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series

# Live2Play Refresh

June 2024

# Background

When we wrote about play last year in our piece *Live2Play*, we focused a lot on how play—and the world—is becoming more and more digital. And indeed, as we track trends in the play space and beyond, we see shifts from crayons to AI art, esports entering the realm of "legitimate" sports, and Monopoly becoming Monopoly Go.

This fundamental change has made things faster, more efficient, more streamlined. This year, it's time to make it a little messy again.

We're starting to see people bring back some of what they love about old-school, physical play into digital spaces. This move toward hybrid, "phygital" play is aimed at injecting the joy and imagination back that consumers have been missing, and it has helped make play even more accessible to those who need the door opened a little wider.

And consumers want brands to not just facilitate the phygital, but be there playing alongside them.

# Methodology

After synthesizing dozens of studies and reports and surveying over 1000 Americans about their views on play, we saw people repeatedly say no to digital, and yes to phygital:

**A blend of tactile experiences with digital extensions that represents a more naturally human way to embrace tech and the future.**

In this report, we offer a refreshed perspective on the role of and outlook for play. Specifically, we'll explore three ways in which play is meeting the phygital needs of the people:
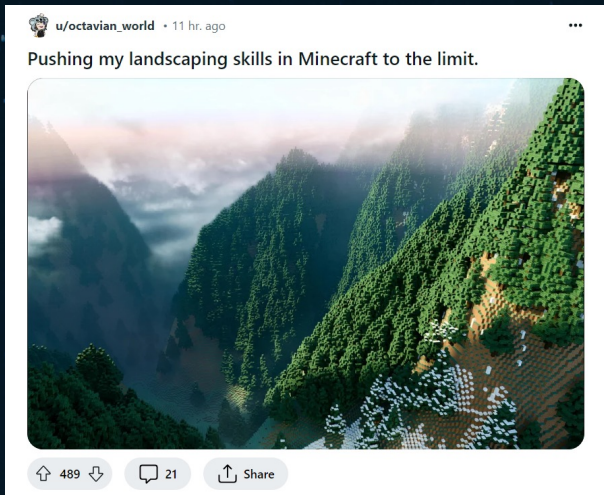
Identity
**1** nOObs Welcome

Community
**2** IRL 2.0

Creativity
**3** (Re)Imagination

**Community Expansion**

Posts on r/gaming have grown from centering on games like World of Warcraft and even Fortnite, to include more recreational game enthusiasts. And even a 72-year-old cereal mascot can be a gamer, as Frosted Flakes showed when it turned Tony the Tiger into a gaming streamer on Twitch.

# **70%**

of Gen Z gamers say diversity in gaming is important to them.
*(Source: Newzoo Global Gamer Survey)*

# **+20%**

Increase in women who identify as gamers since 2008.
*(Source: Entertainment Software Association)*

## 1 Identity
# nOObs Welcome

### The Situation

Traditional gaming spaces have historically been big on gate-keeping, and for years women and other under-represented communities within gamer culture have complained about the exclusivity associated with gaming. But the once-meteoric rise of the kinds of esports that defined the gamer community has tapered off. What's at play (pun-intended) is more than just mainstreaming of gamer-dom: The move toward phygital has highlighted the need to make the gaming space more communal and less exclusive.

### The Change

The push toward phygital joins preexisting trends toward social gaming and other, more mobile gaming. And all of these forces have served to make gaming more accessible and more inclusive. In addition to allowing more people to participate, the in-person elements counteract some of the most toxic parts of the gamer internet world. Only 1/3 of self-proclaimed gamers now say they are interested in esports. And as what qualifies as "gaming" has expanded, so too has the definition of who a gamer can be. We're entering a world where identifying as a "gamer" has not just lost its stigma, but is increasingly inclusive of people beyond the old stereotype.

## What this means for brands

If gaming is becoming more inclusive, then so too should brands operating in that space. This means helping to make existing play spaces more accessible and championing longstanding portions of the gaming community that traditionally haven't had much visibility in the gaming community.

## 2 Community
# IRL 2.0

### The Situation

Last year, we noted the power of play to alleviate disconnection and loneliness in adult men. This year, we're seeing this impact across the ages and genders. ¼ of adults globally report feeling lonely (Source: Gallup), and ¼ of children are estimated to struggle with depression and anxiety (Source: Pew Research). As it turns out, just like loneliness is universal, so is the power of play.

### The Change

More and more, people are returning to more traditional forms of in-person gaming and experiences that use technology to *enhance* the IRL world rather than replace it. And sometimes, they're returning to old-school IRL games altogether. Board games, for example, have experienced 29% growth since Q4 of 2020 (Source Statista). This incorporation of in-person elements is helping bridge generation gaps within households and help heal some of the childhood isolation caused by the pandemic.



**Social Gaming**
Increasingly, Gen Z is returning to in-person gaming with friends, a shift from remote online gaming that had been dominating in years prior.



**Growth of AR**
To promote Dune: Part 2, Warner Brothers introduced the Dune Lens Snapchat augmented reality filter that allowed people to become the character Fremen from the film. AR has flourished as a way for people to play in the overlapping space between the real and the virtual.

# 75%
of people say they use play to help them stay connected to family and friends.
*(Starcom Proprietary Study)*

# 2/3
of people say they prefer to play alongside other people.
*(Starcom Proprietary Study)*

## What this means for brands

Particularly for brands who often speak to kids, gaming has become an easy way to connect to target audiences. But what we're seeing now is a desire for parents to play alongside their kids in these gaming spaces. These brands can build emotional resonance by centering themselves as a facilitator of intergenerational connection through gaming. **Stay tuned for our upcoming perspective on co-viewing to learn more.**
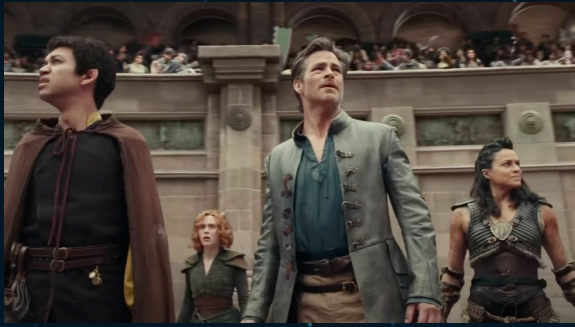
**Role-Playing Games**
As last summer's *Dungeons & Dragons* movie showed, old-school role-playing games are having a moment. These forms of play had largely been relegated to nerd subculture for decades, but are now mainstream.



**AI Generation**
AI art generators like Dall-E are proof positive that for many, content generation is, in itself, a gaming-like play experience. And brands are taking notice. Keelber used AI art in an activation recently that allowed people to play alongside them by turning themselves into Keelber elves.

# 51%
of Gen Z considers creating art to be "play."
*(Source: Starcom Proprietary Survey)*

# +25%
Increase in sales of worldbuilding games like Minecraft in the last 2 years.
*(Source: Statista)*

## 3 Creativity
# (Re)Imagination

### The Situation

One of the consequences of digitization has been devaluing the importance of play for everyone. In other words, people are feeling more pressed to be productive—even as children—and less allowed to play. This has long-term consequences beyond the emotional: Imaginative childhood play is a critical driver of developing the kinds of creativity people need later on as adults.  A global survey of CEOs found that the vast majority consider curiosity, creativity and imagination to be critical to the success of their organization but don't think their workforce was poised to meet this need (Source: Deloitte). When we play less as children, we invent less as adults. And when we *do* play as adults, we have historically trended toward less imagination-based play (e.g. recreational sports, poker).

### The Change

The phygital shift in play is opening the door for a whole host of new, imagination-based play spaces. "Playing" means more than just a literal game these days. In fact, 27% of adults say they consider even just passively consuming content as "play." We see people gravitating toward collaborative creation as a form of play: continuously iterating and building off of each other's creativity.  We're seeing this in the continued success of worldbuilding video games, the ways people use Dall-e and other AI art apps and the evolution of TikTok challenges.

## What this means for brands

People of all ages want to play make-believe again, and they're showing a desire to engage in imaginative play with the brands they love. Not only are they looking for brands to offer them spaces to create, but they're also curious to see brands create, morph and play *alongside* them.

# What Next...

It's clear through our research that **play has never been more important**. It represents our limitless imaginations, can bridge previously insurmountable generational and cultural gaps.

Brands face a unique opportunity to not just foster the creativity and connection people are seeking through play, but truly be partners in them. While last year, we noted the ways in which brands could create spaces for play for their consumers, this year, we're seeing consumers push the envelope even further.

**Consumers seeking out brands that will truly play alongside them**: brands that are inclusive to previously invisible gamers, are IRL right there with them, and will engage their own imaginations, too.

*To learn more about how Starcom can help your brand tap into consumers through play, check out our other pieces in our Fandom series.*