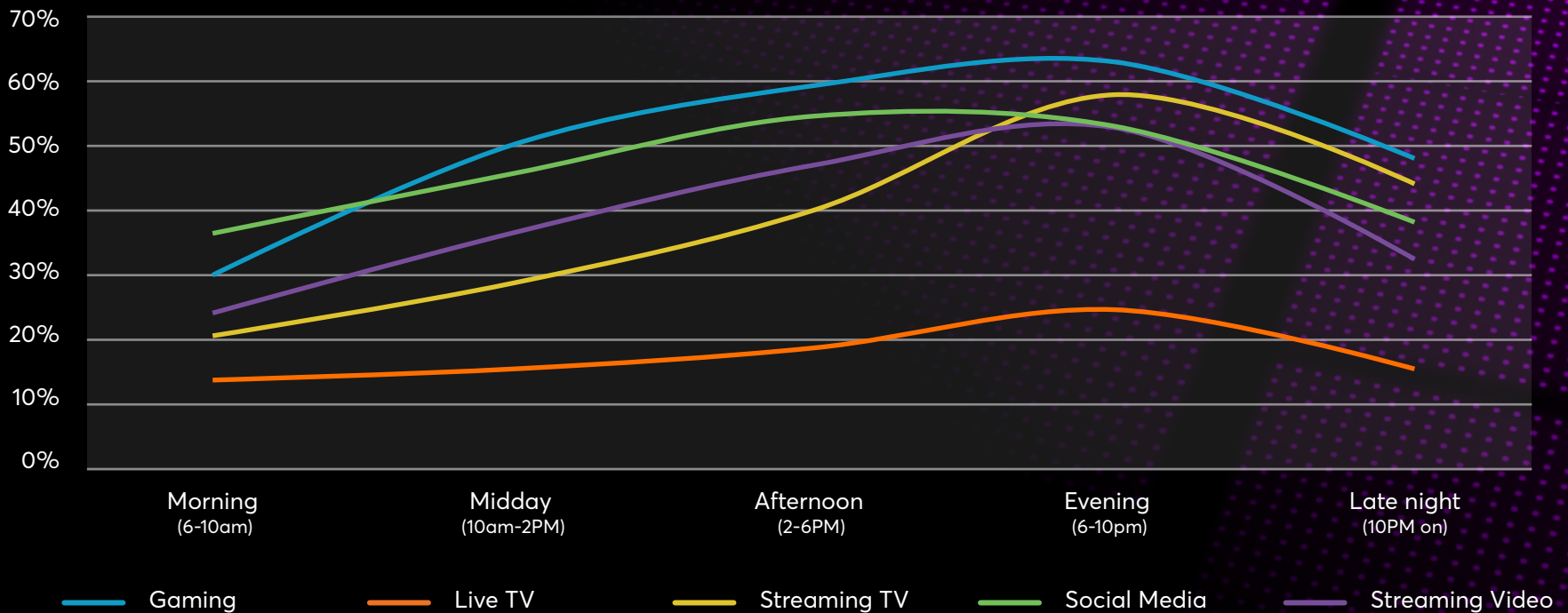
M-F Media Consumption: Gamers 35-54



For 18-34yr old gamers, Gaming is on par with Social Media as a preferred entertainment activity throughout the day, with both activities steadily increasing towards prime time viewing hours. Traditional forms of entertainment, such as Live TV, remain outpaced by Streaming TV, which experiences a spike during prime time. Later on in the evening, however, Gaming emerges as the entertainment of choice, overtaking all other forms of media.



M-F Media Consumption: Gamers 18-34



These generational behaviors are reflective of broader media trends and are an opportunity to better understand future media consumption. While older audiences show higher engagement with traditional media such as TV during prime time hours, younger generations highlight a clear behavioral shift towards engaging with gaming more often throughout the day. As these generations continue to age, they will likely bring their current habits forward, much like the 55+ age group who grew up with appointment television has continued to choose Live TV as a cornerstone source of entertainment.

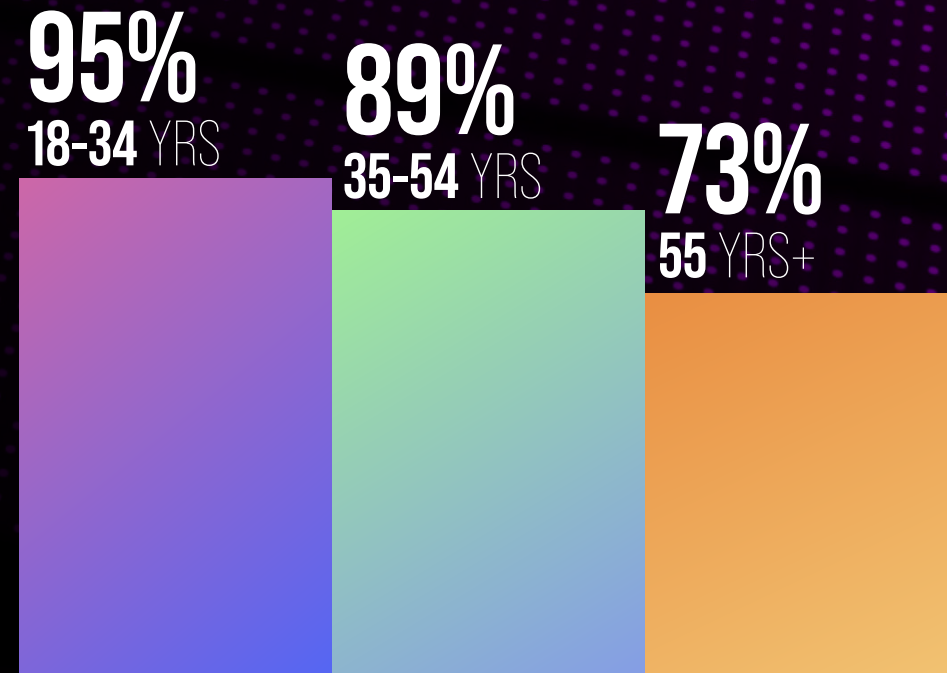


Gaming is a Second Screen Staple

There are more entertainment options available to the average consumer than ever before and an increasingly limited amount of time to engage with them. But it's not just an overabundance of choice offered to today's audiences — they now have more control over their entertainment experiences thanks in large part to advancements in consumer technologies making all entertainment, including gaming, both accessible and portable.

As a result, audiences are increasingly consuming multiple sources of entertainment simultaneously, with 85% of people watching TV with another device in hand, adept at absorbing these multiple experiences while switching between devices. This is especially true for gamers, with 91% of gamers viewing TV with a second screen in hand.

Percent of Audiences Watching TV with Another Device



For gamers, gaming is the number one second-screen activity, with more than half of gamers using a mobile device to game while watching TV. This is because gaming is no longer restricted to high-end PCs or consumer-friendly living room boxes and now provides a seamless second-screen experience via mobile.

Once again, the younger audiences are more likely to be gaming while watching TV, with over half of those in the 18-34yr and 35-45yr demographics stating they use their second screen to game while consuming other forms of entertainment.

"I'm really able to watch anything while playing almost anything...I could be completely focused on a game knowing what I'm doing [and my Wife will ask] 'Oh well what did that person just say on the show?' [I say] 'Oh, they said this and that'."

— Male, 35-49

Percent of Audiences Gaming While Watching TV

68%
of 18-34 YRS

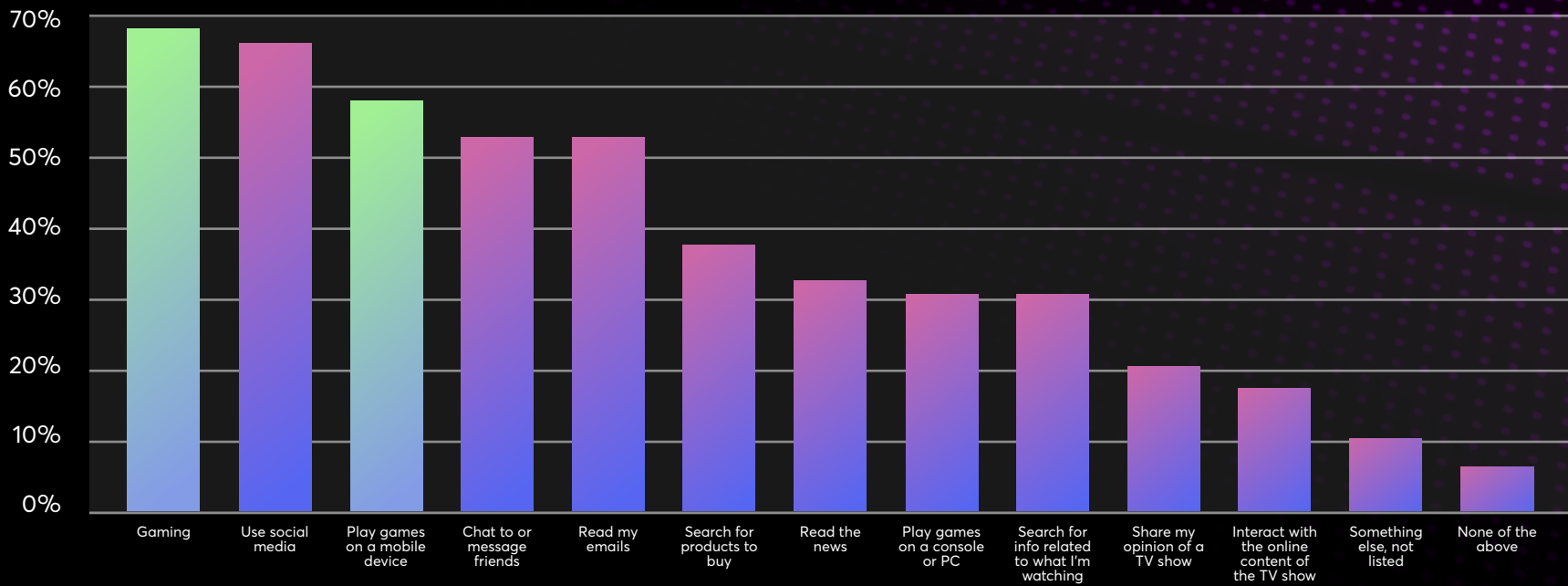
53%
of 35-54 YRS

42%
of 55 YRS+

For esports viewers, engagement with second-screening is even more pronounced. 97% of esports viewers watch a form of television with another device in their hand, 84% with a mobile device, and 53% with a video game console. This is partly due to the younger skew of this subset, with 52% of esports viewers aged 18-34yr, a generation whose overall comfort level with new technology and multiple devices is second nature.



Gamers' Second Screening Activities



Gamers Want Fluid Entertainment Experiences

While consumers have more choice when it comes to their entertainment, they also have more opportunities to switch off and avoid ad experiences that are not engaging or authentic to the environment in which they are viewing them.

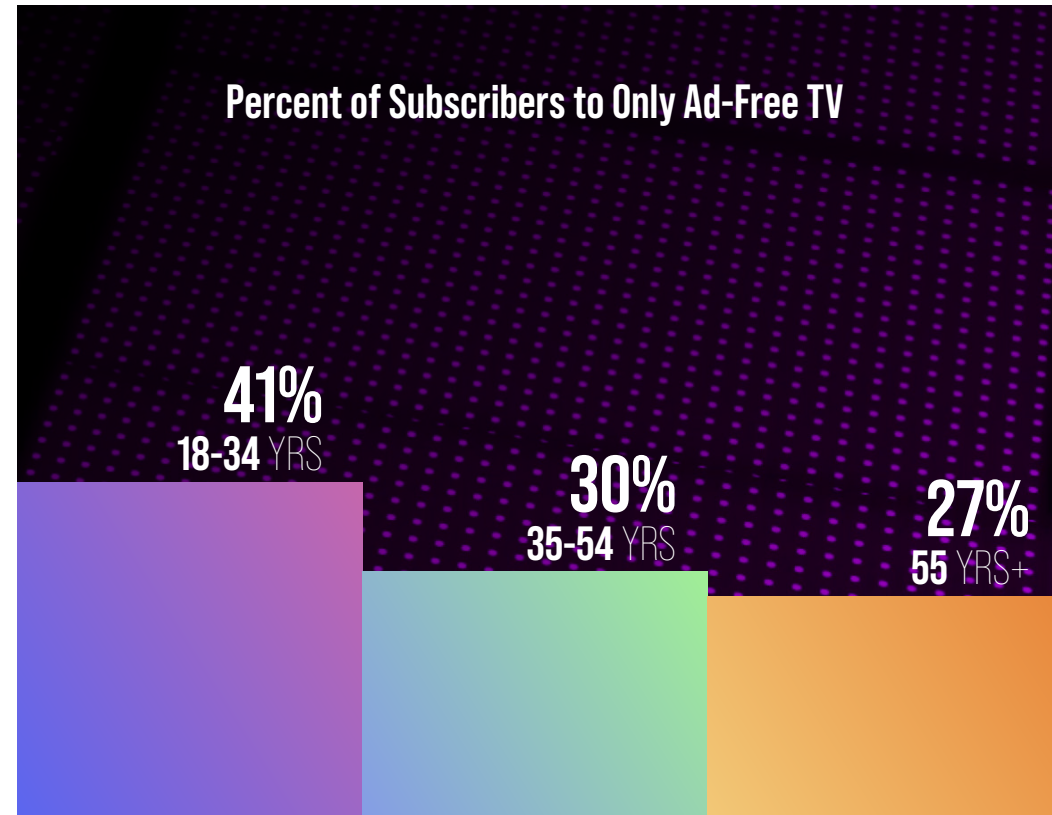
Only one-third of respondents claim to pay attention to TV ads, and with a competing activity happening while audiences are watching TV, inclusive of gaming, social media, and texting, it's clear that consumers will happily transfer their attention elsewhere to avoid advertising.

Further exemplifying this, nearly two-thirds of consumers are willing to pay to skip ads altogether. Across all segments surveyed, 63% prefer ad-free television and streaming, and 51% say they typically avoid watching TV commercials altogether. Even the most active TV viewers (those watching live or streaming TV at least weekly) skip TV and video ads whenever possible (60%), with gamers avoiding ads at a similar rate (61%).



Younger audiences are more likely to opt for premium, ad-free experiences, which enforces the notion that they are typically harder to reach through traditional forms of media. This again signifies a shift in future media behaviors, which could lessen allegiance to ad-supported viewing.

Though more respondents subscribe to a combination of ad-free and ad-supported formats (36%) than one or the other (32%), gamers prefer ad-free viewing experiences and are significantly less likely than non-gamers to subscribe to ad-supported formats only. To capture the attention of this valuable audience, brands need to meet them where they are and activate in immersive and non-intrusive formats.



Percentage of People Subscribing to Ad-Supported Formats



29%
GAMERS

39%
NON-GAMERS

CONCLUSION

Marketing for the Gaming-Centric Future

Entertainment consumption behaviors are not only advancing, they're advancing with each passing generation. And it is gaming that has emerged as a key influencer in shaping consumers' digital entertainment habits and generational media behavior.

For gamers and non-gamers alike, the second screen, once thought to be a deeper way into traditional entertainment, has now become a source of entertainment all its own. And for consumers looking forward to their next moment of play, the second screen provides access whenever and wherever they want it.

But for gamers specifically, gaming has become inseparable from the enjoyment of day-to-day life. From the games that begin during the early morning hours, through mid-day, and well into the evening, gaming has become part of a carefully curated and enriched entertainment experience. It's an open dialogue between the community, the creators, and all things additive. It's a rewarding, immersive experience that is second to none.

Audiences have never had access to more entertainment options or greater control over their experiences, making it easier for them to switch off from ad experiences that are intrusive and interruptive. With these audiences consuming more media across multiple devices at any one time, it is crucial that brands create experiences that are immersive and authentic to the environment and reach consumers on their preferred platforms at moments of key engagement. For gamers, this means connecting with them during play in a way that offers value and enrichment to the players.

As the influence of gaming continues to grow, so too does its value, creating more opportunities to connect with a highly-engaged and essential audience.

Methodology

Activision Blizzard Media partnered with Toluna insights to perform a quantitative online survey of 2000 US adults 18+. All respondents used at least one of the following mediums: gaming, streaming tv, live tv, and esports. This study was fielded for a week in December 2021. We also partnered with Michelle Madansky Consulting to interview 12 gamers for 90-minutes, including 17 gamers located in the US and UK, about a day in the life of their media consumption.

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

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