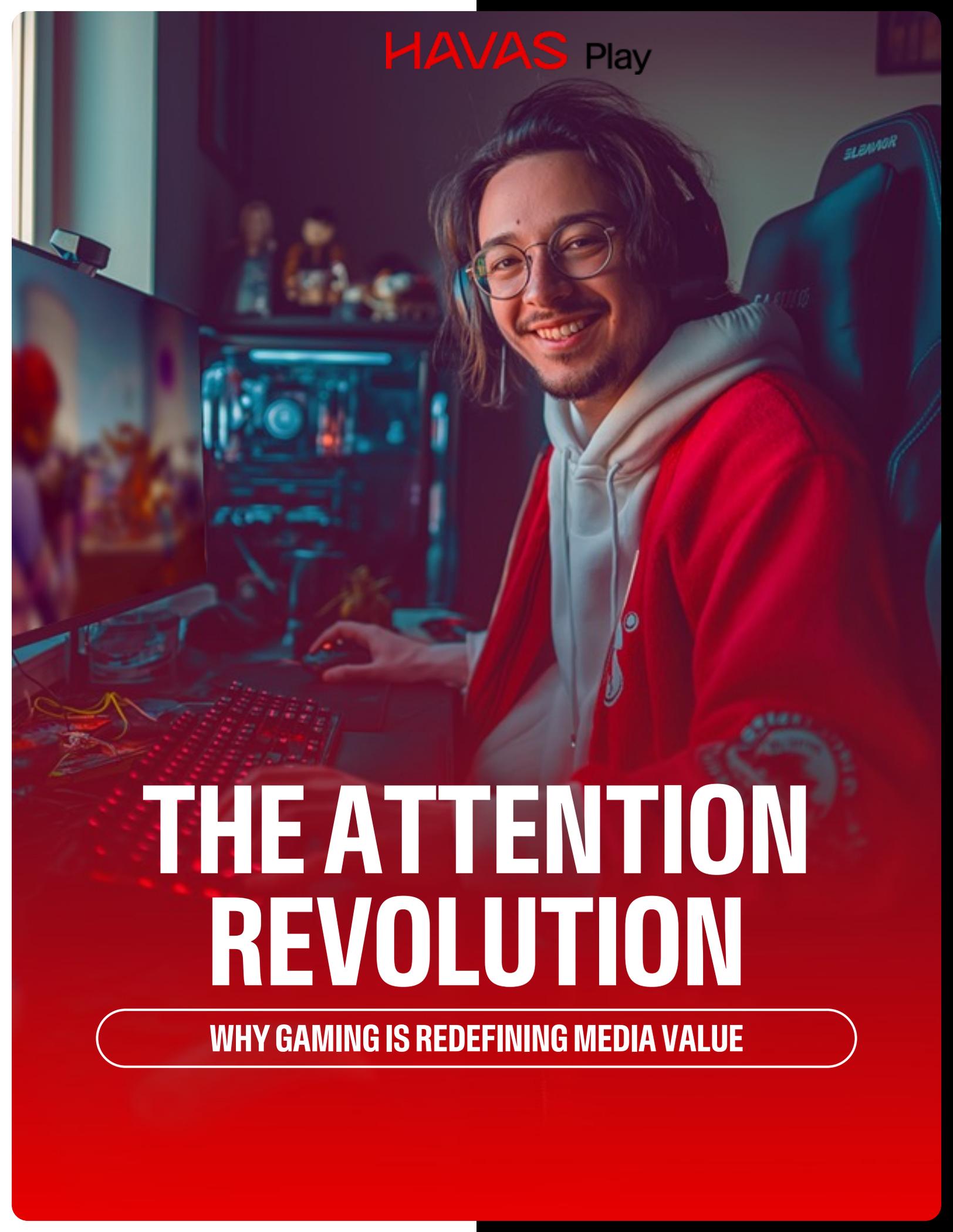


**HAVAS** Play



# THE ATTENTION REVOLUTION

WHY GAMING IS REDEFINING MEDIA VALUE

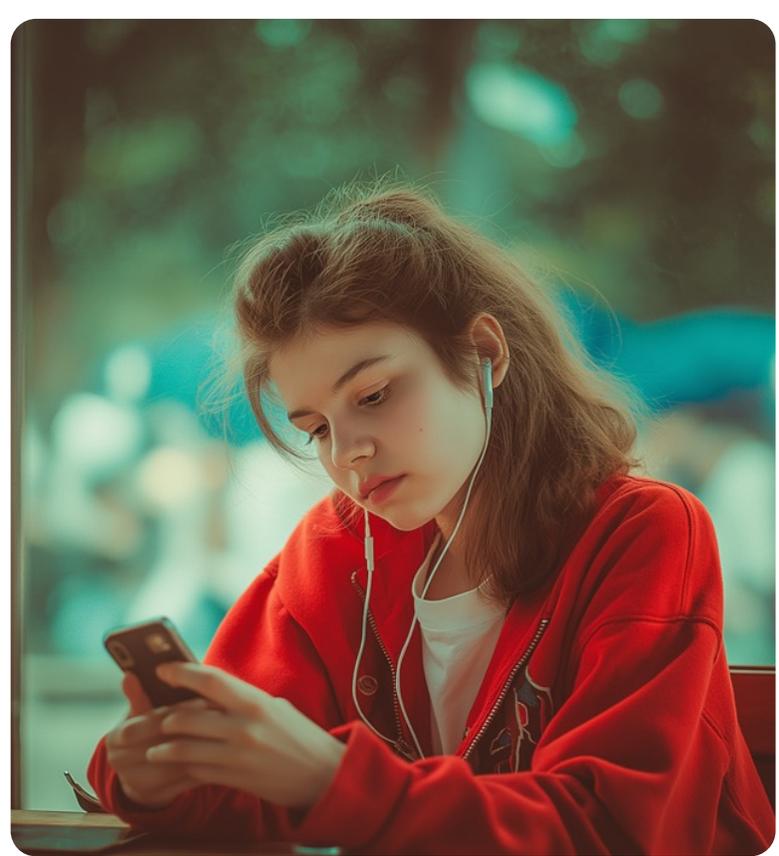
# THE ATTENTION CRISIS

We are exposed to more than 1,200 advertising messages every single day. Add to that the endless stream of content produced by streaming platforms, social media, creators, and brands themselves—a flow now accelerated even further by AI. Advertising burnout is no longer a looming risk; it's a lived reality.

The consequences are already visible. According to Havas' Meaningful Brands study, 78% of brands could disappear tomorrow without anyone caring. Ten years ago, that figure was 63%. In an economy built on visibility, attention has become the scarcest and most valuable resource.

**For brands, this raises a fundamental question: how do you stop competing for attention—and start earning it in a way that actually builds value?**

Gaming has become one of the most powerful answers to that question, standing apart in today's fragmented media landscape.



**Globally, gaming is now one of the largest cultural industries on the planet.**

In 2025, the global games market is expected to generate nearly **\$190 billion in revenue**<sup>1</sup>, with a player base approaching **3.6 billion people worldwide**<sup>2</sup>. Beyond its economic scale, gaming is also one of the most time-intensive entertainment habits today: on average, players globally spend **around 7 to 8 hours per week gaming**<sup>3</sup>, choosing to actively engage rather than passively consume content.

And yet, despite this cultural relevance, time spent, and economic weight, gaming still accounts for **only around 5% of global advertising investment**<sup>4</sup>. The reasons are familiar: perceived complexity, lack of understanding, and outdated assumptions that continue to undervalue its true media potential.

What this gap reveals is not a lack of opportunity, but a misunderstanding of value.

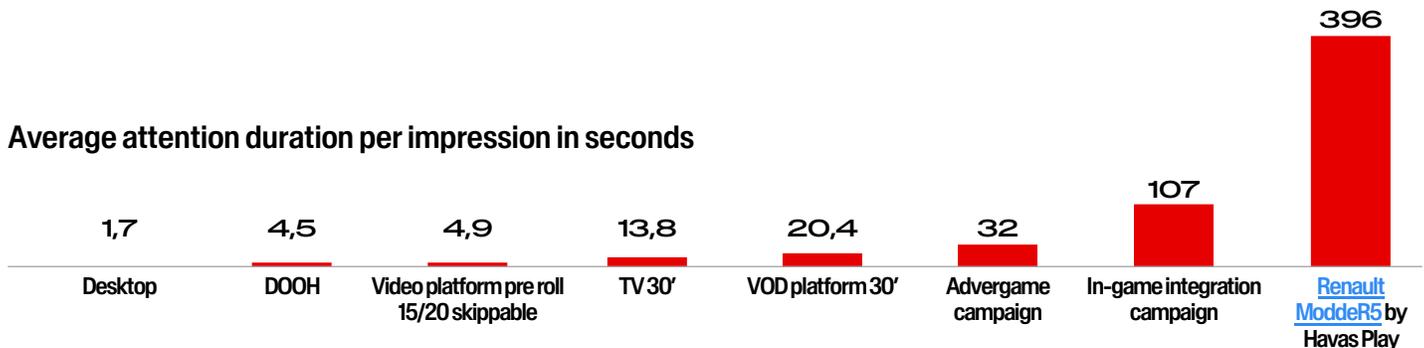
Because gaming offers something increasingly rare in today's media ecosystem: attention that is not forced, but chosen. Attention that is sustained, immersive, and meaningful.

Over the past decade, working alongside brands in gaming environments, we've measured this difference directly. Advergames, in-game integrations, and immersive experiences generate attention durations that dwarf traditional media benchmarks. Where non-skippable video ads deliver seconds of focus, gaming delivers minutes—sometimes hundreds of them.

But gaming doesn't just capture attention. It earns it. And that distinction changes everything.

In the sections that follow, we unpack how earned attention in gaming becomes emotion, connection, and ultimately, long-term brand value.

## Average attention duration per impression in seconds



**Don't ask if you need a gaming campaign—ask if you're losing attention and what it's costing you.**

**Pierre ACUÑA**

Head of Gaming and eSports, Havas Play France

# THE VALUE OF ATTENTION

From impressions to meaningful engagement VIDEOJUEGO ESPAÑOL LA HICIMOS JUGANDO



**The advertising industry is undergoing a fundamental shift: moving away from the commodification of impressions toward the valuation of attention. Not attention as a technical metric, but as a human resource defined by quality, focus, and active engagement.**

**This shift is not only methodological. It's sociological.**

Traditional media largely positions people as spectators. Television, VOD, and social feeds encourage passive, “lean-back” consumption, often accompanied by second screens, partial focus, or cognitive overload. Attention is fragmented, borrowed, or tolerated. Gaming operates differently.

It demands a “lean-forward” posture. Players are not observers; they are protagonists. Progress depends on focus. Outcomes depend on skill, strategy, and presence. In gaming, attention is not optional—it is the entry point.

This is where the concept of meaningful attention emerges. Not attention extracted through interruption, but attention earned through reciprocity.

When brands integrate organically into gaming environments — enhancing the experience rather than disrupting it — they respect what can be described as the social contract of play. They stop being intruders in leisure time and become enablers of enjoyment, exploration, and self-expression.

This shift from interruption to contribution is where media value is redefined.

A clear example is Domino's Tribute, a documentary celebrating the history of gaming in Spain. Rather than competing for fleeting seconds of exposure, the brand chose to elevate the community's culture, premiering the content on Prime Video. Domino's didn't act as an advertiser, but as a cultural patron —validating the identity of gamers instead of exploiting their attention.

When brands respect the player's motivations — triumph, discovery, belonging — attention deepens, memory encoding strengthens, and intent follows. Gaming proves that the most effective way to capture attention is not to seize it, but to deserve it.

**Redefining media value means shifting from interruption to contribution, transforming brands into organic enablers that respect the social contract of gaming and play.**

**Abel DELGADO**

Innovation Booster, Havas Play Spain

# FROM ATTENTION TO EMOTION

Why gaming doesn't just hold focus —it creates feeling

We're living through an attention crisis. Every brand is louder. Every platform is more crowded. And most people have learned to tune it all out.

## Fandoms are different.

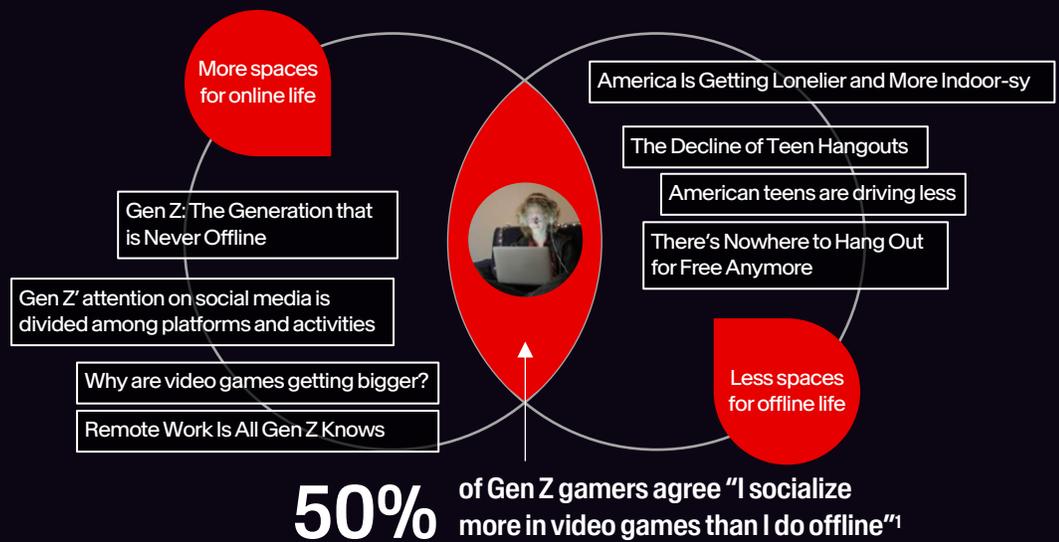
Fans don't stumble into attention — they arrive with intent. Ready to explore. Ready to invest emotionally. Ready to go deeper into the worlds they love.

That's what makes gaming so powerful. Where most media is passive,

gaming is immersive. Where most formats ask people to watch, gaming asks them to participate. Attention here is not a byproduct; it is the foundation.

Gaming fandoms are not defined by consumption alone. They are ecosystems of participation: players, viewers, creators, modders, streamers, and community builders. Two-thirds of players engage in online communities. Over a third regularly watch gaming content and creators. Since 2019, the number of active content creators and editors has grown by more than 40%, driven largely by Gen Z.

Gen Z are coming of age at a time when digital worlds are expanding, but the physical world feels smaller



This is not passive attention. It is deliberate, emotional investment.

That investment creates a neurological state of deep focus — often described as “flow” — where emotion and cognition align. Games deliver cinematic storytelling, meaningful stakes, and moments that stay with players for years, sometimes decades.

## Emotion is not a side effect of gaming. It is the engine.

Joy, relaxation, challenge, frustration, triumph —these emotions sustain

attention far beyond what traditional media can achieve. More than half of players describe gaming as one of their main sources of happiness and escapism. And crucially, these emotions are amplified through interaction, not isolation.

Gaming transforms attention into emotional resonance because it gives people agency inside the experience. And that agency is what brands can tap into — if they show up with respect, creativity, and authenticity.

If you still think gaming isn't a priority, it's time to rethink your strategy. Gaming doesn't just compete for attention – it commands emotion. It deserves a seat at the table alongside sports and entertainment because it's not about placements, it's about participation. The most impactful activations use play as a problem-solving system, building ecosystems where fans and brands co-create solutions, not just content.

**Alessia** GROSSO

Head of Strategy and Product, Havas Play USA

# FROM EMOTION TO CONNECTION

Gaming as a social and cultural infrastructure

If attention drives emotion, connection is what sustains it over time.

What began as a largely solitary activity has evolved into a global social architecture of more than 3.4 billion players. Today, gaming is not just about playing games; it's about spending time together in shared worlds.

Two-thirds of players regularly play with others, online or in person. Nearly half say social interaction — competition, collaboration, meeting new people — is a core reason they engage. Gaming has become a way to maintain relationships, create new ones, and belong to communities that extend far beyond the game itself.

These connections add emotional depth. Over half of players say gaming has strengthened bonds with friends or family. Shared play intensifies feelings of excitement, challenge, and accomplishment. Even moments of frustration or competition deepen emotional investment —because they happen together.

Connection doesn't stop when gameplay ends. Platforms like Discord, forums, and streaming chats function as cultural hubs where people exchange strategies, express identity, and reinforce belonging. For many Gen Z and Gen Alpha audiences, these spaces are their primary social environments.

Culturally, gaming adapts to local contexts while remaining globally connected. From PC bangs in Asia-Pacific acting as social third spaces, to eSports arenas in Brazil serving as community hubs, to Western youth treating voice chat and cross-platform play as everyday social infrastructure — gaming flexes seamlessly between autonomy and togetherness.

At the same time, gaming IP has moved firmly into the cultural mainstream. From music and film to fashion and live events, gaming now generates shared global moments. In-game concerts, hybrid physical-digital events, and community-driven activations turn participation into culture.

Looking ahead, social gaming will become even more fluid. New hardware, portable devices, cloud gaming, and cross-platform ecosystems are making participation frictionless. Identity, progress, and community now travel with the player — across devices, spaces, and contexts.

**Gaming is no longer just a medium. It is a social layer.**



## IN CONCLUSION

# FROM ATTENTION TO BELONGING

In a fragmented ecosystem where visibility is cheap but focus is rare, gaming shows a different path. One where attention is earned through participation, emotion is built through immersion, and connection grows through shared experiences and communities.

For brands, this shift comes with a clear challenge: **gaming is not something you “add” to a media plan. It’s something you design for.**

Based on how gaming ecosystems actually work, here are **five key considerations for building meaningful and effective gaming activations:**

1

### Design for participation, not interruption

Gaming demands a different mindset. Brands succeed when they enhance the experience rather than disrupt it —by adding value to gameplay, storytelling, or community interaction. Playful, native integrations always outperform forced visibility.

2

### Think in ecosystems, not placements

Gaming is not a single touchpoint. It’s a network of games, creators, platforms, communities, and moments. Effective activations understand how these elements connect —and how to show up consistently across them.

3

### Respect the culture before activating the channel

Every gaming community has its own codes, motivations, and rituals. Credibility comes from understanding the culture first, then building ideas that feel authentic to players —not adapted from elsewhere.

4

### Measure what actually matters

Success in gaming goes beyond reach. Attention quality, time spent, emotional engagement, and community response are far better indicators of impact. Gaming sets a new benchmark for meaningful media when measurement evolves with it.

5

### Build for the long term

The strongest gaming brands don’t show up once. They commit. Long-term presence through creators, content, experiences, and communities is what turns attention into trust — and trust into brand value.

At Play, our role is to help brands navigate this complexity — connecting cultural insight, creative thinking, partnerships, and media innovation to build gaming ecosystems that people genuinely want to be part of.

Because the future of It’s about earning a place in people’s lives media isn’t about capturing attention at all costs.

—through play, participation, and real connection.

The future of media isn’t about capturing attention at all costs. It’s about earning a role in people’s lives by designing experiences that invite participation, build connection, and create lasting value

**Arnaud** Robin

Havas Play Global Gaming Director

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