



# GAMERS & BRANDS

Making a meaningful difference  
Inspiring meaningful connections



vivendi **Brand  
Marketing**



# Gaming

Market dynamics



# Gamers

New faces of gaming



# Brands

Making a difference



# Content

Inspiring connections

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# Our unique Brand Framework for Gamers

## Studies

Meaningful Brands™

Meaningful Content™

+ “Entertainment  
in a New world”

## Scope

**31** countries

**22** industries

**+1,800** brands

## Sample

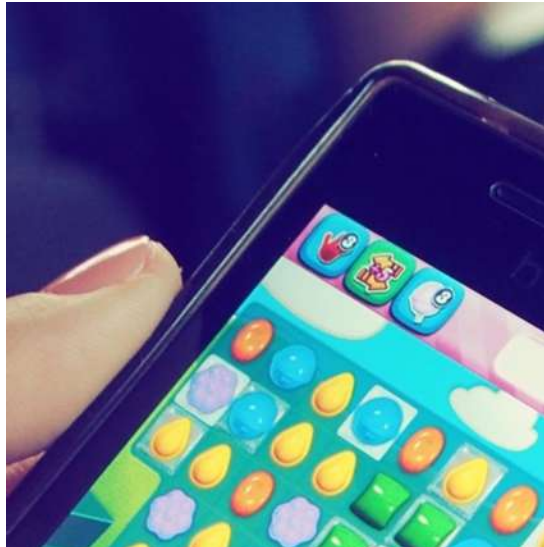
**+82,200**

Gamers  
Interviewed  
globally

## Collection

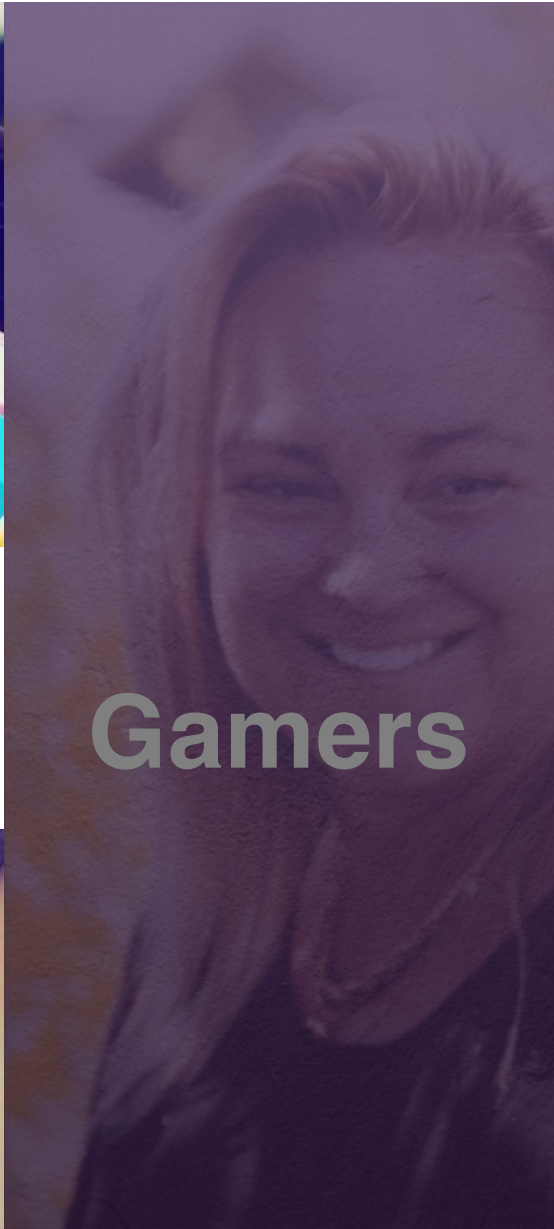
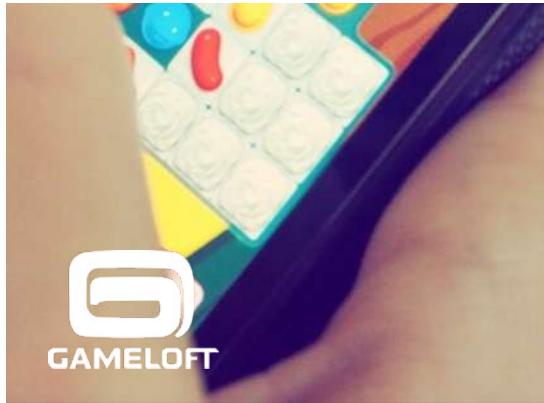
Quantitative  
questionnaire

Online surveys through  
DYNATA proprietary  
panel



# Gaming

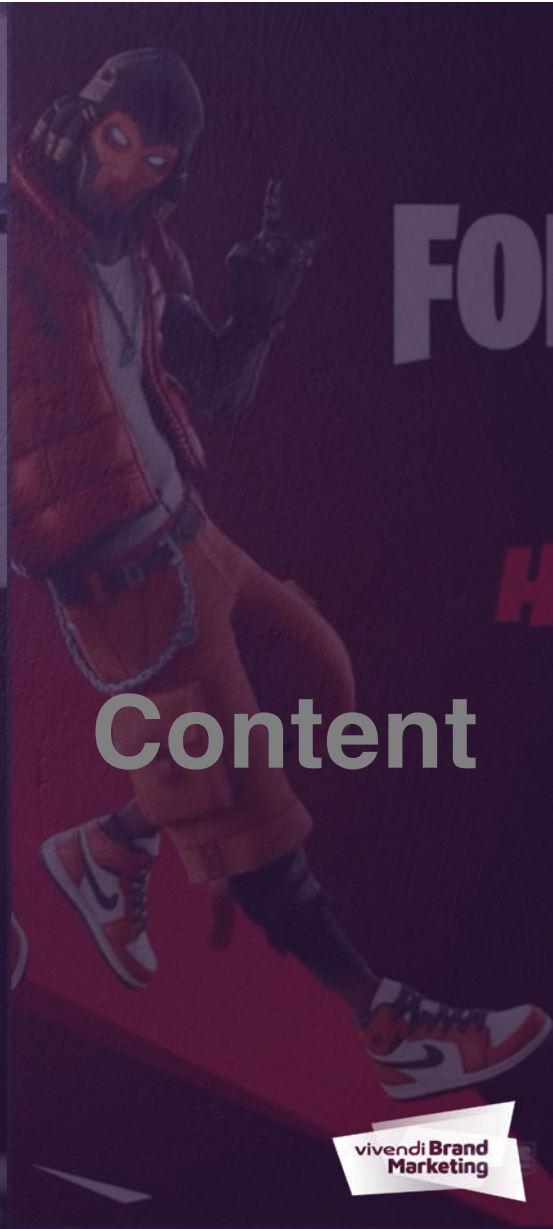
Market dynamics



# Gamers



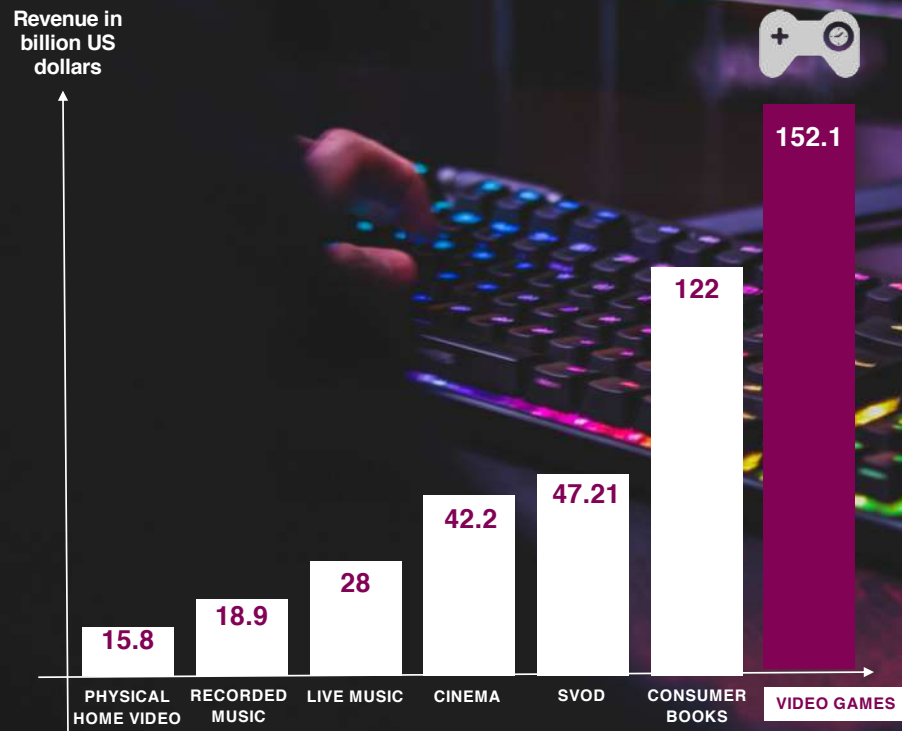
# Brands



# Content

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# World's Biggest Entertainment Industry



**\$152Bn**  
WORLDWIDE REVENUE in 2019

Source: Newzoo, Statista, Pwc (2019)

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**51%**

of consumers worldwide play  
**Video Games**  
**AT LEAST ONCE A MONTH**

**39%**

of consumers worldwide play  
**Video Games**  
**AT LEAST ONCE A WEEK**

# A quarter of daily gamers worldwide

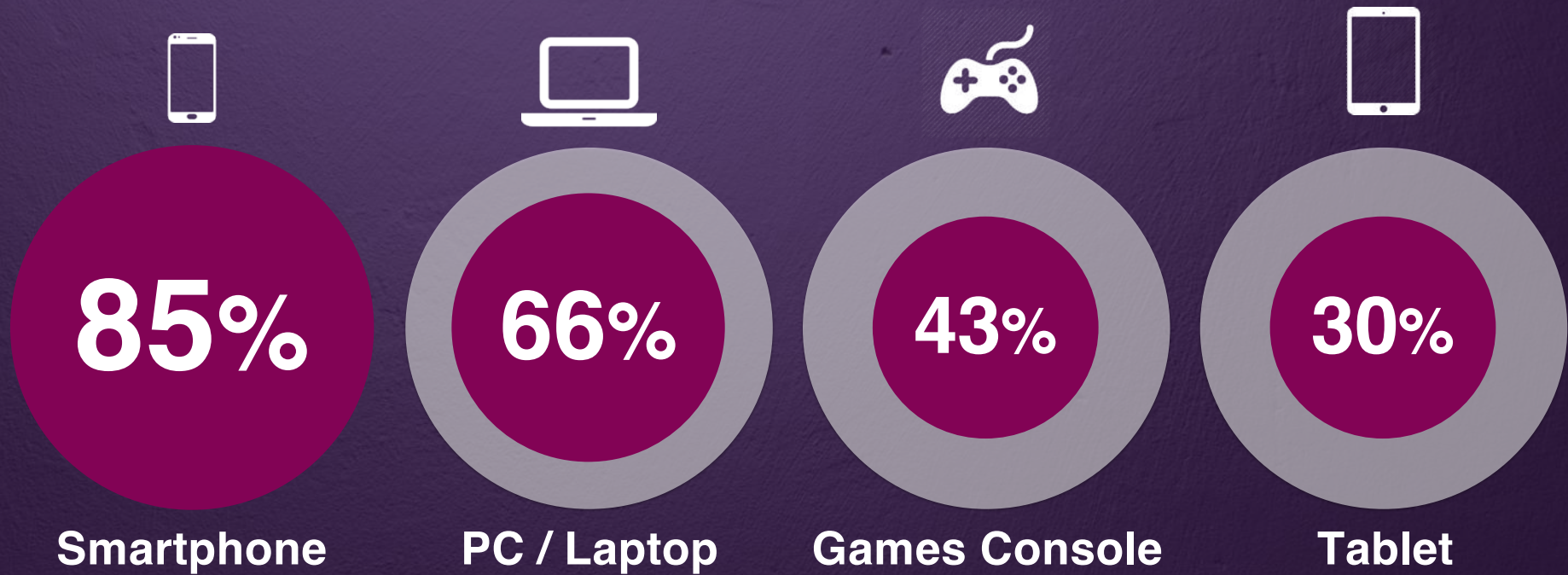
**23%**

of consumers worldwide play  
**Video Games**  
**EVERYDAY**

SOURCE: Meaningful Brands®

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# 5 in 6 gamers in the world play on mobile

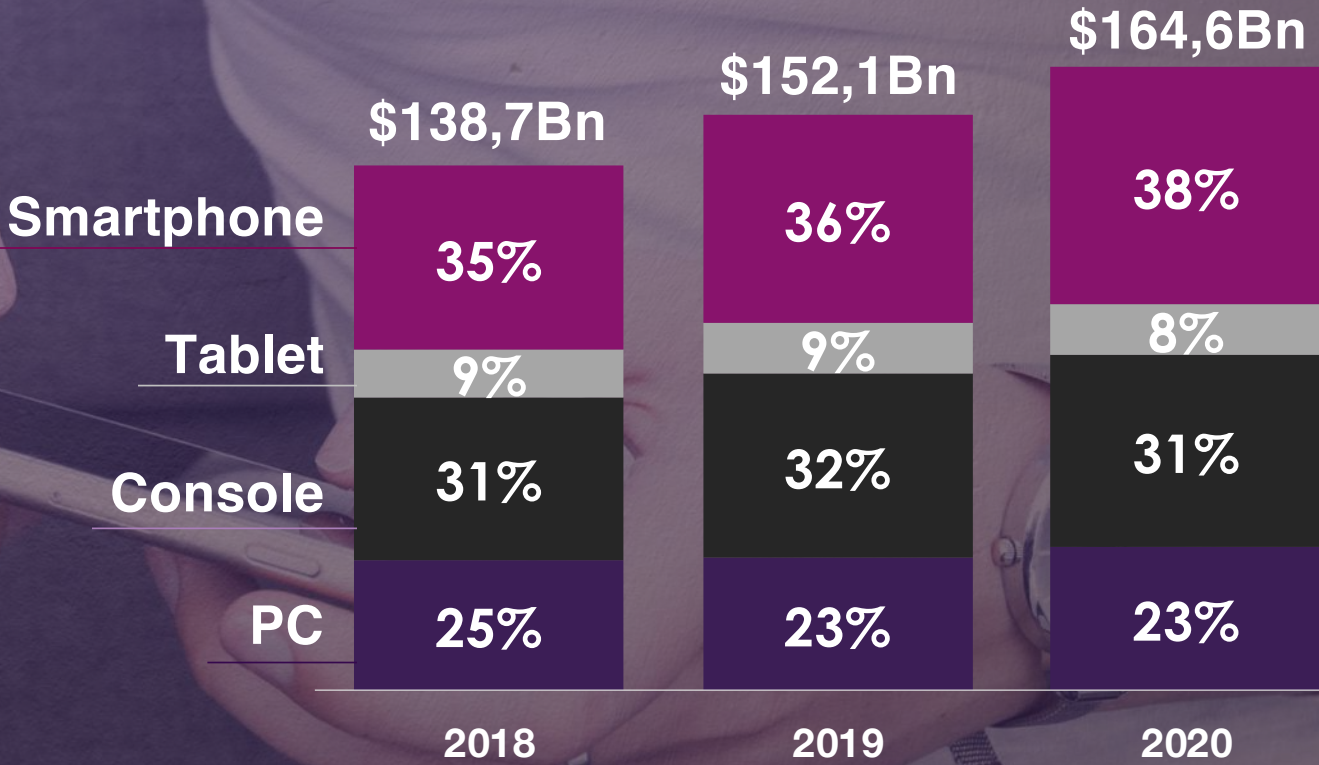


SOURCE: GWI The world of Gaming (2020)  
% of Gamers who use the following devices for gaming

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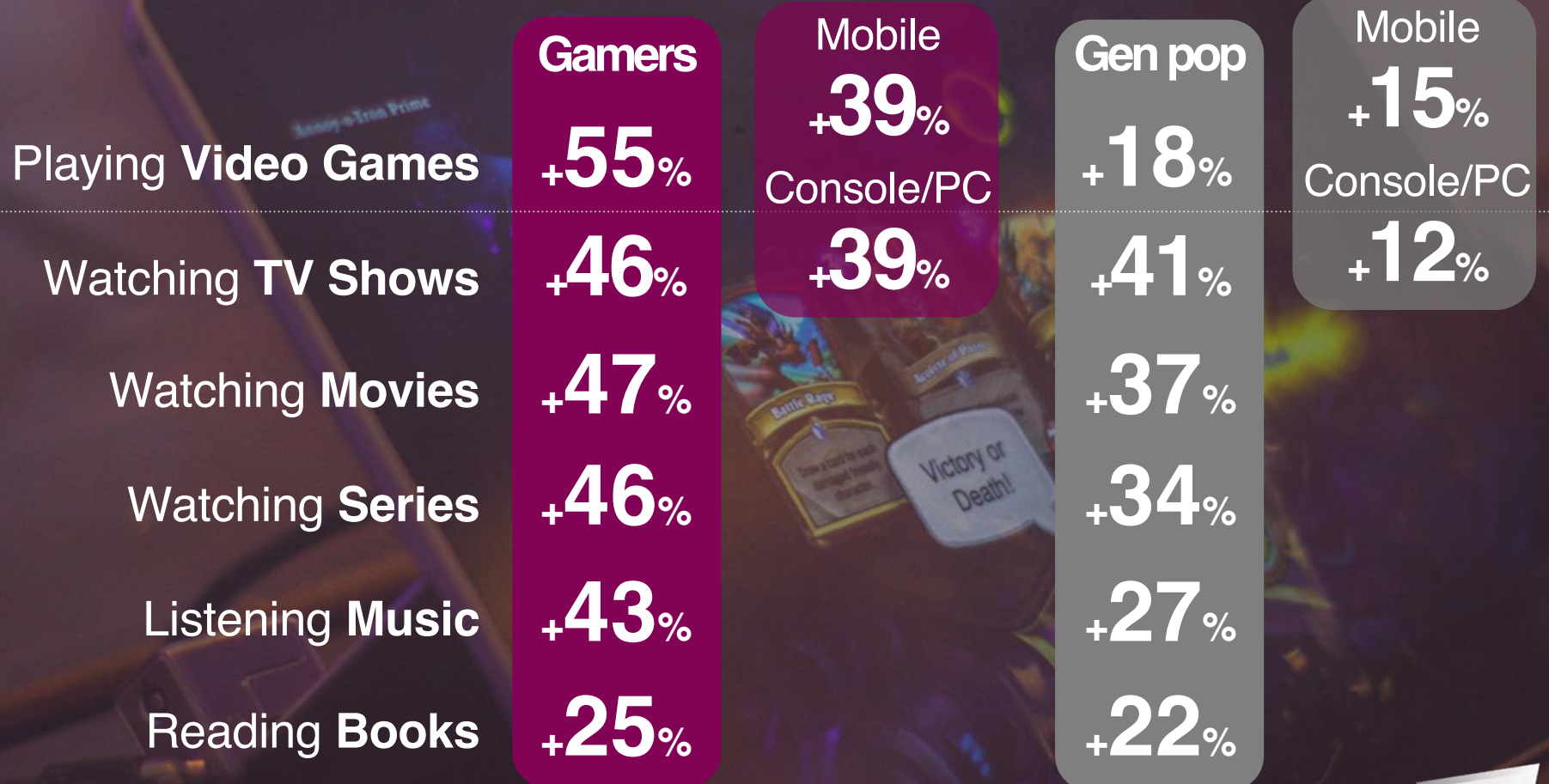


# Market growth driven by Mobile



SOURCE: Newzoo 2019  
Global games market revenues (in Billions \$)

# Increased consumption during Covid crisis



SOURCE: Entertainment in a New World (Vivendi)

% Balance of consumers practising each activity **MORE** - **LESS** than before the crisis started

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# ... both individual & multi-players games

## Gamers

By myself

**+45%**

Multi-players

**+29%**

## Overall

By myself

**+13%**

Multi-players

**+4%**

SOURCE: Entertainment in a New World (Vivendi)

% Balance of consumers practising each activity **MORE** - **LESS** than before the crisis started

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# Multi-players games connected gamers

**74%**

of Gamers think **Multi-players video games** enable them to keep a social contact

**55% Overall**

# Confinement left spare time to try new things

**8%** Played Games  
on **Mobile** for  
the **1<sup>st</sup>** time

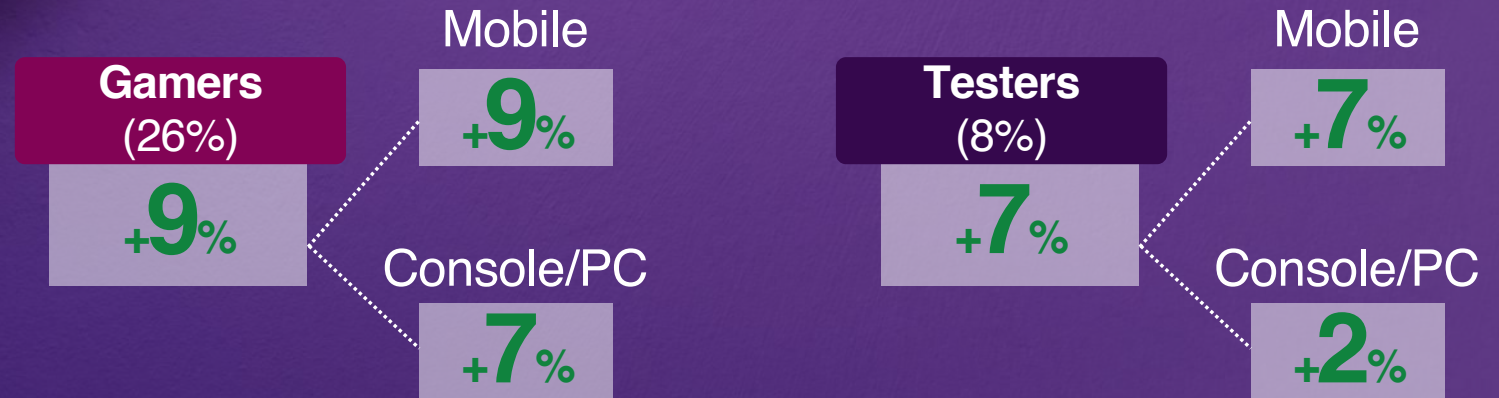
**7%** Played Games  
on **Console/PC**  
for the **1<sup>st</sup>** time

SOURCE: Entertainment in a New World (Vivendi)

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# Gamers will play more after the lockdown (vs. before) ...and some of the Testers will stay



SOURCE: Entertainment in a New World (Vivendi)

\* "Testers": People who played video games for the 1st time during lockdown

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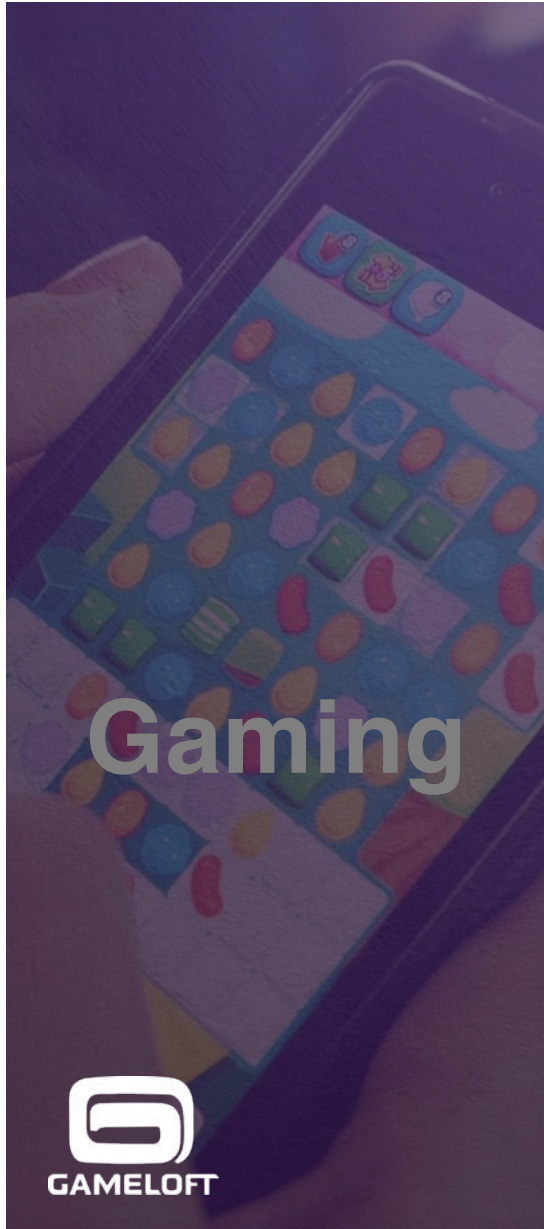
# Future of gaming: a continuous growth!

**\$152Bn**  
of revenues  
in 2019

**+\$200Bn**  
of revenues  
expected  
in 2023!

SOURCE: Newzoo.com

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**Gaming**

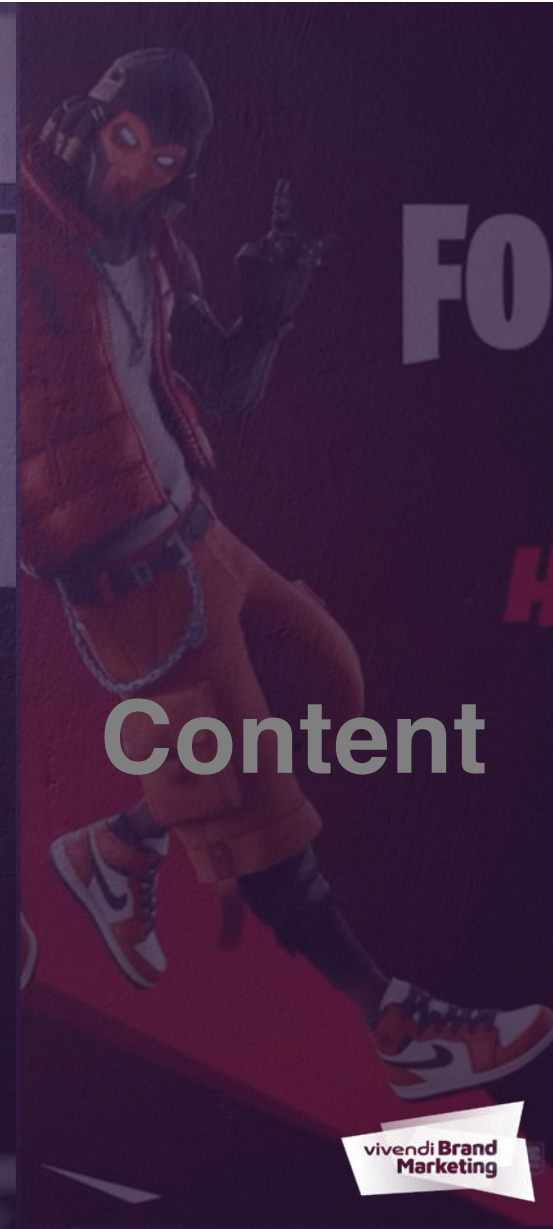


# Gamers

New faces  
of gaming



**Brands**



**Content**

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# Busting a myth!

**51%**

of **Women** amongst Gamers

SOURCE: Meaningful Brands®  
Gamers = Playing video games at least once a day

**55%**

of **36 y.o.+** amongst Gamers

And "ONLY"

**26%**

of **18-35 y.o. Men** amongst Gamers

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# Aware & Connected

**50%**

of gamers say they are actively

**engaged in  
pop culture**

*(+12pts vs. Non-gamers)*

**47%**

of gamers could not live without being

**connected**

**24/7**

*(+9pts vs. Non-gamers)*

SOURCE: Meaningful Brands®  
Gamers = Playing video games at least once a day

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# Amplifiers & influencers for Brands

**56%**

of gamers say they  
**trust companies  
& brands**

*(+9pts vs. Non-gamers)*

**57%**

of gamers say they are a  
**trusted source  
of advice**

for their friends & family  
*(+9pts vs. Non-gamers)*

SOURCE: Meaningful Brands®

*Gamers = Playing video games at least once a day*

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# Expecting brands to have a purpose

**62%**

of gamers say they have

**more trust in socially  
& environmentally  
responsible brands**

*(+7pts vs. Non-gamers)*

**58%**

of gamers say they

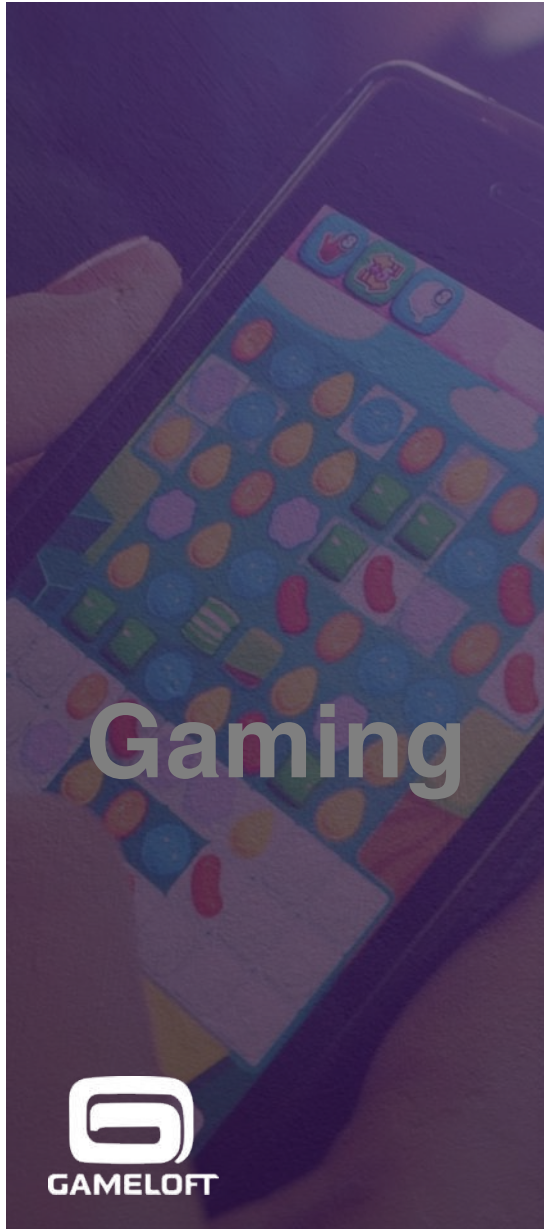
**prefer to buy from  
brands with a purpose**

other than just profits

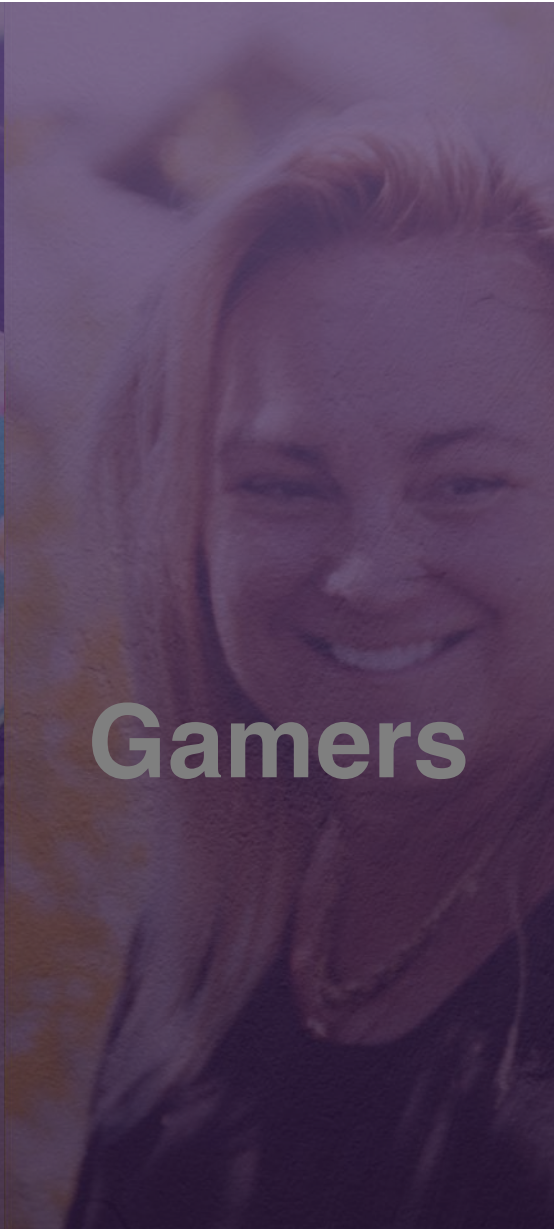
*(+7pts vs. Non-gamers)*

SOURCE: Meaningful Brands®  
Gamers = Playing video games at least once a day

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**Gaming**



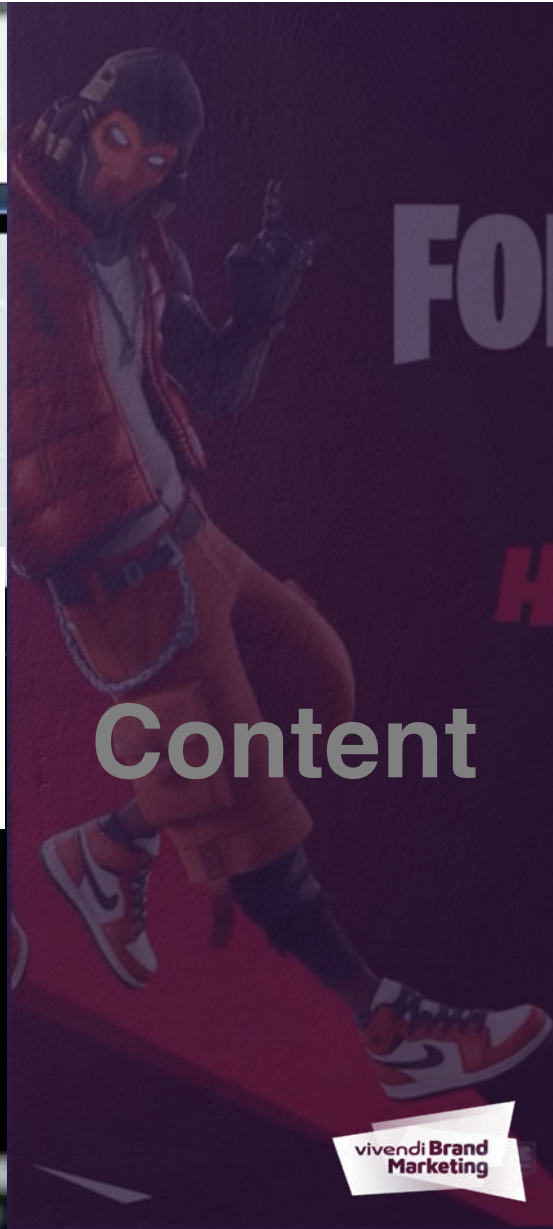
**Gamers**



**MEANINGFUL BRANDS**

**Brands**

Making a difference



**Content**

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# Defining meaningful

Understanding what matters



## Functional benefits

Does the product or service deliver?

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## Personal benefits



How brands improve peoples' lives?



What's their role in society?

## Collective benefits

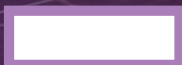
**MB INDEX = Brand Performance + KPIs**

# Most Meaningful Brands

Lots of tech & auto brands in the TOP 30 Global Brands for Gamers

1 78,8	2 77,3	3 76,1	4 76,1	5 76,0	6 75,6	7 75,0	8 74,7	9 74,5	10 74,1
11 74,0	12 74,0	13 73,7	14 73,7	15 73,6	16 73,2	17 73,1	18 73,1	19 73,0	20 72,9
21 72,8	22 72,6	23 72,6	24 72,5	25 72,4	26 72,2	27 72,1	28 72,0	29 71,9	30 71,9

MEANINGFUL  
BRANDS



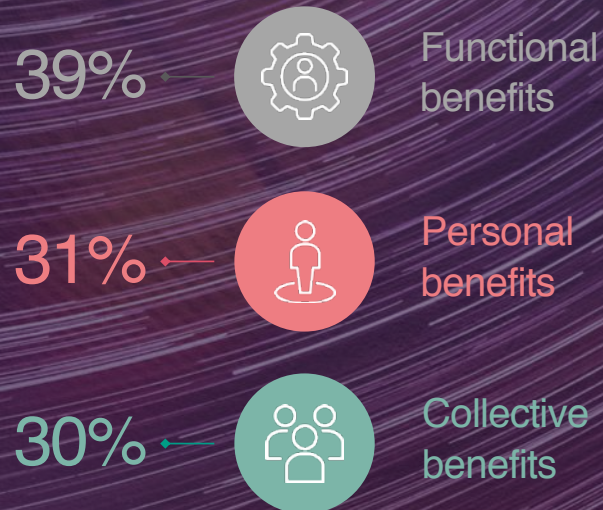
Brands more meaningful amongst Gamers (vs. Non-gamers)

A Global Brand is a brand assessed in at least 3 markets and 2 regions in MB19, and available worldwide.

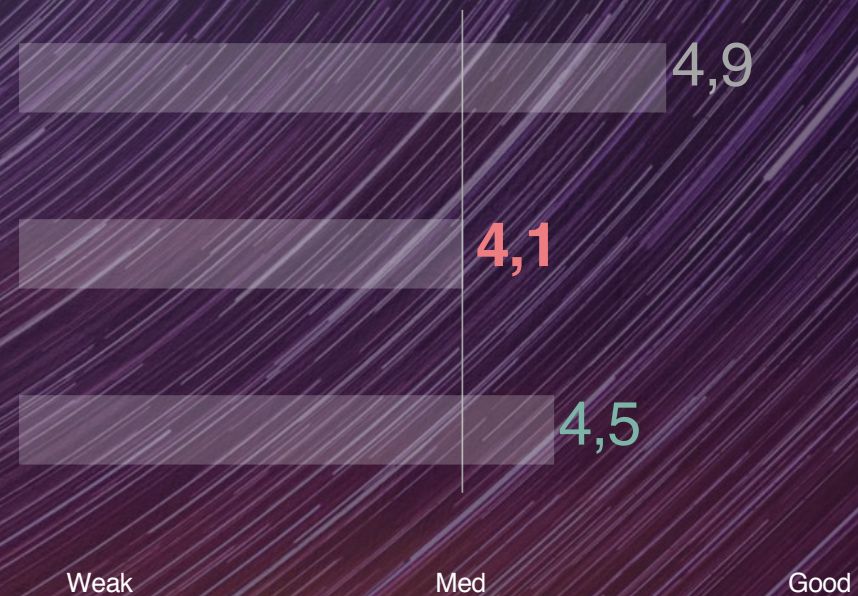
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# But most of brands fail on personal

## DRIVERS' IMPORTANCE



## BRANDS' PERFORMANCE





# Great content drives personal benefits

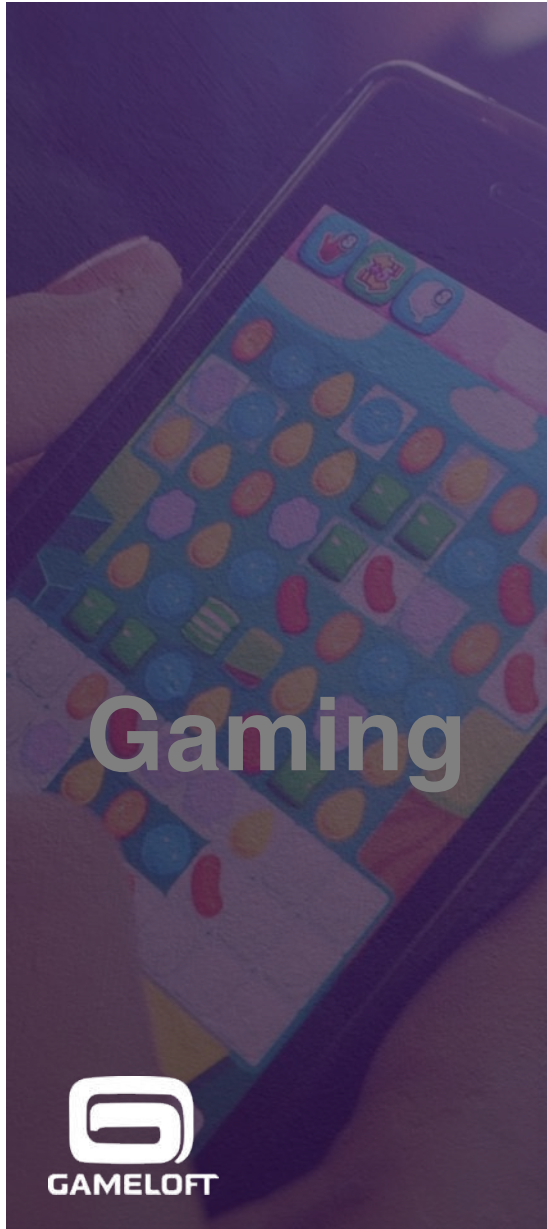
72%

Correlation between performance on Personal Benefits and Content Effectiveness\*

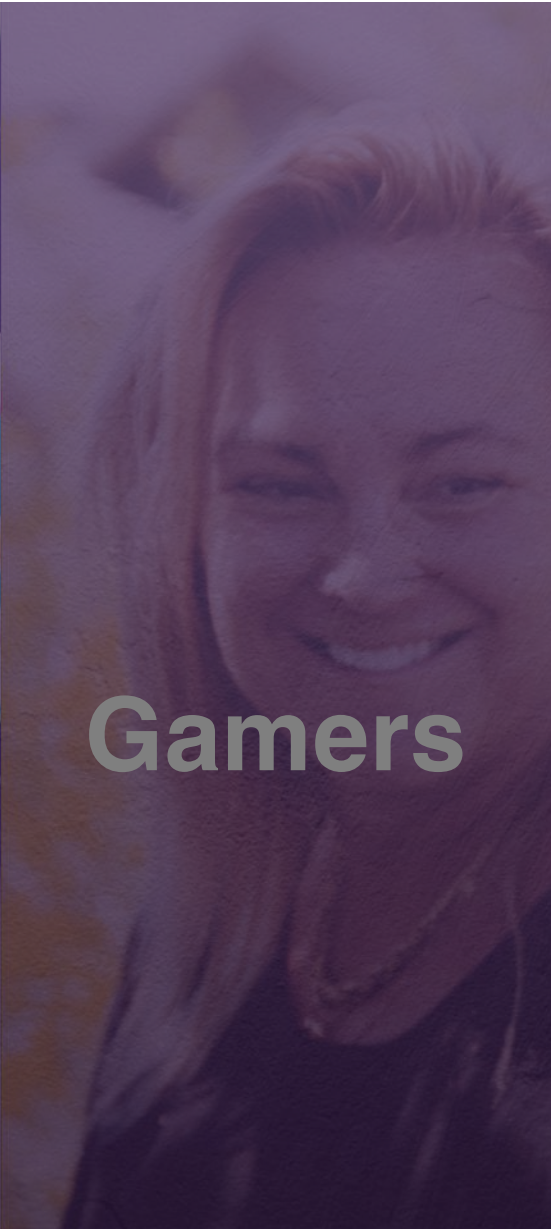
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BRANDS

\*CONTENT EFFECTIVENESS is defined by crossing the strength of association of a brand to content types and the performance of the content performed by the brand

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Gaming



Gamers



Brands



Content

Creating connections



# 92% of Gamers Expect Brands to provide Content



Experiences



Solutions



Entertainment



Stories



Events

# Almost half of content is just clutter...

**44%**

of the content provided by brands

**is not meaningful  
to GAMERS**

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CONTENT

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# A unique framework

**18**  
Content  
Territories



**6**  
Content  
Roles



**43**  
Content  
Types



**Consumers Expectations**



## Brands' **social responsibility** is key amongst Gamers

Gaming not a territory as such, but a container - gamification being used on all territories...

## Most expected Territories

Charity / Causes	62%
Lifestyle / Trends	58%
Well Being / Health	55%
Hi-tech	55%
Social topics	52%
Food / Beverages	51%
Travel	51%
Sport / Fitness	51%
Children Education	48%
Music	46%

...

FDA U.S. FOOD & DRUG ADMINISTRATION

"THE REAL COST OF SMOKING"



60%

of Gamers expect

Institutions

to preempt

Causes



MEANINGFUL CONTENT

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**56%**

of Gamers  
expect

**BMW**

to preempt

Music



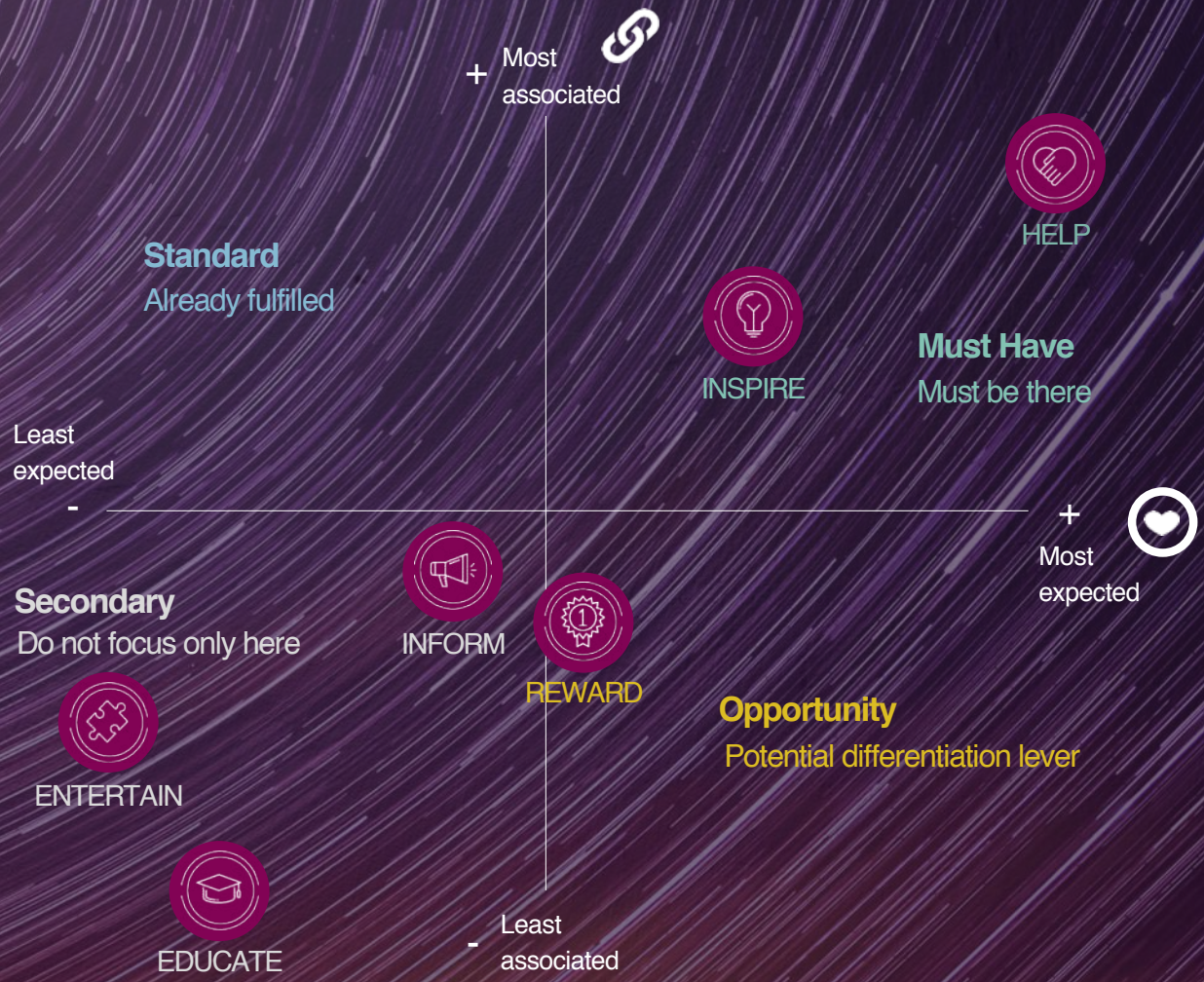
MEANINGFUL  
CONTENT



6 Content Roles

# HELP, INSPIRATION & ... REWARD

most expected from brands by GAMERS



63%

of Gamers  
expect

Get the ultimate performance upgrade

with **Michelin**  
+10 minutes  
to provide



HELP

MICHELIN PERFORMANCE BOOST!



0h 09m 57s

FREE



MEANINGFUL  
CONTENT

58%  
of Gamers  
expect

RETAIL  
brands  
to



REWARD

MEANINGFUL  
CONTENT



WHERE  
SHOPPERS  
PLAY  
BRANDED  
MINI GAMES

43

Content  
Types



# User-generated content: key along the CDJ

Charity events & Loyalty Programs / VIP experiences are also expected

## FAMILIARITY

CRS POSTS ON SOCIAL MEDIA  
BEAUTY / MAKEUP EXPERIENCE

## PURCHASE

CRS POSTS ON SOCIAL MEDIA  
PRODUCT INFO  
CO-CREATION  
VIP EXPERIENCE  
LOYALTY PROGRAM  
PRODUCT CUSTOMIZATION  
CONSUMERS' TESTIMONIAL  
INSPIRATION TOOL/APP  
PERSONALITIES' TESTIMONIAL  
CHARITY

## REPURCHASE

PRODUCT INFO  
CRS POSTS ON SOCIAL MEDIA  
CONSUMERS' TESTIMONIAL  
LOYALTY PROGRAM  
CHARITY  
ISSUE-SOLVING TOOL/APP  
CO-CREATION  
INSPIRATION TOOL/APP  
VIP EXPERIENCE  
PRODUCT CUSTOMIZATION

## ADVOCACY

CRS POSTS ON SOCIAL MEDIA  
PRODUCT INFO  
CONSUMERS' TESTIMONIAL  
CHARITY  
CO-CREATION  
LOYALTY PROGRAM  
INSPIRATION TOOL/APP  
VIP EXPERIENCE  
PERSONALITIES' TESTIMONIAL  
ISSUE-SOLVING TOOL/APP

## PREMIUM PRICE

TV SHOW  
CELEBRITIES COLLABORATION  
ARTISTS' TESTIMONIAL  
PERSONALITIES' TESTIMONIAL  
CRS POSTS ON SOCIAL MEDIA  
CO-CREATION  
SHORT MOVIE/ VIDEO  
MUSIC VIDEO  
PRODUCT CUSTOMIZATION  
VIP EXPERIENCE

MEANINGFUL  
CONTENT

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**74%**  
of Gamers  
expect

**AUTO LUXURY**  
brands  
to offer

VIP  
EXPERIENCES

#

**A9LEGENDARYTRIP**  
BRIDGING THE VIRTUAL AND THE REAL

MEANINGFUL  
CONTENT



# Gamers & Brands

## In a few words...



# Gamers: a powerful target, with unfulfilled expectations towards brands

A huge & growing global market of \$165Bn, more than music or OTT videos...

A growth driven by mobile – and strongly boosted during the Covid crisis

**Busting the myth** of gamers: more women & older, influencers & demanding vs. brands



# Brands must now address these expectations while being aligned with their own DNA

Gamers expect brands to provide personal benefits – but most of brands fail to deliver on personal

Content - especially gamified - is a great way to drive those personal benefits to gamers, mainly through:

- **Charity / Causes**, being a real concern for Gamers
- **Help / Inspiration / Reward**, primarily asked
- **User-generated content**, loyalty programs & VIP experiences, relevant all along the CDJ



Thank You



GAMELOFT

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