



LIVE 2 **PLAY**

PLAY 2 **LIVE**

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BACKGROUND

It's no secret that America's largest export is culture. (Okay also petroleum but this isn't called *Live 2 Frack*, now is it?) Americans have a long-standing obsession with distracting ourselves, and it's only going to get...wait, have you seen this TikTok with the guys filling up the glass of water?



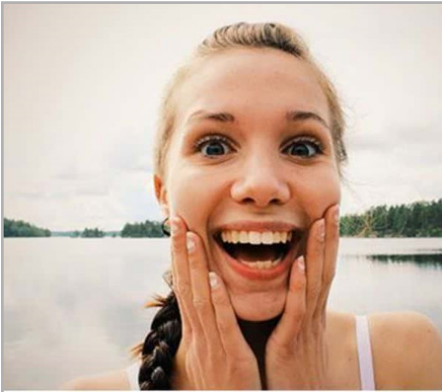
As part of Starcom's ongoing Cultural Exploration series, we wanted to investigate how Americans play, and what that can teach us about where we are heading culturally. If culture can be argued to be "all the things people do, that they don't HAVE to do" then play and culture are almost inseparable. We conducted two primary surveys (one of parents about their kids and one of adults about themselves), and focus groups (one with a cohort of men to understand their attitudes towards play, one with parents of young children to explore the uneasy relationship that exists between parent, kids, play and technology). Our research built on dozens of previous studies and data sets we pored through, giving us confirmation on some established truths about adult and kid play.

WHAT WE VALIDATED

Play is central to most of the things we choose to do, and like almost everything else, it's getting complicated:

1. "Play" takes on innumerable forms. Beyond the obvious things like video games and sports, we are always looking for opportunities to play. When we tell stories, when we use slang, when we put together an outfit, when we go on vacation, when we go to an amusement park, when we create, we are playing. The opportunities to intersect with people in moments of play are endless.
2. Parents have a lot of influence over how, what, and with whom their kids play. And much of that comes from who they are: how much money they have, what their ethnicity is, and how they politically identify.
3. Regardless of how old you are, play time is increasingly becoming screen time.
4. Parents are torn between concern over how addicted to devices their kids are, and recognizing digital play has also added to their kids' lives too. And frankly, it makes life more convenient for the parent. This digital dissonance provides an opportunity for brands to be reassuringly safe, authentic, and relatable.

And oh yeah: We learned a few new things too... Keep scrolling to read more, or [click here for our tl;dr version](#).



Jen, 25

📍 4 miles away

About Me: Best friend,
sister, free spirit, and
WoW wizard

Einstein said play was research. Sometimes the research is in service of self-discovery and expression.

Often, people define themselves based on their personal play style. We might describe ourselves as a musician, a foodie, or a rec league point guard. All of these descriptors have something to do with how we play. To make this more tangible, picture 20-something Jen: She spends hours and hours a week playing World of Warcraft with a group of people she's never met in person. She's also active on a bunch of Discord forums and subreddits about the game. And oh yeah—she also watches her favorite influencers play on Twitch to learn tips and tricks. All of this is play to her. It takes up almost all of her free time and so much of her brain space that she considers it part of her identity.

It's not new that adults now recognize the importance of play. More than 2/3 of our survey respondents told us as much. But the last three years have done a lot to make people elevate its importance in their lives and in their identities. More and more Americans are tired of student debt,

the gig economy, job insecurity, the pandemic, and a genuinely scary news cycle. Especially for Gen Z and Millennials, they're tired of always grinding and are done waiting to "pay their dues" until they get to enjoy their lives. They want to play now and play hard.

People don't want you to define them by what they do for a living anymore. They want you to define them by all the things they do when they're not working—by what they do when they play.

58% of adults said that what they play is important to their identity.

The result: We don't want permission to play. We want to be allowed to define what play means to us as an individual. And to let that in turn define who we are.

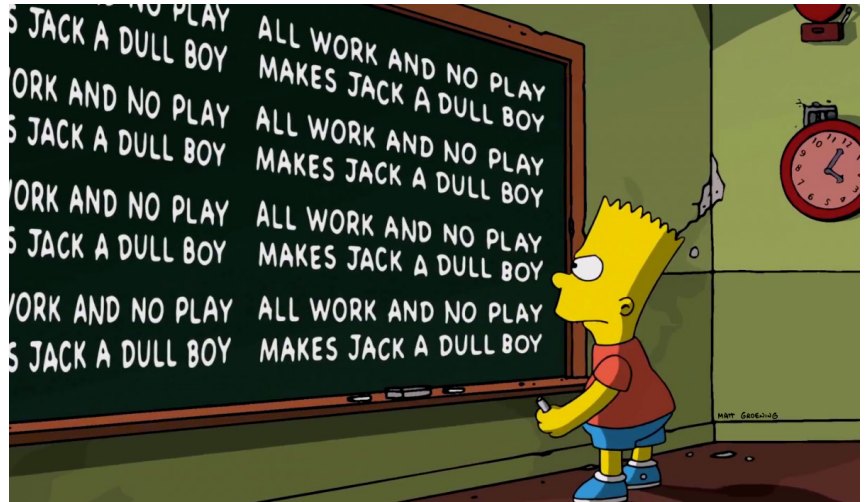
WHAT THIS MEANS FOR BRANDS

Adults want play that matches their identity. Brands can win by reducing barriers to play and increasing accessibility for people in the forms of play that are particularly relevant to them.

When it comes to work, we're so over it. Unless, of course, we could get paid to play.

Leaning Out

We've been tracking "hustle culture" fatigue for a while now (see [our 2023 trends](#) if you don't believe us). Young people in particular feel like all that grind is getting them nowhere—not with student debt, gig economy exploitation, automation, and inflation. And the pandemic has only made all of that worse. Work bums them out, and play makes them happy. The old saying, "I'll sleep when I'm dead," is getting a strong #hardpass, with more people taking a step back from their careers and instead choosing to enjoy their lives through play now. We don't see this trend reversing, and if anything, our survey showed adults are even broader now with how they define "play," including "productive" stuff like exercise, baking, and going out to eat or drink.



58% of adults said they would play all day if they had the time.

Less Money Mo' Problems

We've all still got bills to pay, though. But spending hundreds of thousands of dollars in college just to end up treading water at a job that burns you out is a hard sell for Gen Z. Instead, they're looking to turn their passions into profit: One in four Gen Z Americans says they want to become an influencer (Source: Forbes, October 2022). To them, being an influencer—in other words, playing for a living—is maybe the only way to make ends meet while still enjoying life.

WHAT THIS MEANS FOR BRANDS

Adults are showing a desire to blur the line between work and play more and more. Brands can connect with younger consumers by empowering them to pursue (and maybe even monetize) their passions outside the office.

PLAY IS THE ANTIDOTE TO MALE LONELINESS

The most overlooked opportunity in play isn't with kids; it's with Gen X dads (borrring).

We all seem to recognize that play helps kids express themselves emotionally and develop better interpersonal relationships. For some reason, we forget this is true for adults too. And no group could use that emotional and relationship help more than adult men, who are in the midst of a loneliness crisis. We see men stay (and become once again) single later into their lives, and we also see them struggle to maintain their relationships past adolescence and young adulthood. When middle aged men do hang out with friends, they often stick to the superficial like common sports rooting interests. These bonds are rarely strong enough to hold up when life throws curveballs your way you struggle to deal with alone. Enter play: a safe space for men to bond and develop meaningful relationships without the self-conscious barriers other forms of intimacy create.

A 2019 article in *The Atlantic* highlights this well: In it, six guys in their late 40s talk about how the 30-year-long game of *Dungeons & Dragons* they've been playing has served as an approachable outlet for them to talk about their feelings in a way that doesn't make them feel uncomfortably vulnerable. "We can talk about guy things and not get all emotional," one player says.

Whether or not they are willing to explicitly call it "play," men are willing to spend wild amounts of time and money on their hobbies. There are car guys, guitar bros, fantasy football nerds, and poker buddies everywhere you look. And as those D&D players experienced, they use these hobbies—this play time—as a way to combat loneliness and fears of emotional intimacy.

So, should Callaway make a "dating app" for adult men who are looking to join a golf four-some or a grilling club? Absolutely. Should LEGO have a replica set for desirable cars and when a guy sends signals that he's looking into buying a oh-I-don't-know Ford Raptor we send him an ad saying "while you wait for the real thing, get your hands on a Raptor tomorrow for \$199"? 100%.



WHAT THIS MEANS FOR BRANDS

Adult men—particularly those over 50—present a unique opportunity for brands to market play in a whole new way. Play creates a level of distance for men who struggle to express themselves emotionally otherwise, and brands that facilitate this can share in the emotional connections that result.

Note: While not specifically studied in this research, play help combat loneliness and isolation beyond just adult men as well. ([See: Starcom's recent research on introversion.](#))

The next big thing is billions of little things.

The story of culture at large in 2023 is a story of endless fragmentation, and play certainly is not exception. People will use play to help them express their individuality, pursue wellness, and distract themselves from the increasingly complex, polarized, and nagging world we find ourselves living in. We mentioned up top that parents get technology has given their kids a ton of new ways to play, but they are also worried all that screen time is turning their brains (and their eyesight) to mush. The future of play is all reconciling this, and the solution is finding new school ways of enjoying old school play.



The Big Wheel is back.

Back to Basics

The simplest way to do this? Just bring back the retro toys you used to play with. Maybe add smart app functionality or other digital bells and whistles. And that's just what's happening. We're seeing the return of classic games and toys, occasionally with modern tweaks, that give parents nostalgic comfort but are still evergreen ways to keep kids entertained.



Kids don't consider consuming content to be play. Maybe adults shouldn't either.

Passive Play

More and more adults—and only adults—are counting passive activities, ones that don't require participation, as play, too (e.g. streaming TV, scrolling Insta). Our study showed passive play doesn't offer nearly the same benefits as active play. There's an opportunity for brands to remind and encourage adults to be an (active) kid at heart.



LEGO's BTS set launched in March 2023.

Pop Culture Lifestyle

The entertainment industry is risk averse: It's why we keep rebooting the same franchises and renewing shows for Season 27. But parents are risk averse too, and they want to buy their kids things they know they'll actually play with. The solution for both is licensed IP toys and games, which already account for 31% of annual toy sales.



Star Wars-themed toys span genres and age groups.

Age Agnostic IP

Every parent has experienced the mind-numbing boredom of playing [insert awful game your kid loves here] for the 900th time. Finding things that truly are fun for the whole family is hard, but franchises like Harry Potter and LOTR have fans of all ages making them household crowd-pleasers. They also encourage a "collect them all" mentality that can help brands sell not just one product, but a whole suite of them.



IKEA created a climbing wall made of apartment furniture to celebrate the grand opening of a new store in France. The activation very literally encouraged active play.

TL;DR

Play is important for kids and adults, but a lot of it lives on screens now, yada yada yada... Here's what actually matters:

WE USE PLAY TO TELL THE WORLD WHO WE ARE

For grown-ups, what you play can be even more important to defining who you are as a person as a demographic marker.

PEOPLE WANT TO PLAY FOR A LIVING

People don't want to wait until retirement to enjoy their lives. They want to play now, and if possible, get paid to do so.

PLAY IS THE ANTIDOTE TO MALE LONELINESS

Brands face a unique opportunity to market play to adult males who often rely on play as their only emotional outlet.

WHAT'S NEXT?

Parents want to feel safe with what their kids play, but kids are unimpressed by toys that dumb down the world for them. Brands need to solve this tension while also encouraging adults to pursue active, not passive play.