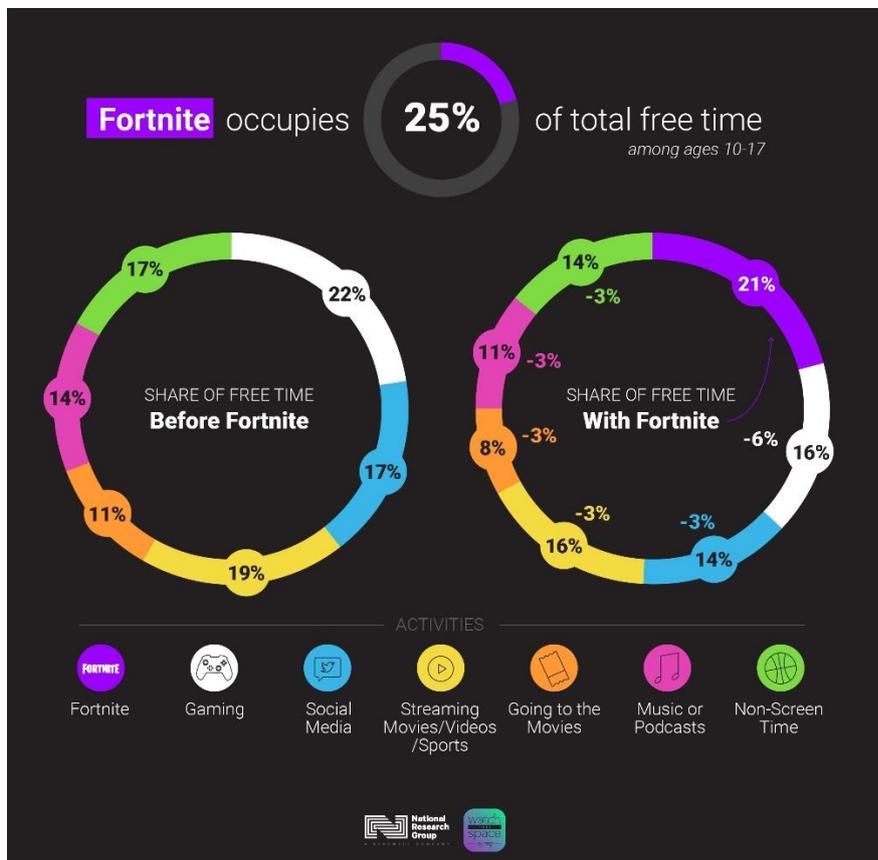


## INSIGHTS: FORTNITE, THE NEW SOCIAL MEDIA?

The *Number One* Service Tweens are Plugging into this Year Over Last

(Los Angeles, June 4, 2019) National Research Group (NRG), a leading global insights and strategy firm with 40 years of media and entertainment expertise, released new findings around the global phenomenon Fortnite and what this means for the future of entertainment – in gaming and beyond ([white paper linked here](#)).

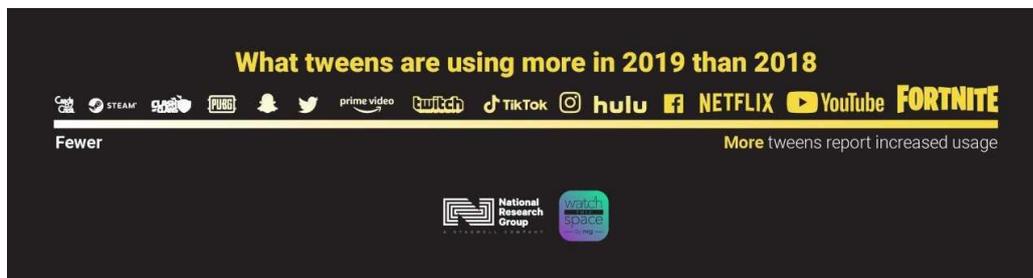
In an era defined by immersive experiences, every brand must think like an entertainment company to win and keep consumer attention. In less than two years, Fortnite has attracted more than 250 million users around the world and for its audience of teens (ages 10-17) who play at least once a week, Fortnite is consuming a colossal 25% of their free time. Fortnite is changing the way consumers and brands interact, offering brands access to significant young audiences who watch little traditional TV, and opening up new opportunities for live, real-time engagement.



Emergent platforms such as Fortnite are catalyzing social connection in digital spaces, allowing users to express “who I am *now*” and connect on a level that is uncurated and unfiltered. Fortnite is the number one service teens are using, and audiences cite its social elements as the primary motivators for playing: it’s the best place to *be my authentic self* and to *connect to what everyone is talking about*, making me *feel like I’m not alone*.



With the overwhelming amount of content and experiences at the touch of our fingertips, it's increasingly difficult to engage with and keep consumer attention. A key feature of Fortnite is enabling consumers to express their authentic self with like-minded individuals: how will this change the way we connect and communicate? How is Fortnite's uniquely immersive universe impacting our consumption? How is this competitive game that creates community changing how we play?



"Our research deconstructs the Fortnite phenomenon - a universe full of interesting paradoxes: it's a competitive game that fosters deep community; it's an immersive experience centered around lasting social connection; it's a playground to be anybody, yet it's where we can be our true authentic selves. With polarization and divisiveness seemingly defining our culture, Fortnite presents a more hopeful meta-verse where community, inclusivity, creativity and authentic relationships can thrive," says Jon Penn, CEO, NRG.

Applying a comparative lens between Fortnite and leading social, gaming and video brands, NRG's *Fortnite, The New Social Media?*, deep dives into the importance of giving consumers control and opportunities for authentic self-expression. Key findings include:

## THE FORTNITE PHENOMENON: WINNERS & LOSERS

- Fortnite is the service with the **highest reported usage this year over last year among tweens (10-12 year olds)**, surging ahead of YouTube, Netflix and Facebook. **Two in three tweens say they're playing more this year than last year.**

- Fortnite has momentum: **the majority (60%) of Fortnite weekly players ages 10-17 say Fortnite is on the way up**, behind only Netflix and YouTube by 2%.
- Since entering the market, Fortnite has significantly changed the way consumers spend their free time, occupying **21% of total activity time among weekly players**.
  - Fortnite's ripple effect is felt nearly equally across all forms of entertainment, both on and offline**, through decreased share of time: video/computer games (-6%); social media (-3%); streaming content (-3%); going out to the movies (-3%); listening to audio (-3%), and other activity such as spending time with friends or playing a sport (-3%).

## MORE THAN A GAME

- There are 27 key emotional benefits that services and platforms like Fortnite offer audiences. Our analysis demonstrates that these benefits can be summarized in three key categories: **it connects me, is a worthwhile experience and is fun to use**.
- Surprisingly, Fortnite is the strongest performer on satisfying audiences, across all three groups, as the platform that **makes people feel good, while also providing a worthwhile experience and social connection**.
  - Unlike other platforms and services, Fortnite uniquely combines benefits from gaming, social media and streaming platforms, offering consumers a singular experience. **Consumers say it's the best place to be my authentic self and to connect to what everyone is talking about, making me feel like I'm not alone**.

## A MORE POSITIVE CONSUMER EXPERIENCE

- Consumers say **the brands with the most positive impact on their lives are YouTube and Fortnite**, while social media platforms Snapchat, Facebook and Instagram deliver the *least* positive impact.
- When compared to top streaming brands, Fortnite offers a more interactive, immersive and inclusive entertainment experience, giving consumers control**. Consumers say: *it makes me feel more active when I use it, it immerses me in places I cannot physically experience, and gives me control; it makes me realize I am part of a community*.
- When compared head-to-head with top social media platforms, Fortnite is a safer place for escaping real-life pressures and demonstrating self-expression**: consumers say *it helps me forget my real-life problems, lets me act on feelings I cannot in my everyday life, lets me pretend I'm someone else, is a safe place to express myself free from bullying and increases my confidence*.

- Social media platforms are 12% more likely to *make me feel isolated and lonely*.

### **Methodology**

NRG surveyed a nationally representative sample of n=1500 general consumers for one continuous week in March 2019 to better understand the Fortnite phenomenon.

### **About NRG**

NRG is a leading global insights and strategy firm at the intersection of entertainment and technology. Rooted in four decades of industry expertise, the world's leading marketers turn to us for insights into growth and strategy for any content, anywhere, on any device. Working at the confluence of content, culture and technology, NRG offers bold insights for storytellers everywhere.

### **About Watch this Space**

Watch this Space is a think tank at NRG, producing thought leadership on frontier technology and content. Our finger on the pulse of industry trends helps content creators understand cultural shifts, connect with new audiences and productize new tech, from artificial intelligence to immersive experiences like augmented reality, gesture, voice and other converging applications.

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