IMPACT____ THE REMOTE CONTROLLER Captify's latest Impact study provides a pulse on how COVID-19 lockdown is impacting consumer behavior around the at-home streaming and gaming economy and how brands can connect with the 'remote control' consumer. Using dynamic, fresh and real-time onsite Search Data, Captify reveals what consumers are searching for as of today...

captify

COVID-19 = SHIFTING PRIORITIES Routines, hobbies and lives have been turned upside down as people adjust to a new normal in light of COVID-19. Captify analyzes onsite search behavior for the at-home consumer to understand how global interests and priorities have changed, revealing the brands,

This global data was collected from January 1, 2020 to April 2, 2020 from billions of monthly onsite searches that Captify captures across its premium publisher network

programs and games that are curing lockdown boredom. USED TO BE SEARCHING FOR (PRE COVID-19) STILL SEARCHING FOR **NEW SEARCH INTERESTS**

INTEREST INDEX **BLOGS** 28.4X

INTEREST INDEX TRAVEL **207.4X** •--- Triggered by **GAMING** 113.9X

INTEREST INDEX

31.4X

14.7X

7.6X

3.1X

TV & STREAMING

SOCIAL MEDIA

BRAND LOYAL 14.6X

NEWS

GAMBLING

FITNESS 25.3X **SOCIALIZING** 10.4X

CELEBRITIES

FASHION BEAUTY & COSMETICS

6.2X 5.6X 3.8X LUXURY LIFESTYLE 3.7X

FOOD & COOKING

25.7X **PETS** COMPUTERS **7.3X** 6.7X 6.0X **FINANCE** HEALTHCARE 1.4X

HOME IMPROVEMENTS

searches for cancellations

& travel deals

QUALITY SEEKING HOW IS STREAMING AND GAMING INTENT BEING IMPACTED? With the world in lockdown, consumers are now trying to navigate this new reality and reassess their priorities—for the first time, entertainment and connectivity are being held up as necessities.

Through onsite search behavior analysis, Captify reveals how consumer appetite for streaming and gaming has shifted and how this trend correlates with rising search interest around COVID-19.

Streaming **187%** Gaming **253%**

SEARCH TREND FOR STREAMING, GAMING AND COVID-19: KEY Streaming Gaming Coronavirus Base Index **MARCH 1-31 KILLER INSIGHT:**

correlate with a 108% search uplift for Food Deliveries

+ Search interest around streaming and gaming also

03/08/20 03/22/20 01/12/20 01/26/20 02/09/20 02/23/20 Date MEET THE NEW AUDIENCES NOW INTERESTED IN STREAMING AND GAMING

With streaming and gaming searches surging, Captify's onsite consumer search behavior

uncovers new and growing audiences for brands to engage with and capture through new

content, trials and deals.

TOP AUDIENCES SEARCHING AROUND GAMING:

GEN Z

0%

100%

As consumers browse for new shows and

movies to keep them entertained throughout

lockdown, Captify reveals which streaming

providers consumers are turning to for their

entertainment fix.

CORD-CUTTING CONSIDERATION

ACCELERATES

+ Frequency of searches have increased by

+ **Research time** around streaming services

+ 145% search uplift for subscription plans as

subscription for ad-free streaming or to

consumers look to upgrade their streaming

KILLER INSIGHT:

+ Consumer search interest for music streaming has actually

decreased by 35% compared to the beginning of the year

NETFLIX, BUT FOR GAMES

With the crisis causing

consumers to avoid shops

and human interaction, Captify

reveals there's been a 89%

search increase for gaming

subscription services since Jan

1 as consumers opt to stream

over buying games outright.

ATTRIBUTE ANALYSIS FOR INTERESTS OF THE 'CORE GAMER' FOR JANUARY VS MARCH

ACTION & ADVENTURE

Shooter Games in January to Role-Playing Games (RPG) in March. This

may suggest that during a time of uncertainty, they're using gaming as

a form of escapism and immersing themselves in a fictional world.

+ MULTIPLAYER GAMES SEE A BOOST — With consumers unable to

socialize in person, they're looking for alternative ways to stay

connected with friends. Online gaming is seeing a boost, with a

TOP 3 ATTRIBUTES WHEN SEARCHING AROUND GAMING:

Accessories & Add-Ons 2.6X

TOP 3 ATTRIBUTES WHEN SEARCHING AROUND GAMING:

O1 Accessories & Add-Ons 2.3X

TOP 3 ATTRIBUTES WHEN SEARCHING AROUND GAMING:

O2 Accessories & Add-Ons 6.5X

TOP 3 ATTRIBUTES WHEN SEARCHING AROUND GAMING:

Accessories & Add-Ons 6.9X

o Memory **18.8** X

Functionality 15.8X

o₂ Functionality 1.2X

os Consoles 1.1X

⁰¹ Memory **40.2X**

of Consoles 10.7X

o₂ Functionality 2.8X

121% search increase for multiplayer games since Jan 1.

FIGHTING

HORROR

extend their profile with other family members

+ Consideration time around streaming

services has **decreased by 68%**

has **decreased by 45**%

70%, revealing higher intent for streaming

GLOBAL SEARCH VOLUME (%) FOR

TOP STREAMING SERVICES:

KEY

Disney + **49**%

Netflix 43%

Amazon Prime

Hulu 1%

Change in Search Volume (%) for Gaming

200%

300%

ECO-CONSCIOUS

BUSINESS TRAVELERS

INVESTORS

ECO-CONSCIOUS SUBURBAN BUSINESS TRAVELERS SILVER SURFERS FITNESS FANATICS RETIREES **HOMEOWNERS** STAY AT HOME PARENTS FITNESS FANATICS **FAMILY SHOPPERS** FINANCIALLY CONSCIOUS **OUTDOOR ENTHUSIASTS**

150%

streaming interest is shifting and which brands are front of mind for consumers. **CONTENT IS KING AND** STREAMING WARS GETS **EVEN MORE HEATED** PRICE NO LONGER DOMINATES

KEY

Deals

Content

A DEEP DIVE INTO STREAMING

The TV and Streaming industry are experiencing a seismic shift as viewing behavior

accelerates and audiences from Gen Z, Silver Surfers to Parents look to keep themselves

entertained during lockdown. Through real-time Search Data, Captify deep dives into how

534% surge in searches for content Searches for

ANALYZING DEAL VS CONTENT SEARCHES FOR STREAMING:

Index

SPORTS FANS

2.66X

2.59X

CAREGIVERS

2.18X

2.13X

05 SILVER SURFERS

MHEERRET

02

03

04

05

SPORTS

KILLER INSIGHTS:

US MARKET FOCUS

peacock! 6%

UK MARKET FOCUS

SEARCH UPLIFT FOR Streaming: ↑134%

SEARCH UPLIFT FOR Streaming: ↑80%

SHOOTER

ECO-CONSCIOUS

STAY AT HOME PARENTS

While streaming prices, offers and deals were

a key area of search interest for consumers in

January, Captify reveals that when lockdown

restrictions heightened, importance shifted

towards **content offerings**.

TOP AUDIENCES SEARCHING AROUND STREAMING:

50%

Change in Search Volume (%) for Streaming

100%

GEN Z

TRAVELERS

CREATIVES

DIY ENTHUSIASTS

01/26/20 02/09/20 02/23/20 03/08/20 03/22/20 01/12/20 Date WHICH AUDIENCES ARE THINKING OF **CORD-CUTTING IN LIGHT OF LOCKDOWN?**

KILLER INSIGHTS:

+ In March, Cord-Cutters searched

for **7 streaming brands** on

for just 2 brands on average

+ When Cord-Cutters are looking

accounts for over 95% of

for content inspiration, Disney+

A DEEP DIVE INTO GAMING

Social distancing and lockdown has already started to radically reshape all forms of human

interaction. Consumers are looking for alternative and creative ways to continue their social

interactions and stay connected with friends and family. Captify reveals how gaming is

Pokémon GO was originally

created to encourage gamers

to get outside & explore

the world, Niantic recently

average, in contrast to an overall

streaming audience that searched

2.0X streaming searches with Netflix only accounting for **3**%

This might also suggest casual announced they'll be adapting gamers are not as willing the game so players can team to invest in games as it's a up with friends & battle from the comfort of their home temporary hobby. SIMS1

one of the verticals benefiting from this behavioral shift.

06

GAMING LEADERBOARD

With the gaming vertical seeing a 253% search increase

in March alone, Captify analyzes the Top 10 most

searched for games by consumers:

KEEPING A PULSE ON GAMERS – FROM THE CASUAL TO THE CORE AUDIENCE

ATTRIBUTE ANALYSIS FOR INTERESTS OF THE 'CASUAL GAMER' FOR JANUARY VS MARCH

ACTION & ADVENTURE

in March versus January. Over the same period, their interests

have shifted from Fighting Games to Sports Games—with live

sports on hold, they're bringing the action to their living room.

+ SWITCHING HOCKEY STICKS FOR JOYSTICKS — With mass live sports

since Jan 1 with the top indexing audience being Sports Fans.

cancellations, consumers are looking for their sports fix elsewhere. Captify

reveals consumer interest for **Sports Games** saw a **1054% search uplift**

Through analysis of search behavior around two key gaming audiences, Captify uncovers some interesting changes in gaming preferences in light of COVID-19.

KEY

Jan

March

FIGHTING

HORROR

SPORTS

SHOOTER

RPG **RACING** RPG RACING Casual Gamers are 1.8X more likely to search around gaming Interestingly, Core Gamers have shifted their gaming preference from

TUNING IN AROUND THE WORLD

Captify analyzes at-home preferences across the globe to understand what matters to

different consumers and which brands are sparking the most interest.

This local data was collected from January 1, 2020 to April 2, 2020 from billions of monthly onsite searches that Captify captures across its premium publisher network

SEARCH UPLIFT FOR Gaming: ↑48%

SEARCH UPLIFT FOR Gaming: ↑200%

SEARCH UPLIFT FOR Gaming: ↑58%

TOP 3 SEARCHED FOR GAMING CONSOLES:

o₂ Xbox One 43%

O1 Nintendo Switch 45%

os Playstation PSP 12%

os PlayStation 4 14%

TOP 3 SEARCHED FOR GAMING CONSOLES:

02 Xbox One 35%

Ol Nintendo Switch 49%

TOP 3 SEARCHED FOR STREAMING BRANDS: TOP 3 ATTRIBUTES WHEN SEARCHING AROUND STREAMING: TOP 3 SEARCHED FOR GAMING CONSOLES: Of Contract Commitments 6.2X 56% 01 Xbox One **43**% Nintendo Switch 43%

os Prices, Offers & Deals 0.2X 03 Xbox 360 16% os Content 1.8X SEARCH UPLIFT FOR Gaming: 168%

SEARCH UPLIFT FOR Streaming: ↑115% SEARCH UPLIFT FOR Gaming: 131% TOP 3 SEARCHED FOR GAMING CONSOLES: TOP 3 SEARCHED FOR STREAMING BRANDS: TOP 3 ATTRIBUTES WHEN SEARCHING AROUND STREAMING:

TOP 3 ATTRIBUTES WHEN SEARCHING AROUND STREAMING: TOP 3 SEARCHED FOR STREAMING BRANDS: Ol Content 1.6X Stan. 60% Functionality 1.1X NETFLIX 24% o3 Contract Commitments 0.7X

REQUEST INSIGHTS

*For brands, agencies & publisher partners only

TOP 3 ATTRIBUTES WHEN SEARCHING AROUND STREAMING:

02 Content 2.2X NOWTV 37% 03 Trials 1.9X 03 NETFLIX 7% FRANCE MARKET FOCUS SEARCH UPLIFT FOR Streaming: ↑65%

O1 Content 3.0X

02 Plans & Packages 0.5X

03 Bundles & Extras 0.4X

TOP 3 ATTRIBUTES WHEN SEARCHING AROUND STREAMING: TOP 3 SEARCHED FOR STREAMING BRANDS: orange 66% O1 Content 2.5X CANAL+ 24% Contract Commitments 0.5X NETFLIX 10%

SPAIN MARKET FOCUS SEARCH UPLIFT FOR **Streaming**: ↑125% TOP 3 SEARCHED FOR STREAMING BRANDS: TOP 3 ATTRIBUTES WHEN SEARCHING AROUND STREAMING:

Contract Commitments 0.4X prime os Prices, Offers & Deals 0.1X **NETFLIX 23%** ITALY MARKET FOCUS

Plans & Packages 0.3X **AUSTRALIA MARKET FOCUS** SEARCH UPLIFT FOR **Streaming**: ↑125%

TOP 3 SEARCHED FOR GAMING CONSOLES: O1 Content 2.5X Oli Nintendo Switch 49% 02 Xbox One 29% os Playstation PSP 22%

Streaming Quality 1.8X oz Content 1.5X

> THE TRENDS DESK Powered by Sight, the Insights Studio

ABOUT CAPTIFY Captify is the largest holder of consumer search data outside of Google, and its

Nintendo Switch 40% oz Xbox One **38**% os Playstation PSP 22% SEARCH UPLIFT FOR Gaming: ↑251%

TOP 3 SEARCHED FOR GAMING CONSOLES: on Xbox One **54**% oz Nintendo Switch 39% o3 Xbox 360 7%

01 NETFLIX 82%

Rai Play 9%

Interested to find out how your brand is being impacted by global lockdown?

Captify's Search Intelligence powers media and insights for

unique technology understands the intent and interests of consumers across all channels, including voice search, desktop on-site search and in-app search.

800+ of the world's biggest brands.

Get in touch with Captify's Trends Desk.

TOP 3 ATTRIBUTES WHEN SEARCHING AROUND GAMING: on Prices, Offers & Deals 27.1X 02 Memory 27.0X os Stock Availability 2.0X

TOP 3 ATTRIBUTES WHEN SEARCHING AROUND GAMING:

Prices, Offers & Deals 7.8X

os Functionality 1.0X

OZ Accessories & Add-Ons 2.9X