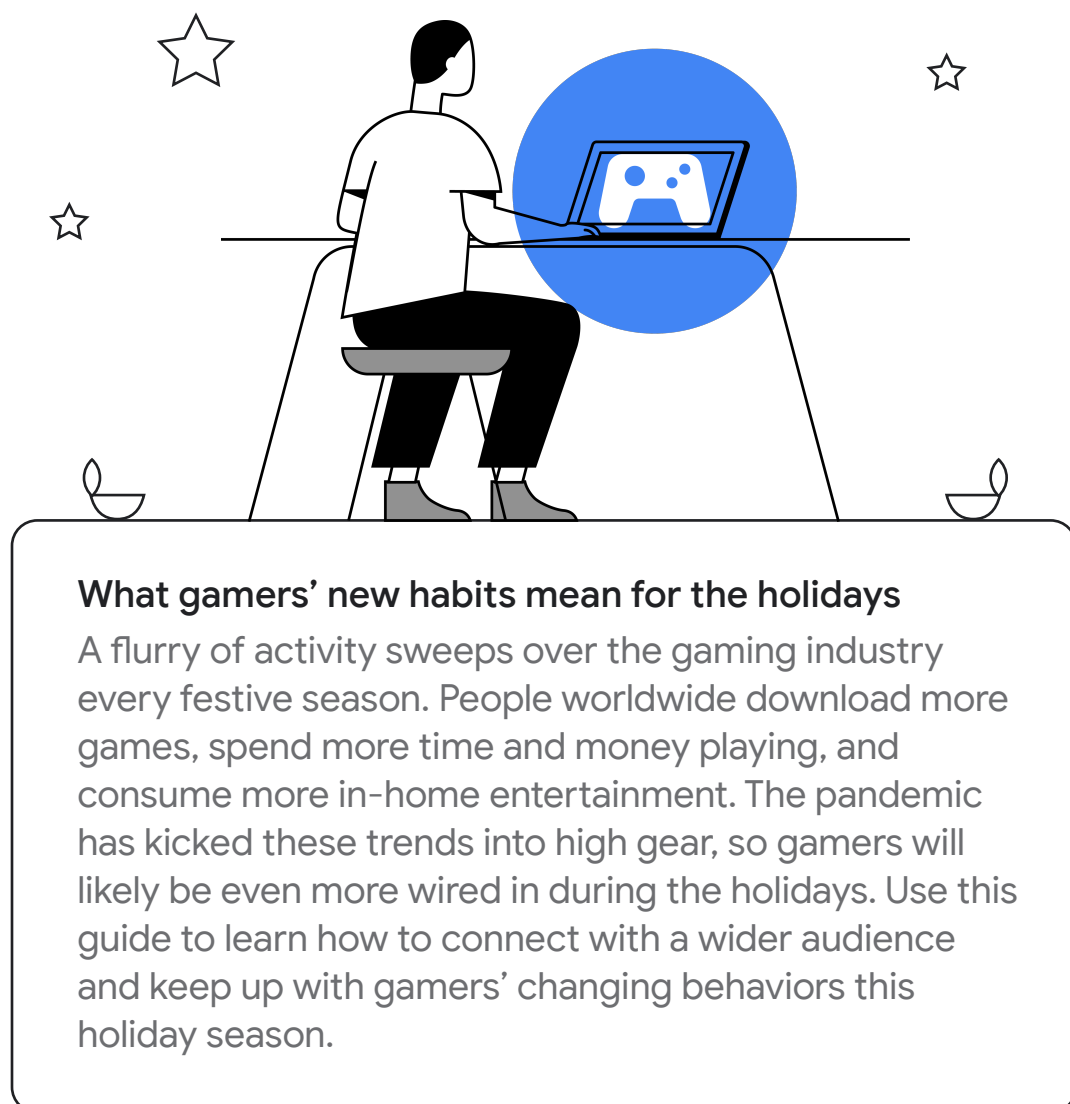


Prepare for one of the most unique holiday gaming seasons yet

The latest insights and trends for game developers



Gamers play more during the festivities

Whether they're lighting diyas for Diwali or staying cozy during Christmas, people unwind with games as they celebrate with their virtual and real-life communities.

Mobile game queries in Q4 2019¹



+41%
on **mobile devices**
compared to Q1



+19%
on **desktop and PC devices**
compared to Q1 2019

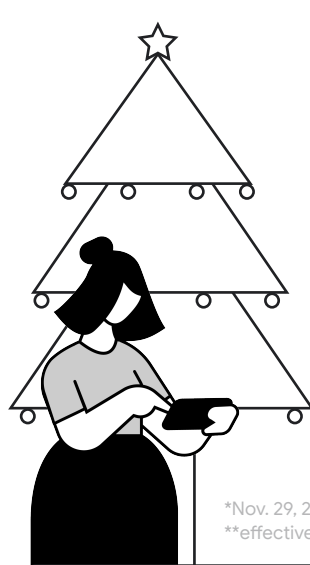
Google App ads impressions of games during the holiday season²

+41%
in the **U.S., Germany, and Japan***

eCPMs peak in Q4 for rewarded videos in the U.S.³**

Late-night gaming rises

+25%
of Minecraft gamers in the U.S. played between **10PM and 12AM** in **December 2019⁴**



*Nov. 29, 2019–Dec. 19, 2019 vs. Dec. 20, 2019–Jan. 9, 2020
**effective cost per thousand impressions

Players are even more plugged in this year

As gamers increasingly spend the holidays at home, they're spending more time discovering games online.

Impressions for game-related Google App ads have been on the rise during the 2020 holidays⁵

Year-over-year growth for game-related Google App ads⁶



+43%
impressions
during **Easter**
in the U.S.



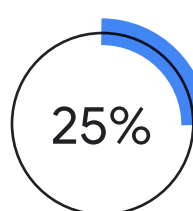
+92%
impressions during **Ramadan** in the Arabian Peninsula

New audiences are eager to play (and pay)

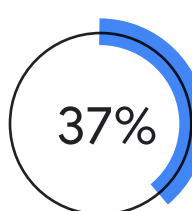
Younger gamers have jumped in on the action since the start of the pandemic, and they're likely to stick around.



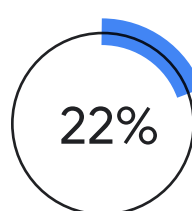
COVID-19's impact on gamers' habits in the U.S.



of people spent money on **in-home entertainment** for the first time⁷



of video game players aged 18-29 are expected to **spend more on games**⁸

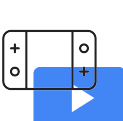


of **Gen Zers and Millennials** say they'll continue to use **more in-home entertainment** after the pandemic⁹

Passion for esports and video is on the rise

Many gamers are connecting with their community virtually by watching content such as playthroughs and live streams.

How COVID-19 has influenced global media consumption¹⁰



910M
people have been **watching more videos** on platforms such as YouTube

419M
people **say they'll continue** to do so after the pandemic



216M
people have been **spending more time** on esports

82M
people **say they'll continue** to do so after the pandemic

Keeping holiday gamers active and engaged

By adapting to how COVID-19 has shaped the global gaming community, you can set the stage for seasonal success.



3 ways to unlock the holiday gaming opportunity



1. Rethink design and launch

Create more immersive experiences by sharing festive in-game features in new and existing games.



2. Reach and retain users

Engage gamers with fun notifications and prizes, especially at night, and invest in online video and esports tournaments to keep people playing.



3. Experiment with monetization

Optimize your ad revenue as eCPMs* continue to improve and connect with young and new-to-pay gamers by offering character upgrades, reward items, and subscriptions.

*effective cost per thousand impressions

Sources

1-2, 5 Google Internal Data.
3 Statista, Android in-app rewarded video ads eCPM in the U.S. during holiday season 2017–2020, April 2020.
4 Similarweb, Percentage of December Minecraft daily usage, 2019.
6 Google Internal Data, Google App campaign performance in 2020 vs. 2019, Easter performance in the U.S. and Ramadan performance in Saudi Arabia.
7, 9 BCG, COVID-19 Consumer Sentiment Snapshot #11: Getting to the Other Side, June 2020
8 Statista, Coronavirus: impact on the gaming industry worldwide, 2020.
10 GlobalWebIndex, GWI Custom Coronavirus multi-market study, Wave 5, Behavioral Changes, 2020.