GAMING
playbook

yieldmo
MAKING ATTENTION ACTIONABLE

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THE GAMING INDUSTRY

When you hear someone called a "gamer," does the image of a hermit who lives on mac and cheese in their mother's basement come to mind? Well, that stereotype is a thing of the past.

Roughly one-third of the planet's population – that's 2.6 billion people – will play a mobile game this year. And according to the latest figures from ejInsight, the video game business is now larger than both the movie and music industries combined, making it a significant entertainment industry.

This playbook will share how the gaming industry has changed and what trends will shape it over the coming months.

POST-COVID GAMING TRENDS

This year, the global games market is estimated to generate **$152.1 billion** from **2.5 billion** gamers worldwide across PC, mobile, and console gaming.

Similar to its film counterparts, gaming franchises lead the marketplace with titles such as Mario, Pokemon, Call of Duty, Grand Theft Auto, The Sims, League of Legends, and FIFA, just to name a few. The promotion of these new titles' releases can start as early as 2-3 months before launch, focusing on pre-sales. And these legacy titles have such a massive following that marketing efforts will focus on retention and a strong emphasis on new users.

Gaming has always been a digital-first medium, which means developers and platforms can better understand its users more than any other entertainment channel.

Most companies accept and will share first-party data to better target users.

As stay-at-home orders were issued due for COVID-19 in early 2020, the gaming landscape changed to an always-on entertainment option.

According to a June 2020 Statista study, consumers aged 15 to 19 years spent 64 minutes on gaming or leisurely computer use during an average weekday, and more than 70 minutes doing so during weekends or holidays.

However, in an April 2020 webinar, EA's CMO, Chris Bruzzo, said there is no longer a "quiet period" with typical day parts of gaming engagement. Traditionally slow weekdays such as Mon-Wed are starting to look more like the weekend.

The number of net-new players has seen a massive influx during the pandemic. In April, Microsoft disclosed that the number of subscribers to its Game Pass service (think Netflix-for-gaming) cracked 10 million. Among those subscribers, Microsoft reported a **130%** increase in multiplayer engagement across March and April. Nintendo announced in early 2020 its Switch console sales were up **24%** year-over-year, while its new game, "Animal Crossing: New Horizons," had sold **13.5 million** copies since its release in late March.

Overall, video game sales in March 2020 approached **$1.6 billion**, representing a **35%** year over year increase, according to NPD.

Gaming is more than just playing. It's watching.

Many people spend more time watching someone play a game rather than playing it themselves because of it.

The most crucial factor in the gaming business is Twitch, a video live-streaming service operated by Twitch Interactive, a subsidiary of Amazon.com, Inc. Introduced in June 2011 as a spin-off of the general-interest streaming platform, the site primarily focuses on video game live streaming. Content on the site can be viewed either live or via video-on-demand.

Since its launch nine years ago, Twitch reports it now has **17.5 million** daily unique viewers who watch the more than 4 million unique streamer creators each month, and users watched more than 600,000,000,000 minutes of gaming in 2019.

Similar to watching traditional sports such as basketball or baseball on TV, viewers tune in to learn new tricks or skills to beat a certain level and connect as they chat, discuss, and criticize each other's technique. Viewership can also provide an enviable future to anyone who can work hard enough to go pro.

With the pandemic's change to daily habits and behaviors changing, Twitch saw **1.49 billion** gaming hours watched in April 2020 — a **50%** increase since March 2020 — according to data from Arsenal.gg.

To keep users excited and engaged, gaming companies create new experiences such as syndicated tournaments with athletes and celebrities across cable television networks - bridging the gap between television and gaming. According to the Washington Post, "The rising tide of video games over the past couple months [during the pandemic] has also buoyed gaming, as cable networks look to fill airtime that once belonged to now-idle traditional sports programming. Officially licensed video games of Major League Baseball, the NBA, NFL, FIFA, Formula 1, and NASCAR have aired on, variously, Fox, Fox Sports, NBC, ESPN, and ESPN 2 during prime slots over the past few weeks. In the case of eNASCAR on Fox, it drew over **1.3 million** viewers."

For example, rapper Travis Scott played a virtual concert on battle royal game Fortnite debuting his song "The Scotts" to an audience of more than 12.3 million people.

Another example is gaming superstar Ninja playing Fortnite with All-pro NFL Receiver Juju Smith-Shuster of the Pittsburgh Steelers, Drake, and Travis Scott, which broke the Twitch concurrent viewership of 630,000 people. The NBA also held tournaments with current NBA players hosted on ESPN, playing NBA 2k20.

Marketing to Gamers has shifted towards direct engagement with tailored messaging and more social media interaction.

The rise of professional eSports:

With gaming becoming more and more popular with today's kids, especially GenZ, professional leagues have formed and thrived over the years.

League of Legends has a **115 million** monthly player count and a peak of **50 million** daily players. And according to Statista, a combined **36.8 million** hours of League of Legends watched (not played) on Twitch in one week in October 2020.

In 2018, more than **99.6 million** people globally watched the League of Legends World Championship online. A close second to the **102 million** total viewers tuned into the 2018 Super Bowl - the most-watched television broadcast of the year.

The addition of streaming has made it easier for players to create an image and sell merchandise for their personal financial growth - either alone or with their "team."

While eSport teams are more often the ones with the sponsorship deals, platforms, and the ability to enter high stakes tournaments, solo superstar players like Ninja are finding partnerships of their own. Tyler "Ninja" Blevins is a rock star in the gaming world with more than **15 million** Twitch followers and has sponsorship deals with Adidas and Red Bull. Last summer, Ninja shook up the game streaming industry when he took an exclusive agreement with Microsoft's Mixer for an estimated **$20 million to $30 million.**
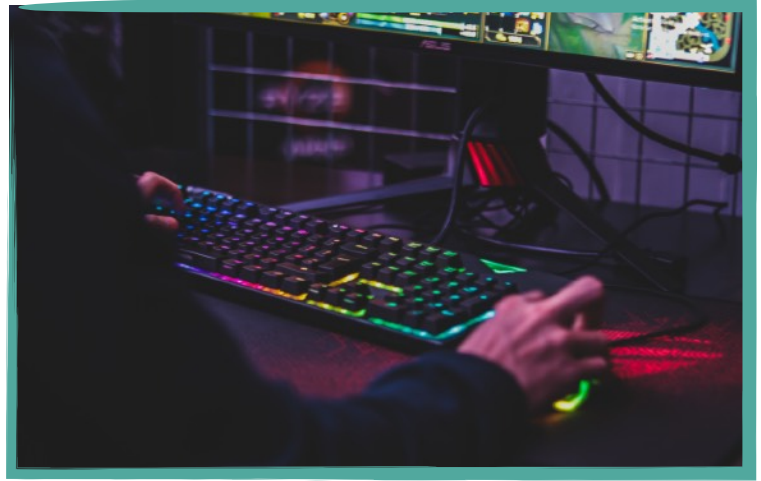
CONSUMER PROFILE

The gaming consumer is broad and depends on the specific game. While 40 percent of video game players still come from the 18 to 35 age demographic, some 21 percent are 50 years and older.

As the digital-first generation, Millennials have a significant impact on the gaming industry. According to a new report from Nielsen, **71%** of Millennial gamers watch gaming video content, or online videos about games, on platforms like YouTube and Twitch. **54%** have a full-time job and **46%** have children. And not just males, but a new report suggests females represent 45% of all gamers. Gaming has transcended the game but has become a lifestyle for many enthusiasts. For example, a couple decided to invite their wedding party to use Sims for a virtual re-creation of their wedding.

The gaming market has a ton of subcategories for brands to use for targeting. Since each type of gamer is unique to the games they play and watch, the gaming market has tons of subcategories that can be used for targeting, many of which cross generational boundaries.

YIELDMO SOLUTION

For gaming clients, Yieldmo focuses on data and contextual alignment by building out custom gaming segments that utilize Oracle data as an added value to reach specific audiences. Additionally, Yieldmo can also craft an inclusion list at the placement level, thus ensuring the most granular contextual relevance. This added value will save money and inevitably bolster ROI.

Yieldmo can help gaming clients win by creating contextual alignment at the placement level to reach "high-value gamers," parents, and GenZ'ers and help them create impactful creative to reach them at scale.

Yieldmo 'placements' are subsections of the domains we serve on - for example, we can get down to the gaming section across our wide breadth of publishers, allowing us to make sure that we're reaching only the client's intended audiences.

Most gaming brands have first-party data under lock and key. To break through this barrier, Yieldmo provides clients with a third-party data layer to model this proprietary data to understand audiences better and create industry-best content curation.

UPPER FUNNEL

Yieldmo's innovative video formats (outstream) and high impact units such as Pinhole and Megashopper are essential to promote trailers and engaging consumers in the gaming world. These units have efficient reach, scale, and help drive attention.

Many KPIs relate to the reach and frequency of target audiences to ensure Yieldmo brings more efficient solutions than the consideration set. And fast, creative turnarounds allow partners to seamlessly rotate in new creative concepts as more gaming features get teased out to consumers to build awareness.
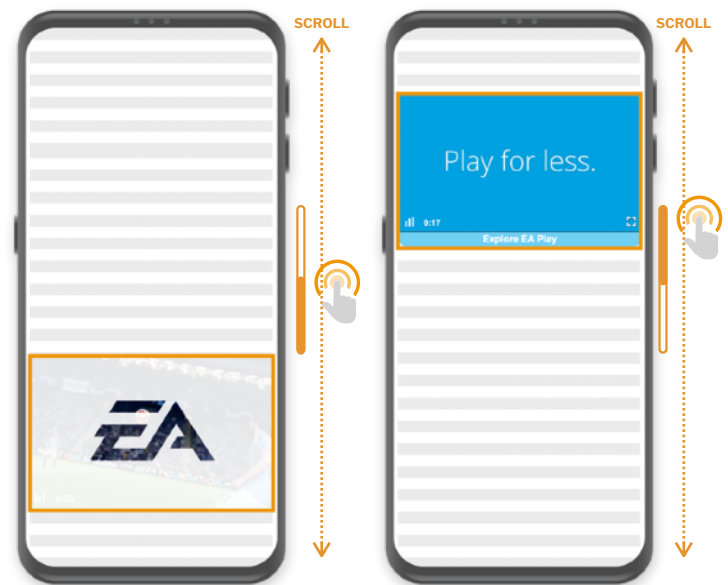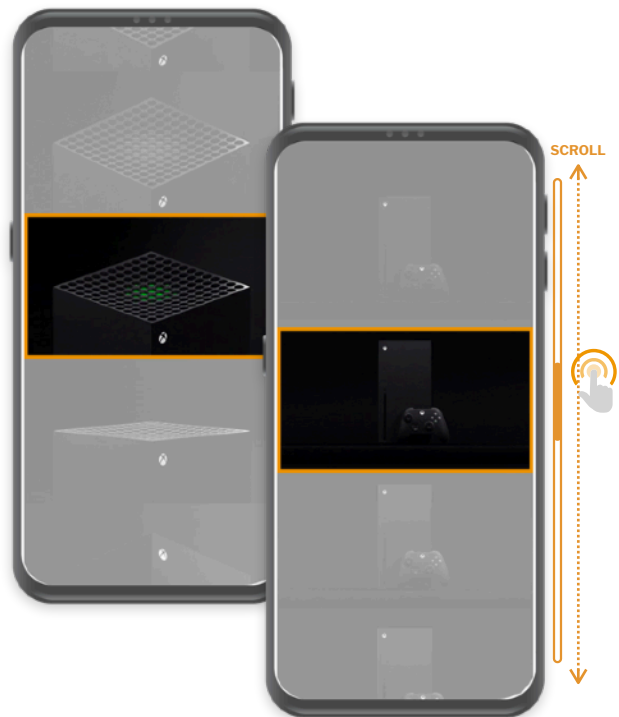

PINHOLE • DEMO LINK

Enhanced video experience designed to reveal your brand with cinematic mystique.

MEGASHOPPER • DEMO LINK

The immersive shopping experience that features a
branded video and cube catalog with products and CTA.

SCAN ME

HYPERSCROLLER • DEMO LINK

Similar to an animated GIF, the Hyperscroller is a 20
frames animation ad that utilizes user scrolling behavior.

SCAN ME

MIDDLE FUNNEL

The Hyperscroller, Pull, and Window units provide
the ability to show different aspects of new games/
tournaments with release highlights that will help
drive viewership consideration for platforms like
Twitch, new characters, enhanced levels, and various
gaming modes.

Yieldmo can customize CTAs to include Learn More,
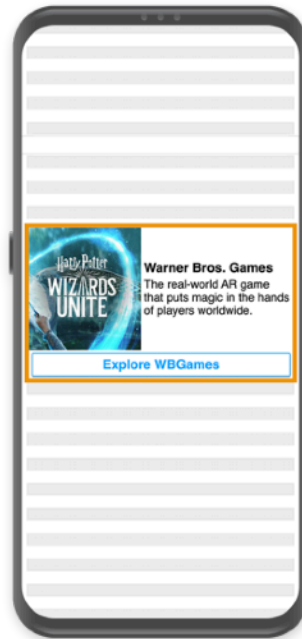Watch the Full Trailer Now, Pre-Order Now, and
more.

WINDOW • DEMO LINK

Standard 300x600 with a parallax scrolling effect
that reveals the ad as the user scrolls up and down.

SCAN ME

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PULL • DEMO LINK

Built for storytelling and sequential messaging on the smaller screen.

FLEXCARD • DEMO LINK

Native text+image with a prominent call-to-action.

LOWER FUNNEL

The Flexcard and Flexbanner units are great for measuring efficient CPAs and/or efficient, qualified site traffic. Native (Flexcard) units have high CTR and are known conversion drivers.

FLEXBANNER• DEMO LINK

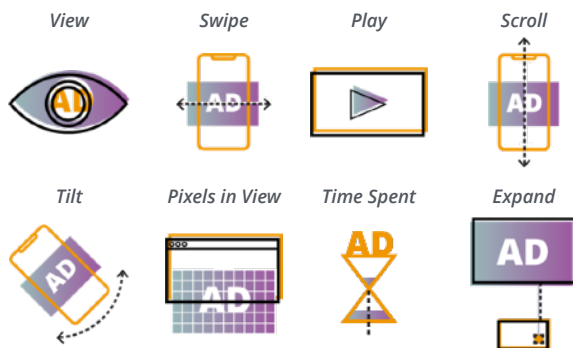Standard 300x250 ad with optional animation effects.

ATTENTION ANALYTICS

Use an AEROS PMP to optimize any campaign. These are PMPs designed to improve your KPIs. AEROS Attention Analytics picks up on human attention signals (gestural) and other page signals multiple times a second, factors them into unique AI algorithms, and automatically optimizes your media performance. We've seen, on average, across our AEROS campaigns on our marketplace:
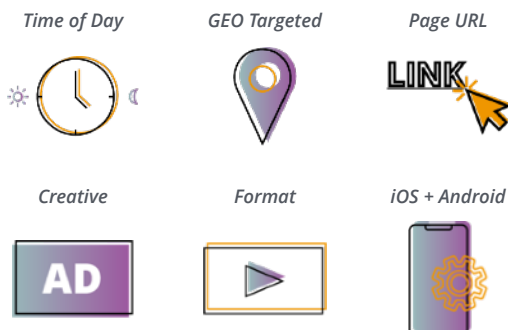
⬆ Up to 85% average KPI lift

💰 80%+ cost-adjusted lift

Consumer Attention Signals

View	*Swipe*	*Play*	*Scroll*

Tilt	*Pixels in View*	*Time Spent*	*Expand*

Content and Creative

Time of Day	*GEO Targeted*	*Page URL*

Creative	*Format*	*iOS + Android*

NEXT-GEN FORMATS AND CREATIVE OPTIMIZATION

Our patented formats in video, high-impact, native, and display are available across all channels (mobile, desktop, in-app). They're not only visually appealing; they also capture attention on the front-end to find your qualified consumer. The formats are designed to generate more attention signals, which give us more data to inform our optimizations.

Our in-house team of designers can tailor your creative at any time, with a quick 24-hour turnaround. Need to alter a deal or message? Or simply expand on an offer or make a destination look even more visually appealing within a format? Our team provides these services for free.

SMART INVENTORY

Another way we can help your campaign perform better is through Smart Inventory. Smart Inventory understands precisely which impressions will perform better for you, minimizing waste and maximizing VCR, CTR, ROAS. This works with and without cookies as we capture actionable information on page to prevent DSPs from bidding on less desirable media. We then select the best impressions for our buyers' campaigns.

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For more information, please reach out to your account manager
or email info@yieldmo.com.

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