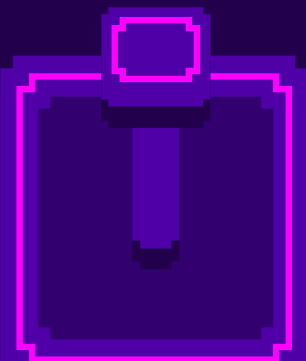


LEVEL UP



CHARITY
GAMING





MENU



[FOREWORD](#) 4



[INTO THE GAMING-VERSE](#) 6

What is Gaming?	9
Gaming: The Numbers	12
History of Gaming	14
Mythbusting	18
Charities & Gaming	22



[READY, PLAYER ONE?](#) 26

Introduction	29
Players	30
Creators	54
So What?	66



[STORY MODE](#) 68

Introduction	71
Where We Tell Stories	72
The Stories We Tell	84
So What?	122



[INCOME EXPANSION PACK](#) 124

Introduction	127
Income Through Gaming	128
So What?	156



[TREND BYTES](#) 158



[TL;DR 10 FOR 10](#) 164



[GLOSSARY](#) 166



FOREWORD

Gaming has come a long way from being a niche hobby, stereotyped by pale teenage boys gaming for hours in their bedrooms, to being an inescapable part of our day-to-day life. From a wildly competitive *Monopoly* game night which ends with someone flipping the board, doing the *Wordle* while you eat breakfast, a year-long intensive *Dungeons and Dragons* campaign, to the gamification of your daily step count. With **3.2 billion gamers** worldwide and **44 million** in the UK, gaming has gone certifiably mainstream.

Games are a compelling creative medium that can distract you for weeks in a saga worthy of Dostoyevsky's *The Brothers Karamazov*, or fill that 5 minute moment of time whilst your lunch heats in the microwave. Add onto that, that gaming is an incredibly lucrative industry, generating a whopping **\$406b in revenue** worldwide, and it's no wonder that charities want to get in on the act.

The obvious first step for many has been dipping a toe into streaming. Partnering with professional and amateur streamers, or running charity-led streams to generate income. And there have been some big successes in this space. But we believe there's so much more potential as yet untapped by the charity sector to generate philanthropic and commercial income through gaming.

But in order to unlock this new universe, you need a strategy. One that unpacks the full potential of gaming and answers the who, why, where, what and how.

Who: Gamers are not one audience. They reflect the diversity of society, so work out which communities and which audiences you want to prioritise and engage. Don't lump 44 million people together into one segmentation bucket. The who is also vital to who you have in your team. Build your internal talent and expertise of people who already understand and inhabit some of these spaces. Don't rely on one poor soul who has a Twitch account to answer all your gaming questions.

Why: Why would gamers, brands, developers and streamers want to partner with and support your work? But equally, why are they the right partners for you? Go multiplayer; find experts to help guide your journey and inform your decision making.

Where: As much as gamers are not one audience, gaming is not one medium. From video games, to board games to LARPing. There's also a myriad of different platforms and channels to choose from. We recommend setting up camp on a platform like Twitch and learning the landscape before you dive in.

What: What are your goals? What do you want to achieve through gaming? Is it brand awareness, income generation, data collection, citizen science, safeguarding, lobbying, or a bit of everything? And which element of this is the most important?

How: This is where your strategy can get creative. From brand activations in the metaverse, to gaming telethons, charity gaming Cons, owned-game development, content collabs, around-game merchandising, sponsorship, events. The list goes on and on. How do these link together and ladder up to deliver on your goals?

Unlike previous Good Futures Paradigm Shifts, this report is less a 'future of' and more of an 'intro guide to' the gaming space. We've split it across three chapters: who is playing and creating, what stories they're telling and how, and where's the money. We've also added in a lot more case studies than usual as inspiration and fuel for your innovation and strategy development. (There's also a standalone case study deck you can download).

So, player, if you're ready. It's time to suit up, strap in and LEVEL UP: Charity Gaming.

Team Good Futures

EAT.
SLEEP.
GAME.
REPEAT.

LEVEL 1

INTO THE GAMING-VERSE

CONTINUE?

YES

NO

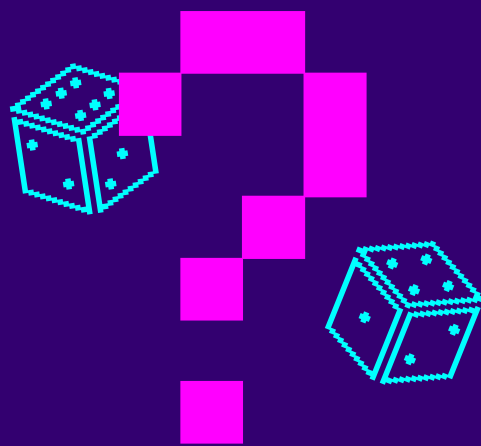


Your progress
has been saved.



INTO THE GAMING-VERSE

TAKE THE RISK



OR LOSE THE
CHANCE



TWITCH



£60

GIFT AID



DISCORD



£60

VAT



STEAM



what is gaming?

The word 'gamer' originally dates back to 1422, when it was used to refer to unlawful gamblers. When *Dungeons and Dragons* hit US markets in the 1970s, it described itself as a role-playing game played by 'gamers', and we got the modern definition of the word: a person who plays board games and/or video games.

However, the 20th Century definition of gaming hasn't fully shaken the gambling connotations in the UK, and for many organisations (specifically charities), gaming still equals gambling. We acknowledge that, for many UK charities, gaming income generated from lotteries and raffles has been a stable (and for some, growing) income stream in the past decades. For the purpose of this report, we are focussing on gaming in its modern, hobby sense. These are interactive games like tabletop games, video games, or skill-based card games.

"In 2023, the video gaming industry generated \$406b in revenue worldwide"

In 2023, the video gaming industry generated **\$406b in revenue worldwide**, that's 18% more than film and music combined, and it shows no signs of slowing. By 2027, it's set to bring in a **staggering \$584.6b**. Tabletop games aren't doing too badly either, valued at **approximately \$11.88b**.

So, who is responsible for this growth? In short, everyone. There are **3.2 billion gamers** worldwide, more than the populations of India, China, and the US. In the UK, **44m people** (66% of the population) regularly play. Although gaming has always been a popular pastime, it reached new heights over lockdowns, with all of us forced to spend more time inside than ever before. But unlike banana bread and Tiger King, interest in gaming didn't diminish as the world reopened. Worldwide, **45% of people** are now gaming more than they did pre-Covid. Gaming, gaming mechanics, and gamification (think leaderboards, levels, and points systems) are now an unavoidable part of day-to-day life.



Consider some of the most significant shifts in the landscape over the past decade:

MAINSTREAM

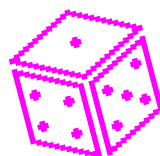
Interest in gaming has long been an easy pop-culture shorthand for a niche, 'geeky' hobby that came with a slew of stereotypes. But even pre-pandemic, these perceptions had changed: the growth of hyper-casual gaming and evolving social norms inviting wider audiences mean that gaming is certifiably mainstream.

SOCIAL MIXER

Although board games have always been a social mixer, early computer games mostly involved one player against the machine. New consoles made it increasingly easy to play with friends, and most games now let you play with (or against) friends in any timezone or geographic location.

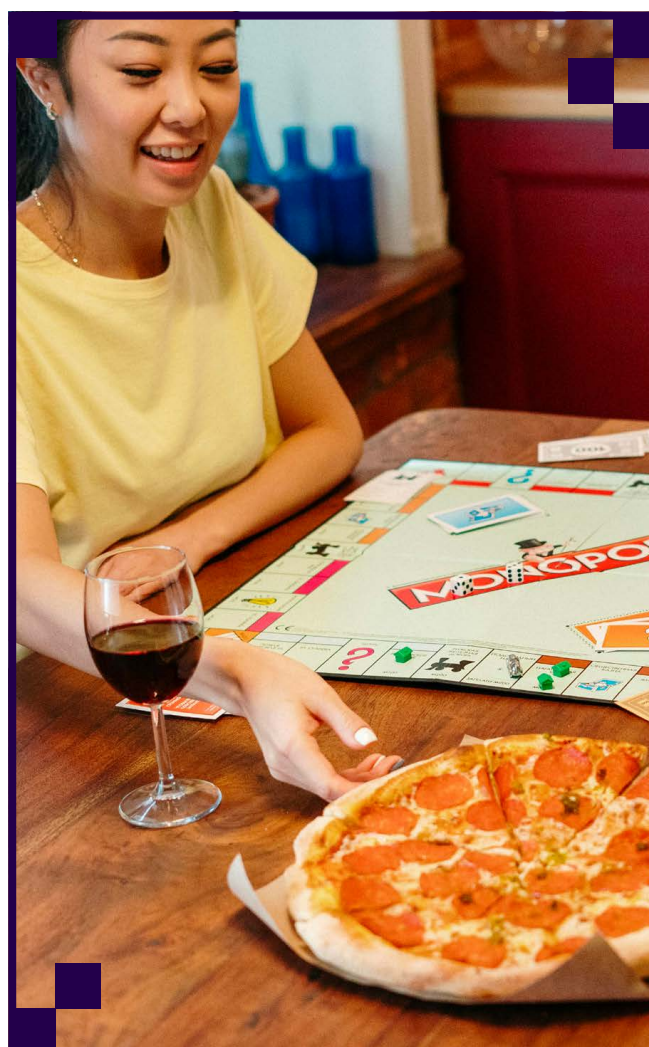
AVATARS

You don't have to be Mario or Pac-Man anymore. Most games now let you play as a customisable avatar, whether you want that to be true to your current identity or as someone completely different.



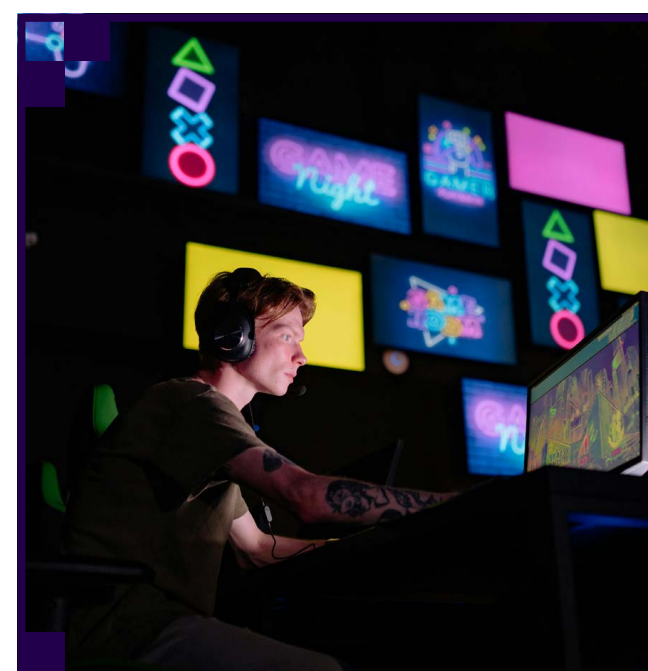
BUILDING

Sandbox games like Roblox and better tools for no-code creations have changed how we make games. It's less about having technical game-dev or coding skills than having the right creative ideas.



Perhaps one of the most significant changes is that it's no longer just about the gameplay. Social interaction, whether watching game content, socialising in-game, or attending events in and out of games, has become a vital part of the experience. Games are becoming immersive worlds in their own right. They're a space for people to connect, create and play.

"Games are becoming immersive worlds in their own right."



With the definition of gamers wider than ever, gaming is becoming a town square for people of all ages, backgrounds, and walks of life to connect. Most modern video games now **feature some form of in-game community** where players can interact with each other while playing the game itself. Out-of-game communities go beyond this, connecting gamers with similar interests and hobbies related to gaming culture or specific titles and genres. Think Reddit, YouTube, Twitch, Discord, or in-person social clubs. Younger generations are **driving this trend**, with **almost half of Gen Z** engaging with community beyond the game. **Interaction is king** now: games and campaigns that can encourage players to interact with each other inside and outside of the game.

But, as we covered in our **2021 report on Future Communities**, these spaces have their own rules, languages, social norms and expectations. Engaging with gaming is most effective when you can tap into these communities, focussing on shared, inclusive values. Be warned; you can't bluff or fake authenticity or belonging in these spaces. Your brand, messaging and actions must mirror and represent the spaces you are entering.

Gaming: The Numbers

3.2b

3.2 billion
gamers
worldwide

3.2b

Market

- Generates **\$406b in revenue worldwide**, set to bring in **\$584.6b** by 2027.
- 3.2 billion gamers** worldwide
- 44m gamers** in the UK
- UK gamers spend an average of **£22 per month** on their hobby
- 45% of people** are spending more time gaming than they did pre-Covid

\$406b

\$406 billion
in revenue
worldwide

\$406b

Genres

- Most popular type of video game
The First-Person Shooter
- Most popular board game genre
Word Games
- Most sold video game of all time
Tetris
- Most sold board game of all time
Monopoly
- Most sold console video game of all time:
Grand Theft Auto V
- Most sold video game 2023
Hogwarts Legacy
- Most played PC game 2023
Fortnite
- Most downloaded mobile game 2023
Roblox
- Most watched game on Twitch 2023
League of Legends

350m

350 million
monthly
users on
Roblox

350m

3t

3 trillion
views on TikTok
gaming content
in 2022

3t

Platforms

- 41% of players play on console**, compared to 43% who play on PC, and a whopping 79% who play on their phones
- Nearly half of gamers** tune into esports every week
- Roblox has **350m monthly users**
- Discord has **175m monthly users**
- Twitch has **240m monthly users**
- Steam **120m monthly users**
- Gaming content on TikTok got **3 trillion views in 2022**

Audiences

- 47% of UK gamers** are female
- 63% of streamers** are male
- 4 in 5 gamers** globally are over 18
- The UK average gamer is **28 years old**
- 90% of gamers** have experienced or witnessed emotional abuse or bullying in games

47%

47%
of UK gamers
are female

47%

8000BC

The first evidence of games played for fun or competition can be traced back to this early date in Axum, Ethiopia.



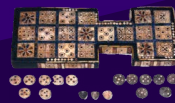
Senet
Image Source

3100BC

Senet, the OG board game, is first played in Ancient Egypt.

2600BC

The Royal Game of Ur appears in Mesopotamia. It's the first game to be played outside of royal courts.



The Royal Game of Ur
Image Source

600BC

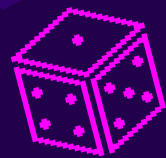
One of the oldest games still played in the world: Chess is thought to date back to this year in the Indian subcontinent.

1000s**1612**

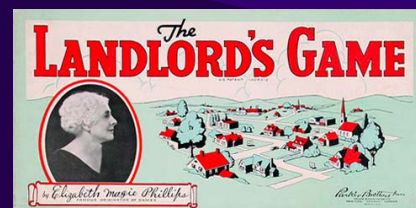
The Shogun begin running Go competitions, giving awards to the strongest players in Japan. The game itself is thought to have originated in China 3,000 - 4,000 years ago.

1800s

Some of the first mass produced games hit the market in newly-industrialised Western Europe.

**1900s**

Artist and anti-monopoly protestor Elizabeth Magie creates the first version of her game: 'The Landlord's Game'. It is later copied and sold as the game Monopoly - the most sold board game of all time.



The Landlord's Game
Image Source



Spacewar!
Image Source

1903

Artist and anti-monopoly protestor Elizabeth Magie creates the first version of her game: 'The Landlord's Game'. It is later copied and sold as the game Monopoly - the most sold board game of all time.

1400s

The first four-suit deck of cards as we know them is created in Europe. It's designed to be played with multiple sets of rules.



The first four-suit deck of cards
Image Source

1950

Computer scientists set up a digital version of Tic Tac Toe, dubbed Bertie the Brain. It was used to showcase the power of early computers.

1951

The Nimrod is exhibited at the Festival of Britain. It's considered to be the first gaming computer to ever exist, although it was intended to be an exercise in maths.

1961

Spacewar!, a computer-based space combat video game for the PDP-1 - then a cutting-edge computer found mostly at universities - is developed at MIT. It's the first video game that could be played on multiple computer installations.



Odyssey Magnavox
Image Source

1970s**1972**

The first video game home console hits the market: the Odyssey Magnavox. It commercially fizzles and dies out.

972

Inspired by one of the Odyssey's games, Atari launches Pong, the first arcade video game.



Pong
Image Source

1974

The first edition of Dungeons & Dragons is published. It will later be published by Wizards of the Coast, now a subsidiary of Hasbro.

1977

Atari releases the Atari 2600. The home console with joysticks and interchangeable game cartridges kicks off the second generation of video game consoles.

1980s

Pac-Man arcade game
Image Source

1980

A missing slice of pizza inspires Toru Iwatani to create Pac-Man, which goes on sale in 1980. Two years later, Ms. Pac-Man becomes the best selling arcade game of all-time.

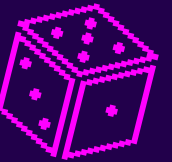
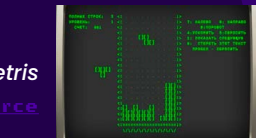
Donkey Kong
Image Source

**1981**

Fans go ape over Nintendo's Donkey Kong, featuring Jumpman. He'd later be renamed Mario.

1983

The first ever Spieltag games fair is held in Essen, Germany. The small convention is later expanded to an international annual event.

**1984**

The original Tetris
Image Source

Russian mathematician

Alexey Pajitnov creates Tetris. It escapes from behind the Iron Curtain, and five years later, Nintendo bundles it with every new GameBoy.

1987

Warhammer 40,000, a miniature wargame, is launched. It becomes the most popular mini-war game in the world.



Warhammer 40,000
Image Source

1989

Nintendo strikes again: they make waves by popularising handheld gaming with the release of their 8-bit Game Boy device.



Game Boy
Image Source

1991

Nintendo launches a 16-bit Super NES console to compete with Sega's 16-bit Genesis console. The first console war begins.



Super NES console
Image Source

1992/3

Wolfenstein 3D and Doom usher in the era of the first-person shooter (FPS). Until the 2000s, any version of these games is called a 'Doom clone'. They also kick-start user-created video game modifications (now known as mods).



Doom
Image Source

1993

Russian mathematician Alexey Pajitnov creates Tetris. It escapes from behind the Iron Curtain, and five years later, Nintendo bundles it with every new GameBoy.

1994

Sony launches the PlayStation. It is the first console that uses DVDs, which can store more data and host longer, more sophisticated games.



PlayStation
Image Source

1995

The first copy of Settlers of Catan is produced. It becomes the first Eurogame to break into American markets, leading to a boom in European-style tabletop games.

1997

Nokia installs Snake onto all of its mobile phones after the Nokia 6110.



Snake on the Nokia 6110
Image Source

1999

Sega releases the Dreamcast console. It's not a hit, but it allows for online gameplay.

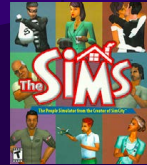
2000s

2000

Welcome to Sim City! *The Sims* signal the start of the simulation game boom.

The Sims

Image Source



2000

Professional esports emerges in South Korea, with events focussed on *StarCraft* and *WarCraft III*.

2002

The Electronics Boutique stores in the UK and Ireland were rebranded as Game UK, which became the country's biggest physical video game store.

2003

Startup G-cluster tries to get cloud-based gaming technology off the ground. It doesn't quite work, but later consoles incorporate the technology to kill off the need for DVDs and physical games stores.

PC players get Steam(y). The distribution platform modernises gaming outside of the big consoles.

Steam logo

Image Source



STEAM

2003-7

Bigger budgets and better tech lead to new narrative-driven games, like *Half-Life 2*; *Call of Duty*; and *Assassin's Creed*.

Assassin's Creed

Image Source



2004

The release of *World of Warcraft* drives growth for massively multiplayer role-playing games (MMORPGs). Thousands of players can play at once, and even create their own insulated economies.

2006

Nintendo's Wii console becomes the first one to incorporate movement-based gaming.

Nintendo Wii

Image Source



Candy Crush Saga

Image Source



Candy Crush Saga is born, and popularises the freemium model where games are free to download and play but you can speed up your progress through IAPs.

2012

2012

Rovio, the company behind the *Angry Birds* mobile game, makes a whopping \$200m.

2013

The era of AAA gaming is in full swing. *Grand Theft Auto V* is reported to cost more than \$250m. Expensive? Sure, but it did make \$6b in return.

2013

Flappy Bird takes the world by storm, with a whopping 90m downloads seemingly overnight. It rakes in \$50,000 a day in ad revenue, but is shockingly shut down by its creator just after it reaches peak fame.



Flappy Bird

Image Source

2017

Nintendo releases the Nintendo Switch, a hybrid console that can be played as a handheld or put into a docking station and played like a home console.



Nintendo Switch

Image Source

Twitch logo

Image Source



2017

Twitch is launched, making streaming more accessible to the general public.

2017

Epic Games hit *Fortnite Battle Royale* is released and drives cross-platform play.



Fortnite Battle Royale

Image Source

2020s

2020

The pandemic drives us all inside and into the arms of Tom Nook, of *Animal Crossing* fame.

Tom Nook, from *Animal Crossing*

Image Source

2023

Apple releases their Vision Pro VR headset to mixed reviews.



Apple Vision Pro headset

Image Source

...to be continued



League of Legends 2018 logo

Image Source

2020s

2010s

2008

Happy Farm is considered the first major social game - it relies on players to interact with friends via social media as a way to gain energy in the game.

App Store 2008 logo

Image Source



2008

Apple launches the App Store.

Roblox 2006 logo

Image Source



2006

Roblox is launched. It will be a game-changer for game-creation systems.

2011

Minecraft becomes fully public, launching a wave of sandbox games.



Minecraft

Image Source

Risk Legacy is published. The redesign of the classic game is the first board game to include 'legacy' elements that carry over between games.

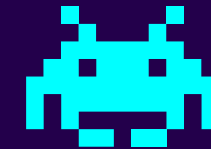


Mythbusting



Gamers are disproportionately young men.

Ask ChatGPT to generate an image of a stereotypical gamer, and you'll be shown a teenage boy sitting in his parents' basement, surrounded by multiple screens. But this is not (and has never been) an accurate representation of the wide variety of people who game. In fact, 47% of UK gamers are female, and 4 in 5 gamers globally are over 18, with the UK average being 28 years old.



Video games are violent.

The First-Person Shooter genre (think *Doom* or *Call of Duty*) is still the most popular type of game, and gang violence-themed *Grand Theft Auto V* is the most sold console video game of all time. But the industry is changing. Open-world games with low stakes and minimal violence have existed for decades, but they've now become a whole genre, referred to as "cosy" or "wholesome games". Take pandemic favourite - *Animal Crossing* - which has sold over 80m copies as of December 2023.



Gaming is bad for your mental health.

Gaming gets a bad rap when it comes to mental health. Research shows that gaming isn't harmful to mental health unless it becomes an addiction - as is the case with most things. Beyond that caveat, gaming can actually have a positive effect. From combating loneliness to healthy brain stimulation, stress relief, coping mechanism development, and self-expression, there are many good things that gaming could bring to the table.



Video games are only played on consoles.

Playstation, Xbox, and Nintendo - and the consoles they produce - have become synonymous with gaming over the past two decades. And while there's no doubt that console gaming is a crucial part of the gaming industry, it's not their be-all and end-all. Approximately 41% of players play on console, compared to 43% who play on PC, and a whopping 79% who play on their phones. From *Candy Crush Saga* to *Sudoku* apps to *Wordle*, mobile gaming alone is worth \$89.25b.



The only way to interact with gaming is by playing.

The definition of 'gamer' is more expansive than ever, and the community surrounding it has become a town square for people of all backgrounds and identities to connect. Every game is built on a foundation of community, whether it's in-game (interactions like chat features or multiplayer features), or out-of-game (making and watching streams, attending conventions, visiting online gaming communities, and much more). For example, 44% of Gen Z engage with games in ways beyond just playing.



Mythbusting



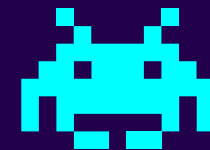
Games are always played together.

Community doesn't always equal play with other people. Of course, *Monopoly* is more fun when played with friends and family, but sometimes *Solitaire* is what you want. The same goes for video games. Some want to dive into *Fortnite* with twenty of their closest internet strangers, whilst others want to get lost in a fully immersive RPG. It varies by demographic, by occasion and by individual. Baby Boomers prefer **single-player, non-competitive games**, while for Gen Z, the social aspect of a game is the most essential factor.



Gaming can't make you money.

The global video game market is a **multibillion-dollar industry** supported by billions of players and hundreds of thousands of employees. From working in the industry, whether in marketing, development, or anything else, to competing in gaming tournaments and esports, making money through streaming, creating UGC for established games, selling mods and merchandise, or becoming a gamer influencer - the list is endless. In 2023, some **3,500 creators on Roblox made over \$10,000**, and about 750 made over \$100,000.



Making games is expensive.

It's true that making some games is eye-wateringly expensive. *Grand Theft Auto V*, the most expensive game ever made, **cost north of \$250m** (to be fair, it has raked in \$6b and counting in revenue). Making a triple A video game will quickly add up - but not every game has to break the bank. Anyone who wants to can build and publish a game on Roblox for free, and we're seeing a surge in no- to low-code options for creating engaging games without having access to coding skills (like **Downpour**).



The only way for charities to make money off gaming is to partner with streamers.

There are a wide variety of ways for charities to generate income through the gaming space—it doesn't just have to be through partnering with streamers. Whether it's engaging in-game or with the community at large, there's an untapped opportunity for the sector to tap into gaming in more creative ways. We'll be looking at some existing models for this in the next section, 'Charities & Gaming.'

Charities & Gaming

St Jude's



St Jude's Children's Research Hospital multichannel gaming strategy is possibly the most established and successful in the third sector. PLAY LIVE, their biggest fundraising activation, engages gamers and content creators to raise funds while streaming. They also collaborate with gaming organisations, influencers, and companies to organise other events, partnerships with streamers and esports teams, and gaming conventions. They've created an authentic understanding and connection with the gaming sphere by actively embedding themselves into the community over the past decade. In 2023, PLAY LIVE **raised almost \$3m.**

Jingle Jam



Jingle Jam is the world's largest charity gaming event, raising **more than £2.6m in 2023** for their charity partners. The event features unique live-streaming content hosted by a variety of creators, as well as a games bundle sent to anyone who donates over the minimum amount. In 2021, they also launched community-based fundraisers, with creators, charities, and game companies running their own Jingle Jam streams.

war child



War Child's gaming strategy involves both in-game and around-the-game activations. They've released downloadable content in games related to their cause, like **11-11: Memories Retold**, a World War I game, in which unique War Child content was available to raise awareness and generate income. Outside of games, they've tapped into the gaming community's broader interests through partnerships with gaming studios like Bethesda, with whom they hosted a concert series of the *Skyrim* soundtrack.

International Committee of the Red Cross



The ICRC's recent '**Play by the Rules**' challenge saw them partner with several Twitch streamers to challenge gamers to avoid committing war crimes in popular First Person Shooters. They even created their own *Fortnite* mode to teach players the rules of actual war. Although the event wasn't monetised, it drew **143,618 unique viewers**. The ICRC has also been experimenting with VR experiences to create more engaging narratives. The '**Enter the Room**' campaign simulated challenges faced by individuals affected by armed conflict.

Charities & Gaming

Unicef x Outright Games



Unicef UK announced its first official video game partnership in 2023, with Outright Games. The publisher committed to **raising at least £200,000 a year** through the sale of video game bundles featuring popular children's entertainment characters. Beyond the sale of these bundles, there's a number of events and livestreams planned, as well as community fundraising by Outright Games.



[Image Source](#)

NSPCC



In February 2024, NSPCC hosted the **Game Safe Festival**, hoping to find a better way to game that could keep children safe in the environment, without excluding them from it. The event saw collaboration with developers, platforms, industry bodies, esports and influencers to play and act for designing a safer gaming future. The event wasn't only for children – parents were welcome too to find resources and information about keeping their kids safe in the world of gaming. The event is a great example of tapping into the gaming community while linking it to the organisation's own mission, and without compromising their ethical stance.

WWF



WWF Deutschland launched their own adventure game last year: '**Tree of Hope**.' Rather than being played on a typical gaming platform, the story plays out as a choose your own adventure story via Whatsapp messages, making it one of the first games to launch on the platform. It was designed to be interactive, informative, and to reach audiences where they live – whilst also being a genuinely fun game to play.



LEVEL 2

READY, PLAYER ONE?

CONTINUE?

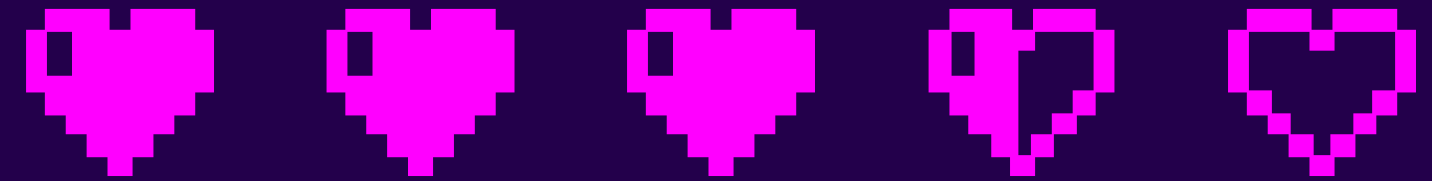
YES

NO



Your progress
has been saved.

READY, PLAYER ONE?



Introduction

In this chapter, we're diving into the people who make gaming what it is: the players and the creators. The first step towards engaging the gaming community is understanding the space you're entering. Gaming audiences are diverse and nuanced, increasingly so, and one-size-fits-all strategies won't work. Engaging a couple of professionals playing RPGs together to unwind will look very different from engaging a young *Roblox* player building their own world. Identify your target audience, where they live, how they interact, and their motivations for gaming before jumping in. Above all, understand that gaming is a tight-knit community. It's a space for people to find connection, either through the game itself or the activities and spaces around it. The community values people who speak their language and are willing to try to understand them. They'll sniff out interlopers in a heartbeat.

"Gaming audiences are diverse and nuanced, and one-size-fits-all strategies won't work."

No less crucial to understanding the gaming space is understanding the people who create the worlds players step into. From big-name studios with flagship franchises to smaller indie game developers making narratively complex and challenging games, there's no shortage of different creators to be aware of. And it's not just professional developers anymore; user-generated content is on the rise. Players want to co-create the worlds they're a part of and showcase their creativity, and better technology (like generative AI) and open platforms are making this easier for them. There are plenty of opportunities to get stuck into the creation side of gaming, from strategic partnerships with developers to co-creating assets with your supporters.

Most importantly, don't shy away from creating your own content. Don't be put off by the price tag. Games don't have to be expensive or difficult to make—there are plenty of low- to no-code options.





PLAYERS

We've already myth-busted the stereotypical image of a gamer (a teenage boy in his parents' house, surrounded by screens), so who is gaming? The answer is essentially everyone. It could be the teenager surrounded by screens, but it could also be a parent playing *Mario Kart* with their kid, a commuter playing *Wordle* on the tube, a professional unwinding with RPG *Baldur's Gate 3*, or someone building a world on Roblox.

By and large, we can break gamers up into frequency of gaming and broad generational demographics:

1. THE CASUAL GAMER

These tend to be women between **23 and 36**, playing on mobile devices. There's no agreed definition for how much time 'casual' means, but it's roughly between 10 minutes and 1 hour daily.

2. THE CONVIVIAL GAMER

One step up from the casual gamer, the convivial (or occasional) gamer tends to play on consoles for a more extended session a few times a week. They're about **28 years old on average** and essentially have a **50-50 gender split**.

3. THE COMMITTED GAMER

Committed gamers play at least once a day for a couple of hours at a time. They **tend to be male** and **between 15 and 19 years old**.



Choose your fighter

BOOMERS

If they were a game: **DOOM**

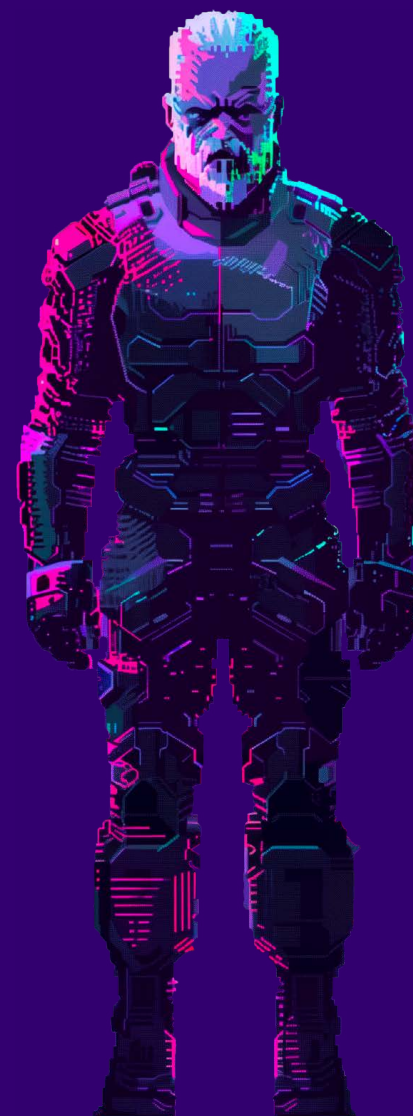
Hardware of choice: **MOBILE**

Genre of choice: **PUZZLE, MATCH**

Favourite Franchise: **MYST**

Main aim: **UNWINDING**

Money spent: **£**



PROFILE

While not the most avid gamers, about **42% of Boomers** game. The pandemic, in particular, drove these numbers up, with **2 in 3 UK Boomers** picking up the hobby over lockdown. For them, gaming is a casual pastime that's intended to **relax and unwind**. It's solo, non-competitive games on their **phones** that rule the day. Alternatively, they play multiplayer games like *Mario* to bond with their grandkids. Take note: this generation also wants to **use VR for entertainment and social interaction**.



GEN X



If they were a game:	AGE OF EMPIRES / WORDLE / PACMAN
Hardware of choice:	MOBILE
Genre of choice:	ACTION/ADVENTURE, PUZZLE/PLATFORM
Favourite Franchise:	FIFA
Main aim:	TIME-FILLING
Money spent:	££

PROFILE

This generation grew up with the advent of video games, watching them evolve from 8-bit all the way through to AAA. Approximately **60% of them** are gamers, with women making up almost half of that demographic. While they're most likely to use mobile gaming as a time filler, a significant contingent of this demographic enjoys computer-based strategy gaming, and they're likely to shell out money on that as well: **52% of them spent money on games** in the first half of 2021.

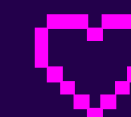
MILLENNIALS



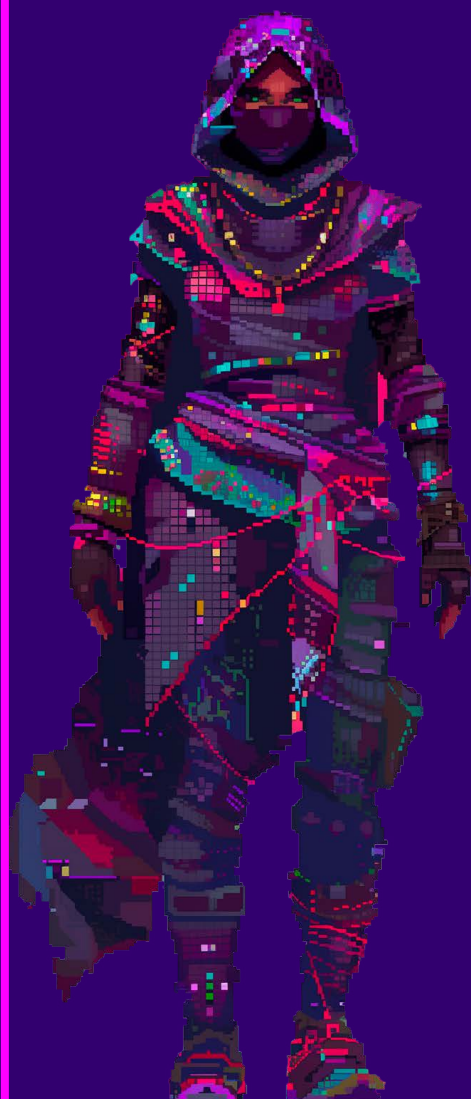
If they were a game:	LEGEND OF ZELDA
Hardware of choice:	PC & MOBILE
Genre of choice:	SHOOTERS, ACTION/ ADVENTURE
Favourite Franchise:	FIFA
Main aim:	STRESS RELIEF
Money spent:	£££

PROFILE

77% of Millennials game, engaging with it more than any other form of entertainment, and they game for **longer than any other generation**. You can find them playing plot-driven games with good character development, or bonding with their kids over a couch co-op game. They're also the generation most likely to spend money on gaming, with Millennials being **24% more likely than the average user** to be influenced to spend money on brands, products or services that are investing heavily in the gaming space.



GEN Z



If they were a game:	FORTNITE
Hardware of choice:	CONSOLE
Genre of choice:	SHOOTERS, ACTION/ ADVENTURE
Favourite Franchise:	CALL OF DUTY
Main aim:	SOCIAL CONNECTION
Money spent:	££

PROFILE

Gaming is one of this generation's go-to hobbies. **87% of them** game at least weekly, mostly because they're seeking **connection, positive social interaction, and a sense of belonging**. They find this through multiplayer, sandbox games, and gaming-focused streaming and messaging platforms, and generally have **wider varieties of engagement than older generations**. In fact, they rarely stop at the game itself. **44% of Gen Z** engage with games in other ways, like following gaming channels, podcasts, visiting online gaming communities, or attending gaming conventions.

GEN ALPHA



If they were a game:	ROBLOX
Hardware of choice:	IPAD (MOBILE)
Genre of choice:	SANDBOX, MULTIPLAYER ONLINE BATTLE ARENA
Favourite Franchise:	MARIO
Main aim:	CREATION
Money spent:	£

PROFILE

Gen Alpha kids were essentially born with an iPad in hand – it doesn't come as a surprise that a whopping **94% of them** identify as gaming enthusiasts. Like Gen Z, this generation cares about the social aspect of games, with approximately **43% of them** engaging with the community at large. But their biggest priority is the creation of new worlds. Gen Alpha loves open-world, sandbox games like Roblox and *Minecraft*, where their creativity is encouraged.

Community

We've briefly touched on the gaming community in the chapter 'Into The Gaming-Verse,' but how do you tap into it? It comes down to a **holistic and authentic understanding** of the subculture, behaviours, preferences, location, and language. One-size-fits-all gaming strategies won't work here. Knowing how to engage these different gaming demographics begins with understanding the diverse landscape and even richer subgroups. Including and elevating the voices of community members within your teams will be crucial for gaining this knowledge.

Having that authentic representation is crucial. Think of it like trying to open a new branch for your organisation in a new country. To get started, you need to speak a new language, culture, legal and monetary system, and ways of doing business. If none of your staff speaks this language, you'll quickly get lost or ignored.

If you decide to tap into the community aspect of gaming, think about why, how and where. Are you identifying and going to an existing community? Are you building your own community space for your gaming supporters to connect and interact? Which platform or space are you interacting (interactions on Twitch look and sound very different to discussions on Discord or comments on YouTube)? Or are you bringing your supporters together by bridging different gaming communities around a common interest?



Platforms



DISCORD

Voice and text chat app designed for gaming. The most popular tool to let gamers communicate with each other through text and voice chat, with **175m monthly users**.



TWITCH

Live-streaming video platform. Not exclusively for gaming. **240m monthly users**. Watch streamers play games, and interact via chat + leaderboards & tournaments.



GAMETREE

Inclusive community app with **165.5k monthly users**. Includes a searchable database of ratings, and social-media style connection features with strong moderation.



TILTIFY

Charity-focused livestream fundraising platform. Real-time interactions, as well as offering gamified features like polls, milestones, and interactive overlays.



REDDIT

Forum-based social network. 'Subreddits' can focus on anything, and the platform has a thriving gaming community. **850m monthly users**, with subreddits like r/gaming counting **40m+ members**.



YOUTUBE

The OG video sharing platform is home to a thriving gaming community. **2.49b monthly active users**.



STEAM

Video game digital distribution platform. Download, review and chat about new releases. Virtual collectible marketplace. **120m monthly active users**.

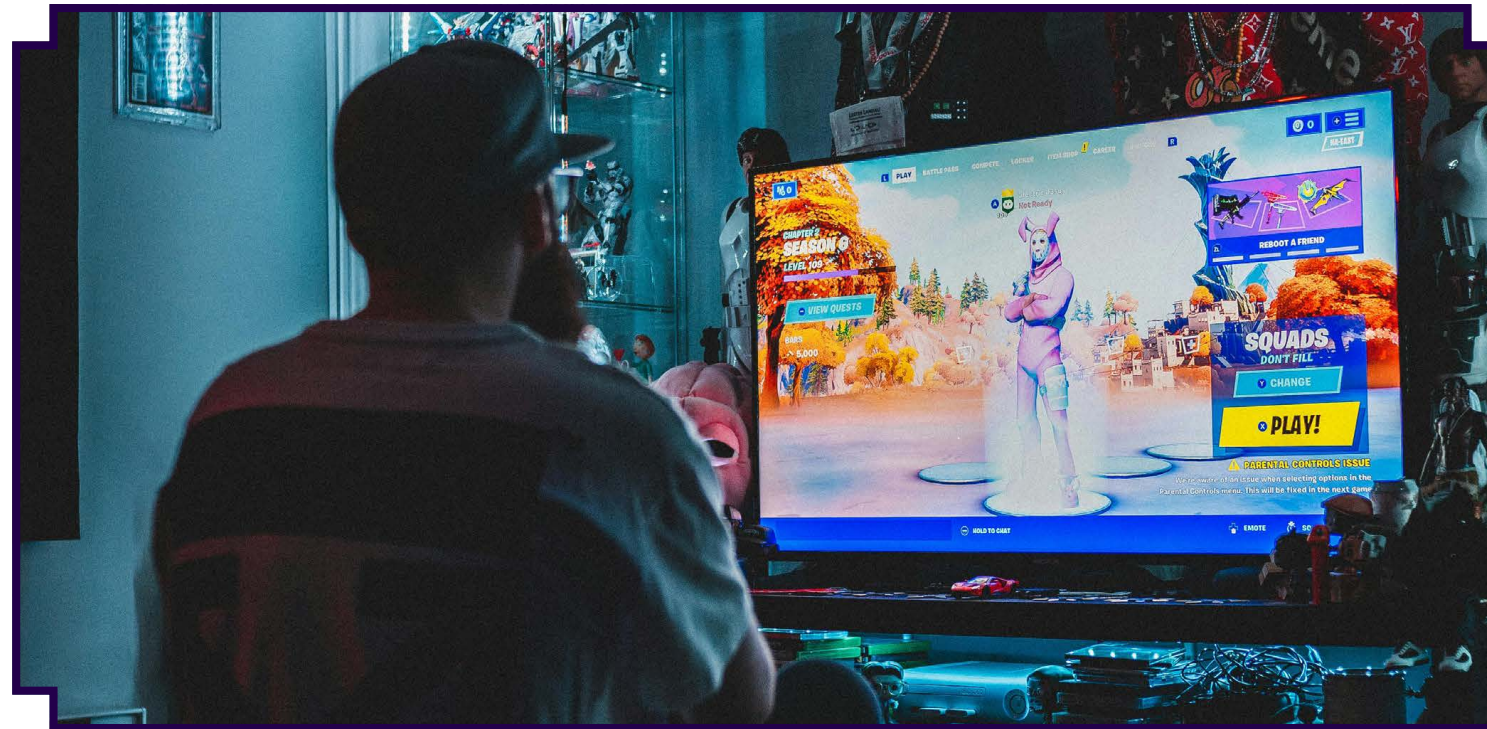
Co-Gaming

Cooperative gaming is **on the rise**, partly driven by the diversification of gaming audiences and a wish for greater community-building (hence, less competition). However, a key driver of this trend is kids gaming with their family and friends. Over the past two years, we've seen a **15% increase of 8 to 15 year olds** playing games with their friends in person, giving new popularity to the 'couch co-op' genre, where multiple people play the same game sat next to each other – think of *Mario Kart* or *Wii Sports*. On top of that, the rise of **5G-enabled tech** delivers low-latency multiplayer experiences, allowing for real-time collaboration and competition on new devices. (Find out more about 5G Futures in our **2021 report**).

“Approximately 64% of Millennial parents say that they play video games with their children”

Where a couple of decades ago, the post-dinner family bonding activity of choice may have been to sit in front of the telly for a few hours, we're seeing a shift towards gaming as a family instead. Approximately **64% of Millennial parents** say that they play video games with their children, often as a form of bonding and connection, sometimes spending up to **five extra hours a week** gaming together.

When gaming as a family, we're looking primarily at the games that Gen Alpha favours – titles like *Fortnite*, *Super Mario Bros*, *Minecraft* and *Roblox*. And yet, though parents are increasingly open to letting their young children play video games, **70% of them** still think there shouldn't be any advertising in games explicitly targeted at children. In reality, most games, including kids', are peppered with ads throughout. Games like *Roblox* and *Fortnite* are full of brand deals and branded experiences, challenges, and hangouts. How do you get that parental stamp of approval? Brands offering something of value to child gamers, like experiences or education, are **more likely to be accepted**.



Digital Identities

Character selection and, eventually, creation have long been a **core component of games**, especially since the advent of role-play and simulation games. Games like *The Sims* (which recently added more diverse personalisation features like **hearing aids and top surgery scars**) drove the popularity of hyper-personalised avatars, and the rise of user-generated content (UGC) means that these are becoming more complex and more expressive.

“Digital worlds offer a space for self-expression, identity experimentation, and exploration”

For a lot of players, this online identity is crucial. Digital worlds offer a space for self-expression, identity experimentation, and exploration that's almost impossible to emulate in real life. Of course, not all digital worlds are 100% safe, but inclusive virtual worlds can help reverse or overcome behaviours and constructs that otherwise exist offline. **88% of US and UK Gen Z** say that expressing themselves in immersive online spaces has helped them be more comfortable with self-expression in the physical world. This freedom resonates especially strongly with marginalised communities, where online identity can be crucial. **76% of LGBTQ+** people are interested in customising their avatar's clothing, compared to only 56% of people who don't identify as LGBTQ+. As gaming audiences become richer, gameplay is transitioning from a **form of entertainment to a form of expression**. New technologies like generative AI and the increasing accessibility of tools to create game mods and UGC will only increase the importance and accessibility of this personalisation.

“76% of LGBTQ+ people are interested in customising their avatar's clothing, compared to only 56% of people who don't identify as LGBTQ+.”

Creating Better Representation

Along with the rise of hyper-personalised avatars, the past decade has seen significant strides in creating better representation in the gaming world. There are [more female leaders](#) in gaming development, publishing and management, and serving as leading characters than ever before. Some games are pioneering gender neutral options for protagonists, or are delving into the rich narratives that explore the realities of marginalised communities. Playstation game [Celeste](#), for example, features a challenging and thought-provoking narrative that has players see through the eyes of its transgender protagonist – something that would have been unlikely to exist even a few years ago.

“The past decade has seen significant strides in creating better representation in the gaming world”

And yet, white men still account for [92% of people](#) working in the industry today (although the split among game developers specifically has closed to [61% male, 30% female and 8% non-gender conforming](#)). Just a tiny fraction of investment money goes towards funding game companies led by women and those from other marginalised groups.

For instance, the 2021 funding surge saw video game companies led by all-male founders bring in [\\$4.1b, compared to the \\$1.2m](#) for companies with all-female founders. **That’s Billion and Million.** Even when accounting for the number of companies, all-male-led companies received around 76x the funding of all-female-led companies.

“White men still account for 92% of people working in the industry today”

Publishers and investors are still stuck on the [stereotypical gaming demographic](#): men, specifically men in English-speaking countries. This is reflected in the fact that the [majority of gaming protagonists](#) are white men, and [male characters speak twice as much as women](#). This problem isn’t unique to the video game industry either – board games suffer from similar issues. Although many games use gender and race-neutral pieces, [89% of characters in popular cover art are white](#).

This lack of representation gives way to increased harassment of marginalised groups in the gaming industry. [1 in 2 women suffer violence](#) when playing with an open microphone; [77% of women gamers](#) experience gender-specific discrimination

while gaming; the [majority of gamers](#) say they’ve witnessed racist hate speech, and [2 in 5 disabled gamers](#) experience harassment. Hate speech and toxic online environments are so ubiquitous that any gamer could tell you about them, although they’re most common in [violent genres like shooters or battle arena games](#).

Why do people do it? It’s the same reason that people also feel more comfortable expressing their identities online. It stems from the [online disinhibition effect](#) (or ‘PC bravery’). People feel more comfortable self-disclosing or expressing extreme opinions than they would in person because they’re afforded anonymity by their screens in spaces with minimal authority.

Better representation in games is needed to embrace the broader variety of people in the gaming sphere and to create an environment for ongoing change. Alongside this, better moderation (think of recorded game chats, integrated ways for reporting hate speech, etc.), companies and organisations taking a firmer stance on discrimination, awareness and support, and acknowledging the presence and role of marginalised communities will be crucial for making the industry a safer space for all.



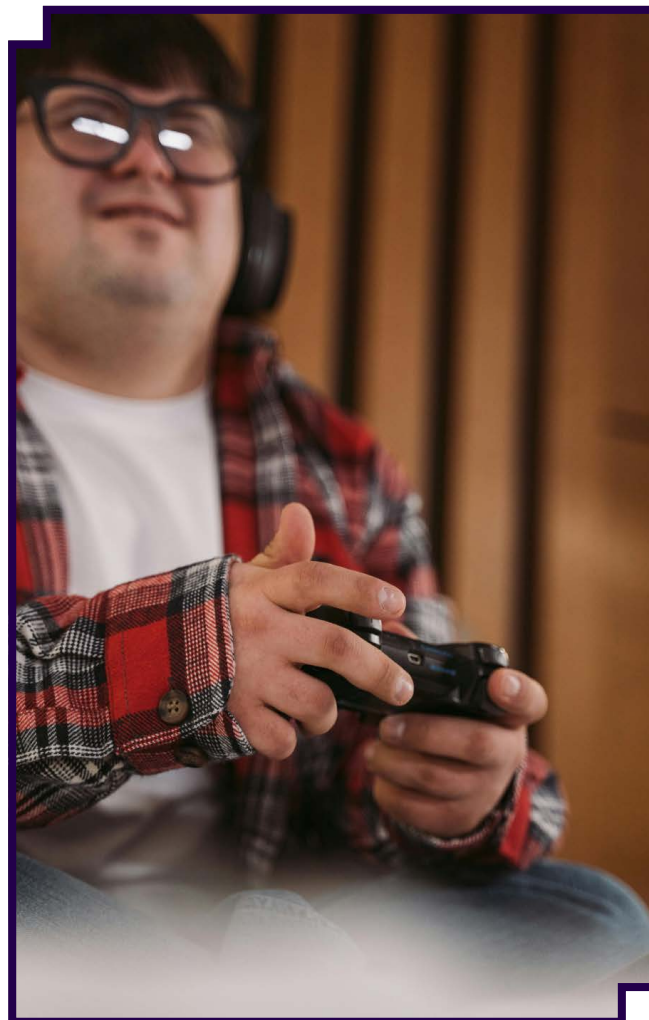
Designing for Radical Inclusion

Representation isn't the only thing that will improve equality within the gaming world – accessibility is essential, too. It's now more widely understood that gamers' diversity reflects society at large. Yet, there is very little research that has been done into the experience of disabled gamers. Issues with inaccessible hardware, complex graphics, limited subtitling, and more continue to impact these groups. **66% of gamers** with an impairment or condition say that they face barriers or issues related to gaming, mainly relating to the affordability of suitable or adapted gear. And a lack of clarity around accessibility features means that **40% of disabled gamers** have bought games they ultimately weren't able to play.

“66% of gamers with an impairment or condition say that they face barriers or issues related to gaming”

Despite this, we're seeing incremental improvements around accessibility. Most games now feature the option to customise sound or controller sensitivity. PlayStation recently pioneered a new accessible controller, and generative AI is making integrating text to speech features easier. The increasing prevalence of **VR** and **AR** could offer a wealth of alternative

experiences for players with disabilities, allowing them to engage with digital worlds in ways that may not be possible in the physical world. We need to encourage further and normalise this progress so that companies consider them the norm and decrease the associated costs for disabled gamers to purchase additional non-standard equipment or add-ons.



Safeguarding

Gen Alpha are digital natives, growing up with iPads in hand, often knowing more hacks to get around safeguarding features than their parents even know. Protecting your children, limiting screen time and ensuring they're accessing age-appropriate content can be a minefield when it comes to even finding the proper **control settings**. While your average Millennial parent is probably tech-savvy themselves, the reality is that kids are often more familiar with these worlds than their parents.

“Only 19% of parents with kids aged 5-15 use family controls on internet connected devices”

Only **19% of parents with kids aged 5-15** use family controls on internet connected devices, even though these controls have been a feature of console design for over a decade. But no matter how daunting the challenge, this is the world we, and most of today's kids, live in now.

As we spend increasing periods in virtual worlds and online environments, there's an urgent need for universal forms of governance and safeguarding – **universal metaverse rights**. These include the rights to:

- ❑ The creation of safe, supportive spaces that prioritise psychological safety
- ❑ A clear understanding of what content is prohibited and how to report violations
- ❑ The promotion of mental health and support by developers in partnership with clinical experts
- ❑ The freedom to be their authentic selves and feel a sense of belonging
- ❑ Ownership of their own data, as well as creativity and control of their own content

Seems reasonable, but building these safe spaces can be harder than it sounds. And it's not just building communities online – we need to consider **building communities of care in the real world**, that add a protective layer for the emotional wellbeing of all gamers.



Case studies

Nex Playground



This colourful cube-shaped console is built explicitly for family fun. Designed to get you off the couch and jumping around your living room, it has a motion-tracking camera to put you in the game. Gamers play physically, with gestures and movements, without needing a controller. The cube has a set of built-in games available through a subscription model, including charades-style games, football, and dancing. It also has a fitness feature with a set of guided workouts.

SO WHAT: With couch co-op and family co-gaming on the rise, the Nex Playground allows families to make their hobby less sedentary and more physically engaging. While the games available now are limited, expect to see more devices built for families to bond over gaming pop up in the future. The developers also plan to add object detection in the future, allowing gamers to incorporate everyday objects into their gameplay (think playing virtual tennis with a real racket) – great for kids who are increasingly blurring boundaries between online and digital.

My Little Pony x TripAdvisor



In 2022, My Little Pony launched a Roblox activation aimed at young kids, building a game that lets players jump into the franchise setting of Maretime Bay. Rather than only advertising their game on Roblox, they also advertised to would-be gamers' parents through a TripAdvisor listing for Maretime Bay as a family holiday destination. Part of the campaign focussed on safeguarding and showing parents how the game could be made more child-safe through settings.

SO WHAT: By targeting parents over their kids through their marketing campaign, My Little Pony is tapping into the rise of co-gaming while also showing their awareness of new challenges parents face when their kids game. By highlighting the safe environment they created and the multiplayer opportunities in the game, the brand is acknowledging the latest way that families are adopting gaming as a communal activity.

Xbox

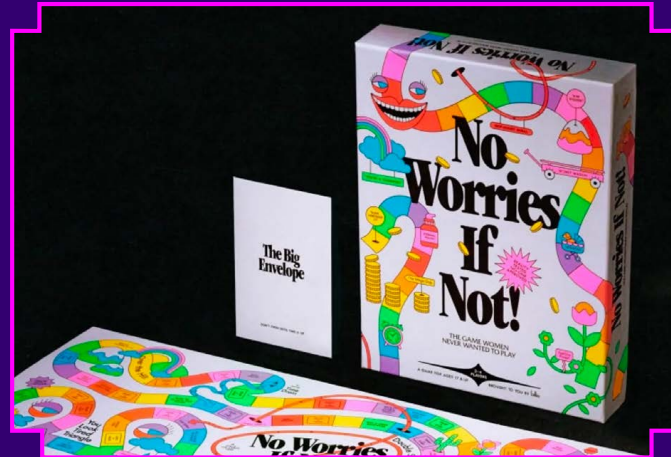


As part of their 'When Everybody Plays, We All Win' brand platform, Xbox launched their Beyond Generations campaign in 2021. The campaign focused on intergenerational connections via loneliness, particularly timely given its launch in the middle of pandemic lockdowns. The brand also encouraged people to become Age UK Digital Buddies.

SO WHAT: The benefits of Xbox's campaign are twofold: they're celebrating intergenerational connection and joy through gaming, while also shining a spotlight on a demographic not typically associated with the industry. Despite older audiences increasingly entering the gaming arena, older audiences are often marginalised by its marketing and product offering. Take Fortnite sensation [Grumpygran1948](#) as inspiration for how older audiences are choosing to play.

Case studies

Billie



Made by women-based self-care brand Billie, the 'No Worries If Not!' board game is designed to address the outlandish expectations that women often face. The unwinnable game, similar to *The Game of Life*, takes players through places like "Smile More street" and "Judgement Junction." Their tagline ("The game women never wanted to play") is a nod to the real-life 'game' that women often find themselves forced to play.

SO WHAT: Billie uses gamification, along with humour and colourful design, to call out women's challenges through a digestible and quirky lens. The humorous approach lets players move through a journey (that many of its players will no doubt find recognisable) that challenges societal norms and promotes inclusivity.

Dove



Beauty and self-care brand Dove has been working to promote inclusivity and diversity in gaming. Their multi-pronged approach includes a Roblox game, specifically designed to help girls combat negative self-esteem; a collaboration with Epic Games and Women in Games to design a set of inclusive character art that's free to use for developers; and a training programme to help devs and designers learn how to avoid unconscious bias when designing new avatars.

SO WHAT: Although we've seen progress with diversity in the gaming industry, there is still a long way to go. The majority of games still feature male protagonists and female characters are often hyper-sexualised with unrealistic body standards. By partnering with industry experts, Dove is pushing for continuous improvement, and furthering their company ethos of improving self-esteem for girls and women.

Women In Games



NGO Women In Games recently launched a campaign for men to experience the gender assault that female gamers face daily. Professional male players were invited to play their favourite games using a voice modulator. The campaign then recreated the violent comments heard by participants during real play and showed how the average number of wins significantly went down when playing as women as a result of the verbal abuse.

SO WHAT: While gaming has helped people express and explore every aspect of their identity in virtual worlds, people are still subjected to real-world prejudices and biases. Women in Games recognises the need to create safe digital spaces where everyone can thrive. By improving the visibility of the challenges faced by marginalised gaming sub-communities, the organisation is hoping to shift the narrative for women gamers.

Case Studies

Pilsen Callao



Peru-based beer brand Pilsen Callao has launched an AI-driven bot that translates real-time audio chats into sign language. Designed to help deaf gamers talk to their friends mid-game, the E-nterpreters software is free to download for Discord. The software was made in collaboration with members of the deaf community, who developed new gaming signs for the bot. It was downloaded by 75% of Peru's deaf gaming community within the first week of its launch in October 2022.

SO WHAT: Accessibility software and hardware in gaming is often challenging to find and expensive. By offering their interpreter free of charge, Pilsen Callao is breaking down barriers for the deaf community, whilst raising awareness for their brand. With the rise of generative AI tools, developments like these will become increasingly easy to make and distribute.

Halo



Recent entries into the *Halo* franchise feature more extensive accessibility features. These include meeting accessibility standards like enhanced colourblind settings, and the ability to rebind a mouse, keyboard, and gamepad controls. Inclusion isn't just limited to the game's settings either – the studio partnered with disabled service member group Warfighter Engaged to design prosthetic customisation options for players creating their own avatars.

SO WHAT: These features are part of a bigger push across console gaming to be more accessible to players of all abilities. While indie games tend to have better accessibility features available, many bigger franchises are still behind the curve. Integrating these features and customisations in flagship games like *Halo* will encourage others to meet the same standards.

Girls Got Game



December 2022 saw Nivea launch the female gaming community Girls Got Game, following a massively successful 2021 pilot that reached 16 million women across the MENA region. The community showcases female gaming in the region, hosts bi-weekly streams on Twitch, a weekly YouTube show, and tournaments, and has a dedicated space for gamers to share stories and connect. They hope that more women will be able and inspired to pursue interests and careers in gaming and esports.

SO WHAT: Girls Got Game aims to unite an existing community in a safe space where open dialogue is encouraged. Not only does Nivea hope to promote women in games, they're also meeting their customers where they live. The platform is designed to foster player-to-player interaction with minimal brand interference rather than act as a brand-to-consumer marketing channel.

Case studies

Heineken



As part of their 'Not All Nights Out Are Out' campaign, Heineken introduced Beer Matchmaking: a platform designed to connect gamers and promote socialising while playing. The platform lets gamers register and find others with similar interests and schedules, mapping their favourite games, consoles, and skill levels. To celebrate the launch, Heineken released collectable beers with QR codes that directed gamers to the platform.

SO WHAT: Gaming sometimes gets flack for being an antisocial hobby – but for many gamers, it's the opposite. It acts as a connector between them and their friends and families and lets them make new friends worldwide. Heineken's new initiative taps into this community aspect by connecting people.

/r/LowSodium Communities



Anyone who has spent time on gaming subreddits will know that most threads are inundated with toxic comments. *Halo's* subreddit was temporarily locked in 2021 because it became too toxic to manage. Fed up with the negativity, some gamers are starting Low-Sodium threads (low-sodium, as in low salt ... Get it?), where people gather to discuss and enjoy games in a more positive way. If you're tired of the toxic nature of your favourite game's subreddit, there's usually a low-sodium alternative.

SO WHAT: Gamers are actively creating safe, non-toxic spaces to come together over their enjoyment of the game. Spaces where the haters aren't welcome. Doesn't matter how niche your interest, there's a community out there who will share your passion. Connecting over joy in uncertain times is a great way to take your first steps into a new community.

Gamers vs Depression

GAMERS =VERSUS= DEPRESSION

Movember-funded initiative aims to train gamers to be 'psychological first-aiders.' Volunteers attend three hour online workshops with a team of experts followed by supervised experience over several weeks. The training helps them pick up on signs of common mental health disorders, how to start the conversation, and to look after their friends. Ultimately, the hope is ensure that every gaming guild, esports team and society has a psychological first aider.

SO WHAT: For many people, gaming communities are already a safe space that can provide solace from their daily anxieties. This initiative is working to embed more awareness and mental health support skills into these communities, to make the positive mental health benefits structural. Give gamers the tools to support themselves and others through difficult times.

Case studies

Roblox



A whopping **60% of Roblox's user base** is under 16 years old. How does the company keep them safe? One of the measures they've taken is to launch a section of its website called For Parents, which explains their safeguarding tools. From algorithms blocking swear words and names and addresses in text-chats, to how to report inappropriate chat or content, or detecting whether players' avatars are wearing appropriate clothing.

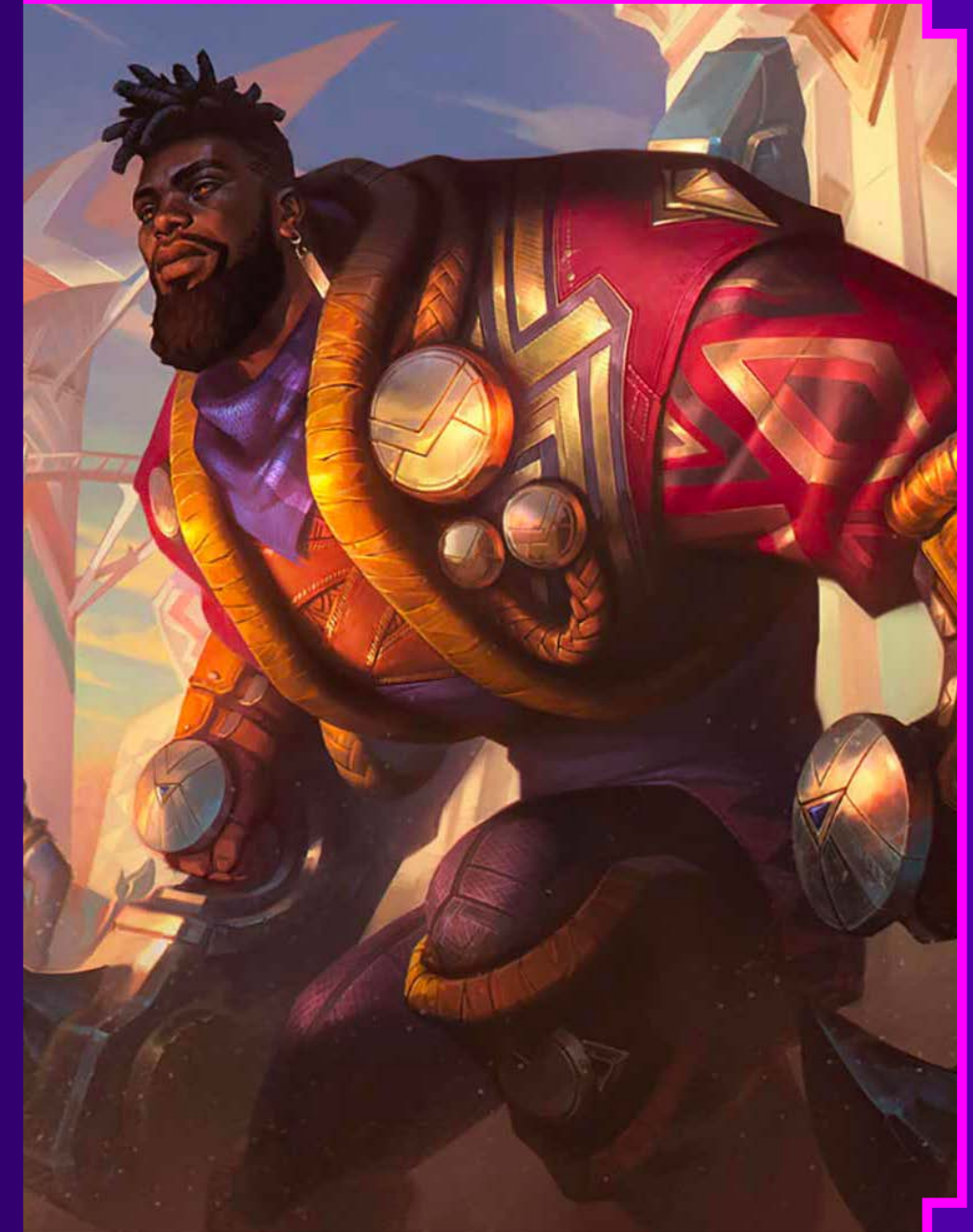
SO WHAT: Creating safeguarding tools that are 100% effective is a challenge that we're yet to see a solution to. But signposting to existing interventions, and encouraging parents to do their research and have open conversations with their kids about safely interacting with the environments they're in will go a long way for improving the safety of online communities.

Ubisoft x Riot Games



In 2022, Ubisoft teamed up with Riot Games on a new research project that's intended to reduce toxic in-game chats. The project, called Zero Harm in Comms, is broken up into two phases: first, the studios are trying to create a framework for sharing, collecting, and tagging data in a privacy-protecting way; next, they'll use that framework to create AI-powered tools to detect and mitigate disruptive behaviours.

SO WHAT: The chat function has become a core part of gaming as it has become more community-focused. While the potential for connection is great (**43% of gamers** have found friendships and/or love through the chat function), gamers are also opening themselves up to potentially harmful conversations. Collaborating to create better safeguarding systems in these chats will not only support the better mental wellbeing of existing gamers, but also break down barriers for those who might be more likely to face in-chat abuse to join the gaming community.



[Image Source](#)

CREATORS

studios

As it stands, the majority of popular (and revenue-incurring) games are still made by big-name studios. The past year saw studios take steps to maintain that position of power with some big consolidation moves. For instance, 2023 saw Microsoft close its acquisition of Activision Blizzard, which gave them rights to huge franchises like *Call of Duty*, *Diablo*, *World of Warcraft*, and *Candy Crush Saga*.

“We’ve seen 8,500 layoffs in 2022, 20% more in 2023”

However, the gaming industry, like many others, has been hit by increases in the cost of living. We’ve seen **8,500 layoffs in 2022, 20% more in 2023**, and 7,800 in the first two months of 2024 as companies react to high inflation rates and past overexpansion. On top of that, higher customer expectations mean that the costs of developing AAA games are **skyrocketing**, with many requiring ongoing support and running costs. Expect a shift from free-to-play releases and a bigger focus on traditional packaged sales to recoup losses.

Top 3 Studios in 2023 by Market Value:

- 🏆 **Nintendo**; responsible for franchises like *Mario*, *Zelda*, and *Pokémon*;
- 🏆 **Electronic Arts (EA)**; responsible for *FIFA*, *Madden NFL*, and *The Sims*;
- 🏆 **Take-Two Interactive**; responsible for *Grand Theft Auto*, *Red Dead Redemption*, and *Borderlands*.

Top 3 Board Game Studios in 2023:

- 🏆 **Hasbro Inc.**; responsible for *The Game of Life*, *Risk*, and *Monopoly*;
- 🏆 **Ravensburger AG**; responsible for *Ticket To Ride*, *Carcassonne*, and *Labyrinth*
- 🏆 **Mattel Inc.**; responsible for *Barbie*, *Hot Wheels*, and *UNO*.

Top 3 Studio-Produced Games in 2023:

NOTE: This list is identical to the top three most sold video games in 2023.

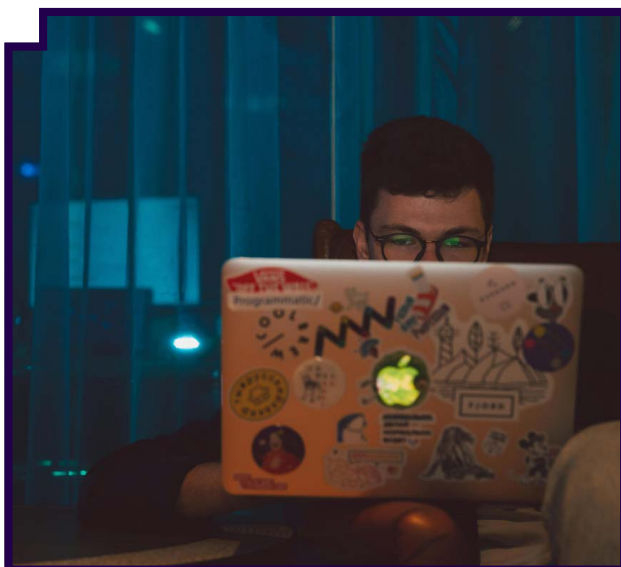
- 🏆 **Hogwarts Legacy**
- 🏆 **Call of Duty: Modern Warfare III**
- 🏆 **Madden NFL 24**



Independent

While big studio gaming still dominates the gaming market, for now, that's changing quickly. The barriers to getting a game to market have seen a number of shifts in recent years. Generative AI is supercharging developers, with its **potential to automate code** (we dive further into AI use in gaming in the **'AI' section**). Indie game producers now have **more distribution platforms than ever** (like Steam or Roblox) that allow them to easily distribute new titles. Along with marketing channels like TikTok, YouTube and Discord. In fact, gaming content on TikTok got a whopping **3 trillion views in 2022** and shows no signs of slowing down.

"66% of gamers with an impairment or condition say that they face barriers or issues related to gaming"



The proof of this shifting landscape can be seen in the number of new titles coming to market. There were nearly 13,000 titles published on Steam in 2022 on the platform, which is almost **double the number published in 2017**. Games like *Among Us*, the COVID-hit that saw players take on the role of tiny, murderous characters on spaceships, and *Stardew Valley*, a calm farming game, become bestsellers through this model.

So where can we find these up-and-coming games and studios? Indie games and creators are increasingly recognised through awards from organisations like BAFTA, which spotlights outstanding achievements in gaming each year (a number of their awards go to indie developers, but keep an eye on the Debut Game category specifically). Browsing through Steam's most played games, Reddit's r/indiegaming, or websites like itch.io, indiegames.com, and Warp Door is also a great way to gauge audience reactions to new releases.

As the UK board game industry goes through a post-COVID phase of growth, we're seeing **more indie developers pop up** in this space as well. Expect to see more indie games hitting the market successfully over the next few years, as barriers to publishing continue to break down.



Top 3 Independent Games Publishers

NOTE: There is limited data available about how these smaller developers compare to each other, so this list may be imperfect and is intended to give an idea of the market.

- 🏆 **Devolver Digital**; responsible for *Hotline Miami* and *Enter The Gungeon*;
- 🏆 **Raw Fury Games**; responsible for *Dome Keeper*, *Sable*, and *Friends Vs Friends*;
- 🏆 **Team17**; responsible for *Overcooked*, *Hell Let Loose*, and *Blasphemous*.

Top 3 Most Played Indie Games on Steam

NOTE: Again, there's limited data available about the best-selling indie games, as there is no standardised metric and indie developers don't necessarily report their revenues. This list is of the top three most played indie games on Steam, at the time of writing.

- 🏆 **Stardew Valley**
- 🏆 **War Thunder**
- 🏆 **Crab Game**

Co-Creating New Worlds

Developers aren't the only people making gaming content anymore – user generated content (UGC) is on the rise. This is nothing new for the gaming industry. User contributions to games have a long and rich history, but until recently were considered a form of self-expression or niche fandom, made out of love for the game and a sense of community. *Doom*, maybe the most famous first-person shooter of all time, built its success on opening up its underlying source code to anyone willing to build additional levels and add-ons, [kick-starting the modding phenomenon back in the 1990s](#).

“The primary driver of UGC is its role as a social connector.”



Now, UGC is reaching new levels. Younger audiences want to co-create the worlds they inhabit. There's a reason why [all of their most popular games are sandbox games](#) built on UGC, like Roblox, *Fortnite*, and *Minecraft*, all of which sit comfortably among the [most popular games for kids](#). On top of that, generative AI progress is making UGC easier to generate.

The primary driver of UGC is its role as a social connector. Creating content lets players share in the community spirit beyond the game itself. It allows people to translate their own experiences into games or to create moderations based on their own perspective or lived experience, and share those tailored experiences with others.

We can't discuss the co-creation of new worlds without diving deeper into Roblox. The platform combines game creation and game distribution in one place and has seen booming success off the back of it. Growing from 275m monthly active users to [350m over the past year](#), with daily users from 59m to 70m, and monthly hours from roughly 4.6b to 5.6b. Although the majority of users will never touch the dev kit, many of them do. Seeing the game's success, others are hopping on the UGC train and incorporating creative stages. We've got *Halo's* Forge Mode, Stage Building in *Super Smash Bros.*, or the Map Editor in *Age of Empires*.

It isn't just a pioneer in terms of creation mode, but also financial compensation. In 2013, it launched a [Developer Exchange program](#), which allowed outside devs to create games and digital accessories but also split profits 50/50 with the company. In fact, in 2021, [Roblox paid \\$250m to their in-game devs](#) and saw more than 1250 creators make at least \$10k in their virtual Roblox sales. We're seeing more companies adopt this model, like *Fortnite*, with their Unreal Editor for *Fortnite*, which saw the game break records with its daily and monthly active user figures.

As players and studios alike are recognising UGC as an art form worthy of cold, hard cash, the financial rewards available are growing as well. On the studio side, rising consumer expectations mean that the cost of AAA games is skyrocketing. On a per-megabyte basis, a \$5m indie mobile title and a \$100m AAA cross-platform game now [cost the same amount to create](#). So, how do studios keep up with these demands? By opening up the creative process to players and outside developers, publishers can outsource innovation and de-risk their business while scaling their design process.

“Players want to help build the worlds they're spending increasing amounts of time in”



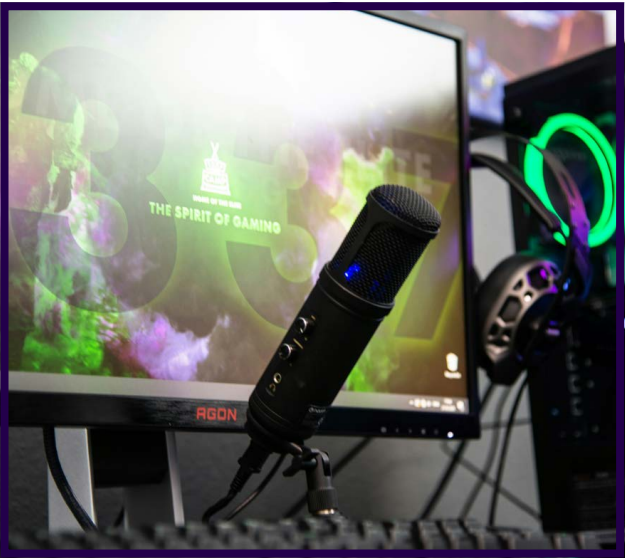
For instance, Electronic Arts generated [5,000 pieces of clothing for The Sims](#) over the past five years, but the biggest UGC sites created 39,000 pieces. Community members are getting more creative with the content they're monetising as well. In *Animal Crossing*, players created their own [WeChat QR codes](#) to display in the game so that fellow players could pay them for customised merchandise.

The bottom line? Players (of all ages) want to help build the worlds they're spending increasing amounts of time in, and studios realise creative contributions to the industry are not only worthy of financial compensation but also generate increased revenue. Games will become increasingly focused on personalised narratives, experiences, and avatars. Future video games will look less like a preset narrative and more like an open world that all its fans have helped build.

streamers

What of the people who create content *around* the game? The most popular type of content creation is streaming, which has surged in popularity in recent years and affected almost every gaming community. Its advent allowed skilled gamers and entertaining personalities to create careers out of streaming their gameplay and has only become more popular now that it's become evident that you can monetise this.

Consider Twitch, a platform built to host live video streams and was first popularised in the mid-2010s. Now famous for streaming video gameplay, it's also home to livestreams of any other activity that the millions of people who use it are interested in watching. Now a cornerstone of the gaming community, with over 240m active monthly users, including 7.36m active streamers. Of this audience, 63% are men and 73% are 34 and under.



So, how did streaming get so popular? This type of face-to-face, often unmoderated, interaction resonates heavily with an audience looking for extra community, a deeper sense of belonging, and authentic UGC. New research shows that members of Gen Z now prefer to watch social video and livestreams (47%) about twice as much as TV shows (24%) and four times as much as movies (11%).

“Members of Gen Z now prefer to watch social video and livestreams (47%) about twice as much as TV shows (24%)”

The popularity of streams has had a massive impact on which games do well online and gain traction, depending on how interesting they are to stream (and thus the reach they have), as well as massively expanding the viewership of esports. They also launched the concept of monetising what used to be a hobby. Twitch-affiliated streamers make 50% of all the revenue their channel brings in.

Regarding monetisation, streaming hinges on a traditional sponsorship model, similar to many charity events, and thus has a strong history of philanthropy. It also doesn't hurt that streamers are used to the sponsorship ask and not afraid to make it often and repeatedly on their lives. However, the success of charity/streamer collaborations hinges on the right choice of partner for both your audience.

Notable Streamers

User	Followers	Known For
 Ninja	19m	Fortnite
 Auronplay	16.2m	Everything from <i>GTA</i> to <i>Among Us</i>
 ibai	15.5m	League of Legends
 xQc	12m	Everything from FPS to 'just chatting'
 Pokimane	9.3m	League of Legends and Fortnite
 DrLupo	4.5m	FPS, and collaborating with St Jude's Children's Research Hospital, raising over \$13m.
 RanbooLive	4.5m	Variety. He also streamed for 16 hours straight to raise over \$325,000 for Charity Water.
 HasanAbi	2.5m	Raising over \$200,000 for Ukrainian relief funds
 Fuslie	1.2m	League of Legends, and stream for the National Breast Cancer Foundation, raising over \$55,000 in less than 5 hours.

Case studies

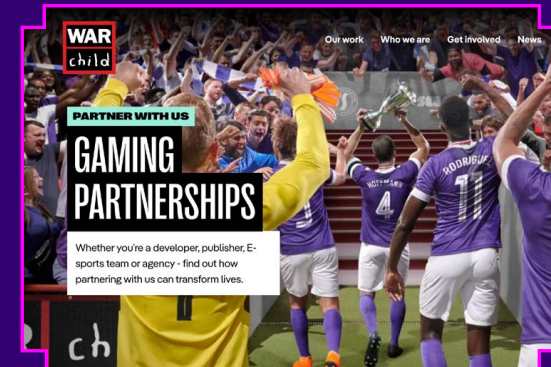
Unicef x Outright Games



Unicef UK has signed a long-term partnership with video game studio Outright Games, known for a number of popular kid's games. The company has committed to raise a minimum of £200,000 for Unicef per year by selling video game bundles, all profits of which will go to Unicef.

SO WHAT: The partnership is a great example of charities partnering with major gaming studios to generate income. In this case, Outright Games acts as an expert partner of sorts, bringing knowledge of the gaming sector and iconic IP to the table, whilst also aligning with Unicef's mission through their focus on children's games.

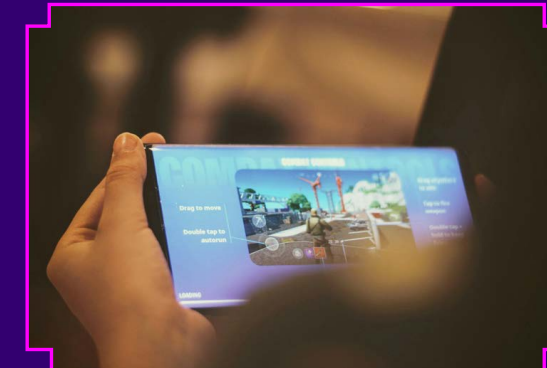
War Child



War Child has an in-house partnership team focused on creating long-lasting, strategic partnerships with various players in the gaming space. From developers to publishers, esports teams, or agencies, these partnerships have raised over £5m for the charity. This includes a 15 year partnership with Sports Interactive, which sees every sale of its *Football Manager* games contribute 10p to War Child and includes in-game advertising; a series of game partners for which they create downloadable content (DLC); and partnerships with IP owners who dedicate a percentage of their lifetime royalties to the charity.

SO WHAT: The sheer variety of War Child's gaming portfolio is what makes this an interesting case study. Some are mission-aligned (ie. DLC for games about war), others are almost purely focussed on income (ie. the partnership with Sports Interactive), but all of them lend the charity legitimacy within the gaming community, and a deeper understanding of how their different audiences interact with this space.

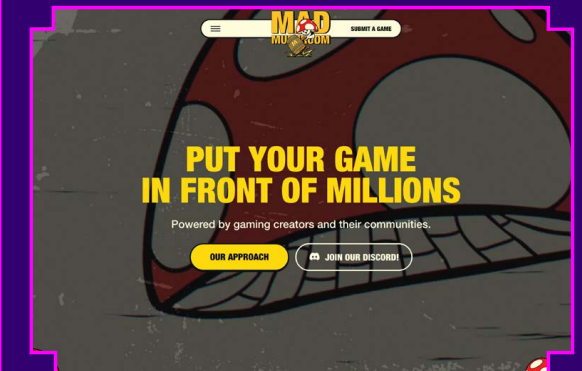
Fortnite



Fortnite is switching to a UGC-driven model. They've updated their engagement payout model, allowing creators to earn when players make in-game purchases, and their UI to push creator-made games to the top of the recommendations list.

SO WHAT: *Fortnite* is no doubt inspired by Roblox's success using a similar model. In response to increasing appetites for co-creation opportunities and UGC, *Fortnite* is hoping that these changes will build stronger brand relationships with young users craving a space to call their own.

Mad Mushroom



Creator-owned gaming company One True King (OTK) has launched a publishing label, Mad Mushroom, to develop indie games specifically with streaming audiences in mind. The label will help smaller, independent creators bring their game ideas to market while also distributing them via their varied marketing channels.

SO WHAT: Streaming (and social media) are changing how players discover up-and-coming games. By promoting indie games with these audiences in mind, Mad Mushroom hopes to contribute to a future of creator-made gaming and elevate voices that don't always get heard in studio-dominated games. The question is whether we'll be losing a bit of authenticity and depth in indie games if they become solely focused on making hits for streaming and social media—only time will tell.

Case Studies

Life By You



This *Sims*-like simulation game features an open world where players can click to control any character. Like *The Sims*, players manage their characters' basic needs and higher life goals. Unlike its predecessor, *Life By You's* characters will speak real language (not Simlish), and players will be able to choose their gender, pronouns, and sexuality. Crucially, users who create mods for the game will own them and be free to sell them.

SO WHAT: As we see the rise of UGC and the monetisation opportunities that come with it, we'll start to see more discussions of who owns what. Help audiences take control of their creations, as well as their data.

Streamloots



This live-streaming platform offers streamers new ways to monetise real-time fan engagement. For example, they might offer a fan a one-on-one interview or give tips about beating a notoriously hard game or particularly tricky level. This added layer of interaction works: the average Streamloots buyer spends **\$26 per month on digital interactions**, more than four times the average user spends on Twitch subscriptions.

SO WHAT: Interactivity sells. People want to feel like they're a part of something, and offering them direct interaction (even at a price), alongside more profound connection and belonging that many users crave. Level up your streaming propositions by incorporating more opportunities for interaction.

Downpour



This new app lets anyone build games out of their photos from the comfort of their Smartphone. Users simply make a collage of images, add some text, and save that as a page. Pages can then be linked together to create a game. It's as easy as that. The Downpour library already includes a wide variety of games, from 'spot my dog' to more complex adventure games.

SO WHAT: Making a game doesn't have to be complicated. We all carry portable yet powerful computers in our pockets at all times—the technology is at our fingertips. Downpour is a great example of the rise of no-to-low-code games that tap into the skills many people already have as internet natives. It's proof anyone can make a game—and it doesn't even have to cost anything.



Image Source

SO WHAT?

DITCH THE STEREOTYPES

Gaming audiences are diverse and nuanced. Challenge your preconceptions about where the biggest opportunities might sit, and go beyond the obvious targets.

FIND YOUR NICHE

Go niche. Don't just segment by age – think about platform, game mechanics, community, motivation, even time of day.

COMMUNITY

Gaming has transformed from a hobby to a full-fledged town square where people of all walks of life come to find connections. Start with building a presence in these communities. Use insiders to help open the door. Authenticity is queen.

REPRESENTATION

Gaming needs better representation of underrepresented and minority communities and voices. Champion more inclusive characters, narratives and gamers who reflect the diversity of the communities you work with.

ACCESSIBILITY

Choose partners who can help make your games, your content and your activations radically inclusive. Champion accessible gaming and games developers.

CO-CREATION

Help others tell their stories in your spaces or with your content. Help them be the heroes in their own story. Offer your co-creators shared ownership of the assets and stories they create, as well as their own data.

DIY

Building a game might seem daunting, but it doesn't have to be. Low- to no-code alternatives make it easier (and cheaper) than ever.

CHAMPION TALENT

Who do you want to work with? Think about supporting the next generation of gaming superstar developers, not just the established big names. (BAFTA is a great watchlist for the next generation of talent).

BUILD YOUR TEAM

Don't rely on one team member with a Twitch account to be your sole gaming authority. Build your internal muscle and expertise.

SAFEGUARDING

We know that one of the biggest hurdles to charities entering the gaming space is concerns around safeguarding. Work with platforms (like Roblox) to understand what they're doing to keep their users safe. Partner with other charities (like NSPCC) who are helping parents, developers and streamers develop their approaches to safeguarding.



LEVEL 3

STORY MODE

CONTINUE?

YES

NO



Your progress
has been saved.

STORY MODE



Hi! Are you the new farmer
who moved into town?

That's me! I'm so excited to meet
everyone.

What? You must have me confused
with someone else.

[Start a fight]



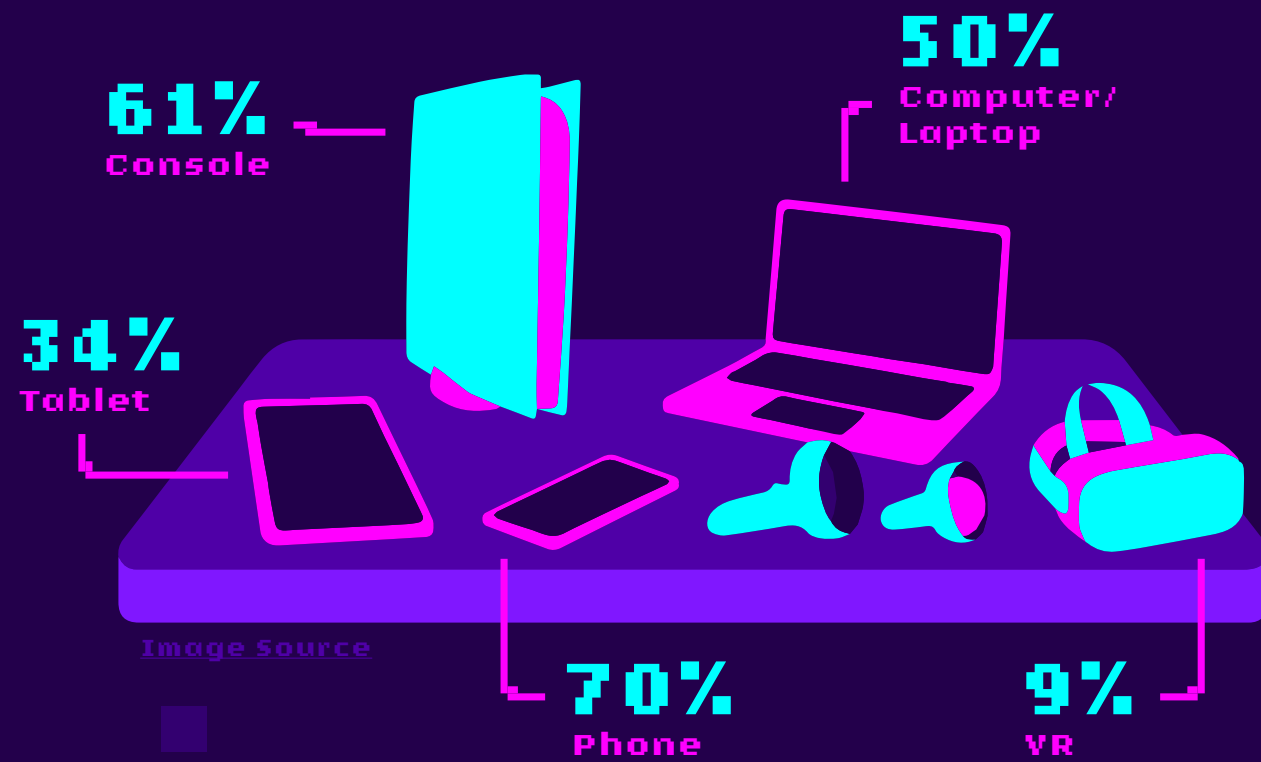
Introduction

Games are becoming more complex in their narratives, using interactivity to tell sweeping, evocative stories. Players gain new perspectives and empathy by literally stepping into someone else's shoes. There are millions of different stories to experience, from educational experiences to climate conversations, narratives about death or cultural heritage. The medium's popularity means that these stories can be experienced by thousands of people who might otherwise never connect. Use gaming to connect audiences to your cause on a more personal level and bring your story to new heights.





Where We Tell Stories



Console

The most well-known and certainly one of the most popular, the console gaming market is currently valued at \$22.9b. Historically, gamers have chosen one console brand to play, and stuck to it religiously. The rivalries that sprung out of this became known as ‘the console wars’. You might be wondering who’s currently winning this ‘war’: Nintendo’s Switch holds a slim margin **with 31%**, followed by Sony’s PlayStation 5 (PS5) at 27%, and Microsoft’s Series X/S Xbox at 22%.

That being said, the console wars are nowhere near as intense as they used to be (and, according to some people, **pretty much over**). Only **13% of global console gamers** stick to one brand.



Top 3 Most Popular Console Games of 2023:

- 🏆 **Hogwarts Legacy**
- 🏆 **Call of Duty: Modern Warfare III**
- 🏆 **Madden NFL 24**



Most popular PC games by monthly active users:

- 🏆 **Fortnite** (221m monthly active users)
- 🏆 **Roblox** (216m MAU)
- 🏆 **Minecraft** (166m MAU)

PC

Meanwhile, the PC gaming market is heating up, valued at **over \$12b**. While you can find any kind of game you like on PC, it is notably **home to more indie games** than consoles, as it’s seen as an easier entry point for indie developers.

The market’s biggest player is Steam, a game distributor which lets gamers browse, buy, review, and play games all in one place. The vast majority of popular PC titles are available here – **47% of publishers** put their games on the platform. However, the past year has seen the rise of challengers to Steam’s dominance, including GOG.com.

Mobile

Worth a **whopping \$89.25b**, **2.7 billion people** worldwide play on a smartphone. Mobile gaming has long been dominated by casual games designed to fill moments of time. However, high-quality mobile gaming is rising, while apps like TikTok cannibalise casual gaming time. Although idle games still make up more than **70% of mobile game downloads**, more than half of revenues and three quarters of growth comes from midcore and even hardcore titles.



Most downloaded mobile games of 2023:

- 🏆 **Roblox** (217.4m downloads)
- 🏆 **Subway Surfers** (214.7m)
- 🏆 **Ludo King** (164.3m)



Tabletop Games

Tabletop games are having a moment. They're immensely popular on TikTok, with [#boardgame](#) having [366.7m views](#) at the time of writing. Among video gamers, the online board game genre has also grown [29% since Q4 of 2022](#). And it's not just *Monopoly*, *Trivial Pursuit*, or *Scrabble*.

The indie board game market in the UK is booming, with a [10% predicted growth rate](#) between 2020 and 2026. We're seeing narratively complex and aesthetically beautiful games emerge from this movement, with innovative gameplay mechanics that allow for new cooperative or single-player play styles. Expect to see more people get into board games as they're exposed to the wide variety of games and styles available.



Crossover Platforms

As people crave increasingly synced services, gaming is becoming embedded in many different types of platforms. For instance, Netflix recently pivoted into gaming and has been [steadily building its games portfolio](#). It's also been testing cloud-streaming of games on TVs, which could remove the need to download or buy.

Netflix may seem like a fairly logical place for gaming to find a new home, given that it's already an entertainment platform hosted on a screen, but we're seeing more creative placements as well. WWF Germany created a low-code, choose-your-own-adventure game called [Tree of Hope on WhatsApp](#) that plays entirely within the messaging app. Meanwhile, BMW unveiled its [new electric car last year](#), which lets passengers play while stationary. During long charging periods, passengers can scan a QR code on the dashboard screen and play using their phones as controllers.

Image Source



Phygital Futures

Welcome to the phygital future, where the digital blends into the **physical**. Gen Alpha, in particular, are digital natives who don't just want phygital futures; they expect them. A world in which car brands use games as a space to test out reactions to forthcoming, real-world features, and where Coca-Cola launches their new limited-edition flavours on *Fortnite* before Sainsbury's.

What does this mean for gaming (and brand activations within it)? More transmedia approaches, whether that's bringing IRL products and experiences into games or bringing digital collectables into the real world.

Image Source

Immersive Technology

The immersive technology on **everyone's lips** is the future of VR and AR in gaming. The former involves gaming with fully immersive headsets and controllers, while AR uses special glasses, smartphone displays or tablets to overlay digital elements onto the physical environment. These technologies have the power to drive **enhanced immersion**. They create a sense of real presence by placing players in a fully 3D virtual environment with realistic sight and sound. In fact, among consumers who own a VR device, **60% say that gaming** is the main reason they use it. This stronger immersion allows deeper emotional connections with characters and storylines.

Yet this market has struggled to get off the ground despite being heralded as the future of gaming for the past decade. As of Q2 in 2023, **only 8% of gamers** use these devices to play, a figure that's remained mostly unchanged since tracking began in Q4 2020. Right now, the most significant barrier to its popularity is **design**. People don't want to wear a heavy set of VR goggles for extended periods of time. They're also expensive, with the majority of gamers generally unable to afford them.

"These technologies have the power to drive enhanced immersion"

Yet, as technology develops, we expect to see this change. Headsets will become more streamlined, comfortable, and accessible to the mass market. Despite the slow start, it's still predicted that the VR/AR gaming market is still predicted to hit a high of **\$571b by 2025**. Don't discount this technology yet.



Generative AI

The other main technological development to watch is generative AI. Like almost every industry, the rise of AI-linked technologies could fundamentally change how games are created, marketed, sold, and played, including reducing the need to invest in expensive software, specialist knowledge, or coding skills.

Let's take a quick look at some of the other applications we're seeing in the industry:

CODE

Perhaps the most common current application is coding. Developers are integrating AI into software to help with repetitive codes or to spot and fix bugs. For example, developers are using Microsoft's Copilot to autocomplete code.

IMAGE

Although AI is still a bit too random and biased to generate the graphics for entire games, some developers already use it for short sequences of advanced VFX. Others are using it to accurately map real-world items and bring them into games as a phygital extension of themselves.

DYNAMIC ADVERTISING

AI is already integrating advertising into recorded or live-streamed gameplay. These native ads are embedded in real-time on streams, depicted as in-game billboards or posters, exactly like a campaign would be in real life.

UGC

User generated content and AI are a match made in heaven. It could make in-game content creation, like mods or avatar customisation, more accessible for every amateur gaming fan (or organisation wanting to create their own branded content). It basically removes some of the technical know-how.

DIALOGUE

We're also seeing AI be used to generate NPC scripting, which could not only automate the process but also make it more immersive and engaging, lending itself to more complete worlds.

SAFEGUARDING

AI can also be used for better content moderation in-game (although it's currently imperfect). Big gaming studios are collaborating to create better algorithms to detect hate speech, and some AIs bleep out hate speech in gaming chats in real time.

CHEATING

From an esports perspective, AIs are a better way to quickly ensure fairness without blowing the budget on expensive moderators and intensive protocols.

GAME GENERATION

There's chatter around possible AI software that can generate whole games, like Genie, which can take a short description and turn it into a playable video game. However, there's a way to go with this technology.

Of course, there are important discussions about ethical AI use that need to be held. However, when used correctly, the technology has enormous potential to decrease the barriers for various indie developers, amateur game makers, and organisations who may need more expensive technical expertise to get into game design and development.



Case studies

WWF Germany



This WhatsApp game is designed to raise awareness of the need to protect natural areas. WWF Germany's initiative sees players become 'EcoNinjas', going through a series of decision-making scenarios all via text. Around 85% of internet users in Germany use WhatsApp, and the game was promoted via billboards with QR codes.

SO WHAT: Integrating their game into the world's most popular mobile messenger app makes it available to a vast audience and removes participation, language and geography barriers. Harness the popularity of digital platforms, like WhatsApp, to bring your narrative to new supporters.

Habbo X



Metaverse chatroom Habbo X recently called on its community to help design its merchandise. The company asked players to submit their garment and toy design proposals, followed by a community-led voting process. Winning items were brought to life as NFTs and physical products.

SO WHAT: Habbo X's initiative taps into three current audience demands: bridging the physical and virtual worlds, strengthening communities by giving audience members a voice, and letting them co-create their worlds. Expect to see more brands launch merchandise lines in phygital spaces.

LEGO x Epic Games



LEGO worked with Epic Games, the studio behind *Fortnite*, to create digital twins for more than 10,000 Lego building pieces to let designers and gaming communities build limitless Lego products, sets and digital experiences. During the launch presentation, the brands shared side-by-side photos of two Lego dinosaurs: one physical and one built in the Unreal Engine. No one in the crowd could tell the difference.

SO WHAT: LEGO and Epic Games (with *Fortnite*) are responsible for some of the most popular games in their respective universes. By bringing these together through a transmedia approach, they're allowing their fan bases to tap into phygital play and enjoy the brands in new spaces.

Case Studies

Chipotle Builder



Chipotle launched its metaverse debut on Roblox with the Chipotle Burrito Builder. Like most branded content on Roblox, the experience is an immersive game that lets players complete challenges (rolling burritos) in exchange for in-game currency.

SO WHAT: This is the first collaboration that lets Roblox users exchange in-game currency for IRL items – namely, a real Chipotle burrito. The game goes one step further than simply driving brand awareness through its activations and encourages gamers to have real-life experiences with Chipotle as well.

All On Board



This VR game wants to bring the ‘game night’ tradition to the digital sphere. It essentially recreates the experience of sitting around a table with friends, with access to a growing selection of adapted board games. A no-code PC add-on allows users to create and share their games, and the platform also offers a matchmaking service to connect new gamers.

SO WHAT: All On Board hopes to recreate the joy of communal tabletop games but inside a metaverse. VR makes the experience fully immersive, letting players see each other’s body language and use their hands to manipulate game pieces and objects, just like they would in real life.

Nvidia Ace



Nvidia’s Ace technology transforms the role and scope of NPC characters in games. Essentially, the AI-driven tech allows NPCs to be smart, with their own AI-generated personality and the capacity to interact directly with human players, talking in real-time and responding to gamers’ actual voices.

SO WHAT: The typical NPC interaction features a few branches of conversation with pre-programmed sentences, but not much more. With new AI technologies like Ace, these characters could offer a whole new layer of immersion and possible exploration, creating the impression of a more fully realised world. On top of that, the technology is available to all game developers and could break down barriers for smaller developers to create richer worlds.

The Stories We Tell

Overview

Unlike Hollywood, where box office data is public, and hits are easy to identify, the gaming industry guards its numbers like a dragon hoarding treasure. While we can cobble together some idea of popularity from press releases or earning calls, there is no standardised way of measuring game popularity, and many companies offer substitute figures like revenue or monthly active users.

Circana, an analytics company that tracks US sales, is considered the most trustworthy but relies on publishers to report sales data – which not all do perfectly (or at all). For example, Nintendo only reports physical sales and not digital sales (which make up the majority of their revenue); Epic Games doesn't report sales from its own store, which hosts games like *Alan Wake 2*; and non-US companies often don't report their numbers at all. And none of this reflects the popularity of free-to-play games like *Fortnite* or *Roblox*. Regardless, even the imperfectly cobbled-together data offers some interesting insights into how the gaming market is moving.

Genres

#1 PC Genre: Shooters
(14.1% of PC gaming revenue)
ie. *Doom*, *Halo*, *CSGO*, *Call of Duty*

#1 Console Genre: Adventure
(17.1% of console gaming revenue)
ie. *Zelda*, *God of War*, *Skyrim*

#1 Mobile Genre: Puzzle
(50% of mobile gamers)
ie. *Sudoku*, *Two Dots*, *Really Bad Chess*

#1 Board Game Genre: Word Games
(Preferred by 47.2% of board gamers)
ie. *Scrabble*, *League of the Lexicon*, *Take A Letter*

Games

Most sold video games of all time:

- Tetris** (520m+ copies)
- Minecraft** (300m+ copies)
- Grand Theft Auto V** (195m+ copies)

Most sold video games 2023:

Note: For the past 15 years, *Call of Duty* has held the top spot except for three times: *Grand Theft Auto V* (2013), *Red Dead Redemption II* (2018), and *Hogwarts Legacy* (2023). Also interesting: as we mentioned, Nintendo doesn't disclose its digital sales, which it says account for over half of its revenue. Games like *The Legend of Zelda: Tears of the Kingdom* (#5 on the 2023 most sold list) and *Super Mario Bros. Wonder* (#12), could rank a lot higher if these had been disclosed.

- Hogwarts Legacy** (22m copies)
- Call of Duty: Modern Warfare III**
- Madden NFL 24**

Most popular PC games by monthly active users:

- Fortnite** (221m monthly active users)
- Roblox** (216m MAU)
- Minecraft** (166m MAU)

Most downloaded mobile games of 2023:

Note: Roblox's numbers here reflect only its mobile downloads—while there is no clear data for how many installs it saw on other platforms, we can assume it's a gargantuan platform.

- Roblox** (217.4m downloads)
- Subway Surfers** (214.7m)
- Ludo King** (164.3m)

Most-watched games on Twitch in 2023:

- League of Legends** (1.3b hours)
- Grand Theft Auto V** (1.2b hours)
- Valorant** (997m hours)

Most sold board games of all time:

Note: We're excluding games like *Chess* and *Checkers*, as it's unknown how many units have been sold since their introduction. However, **3m+ copies of Chess** are sold each year in the US.

- Monopoly** (275m+ copies)
- Scrabble** (150m+ copies)
- Cluedo** (150m+ copies)

Most sold board games of 2023:

Finding data on the most sold board games of 2023 is even more challenging than finding its video game counterpart – there is no central reporting system, most companies don't disclose any data, and the resale market is a crucial component. Every source we found on this topic disclosed a very different Top 10. Most feature some classic games (*Catan* in particular comes up frequently), and a mix of newer indie-darlings like *Cascadia* and *Wingspan*.

Building a Narrative

Over the past decades, games have become increasingly narratively complex. While there's still a market for simpler idle games like *Candy Crush Saga* or *Subway Surfers*, the rapid development of technology means that games can build consistently bigger and more immersive worlds. As these story-based games have become more popular, we've seen the **goal of narrative use in gaming shift as well**. Rather than exist to give context to the gameplay, more and more games are made with a story in mind. These story-based games essentially borrow storytelling concepts from other mediums and adapt their user experience. So, how do they compare to more traditional storytelling methods?

INTERACTIVE

Players can insert themselves into a narrative, gain new perspectives, and apply their own personality to shape the story. Interactivity lets creators convey narratives that are impossible **in a passive format**. Simply put, it allows players to identify more with characters and their experiences and fosters deeper empathy.

ENGAGING

While someone watching TV may be duelling screening on TikTok (or tapping away at an idle game)—and is increasingly likely to be doing so as our **attention spans shorten**—gaming's interactivity forces people to be present in the moment and in the narrative. You can't pause an online game; therefore, you need to be present in the moment.

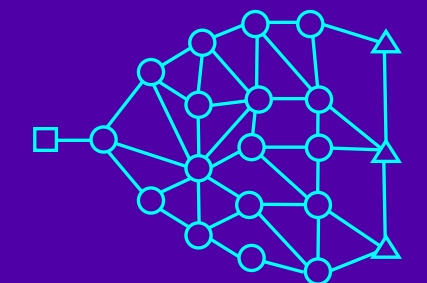
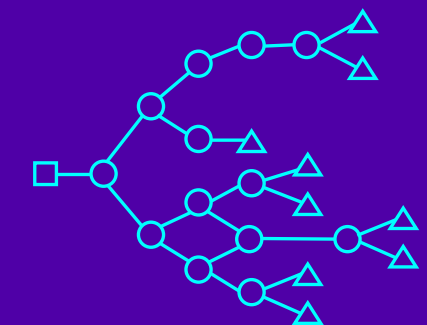
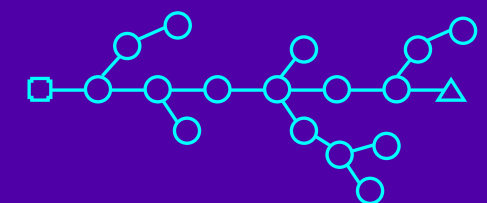
STRUCTURE

Games can have linear narratives, like most other storytelling mediums, but have a unique ability to create branching storylines. In fact, there are **four main types of narrative structure** that they can adopt:

- **Linear**, where events follow a set sequence, like *Doom*
- **String of pearls**, a linear story that can be interrupted by player freedom at times but comes back to the same story arc, like *Final Fantasy*
- **Branching**, where player choice plays a major role in how a world develops and how the game ends, like *Until Dawn*
- **The amusement park model**, where the story is presented by exploration, rather than key events and missions, as seen in *Assassin's Creed*.

KEY

Gameplay	—
Story Event	○
Beginning	□
Ending	△



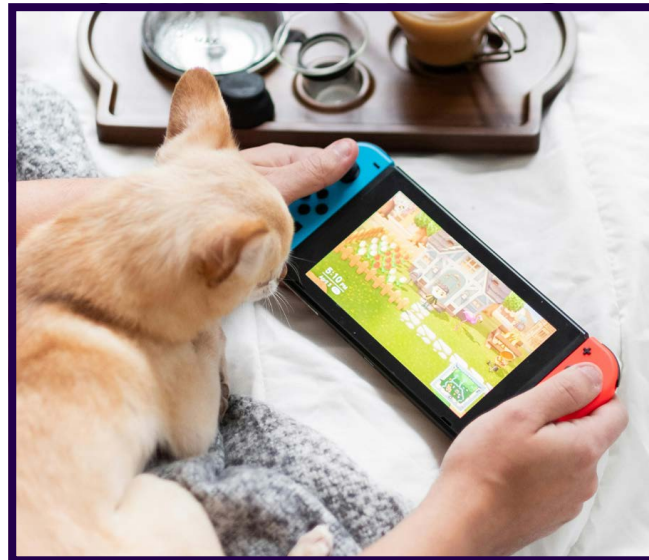
Wholesome Games

A quick glance at the overview of popular games and genres (found at the start of this chapter) might give the impression that most games are still violent, which may create massive brand issues for any charity wanting to enter the gaming market. But this is no longer the case. Yes, shooting games are the most popular genre of PC games right now, but they only account for **14.1% of the market revenue**. The full scope of games available is much richer than this suggests.

We're seeing the **rise of 'wholesome'** or 'cosy' games. These games are essentially built to transport players to alternative realities with minimal conflict, emphasising nature and the simple pleasures in life, often with a heavy focus on community. So what's driving this trend?

"Shooting games are the most popular genre of PC games right now, but they only account for 14.1% of the market revenue.

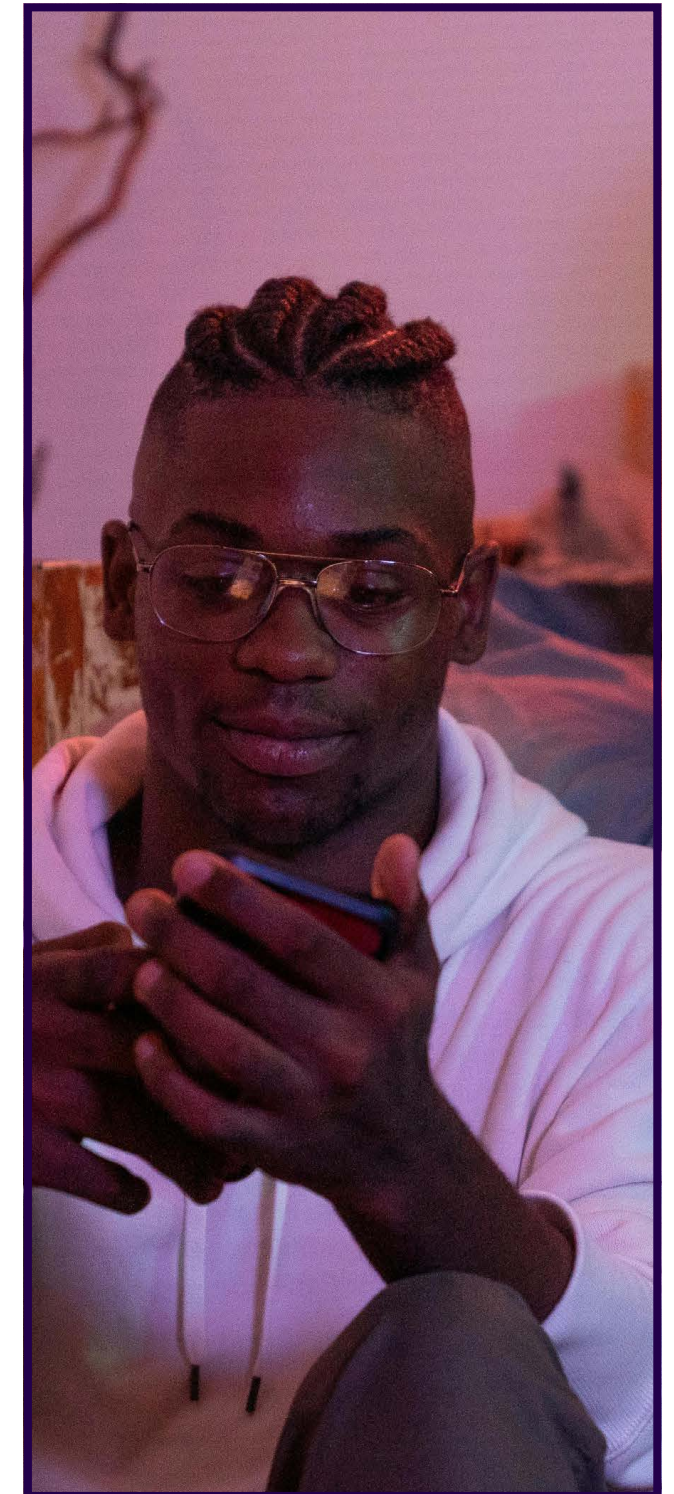
The full scope of games available is much richer than this suggests."



Firstly, escapism (see the Conscious Consumption **2024 trend in the tarot**). These games provide an escape from darker and more violent titles and **the darker and more violent real world**. The genre boomed during COVID-19 and continues to grow in the ensuing polycrisis. Take *Animal Crossing*, a Covid-time hit that has helped people find routine and simple pleasures. It's also true that game designers don't necessarily want to spend their careers designing games about killing. With new headlines about violence and war hitting the headlines every day, these developers feel that creating entertainment filled with bloodshed **contributes to the problem**. Lastly, as gaming becomes a pastime for the entire family, **parents are driving demand** for games that don't feature pixelated machine guns, and don't expose their kids to gore and violence.

"Engaging with gaming doesn't have to mean engaging with violent gaming, there are plenty of other routes to take."

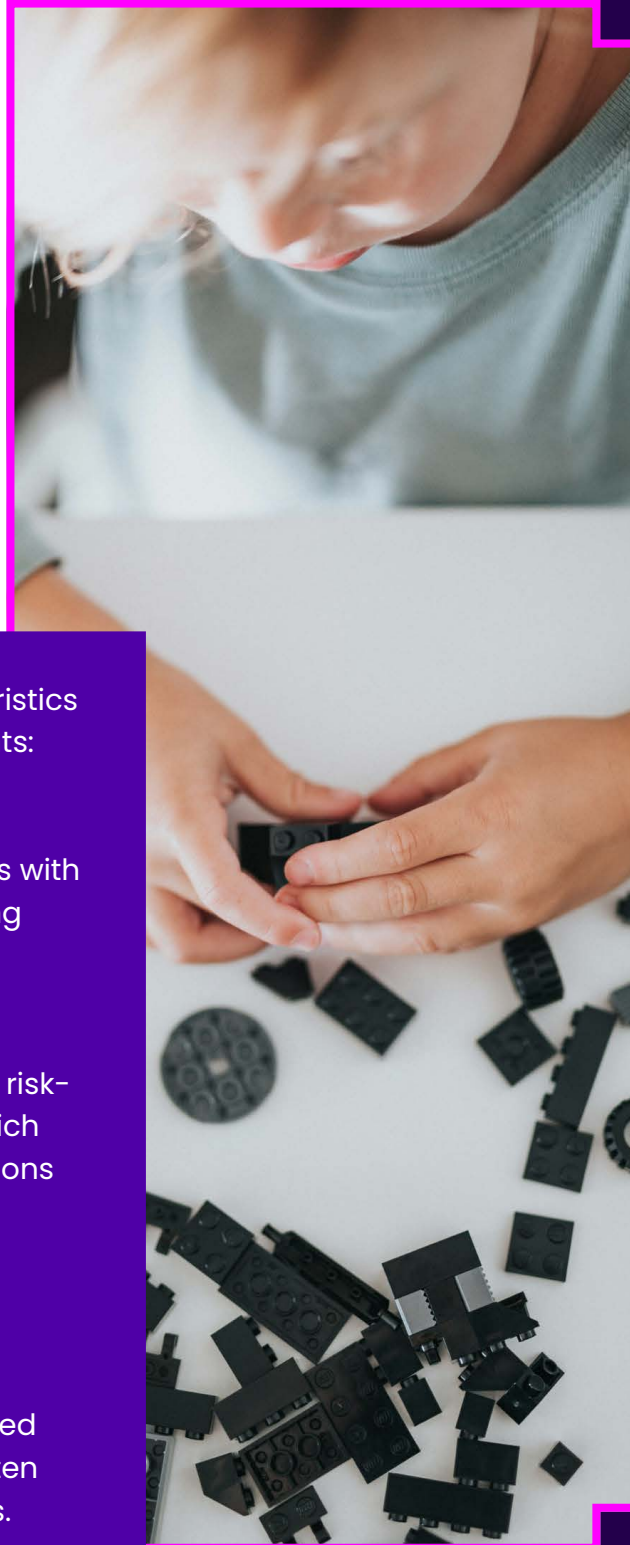
The 'wholesome' game genre is **dominated by indie developers**, characterised by their warm, welcoming, and inclusive communities that draw in audiences typically on the **margins of the gaming community**. As such they're also **more likely to have accessibility features**, like adjustable difficulty levels, palettes for colourblind players, and improved audio cues for visually impaired gamers. While the mechanics and goals in these games can vary wildly (from simply spending your time farming crops in *Stardew Valley*, to the nuanced emotional narratives delivered in a cosy way in *Spiritfarer*), they share a common vibe that's wholly distinct from the male-dominated shooting and sports games that have become analogous with gaming culture. Engaging with gaming doesn't have to mean engaging with violent gaming, there are plenty of other routes to take.





Gaming University

We've been learning through play for thousands of years. In recent decades, we've seen LEGO used to teach spatial reasoning and creativity, puzzle games for creative or analytical thinking, and games like *Twister* for physical awareness. Ultimately, play is a crucial component of cognitive development. So why not video games as well? They've been shown to drive **creativity, critical thinking, and problem solving skills**. Their adaptability in terms of narrative and mechanics means you can learn pretty much anything, which makes them a valuable tool for raising awareness.



Most games have some common characteristics that make for effective learning environments:

COMPLEXITY

Many games present complex environments with scaling difficulty, promoting decision-making and problem-solving skills.

EXPERIMENTATION

Games often promote experimentation and risk-taking without real-world repercussions, which encourages players to find alternative solutions in their day-to-day lives.

NARRATIVE

The variety of narrative and thematic styles means that players take on the identity of a diverse range of characters, can be immersed in perspectives that aren't their own, and often interact socially while in these environments.

Case Studies

Nubank



Financial services platform Nubank partnered with Estrela, a Brazilian toy manufacturer, to launch a fresh take on the board game classic *The Game of Life*. In the new, educational version, players are encouraged to learn about financial education in a gamified way, with strategies that are day-to-day relevant. As part of the launch, the company hosted a Twitch livestream with some of Brazil's top streamers playing the game.

SO WHAT: Finances and financial services aren't always seen as the most exciting part of life planning, nor are they the easiest to understand. By turning something that can be daunting for many into a playful and entertaining board game, they're hoping to increase understanding and knowledge around the topic while also raising awareness for their brand.

LEGO



In 2019, LEGO launched a set of special bricks to help kids learn braille. Instead of the usual patterns of studs, these bricks were built to correspond with the braille system. They were initially only available to schools, but after widespread calls to make them more accessible, they have now been made available to everyone who wants to learn braille. The bricks are designed to integrate with standard LEGO sets, morphing them from a learning method to a playtime activity that bridges the gap between the sighted and visually impaired world.

SO WHAT: By making these bricks available to everyone, LEGO encourages kids to subconsciously learn the basics of a new language. Integrating them into standard LEGO sets also breaks down barriers for kids with sight loss wanting to participate in a communal activity.

Case Studies

Erase All Kittens

E.A.K.



eraseallkittens.com

This *Mario*-style platformer built specifically to appeal to girls uses its game mechanics to introduce kids to coding. It works with standard programming languages, like HTML, CSS and Javascript, making the skills readily transferable to other projects. To expand their reach, they partnered with Tesco to give Clubcard members access to a discounted subscription. As of March 2022, over 170,000 players in over 170 countries had signed up, over half of whom were girls.

SO WHAT: Gender bias continues to keep girls and women out of STEM. Giving young girls access to tools and resources that show them coding isn't just a boy's hobby is crucial for breaking down the stigma and difficulties faced by women in this field. Games like *Erase All Kittens* are small but meaningful ways of showing kids that everyone has the same opportunity to develop digital skills.

Minecraft x Cambridge University



Language experts at Cambridge University teamed up with Minecraft to launch *Adventures in English*, a story-driven map designed to teach the language. Players are guided through a quest filled with puzzles, characters, and multiple worlds, simulating real-life communication through problem-solving.

SO WHAT: The game is designed to be a fun way for young learners to come to grips with the English language while building their problem-solving and general communication skills. Immersing gamers into an environment they're already likely comfortable in allows them to feel safer throughout the learning process.

The Uncensored Library



The Uncensored Library is an initiative by Reporters Without Borders (RSF) to preserve censored information in *Minecraft*. Many countries control the flow of information on websites, social media, and blogs, and governmental disinformation campaigns can manipulate news. Gaming often doesn't see the same restrictions. The online library preserves articles that are censored or banned worldwide and gives voices to journalists in countries where free speech is risky. It currently has rooms for countries including Russia, Vietnam, Saudi Arabia, Mexico, and Egypt. Developers chose *Minecraft* because it is difficult to legislate and enforce server shutdowns.

SO WHAT: The Uncensored Library preserves journalistic freedom and accessible information in virtual spaces, where young players are introduced to topics of press freedom and freedom of speech, maybe even for the first time.



[Image Source](#)



Citizen Science

Similarly, we're seeing the increased gamification of research and science.

Data collection and analysis are baked into game mechanics, designed to contribute new data and uncover insights while audiences play along. Think of this as brand engagement more than it is research. Yes, citizen science can help you churn through a data set at thrice the speed — but so can AI now.



Case Studies

Glyph

This online game is designed to investigate the shapes of letters by getting players to sort characters into two groups. Built by scientists at the Max Planck Institute for the Science of Human History, Harvard University, and Université Paris Sciences et Lettres, the game aims to help researchers understand how letter shapes evolved to be distinctive.

SO WHAT: This is an excellent example of a basic version of gamified citizen science. The gaming mechanic is simple (an organisational task with limited story-telling around it) and easy to build. However, it can be as fun as many other idle puzzling games.

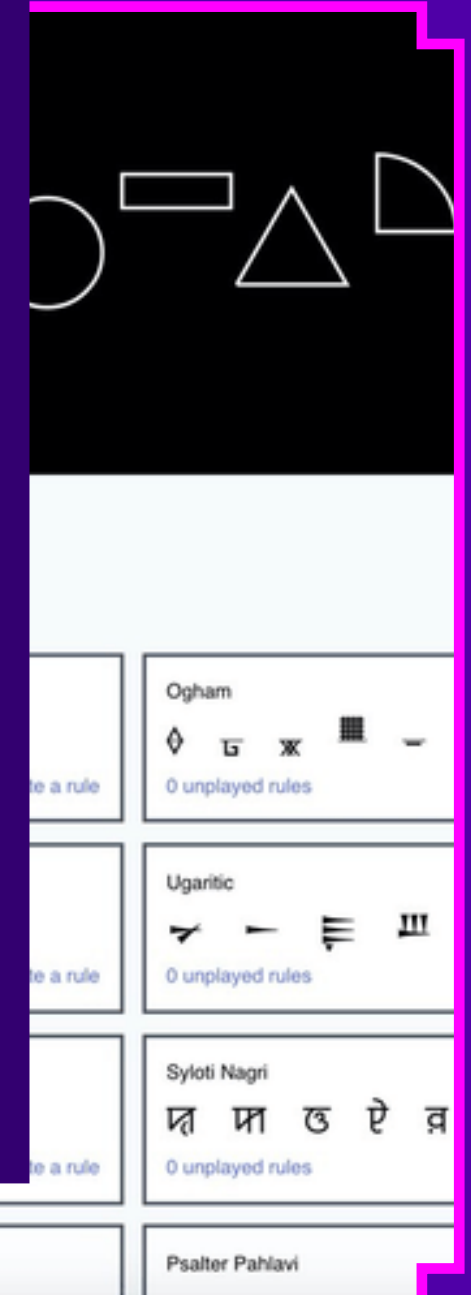


Image Source

Case studies

Stall Catchers



Stall Catchers, an online game developed by the Citizen Science Alliance, sees players analyse actual research data in a gamified way to help advance Alzheimer's disease research. The game mechanic is simple: letting audiences look at videos of the brains of mice and identifying vessels as flowing or stalled. Collectively, players could process **50 times as much data** as the scientists working alone.

SO WHAT: Some people would love to volunteer for charity but don't have the time or ability to commit to a more formal volunteering programme. These remote, micro-volunteering options, which incorporate gamification to make the process fun for volunteers, let these audiences contribute to ongoing research and raise awareness from the comfort of their sofas.

Cancer Research UK



Cancer Research UK has launched several citizen science initiatives, starting with *Cell Slider* in 2012. These ranged from simple sorting games (e.g. games that let players identify and classify images of tumours) to adventure games with more complex narratives, like *Play to Cure: Genes in Space*, which saw players navigate genetic cancer data in their quest to explore space. These games saw wide success, with the latter hitting over 400,000 downloads and 5,000,000 nuggets of data being analysed.

SO WHAT: Simply put, people want to win at games. By framing this task in a gamified way, researchers motivated players to deliver quality data and research at higher speeds and volumes than would otherwise be possible.

AlphaGo



AlphaGo is an AI programme made by DeepMind that was trained to master the board game Go. This game is complex and hinges on human intuition – so much so that previous computer programs could only master the level of amateur players. By playing the game thousands of times (often against real players) and learning from its mistakes, AlphaGo learned to mimic human intuition. The model then pivoted to apply this knowledge to predicting the shape of proteins in the body. Hundreds of thousands of researchers now use it to predict the structures of more than 350,000 proteins.

SO WHAT: Expect to see more organisations using their audiences to train LLMs and chatbots. This is essentially a levelled-up form of citizen science.

Taking a stand

Games have always been a cultural medium for exploring and experimenting with new philosophies, politics, and societal designs. In recent years, many online universes (like Twitch and Roblox) have mirrored IRL activities, and become spaces to **demonstrate** and **protest**. Politicians are also looking to get in on the act—**campaigning in-game**, **hosting Twitch streams on the campaign trail**, or posting election posters as decorations **in *Animal Crossing***.



Case Studies

Virtual Protesting



275,000 teens and tweens took to the virtual streets of Roblox to protest the war in Gaza. In 2016, young users stormed Club Penguin's servers to protest Trump's victory in an election they were too young to vote in, and Toontown, Habbo, and Roblox all hosted Black Lives Matter marches amid lockdown.

SO WHAT: Every generation seeks to have its voice heard but doesn't always have the platform or resources to protest in real life. Digital spaces offer more agency and freedom to take a stand. These virtual hangouts are now spaces for people to organise and rally around their values.



Image Source

Case studies

Minecraft



French President Emmanuel Macron launched an official Minecraft server, a 'Macronverse' if you will, during his most recent re-election campaign in 2022. The server, called *Avec Vous Sur Minecraft* ("With You on Minecraft"), recreated the President's home as the centre of the map. Players could explore the area, including his election office. NPCs were programmed to give information about Macron's previous political successes, point players to the official merchandise store, or sign them on the mailing list.

SO WHAT: Gen Z and Gen Alpha are increasingly getting political news or voicing their opinions **in online forums**, whether TikTok or *Minecraft*. This campaign was willing to meet these audiences where they were and bring politics into their community spaces (although it would have benefited from more open dialogue).

Among Us



In 2020, American congress members Alexandria Ocasio-Cortez and Ilhan Omar participated in a more unusual voter outreach event: streaming *Among Us* on Twitch. The stream lasted a few hours and garnered a whopping 439,000 real-time viewers (the Twitch record at the time was **about 628,000**) and 5.2m aggregate viewers.

SO WHAT: These congresswomen tapped into gaming to have an authentic sit-down with their supporters in their space. Find a game that's popular on streaming, tap into the authenticity of live streaming, and sit down with potential audiences for a few hours in a casual setting.

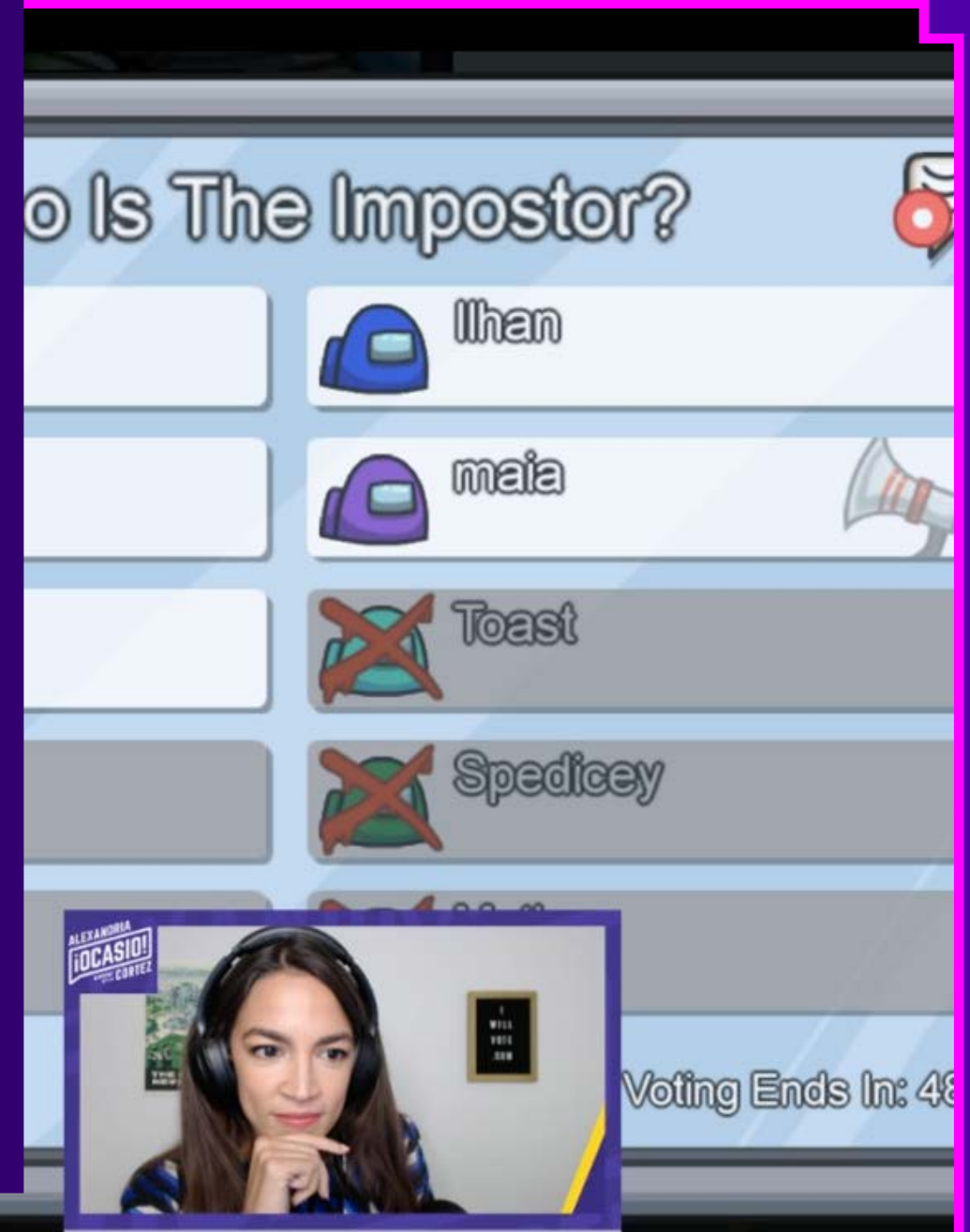


Image Source

Case Studies

Regenerative Gaming

Of course, not all gaming activations have the world's best interests at heart: this is a world in which [Shell used Fortnite to market fossil fuel to kids](#). So, can there be any positive climate progress that can come out of gaming?

From climate and environment-themed games to special features, pop-ups, and [real-life tree-planting opportunities embedded within beloved classics](#), the gaming industry is inspiring a new and different wave of climate action and awareness. We've seen Redditors challenge themselves to play vegan *Horizon Zero Dawn*, whilst others have used *Red Dead Redemption II* for birdwatching instead of violence (the nature in the game is so varied that researchers have found it can actually [improve gamers' knowledge of natural phenomena](#)). Developers are leveraging the limitless imagination that gaming narratives afford to redefine and reshape what's possible in the climate conversation. This rise of eco-responsible gaming has been dubbed '[regenerative gaming](#)'.

"78.6% believe gaming could help them learn about the environment"

While the possibilities are endless, they split into three broad categories:

EDUCATION

Educating players, helping new and established generations engage with environmentalism or offering a deeper level of climate awareness.

IMAGINATION

The limitless and creative nature of game narratives lets players stretch the perceptions of responses to the crisis, redefining and reshaping what's possible in the climate conversation.

COPING

Using this medium to help players cope with climate anxiety (which is up, [especially among younger generations](#)). [See the Horror trend byte.](#)

The critical question is whether this can move the needle on climate attitudes. We're seeing a tentative yes: [78.6% believe gaming](#) could help them learn about the environment, and 35.3% want to see more environmental content. [61.1% of people say](#) they'd be motivated to pay for environmentalist content if it added to their in-game experience, supported a good cause, or taught them something new.

Terra Nil



This game has been dubbed a 'city-builder' in reverse, painting a picture of environmental restoration. Players get dropped into an arid desert, where it's up to them to rewild the landscape using various technologies, like a toxin scrubber, or a beehive. The game's simplicity, as well as its stunning visuals, delivers a fun game experience while offering up a clear critique of detrimental consumption.

SO WHAT: Intended to act as both moral instruction and educational resource, Terra Nil can be enjoyed by any gamer, regardless of their attitudes to climate change going into it. Once playing it, though, it would be hard to miss its emotional depiction of a post-climate disaster future.



[Image Source](#)

Case Studies

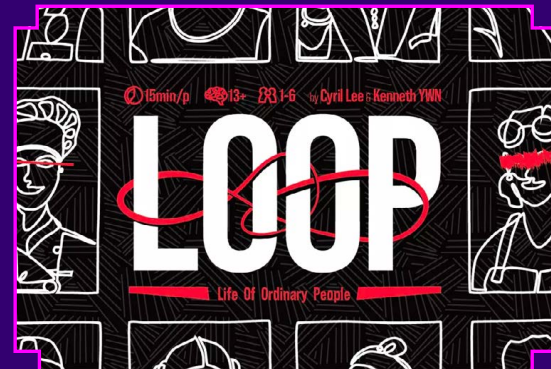
GTA x Greenpeace



In this collaboration, Los Santos (the fictional GTA city designed after Los Angeles) was altered to showcase the real-world effects that climate change could have. Gamers were invited to explore the 'Los Santos +3°C' altered map, which showed a submerged Santa Monica pier, displaced residents, the disappearance of the California coast, and characters wearing face masks while they complete missions like delivering drinking water and rescuing climate refugees. The campaign also included links to donation pages, where fans could also sign a Greenpeace petition hoping to pressure governments to declare a climate emergency.

SO WHAT: By collaborating with one of the most popular video games of all time, Greenpeace was able to raise awareness with a wider audience, and drive a sense of urgency by immersing the player in the realities of climate disaster.

Loop: Life of Ordinary People



This board game challenges players to question consumeristic pursuits and hopes to raise awareness of the "work-buy-consume cycle" through satire. The game centres around the cycle of Materialistic Value Orientation and its impact on the environment and personal happiness. It can be played alone or in groups of up to six people.

SO WHAT: The board game introduces players to alternative consumption behaviours. It hopes to make them stick by raising awareness of the impacts of more detrimental consumption through a card mechanic.

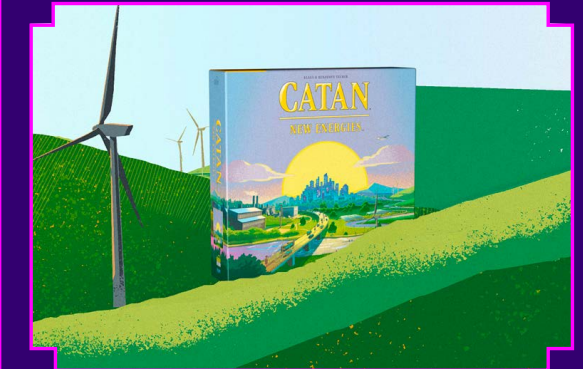
Playing for the Planet



The UN-led initiative 'Playing for the Planet' aims to inspire environmental change in and through the video game industry. Alongside a push for industry-wide decarbonisation, the organisation has hosted four "green game jams:" remote workshops in which game companies devise sustainable themes and gameplay mechanics. Results from these jams are published to help other developers.

SO WHAT: No single game developer will have all the answers for how to 'fix' climate change through gaming. (And then there's the carbon impact of energy consumption in creating and playing games, and the associated technology used to power this). But, by bringing together the expertise of big gaming studios, trading associations, and gamers (and making all of that information widely available), the UN recognises that actual progress will come from collaboration.

Catan



Undoubtedly one of the most iconic board games of all time, *Catan* is releasing a new version of its game in 2024. This updated version, called *Catan: New Energies*, will see players decide whether to build fossil fuel power plants quickly and cheaply (which also increases pollution), or invest more slowly in renewables. The most eco-friendly player won't necessarily win, but if pollution levels rise beyond the threshold, the game ends and the player who prioritised sustainability wins. The collective impact of pollution levels mirrors the unequal effects of climate change – the biggest polluters tend to face smaller consequences.

SO WHAT: To quote the game's creator, "The outcome of this game won't change the world. But maybe your way of thinking will change, and you can later go and change the world." Playing *Catan* won't stop climate change, but it can educate its players about possible futures.



Gaming & Mental Health

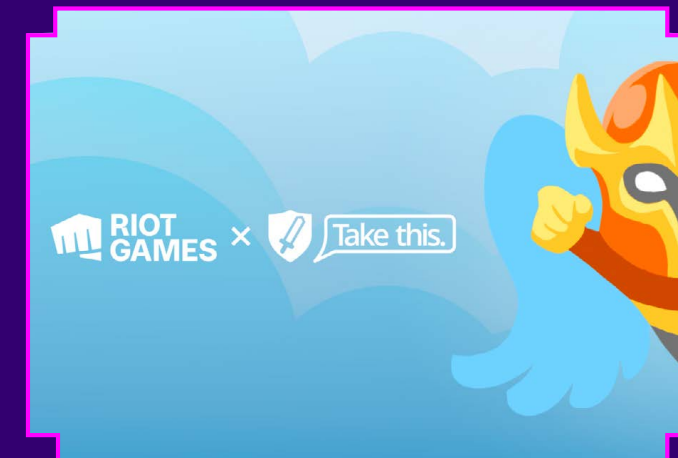
We've already briefly touched on gaming's bad reputation when it comes to mental health. While it's true that the daily consumption of violent video game content correlates to **higher rates of depression**, especially in preadolescent youth, research shows that it's **unlikely to be harmful to mental health** unless it becomes an addiction. Beyond this caveat, there's plenty of research to show that gaming can have a positive impact on mental health. From combating loneliness, to healthy brain stimulation, stress relief, coping mechanism development, and self-expression – there's a lot of opportunity for games to have a meaningful and positive impact on their players.

Not to mention, the community aspect of gaming could be hugely impactful for the loneliness epidemic. With the crisis getting so bad that the World Health Organisation has dubbed it a **global public health concern**, we're seeing more audiences get into gaming because they're **seeking connection and a sense of belonging** that they may not find in real life. New research shows that online gaming communities could be a lifeline for young men struggling with mental health issues, with men who have depressive symptoms and less real-life support being **40% more likely** to form and maintain social ties with fellow gamers. The community-focused nature of modern gaming offers isolated people a space to open up, find empathy, and build the social connections they may lack in real life.



Case Studies

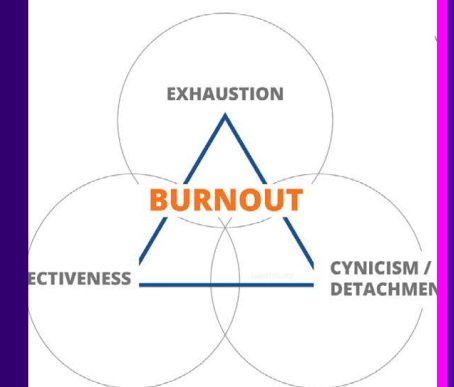
Riot Games x Take This



Game studio Riot Games has announced a partnership with the charity Take This to support the mental health of players and content creators. The collaboration started by creating a programme designed to give casual and professional streamers practical tools to support their own wellbeing and that of their community. A series of modules, created with the charity's clinical experts, were released, kicking off with the topic of burnout in content creation.

SO WHAT: While gaming itself doesn't cause mental health problems, its broad audience is not immune to mental stress. A single developer, studio, or gamer will not solve this problem in isolation. We need to develop strategic partnerships between gaming studios and expert organisations to ensure that games have the best possible impact on the community.

Burnout Looks Like...



EFFECTIVENESS

CYNICISM /
DETACHMENT

The
Guardian
You can die on the internet
as a game streamer
stream job to a burnout

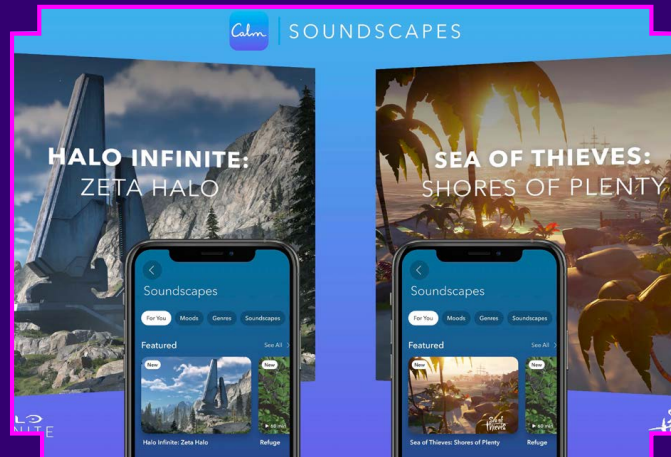
burnout
Burnout turned Twitch streamers
of playing games full time into
nightmares



Image Source

Case studies

Xbox x Calm



Shooting games might not be the first thing that comes to mind when you think about better sleep and meditation. And yet, mental health app Calm is offering Premium members soundscapes from games like *Halo Infinite* and *Sea of Thieves* as they drift off. This partnership with Xbox is the first in a series of game-themed meditations to be featured on the app.

SO WHAT: Gaming isn't just about the gameplay. It's about the graphics, the characters, the narrative, the sweeping music that sets the tone – the artistry makes the game. This collaboration lets both brands increase their audience by leveraging the creative assets in and around games.

Game Therapy UK



This charity uses therapeutic gaming to combat isolation. Their primary goal is to support a wide variety of hard to reach communities, like people experiencing homelessness, survivors of abuse, people in addiction recovery, and socially excluded youth through the benefits of gaming and the adjacent community, mostly through cooperative games, which facilitate creativity, imagination, and social interaction.

SO WHAT: As the positive mental health effects of gaming become more recognised, expect to see more organisations exploring the practical applications of gaming in service design. Get creative with your service delivery—platforms like gaming might let organisations reach audiences that wouldn't otherwise engage.

A screenshot of the Game Therapy UK website. The header features the charity's name 'game therapy uk' in a large, orange, pixelated font, with the tagline 'the therapeutic gaming charity' below it. Navigation links include 'news', 'game therapy projects', 'research and data', 'training', 'community', and 'about us'. A prominent quote from a client is displayed: "I enjoyed playing someone different. Playing a brave character instead of just running away. I can see how playing different people and facing challenges could help me to become more confident". Below the quote is the text 'Client feedback'. The background of the website features a photo of a man playing a board game.

Image Source



Navigating Difficult Topics

Much like taking a stand and exploring different politics and approaches to social organising, games offer a **psychologically safe space** to navigate emotionally sensitive and challenging topics. From cancer diagnosis to discussions about death, games can often allow players to examine their anxieties and fears through the safety net of a screen.

Take grief, for example. The community aspect of games offers relief for many grieverers. Whether it's a space to reflect in *Animal Crossing* or the rich tradition of games like *World of Warcraft* for **hosting in-game funerals and memorials**, people are taking to the online spaces where they feel safest to process emotions.

"Games offer a psychologically safe space to navigate emotionally sensitive and challenging topics"

Death, and conversations around it, are still shrouded in stigma – people just hate talking about it (for more on this, read our **'21st Century Death'** [article here](#)). We see this reflected in conversations around legacy fundraising, where it's often still difficult to drive frank conversations about end-of-life. For example, **41% of people** cite feeling uncomfortable about death as the main reason they had avoided talking to their loved ones about their post-life wishes; but research by Macmillan shows that **64% of people** think we don't talk about death enough in the UK. These games normalise death and help break down stigmas. The added benefit is that breaking down these stigmas could potentially help drive more conversations about end-of-life wishes and the legacy opportunity that comes with those.

Case Studies

Spiritfarer



This warm and cosy game tackles the topic of death yet still manages to feel like a colourful, cosy adventure. The main plot sees you captain a boat full of friendly spirits who've recently passed, helping them complete their last wishes (which get deep fast) before guiding them safely to the afterlife. Despite its difficult subject matter, the game falls squarely into the wholesome gaming category, with the highlight being the deep relationships the protagonist builds with the spirits.

SO WHAT: While a wholesome and cute game about death doesn't sound immediately logical, this game makes it work. It gives its players the opportunity to process grief in a safe and uplifting way, whilst simultaneously driving deeper conversations about letting go.



[Image Source](#)

Case Studies

Minecraft



ExperienceCraft, a Minecraft server launched in 2022, provides a safe, moderated, and grief-aware online community for young kids going through grief. The joint partnership between charities Experience Camps and Connected Camps, allows kids to connect across a wide variety of in-game activities, like a Memorial Garden where they can express their feelings and talk to peers and near-peer mentors, who are trained volunteers.

SO WHAT: These grief-aware communities help kids process emotions they may not have experienced before in spaces where they feel comfortable talking and connecting with peers. By helping kids talk openly about their experiences with grief from a young age, we're breaking down barriers for similar conversations in later life.

ICRC



The ICRC's 'Enter The Room' app simulates challenges faced by individuals affected by armed conflict, particularly related to healthcare in conflict zones. The experience begins in real life, where users hold up their phones to see a virtual door appear. They're then invited to cross the threshold and explore a seemingly ordinary child's bedroom as if they were really there.

SO WHAT: The initiative sees supporters dive into a more engaging, immersive, first-hand perspective of the impact of war on civilians. Unlike many similar experiences, which require audiences to have expensive technology, this simpler technology brings VR to hardware that almost everyone has: a mobile phone.

That Dragon, Cancer



This emotional game is based on the developers' experiences raising their son, Joel, who was diagnosed with terminal cancer at twelve months old. Through a series of poignant vignettes, the game shows their journey through post-diagnosis distress, uncertainty about his health, and his eventual death, all in the style of a point-and-click adventure game. Alongside the interactivity, the game includes narration from the real-life parents and family members.

SO WHAT: Interactive games offer a different medium for players to experience complex emotions that they may not have experienced before. Developers can create a world close to their hearts and have players live in it and feel the emotions they felt going through the narrative as well.

Papers, Please



Focused on the working day of an immigration inspector at a border checkpoint in a fictional country, players are tasked with reviewing the documents of new arrivals. The goal is to allow legitimate travellers through the border and arrest anyone else. As the game progresses, the rules for legitimate immigrants become more complex, and the player can decide to arrest any non-compliant NPCs. At the end of each in-game day, the player earns money based on how many people have been processed (and bribes collected), then allocates their budget to rent, food, heat, and other necessities for their family.

SO WHAT: Starting as a relatively simple puzzle game, the game challenges players with increasingly complicated moral dilemmas as it progresses. Essentially, players consistently have to choose between providing for their family and what is 'right'. It's a great example of presenting moral choice through a video game while also immersing players in the reality that many migrants face daily across the world.



Gamified Health

By now, we're all accustomed to gamification through mobile apps and wearable devices like fitness trackers. We're now seeing more creative interventions in physical health. Some of these innovations take gamification one step further by embedding medical interventions fully into a game, whether as a diagnostic tool or treatment. Developments in AR and VR are helping improve patient outcomes and medical education through simulation games for training or immersive VR to help [young kids overcome their fear of needles](#).



Case Studies

Ami



Ami is the world's first multilingual brain game to stave off dementia, aiming to boost cognitive function in seniors with early-to-moderate signs of the disease. The app uses bilingual brain games based on research that shows multilingualism enhances cognitive abilities beyond language learning.

SO WHAT: With healthcare waiting lists growing and interventions becoming increasingly difficult to access, people worldwide are increasingly asking for preventative healthcare. This game taps into that need, hoping to show how gaming could help stave off disease. And dementia isn't the only disease that can be delayed through gamified interventions—expect to see more research into this space over the coming years.

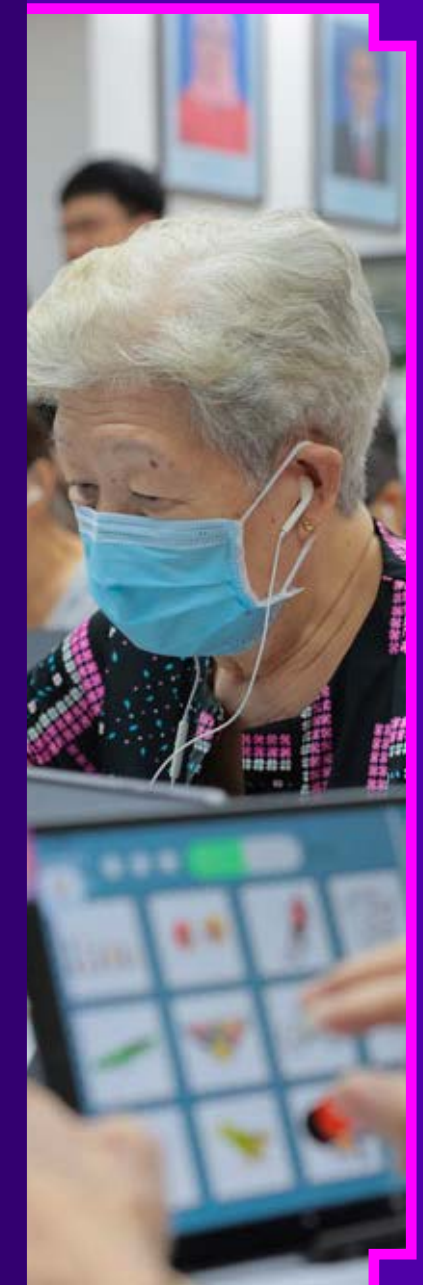
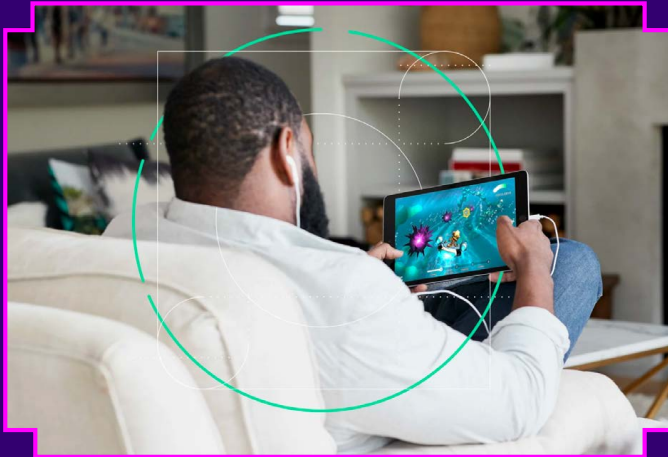


Image Source

Case studies

EndeavourOTC



ADHD medication has remained mainly the same since the 1960s, since the advent of Ritalin. Most people who receive treatment are either on medication or in behavioural therapy, but those interventions don't work for everyone. Enter EndeavourOTC: the first video game licensed as an official treatment for ADHD. It works by activating neural networks in the brain that improve focus, similar to the ones Ritalin lights up. Patients are prescribed 25 minute incremental sessions, five times a week. Their earlier game, EndeavorRx, is a prescription video game that treats ADHD in kids and has been approved for marketing since 2020.

SO WHAT: Early research into the benefits of gaming shows positive impacts across a number of different areas. However, there's still a lack of thinking about how these could be turned into effective interventions. Integrate gaming in your service design as a low-intervention way of helping your audiences manage their health struggles.

Meteor Blaster



This browser-based mobile shooting game was created to identify the early signs of glaucoma. Designed by the Tohoku University Graduate School of Medicine and TV network Sendai Broadcasting, it is designed to be an early diagnostic tool. Given that people with glaucoma often don't recognise the symptoms until it reaches a point of no return, Meteor Blaster's 5-minute, at-home diagnostic time could make a real difference for the people it affects.

SO WHAT: Inequalities in access to healthcare mean that at-home, easy diagnostic tools are crucial for significant swathes of the population. Meteor Blaster is but one example of the many applications of gaming for diagnostics.



[Image Source](#)



Preserving History

Picture this: you're walking through the bustling Akropolis in Athens. On your right, you see a street vendor selling fresh fruits and vegetables, and on your left is a group of people debating Athenian politics. Are you dreaming? No, it's a scene from *Assassin's Creed: Origins*, part of their series which immerses players in incredibly detailed, painstakingly recreated historical worlds. Games have long allowed players to experience 'living history' and bring art, culture, and heritage to life in a way that nothing else can. As more and more people pick up gaming, we're seeing museums and cultural institutions tap into these immersive worlds to bring these stories to broader audiences. Whether the games themselves are educational or simply inspire players to dive into research themselves, there's endless opportunities to showcase cultural heritage.



Image Source

Case Studies

Metropolitan Museum of Art x Verizon



In partnership with Verizon, the Metropolitan Museum of Art has launched a novel way for kids and young adults to experience the museum's collection. 'Replica', an AR app within Roblox, lets users explore a virtual version of The Met's iconic facade, as well as other renowned spaces and collections. Visitors to the museum can access the in-app map to guide them through different artworks, learn about their history, and collect wearable digital versions of them for their Roblox avatars. Collectables include Van Gogh's straw hat, an Anubis statuette, and Medusa's iconic snake hair.

SO WHAT: Replica connects people to art in a new and culturally relevant way, recognising that gaming has become cultural heritage for modern audiences. AR helps bridge modern and old heritage, creating more immersive possibilities for art education.

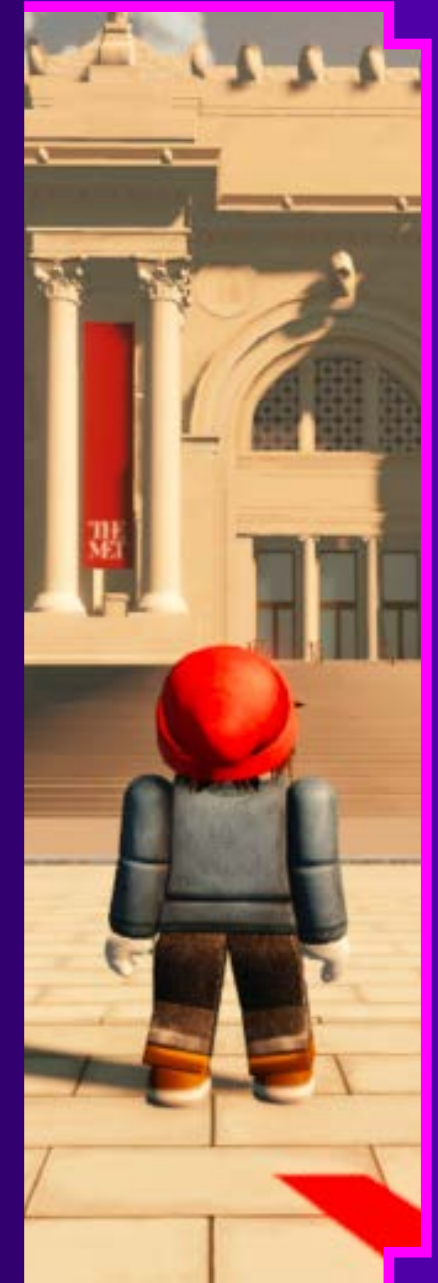


Image Source

Case Studies

Voices of the Forgotten



In 2023, *Fortnite* became home to the world's first virtual Holocaust museum. The digital building, dubbed the Voices of the Forgotten Museum, lets visitors read plaques outlining the history of the genocide, learn about Jewish resistance fighters, and read about people who provided refuge – much like you'd do in a physical museum. Since its launch, the space has collaborated with the LA Holocaust Museum to better curate its exhibition, and now features testimonies from survivors.

SO WHAT: Not everyone has access to a similar museum in their local area. By bringing this piece of history to life in the digital realm, creators can preserve important stories from the Holocaust for generations to come, and potentially educate younger players about history in an engaging and informative way.

venba



Cooking-based game *Venba* uses a series of cooking puzzles to immerse players in emotionally intense family saga. Players embody an Indian mother, who emigrates to Canada in the 1980s, and uncovers lost family recipes that guide players through themes of immigration, identity, and family.

SO WHAT: *Venba* recognizes that is an incredibly important cultural marker for many, and cleverly uses it as a vehicle to introduce new audiences to the nuances of the Tamil diasporic experience and drive deeper conversations around immigration and identity.



[Image Source](#)

SO WHAT?

CHOOSE YOUR PLATFORM

Don't just go console. There are thriving boardgame, DnD, and LARPing communities out there who could offer different types of engagement and support (outside of traditional fundraising streams).

PHYGITAL

The future is phygital. Whether that's bringing IRL products and experiences into games or digital ones into the real world, your next-generation audiences expect phygital engagement.

THE HUMBLE NPC

Capitalise on generative AI to use NPCs to tell stories. Often overlooked, these characters can now have complete and engaging story arcs inside games.

MOMENTS IN TIME

From immersive narrative sagas to filling the 35-minute tube journey. Think about the time you have to engage, distract or educate via gaming. How can your content rival the TikTok scroll loop?

TAKING A STAND

Navigating the Lobbying Act (especially during election periods) can be a perilous tightrope for charities. But that doesn't mean you can't take a stand, especially in the gaming metaverse.

CHALLENGING NARRATIVES

Games can create a psychologically safe space to explore incredibly challenging and emotional topics. Don't be scared to bring your stories to life.

POSITIVE CLIMATE FUTURES

Games can help us imagine the impossible, or explore the impact of innovation, new philosophies and systems of governance. And they can help us start to imagine climate-positive futures.

CITIZEN SCIENCE

Mobilise your supporters and the wider public to help scour supercharge your science. From scouring data to reviewing pathology slides. Yes, with the advent of generative AI some of this may be more PR and progress, but there's still mileage to be had.

GAMING-U

Making learning fun again. From your annual GDPR refresher course, to learning a new language, grasping the basics of coding, or learning to play a new musical instrument.

ESCAPISM

Given the past 5 years, no wonder wholesome gaming has found its moment. Help your supporters and team find joy and escapism in a little bit of cosy game play. Not everything has to be serious and meaningful 100% of the time.



BOSS FIGHT

INCOME EXPANSION PACK

CONTINUE?

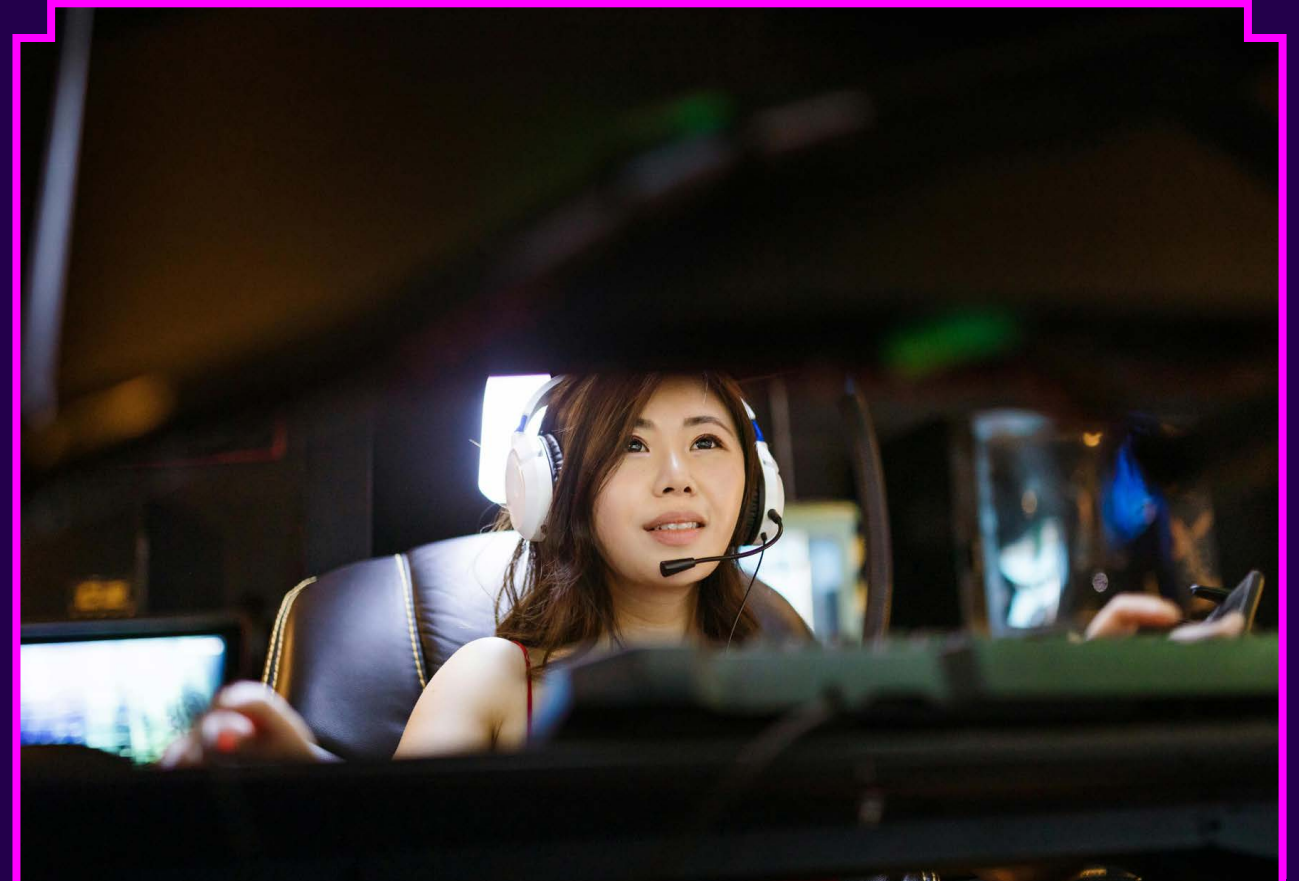
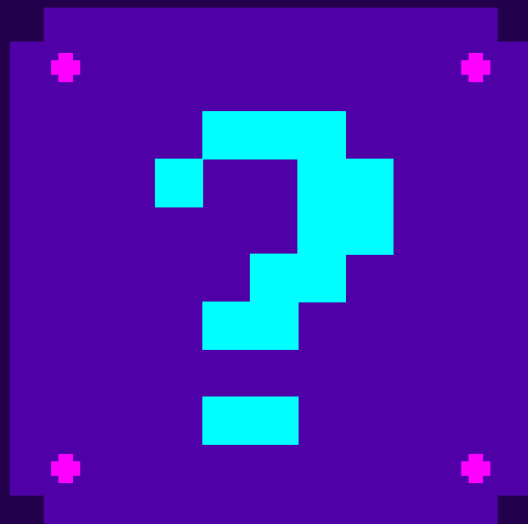
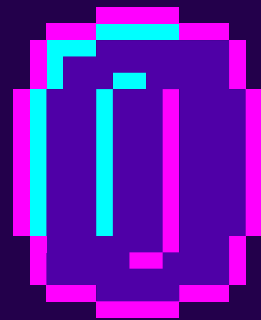
YES

NO



Your progress
has been saved.

INCOME EXPANSION PACK



Introduction

Gaming is an incredibly lucrative industry. It generates a whopping **\$406b in revenue** worldwide, is set to bring in **\$584.6b by 2027**, and has an audience of **3.2 billion gamers** worldwide. It's no surprise businesses and charities want a piece of the action.

"The opportunity for charities to generate income through gaming extends beyond the traditional channels and approaches"

Leveraging the community fundraising model and partnering with streamers to raise money has been the easy first step into the gaming space for most charities, with some success. Jingle Jam, for example, brought in **more than £2.6m in 2023**. However, the opportunity for charities to generate income through gaming extends beyond the traditional channels and approaches. From brand activations to around game activities, content creation, and even events, for charities to truly exploit the gaming potential, you'll need to develop a holistic strategy that takes a multichannel and multi-audience approach.

Collecting Coins: Income Through Gaming

Stream for Charity

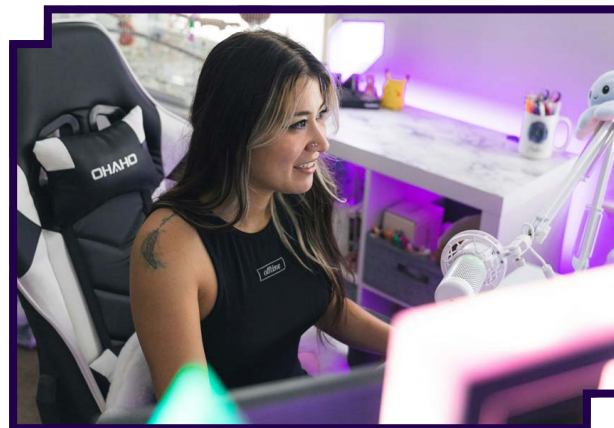
Streaming is all about interactivity: audiences watch people play games (the **most popular type of streamed content**), or any other activity streamers decide to broadcast (painting, playing the guitar, or building a shed). Streamers interact with their audience, providing running commentary or talking about whatever's on their mind. Followers interact with each other and the host via a text chat function.

There's a long history of **philanthropy in the streaming community**. In fact, in 2023, **over £318.7m was raised** for various charitable causes on Twitch, up from the £66m reported in 2020. Not only is fundraising through streaming effective, but it lets organisations reach audiences who may not engage with charity elsewhere, like younger (73% of Twitch audiences are **34 and under**), or hard to reach demographics (**63% are men**).

It's not just fundraising, either. The interactivity of a live stream gives hosts time to not only make the ask but also communicate and educate about the cause. The informal and candid setting in turn, creates a safe space for streamers and their viewers to open up discussions on difficult topics.

"In 2023, over £318.7m was raised for various charitable causes on Twitch"

As streaming boomed during the pandemic, when we were all forced to spend time inside and turned to digital spaces for our social interaction, we've seen **more and more charities get into this space**. From partnering with established professional and amateur streamers, creating events that invite anyone to livestream during a particular time period or challenge them to game in a specific way, to hosting charity-led livestreams with ambassadors, we've seen more and more charities get into this space. So, how do you stand out from the crowd in an increasingly crowded charity marketplace?



COMMUNITY

For gamers and streamers, the goal is community; gaming is just the vehicle. To be part of this community, you'll have to relinquish some brand control.

NO CAP

Be authentic to who you are as a brand and a cause, but also recognise the diverse identities of those you engage. These audiences will look different from your traditional charity audiences, so be prepared to generate new insight and ditch the stereotypes.

MULTI-PLAYER

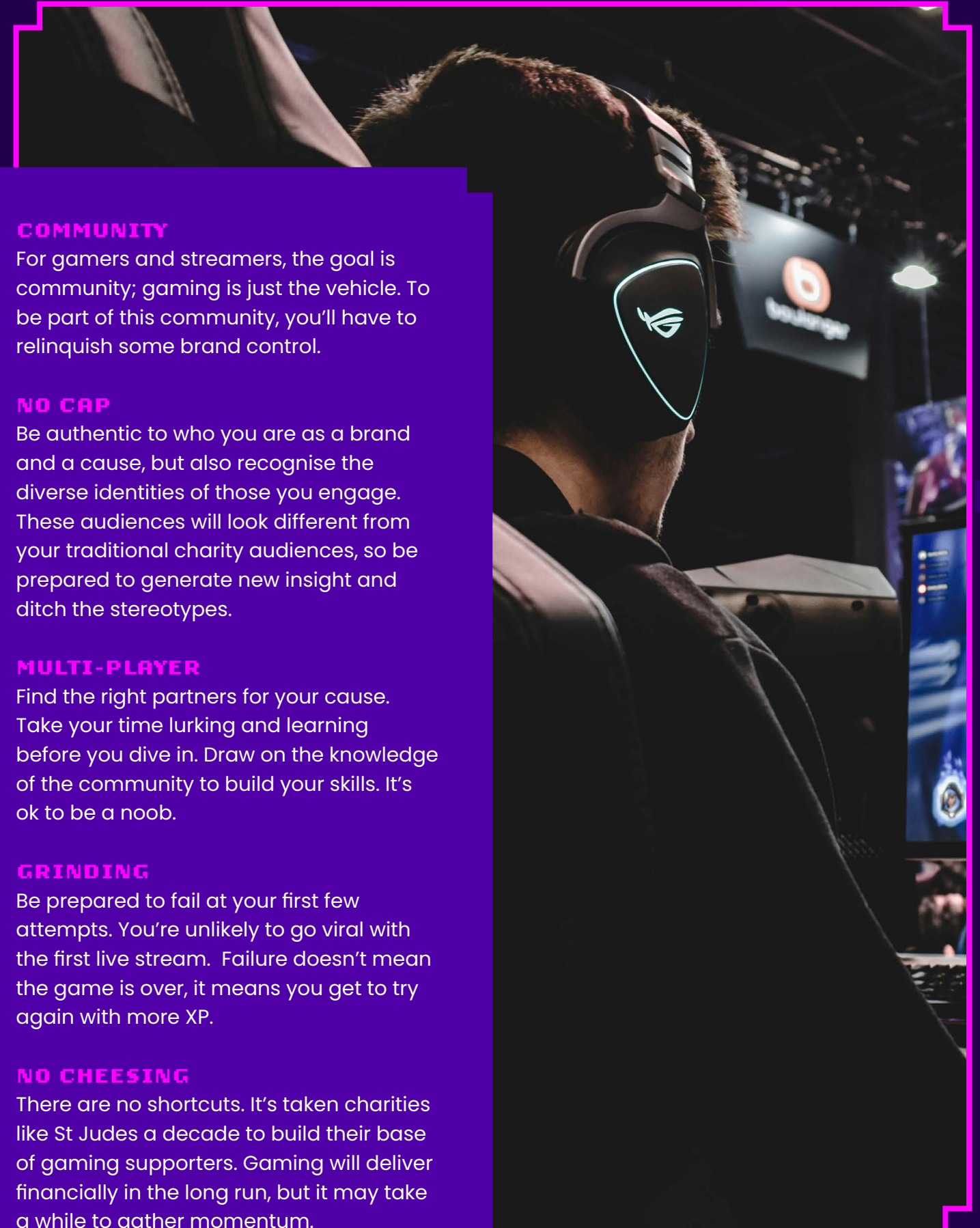
Find the right partners for your cause. Take your time lurking and learning before you dive in. Draw on the knowledge of the community to build your skills. It's ok to be a noob.

GRINDING

Be prepared to fail at your first few attempts. You're unlikely to go viral with the first live stream. Failure doesn't mean the game is over, it means you get to try again with more XP.

NO CHEESING

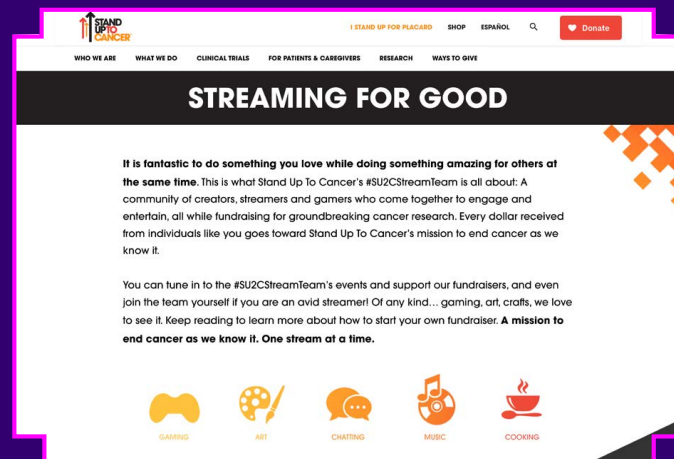
There are no shortcuts. It's taken charities like St Jude's a decade to build their base of gaming supporters. Gaming will deliver financially in the long run, but it may take a while to gather momentum.





Case studies

Stand Up To Cancer



Stand Up To Cancer has been slowly embedding themselves in the streaming community over the past years. They launched streaming fundraising in 2018, became an official Twitch partner in 2019, and partnered with Xbox On in 2020. Their website includes a Tiltify leaderboard (at the time of writing, the leader has raised **more than \$150k**), a link to their thriving Discord community, and a breakdown of how streaming can make an impact.

SO WHAT: More and more charities are getting into the streaming for good space, so how do you stand out? What Stand Up To Cancer does well is embedding itself on every level of the community (ie. building a presence in spaces like Twitch and Discord); tapping into gamified design and competition with leaderboards; and collaborating with big names in the business like Xbox.

St Jude's Children's Research Hospital



Maybe the most famous example of a charity getting into the streaming space, St Jude's Children's Research Hospital hosts PLAY LIVE every year. This fundraising initiative asks participants to raise funds while gaming and/or streaming. Beyond that, they collaborate with gaming organisations, influencers, and companies to organise talks and events alongside the streams, as well as giveaways. In 2023, PLAY LIVE **raised almost \$3m**.

SO WHAT: PLAY LIVE is successful for a number of reasons, but most notably their commitment to understanding the gaming community. They've embedded themselves on multiple levels, from engaging with popular and emerging influencers, existing gaming events, esports teams, up-and-coming games and new releases, and community platforms. Their knowledge of the community has allowed them to identify effective partnerships and understand the needs and preferences of the audience they're engaging.



Image Source

Events

Conventions and events are a cornerstone of the gaming community. From the early LAN parties of the 1970s and the first Nintendo Spaceworld video game convention in 1989, gamers have looked for every opportunity to come together to play.

They broadly split into three main categories:

FESTIVALS

The smallest version is a **LAN Party** (Local Area Network Party). On a bigger scale, we've got the Cons (conventions). Spaces for the people to come together to play, meet celebrities, party, network, and find out about the latest releases and innovations. Examples include: Gamescon in Germany (**370,000 attendees**), Spiel (for board games, **200k+ attendees**), and San Diego Comic Con (**130k attendees**).

MODERN TELETHONS

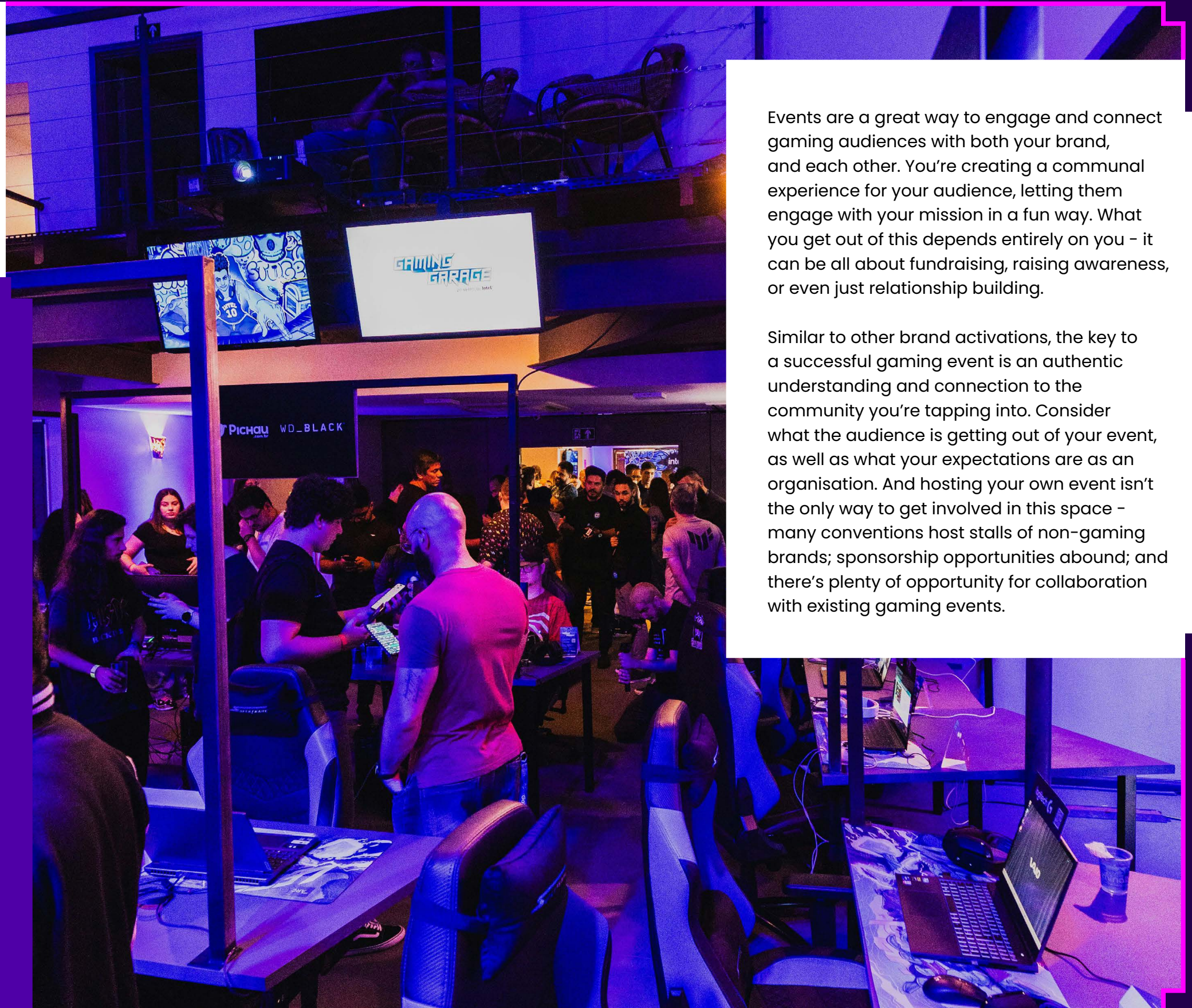
Gaming to raise money for charities. Includes anything from hackathons, streaming marathons, play live, and game jams. Famous examples include St Jude's Play Live (**raised almost \$3m** in 2023), and Jingle Jam (**raised more than £2.6m in 2023**).

CHALLENGES

In-game challenge events are a cross between event and brand activation. Usually time-limited challenges in game, like Vans World in Roblox, which has had more than **100m visitors**, a challenge to play as much as possible, or in a specific way (ie. the ICRC's Play By The Rules event, with **143,618 unique viewers**).

Events are a great way to engage and connect gaming audiences with both your brand, and each other. You're creating a communal experience for your audience, letting them engage with your mission in a fun way. What you get out of this depends entirely on you - it can be all about fundraising, raising awareness, or even just relationship building.

Similar to other brand activations, the key to a successful gaming event is an authentic understanding and connection to the community you're tapping into. Consider what the audience is getting out of your event, as well as what your expectations are as an organisation. And hosting your own event isn't the only way to get involved in this space - many conventions host stalls of non-gaming brands; sponsorship opportunities abound; and there's plenty of opportunity for collaboration with existing gaming events.



Case studies

Insomnia



Insomnia is a festival dedicated to all things game. It has gaming stations, a massive LAN party, esports tournaments, keynote presentations, exhibits of classic and cutting-edge games (both video and tabletop), *Dungeons and Dragons* campaigns, famous creators and big-name guests, cosplay championships, a gaming-themed drag show – I could go on. If it's gaming-related and fun, you name it, it's there.

SO WHAT: This festival caters to every aspect of the gaming community, bringing together various niches and uniting them over their shared love: gaming. The event's success stems from its success in creating a genuinely inclusive, friendly space where everyone can feel like they belong.

UK Games Expo



The UK Games Expo is a Comic Con for board games. Gamers come to play a variety of tabletop games, go to seminars and shows, hear from publishers and designers, support indie developers, join a LARPing party (Live Action Role Playing) and participate in tournaments of board games of all kinds (ranging from big *Monopoly* competitions to smaller titles like *Azul*).

SO WHAT: This expo welcomes board game fans to enjoy their hobby, meet like-minded individuals, and learn something while they're at it. Although its setup isn't flashy, it continues to draw in the largest crowd of any hobby games convention in the UK based on its inclusive atmosphere.

Now Play This



This indie-focussed game event is all about interacting with thoughtful, innovative games drawn from the world we live in. Their aim is to show that games are art, and are driving complex interrogations into all sorts of spaces. The festival showcases cutting-edge new releases, features workshops on creating games and more, documentary screening, co-working sessions about implications for the gaming industry, and LARPing sessions that examine complex themes.

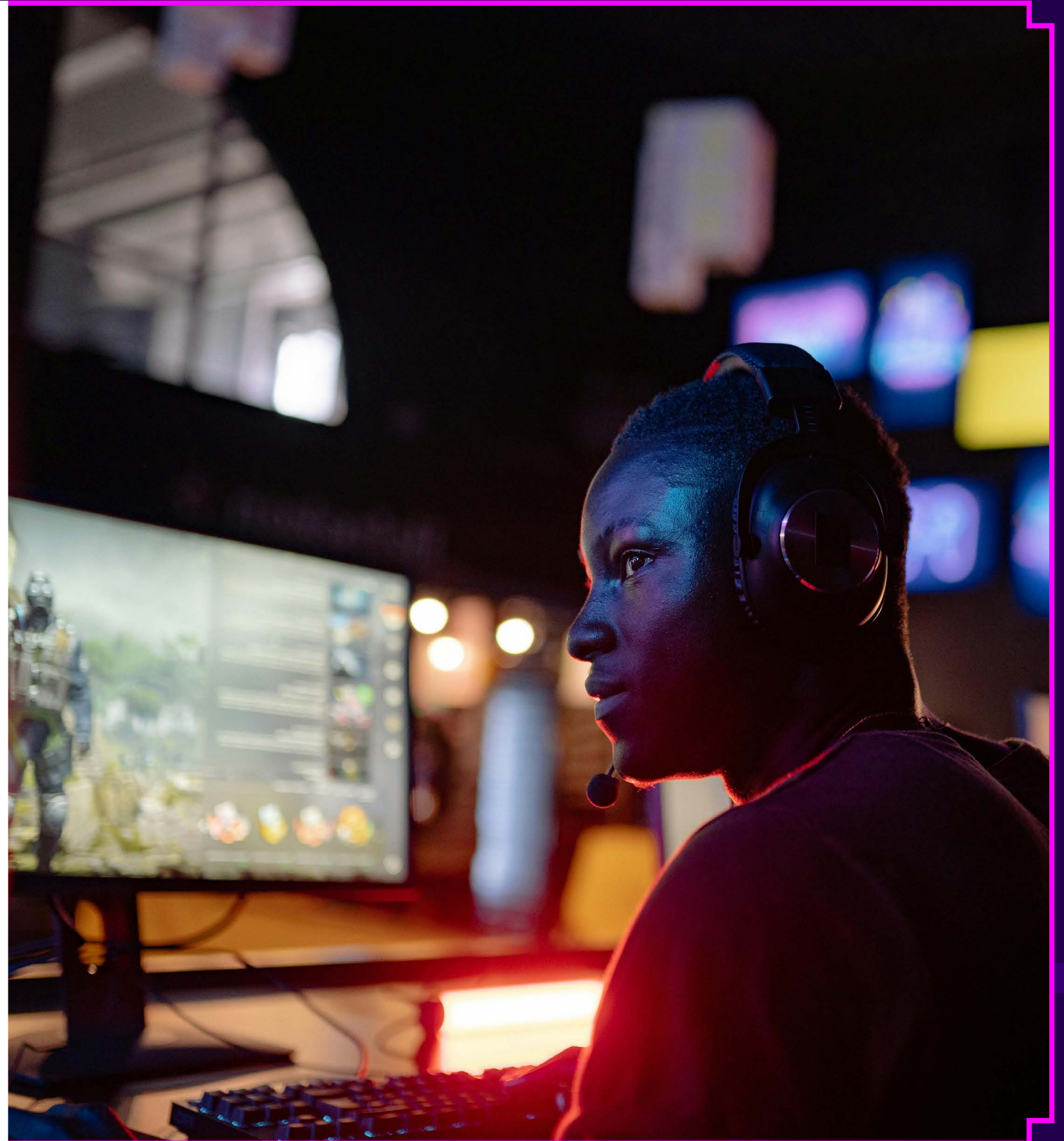
SO WHAT: Gaming events don't have to focus on mainstream, popular titles. They can also exist to support indie developers, spotlight complex and thoughtful narratives, and engage audiences with the thinking that's gone into these. The best events focus on both connection and introspection.

Esports

Esports are the gaming world's answer to competitive sport: video game competitions played for entertainment, usually by professional gamers. Their popularity boomed during the Covid-pandemic, with interest and weekly viewership peaking, and although interest has seen a bit of a decline, the industry is still very much alive. In 2023, the *League of Legends* (one of the most popular esports titles) World Championship Final became the first of its kind to surpass six million concurrent viewers, with a total of 6.4m people tuning in. Nearly half of gamers tune into esports every week, which amounts to more than the number of sports fans who tune into the Premier League every week.

We're looking at an audience made up of generally young (average 26 years old), male, educated, working professionals with above average income and an interest in technology. While audiences in this space remain relatively niche, they're extremely loyal. Esports fans are 42% more likely than the average gamer to buy products to access the community around them and are more likely to spend money in this space overall. Think of esports as any other global spectator sport, with professional teams, leagues and competitions, and growing pots for prize money (the *League of Legends* 2023 prize pool was \$2.23m).

The biggest opportunity for organisations in this space is sponsorship and collaborations with big players, whether those are pro teams, individual players (amateur or professional), tournament operators, streamers, and the online platforms on which they're streamed. Embedding your brand in this space gives you the opportunity to directly interact with loyal fans through a variety of different channels, as well as gain a more authentic understanding of the gaming market. Luckily for charities, these die-hard gamers are open to non-gaming brands getting involved: 38% of viewers are happy to see content from non-esports brands in the space.



Case Studies

League of Legends



Perhaps the most well known esports competition, and definitely one of the biggest, *League of Legends* continues to draw huge viewership numbers for its championships. Events include numerous smaller competitions, in-person co-streaming sessions, and the prestigious World Cup, which is live-streamed. The 2024 World Final is set to be hosted at the O2 in London.

SO WHAT: *League of Legends'* esports competitions are so well known and streamlined by now that they resemble most big sporting tournaments. Hence, sponsorships and collaborations make up a significant part of their income.

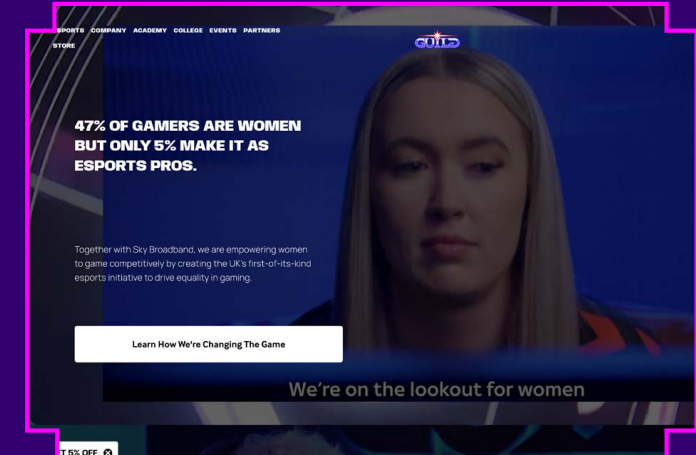
Commonwealth Esports Championships



The inaugural Commonwealth Esports Championships were held in Birmingham in 2022. They featured esports athletes competing in renowned global titles and featured a series of demonstrations showcasing new technologies created to bridge the gap between sports and esports.

SO WHAT: As the popularity and viewership of esports grows, expect to see more events pivot to phygital versions of themselves: both physical and virtual. These twinned events offer up new opportunities for hybrid eventing, and have the power to reach wider audiences.

Guild Esports



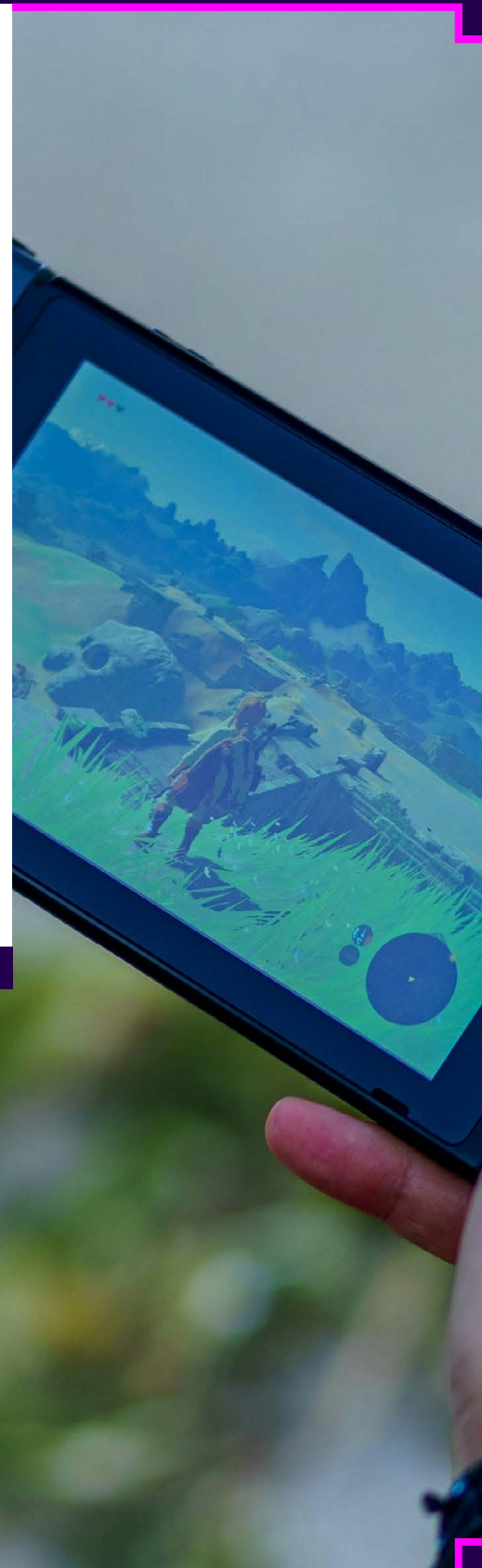
Guild Esports is a competitive esports firm with teams across popular games like *Counter-Strike 2*, *Fortnite*, and *Valorant*. They also run a UK-based talent pipeline, fostering young talent with a focus on building inclusive teams, and provide training boot camps that teach kids skills like maths, problem-solving, teamwork and creativity through the vehicle of esports. They've also partnered with Sky to create #NoRoomforAbuse, a campaign focused on making women feel safer within the community.

SO WHAT: Gaming, and esports specifically, can offer escapism for a lot of young kids, and give them an environment to engage with their hobby away from the challenges of day-to-day life. Yet professional esports is still largely made up of white men. Guild Esports recognises the need to create equal opportunities for young talent and provide them with a safe space, to ultimately improve the diversity of the industry.

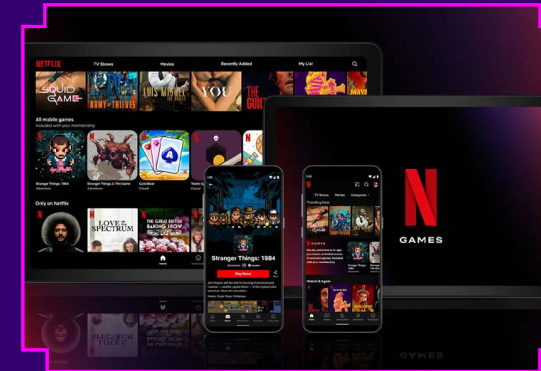
Case Studies

Subscription

Subscription models are now the norm, from streaming services to car ownership. Gaming subscriptions have also become **commonplace** as consoles launch their own services. Switch players use the Nintendo Switch Online service, PlayStation has PlayStation Plus, and Xbox fans get Xbox Gamepass. On top of that, there's third party services, run mainly by studios, like the Ubisoft Store and the Epic Games Store. Not to mention other entertainment subscription services, like Netflix, have been **steadily building their games portfolio**. All these effectively let gamers access online multiplayer games, the latest title, or enhance their experience with exclusive content – all for a monthly fee. The number of gamers who use these gaming subscription services has grown **34% since Q4 2020** (**52% of gamers** now subscribe to at least one gaming service), helped by the fact that more gaming activities are moving online.



Netflix Games



Netflix recently turned to gaming as part of their strategy to become an entertainment subscription behemoth. It has been **steadily building its games portfolio**, curating a suite of downloadable mobile titles ranging from BAFTA-nominated *Immortality* to Netflix-show-based *Love is Blind* games. While they've struggled to get their standalone gaming offering off the ground, they have been testing cloud streaming for games to TVs which could offer a future breakthrough, and are considering evolving their subscription service into one supported by **ads and microtransactions**.

SO WHAT: While Netflix's subscription gaming service is hardly a smash hit yet, it gives us a glimpse into a future where all entertainment is wrapped up into a singular end-to-end platform. What cross-media collaborations and opportunities could this offer the sector?

Humble Bundle



Game retailer Humble Bundle sells, you guessed it, gaming and software bundles at flexible prices. A portion of proceeds of every sale goes to their monthly charity partner, and buyers can choose how their money is divided between creators, charity, the company's partners, and the company itself. Their membership offer gives members free access to a number of PC games each month, as well as a discount on their other games, with 5% of the membership fee going to charity.

SO WHAT: This subscription model is not only a great way for gamers to discover new games, it's also an avenue for them to discover a new charity every month. Consider how your organisation could partner with similar subscription services to raise awareness and funds.

Advertising

In-game advertising is booming, partly driven by the rise of **free-to-play titles**. These have a wider reach and go viral quicker, and fully embedded campaigns can count on a transmedia reach as gameplay videos circulate on social media.

Advertising revenue is projected to **nearly double between 2022 and 2027**, and to reach \$100b by 2025. As such, **55.2% of marketers** found that gaming is THE media channel to focus on for brand creativity and engagement in 2023.

Broadly speaking, there are **three different types of gaming advertisement**:

IN-GAME

Ads that are embedded in the game itself intrinsically. This is one of the fastest-growing channels, letting marketers make their sponsored content a part of gameplay. You tend to have a captive audience, which increases brand recall and awareness.

AROUND THE GAME

These ads aren't in the gaming environment itself, but still part of the ecosystem. They could be rewarded videos or interstitial ads, which can be cheaper placement spots depending on their proximity to the game.

AWAY FROM THE GAME

This is any advertising opportunity that exists away from the game itself, like streaming, esports, influencer marketing, etc. Social media adverts count here too, with TikTok now being the **#1 platform where young games find new games**. These ads typically enjoy a broader audience, as they're not limited to a singular game.

So how do you successfully market to a gaming audience? There's no cheat sheet to this, but gaming marketing tends to follow a similar aesthetic.

Vibrant and electric colours usually rule the day, reflecting the aesthetic of most popular RPG and action games.

We also see a lot of nostalgia come through, taking cues from retro games and consoles like *Pacman*, GameBoy and 16-bit graphics. Essentially: to market to a gaming audience, follow the visual cues that are popular within the medium itself.

Case Studies

4D Sight



Typical esports advertising is similar to TV or YouTube, where ads pop up in between breaks. 4D Sight is an AI platform that integrates native ads in real time on streams or recordings. Instead of interrupting a stream, ads are embedded so that they appear on empty walls or spaces in gameplay (think of a billboard in real life, just in a game). The algorithm can also detect key moments in gameplay, so that ads are integrated at the best moments to draw maximum attention.

SO WHAT: Plenty of people tune out during ad breaks – it's the prime time to go get another cup of tea. By integrating ads into the gameplay, 4D Sight removes this obstacle, ensures maximum exposure of the ads, and avoids disrupting the experience for watchers.

Mountain Dew



Mountain Dew's drink 'MTN DEW AMP GAME FUEL' is specially crafted to fuel endurance gaming in an effort to become the go-to gaming energy drink. Their branding is bold, colourful, and high-octane, taking design cues from sports, energy drinks, and gaming with tech-inspired graphics. Their tagline: "The first drink made by gamers, for gamers" further signals their understanding of the gaming world.

SO WHAT: Visual language is a core part of the gaming community. Mountain Dew's new drink taps into a recognisable style to signal a level of understanding towards the gaming industry, in the hopes of building more authentic connections. Think of it like social mirroring.

Case Studies

Branded Experiences

The future of entertainment is immersive. As gaming increasingly transforms into an immersive, multi-sensory and transmedia community space, it offers brands an opportunity to create the next level of interactive marketing. Companies can bring their brand to life in a metaverse-style space, where they can invite players to literally step into the narrative. On top of that, many of these platforms let the player co-create with your brand, tell their own stories as well as yours, and contribute to the building of your online brand engagement.

We're seeing an influx of branded experiences, hangouts, and content in games, most typically in sandbox and open-world games like *Roblox* and *Fortnite*, which let users build their own activations in relatively simple ways. The opportunity is enormous: easily available, free tools to create immersive brand experiences in spaces with millions of daily users.

However, as this market continues to grow, more brands are entering the space. Players are spoiled for choice with experiences to choose from, and the pressure is on brands to create something that actually stands out.



War Child x 11-11: Memories Retold



Part of War Child's gaming strategy involves creating branded, downloadable content in games that align with their brand. For example, they released a suite of downloadable content for WWI game *11-11: Memories Retold*, which featured the story of two children drawn into the conflict, shown through letters, drawings and photographs collected in game.

SO WHAT: Branded content works best when the game you're choosing is aligned with your brand and mission. In War Child's case, they chose conflict-based games to bring to life the stories of children in war. Which existing games link to your charity, and what new features, stories, and content could you bring to them?



Image Source



Case studies

Gucci



Fashion brand Gucci opened their Gucci Town virtual piazza on Roblox, in 2022. Available activities are evolving as the town grows, but include a creative corner where gamers can discover the works of visiting artists, create their own compositions and visit the fashion house's concept store. There is, of course, also a Gucci Shop, where visitors can buy digital Gucci clothes and accessories for their avatars.

SO WHAT: Sandbox games allow brands to build entire worlds of branded content, activities, challenges, and hangout spaces for their supporters. These spaces can be places to unwind and connect with fellow fans, deck out your avatar in merchandise (whether that's Gucci clothing or slogan t-shirts in support of your favourite charity), and learn about a brand's background, mission, and more. You might be wondering why a brand like Gucci is on Roblox – Millennials and Gen Z are expected to make up **75% of luxury goods buyers by 2026**, with Gen Alpha not far behind. Challenge yourself on the spaces you're allowed to have a voice in, it's not always obvious.

Wesgro



Cape Town's tourism agency Wesgro is leveraging Roblox to attract more family holidays to the city. The branded hangout spot sees some of Cape Town's best-loved destinations brought to life in a gamified, child-friendly way. Players interact with Table Mountain through games like 'Climb Table Mountain'.

SO WHAT: Although Roblox's audience is rapidly diversifying across age groups, their key demographic is still young kids. You might think young kids aren't your organisation's audience now, but they have strong lines of communication to their parents. Use these platforms to engage young kids and get to their parents through them.

Hellman's x Animal Crossing



This Covid-time initiative saw condiment brand Hellman's tap into *Animal Crossing* audiences to turn virtual food waste into real meals. The brand created Hellman's Island in the game and began taking donations of spoiled turnips. For every turnip dropped off, they donated one meal to Second Harvest, a charity that feeds people in need.

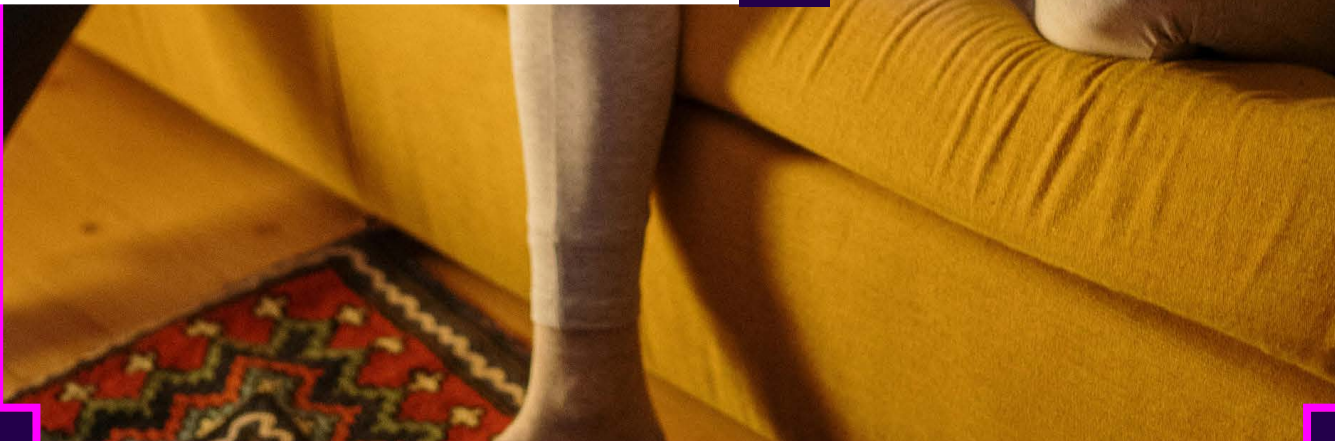
SO WHAT: This is an excellent example of a branded hangout space doing good. Hellman's tapped into a frequent phenomenon in a popular game (turnips going to waste – it happens more often than you think in *Animal Crossing*) to drive brand engagement, education about food waste, and real-life impact. Identify in-game events and spaces that link to your cause to integrate your branded experiences seamlessly.

Case Studies

Breaking The Fourth Wall

Let's talk briefly about the 'around the game' world. These brand activations speak to gamers without being fully gaming-related. This community spends **substantial time and money** crafting the ultimate personal environment to enhance their gaming experience, comfort, and performance. Think comfortable gaming wear, anti-sweat solutions to reduce sweaty hands (a problem familiar to anyone who's ever held a controller for over thirty minutes), and the perfect energy drink to boost them through a difficult mission.

Brands that can identify a niche where they can enhance the gaming experience are building authentic and strong relationships with this community without ever making a game themselves. Tap into design cues inspired by gaming culture, speak the language of gamers, and win their attention. Consider bringing game mechanics, soundtracks and products out of the game and into the real world.



E.l.f



Makeup brand E.l.f has launched a gaming-inspired makeup collection that draws on the electric shades of gaming aesthetics. The packaging includes a secret code that, when cracked, can unlock bonus points, gift cards, and more. This isn't E.l.f's first foray into the gaming space; they were one of the first makeup brands to get onto Twitch.

SO WHAT: To align with gaming audiences, a product doesn't need to be directly to gaming anymore. Tap into the language and style of games to transform your product into a gaming-audience must-have. This marketing isn't reserved for stereotypically masculine brands anymore either - campaigns like this one help further break down those stigmas and normalise broader gaming audiences.



Image Source



Case studies

War Child



War Child hosted a series of live music concerts in partnership with Bethesda Gaming (creators of the *Skyrim* game). Basic seats sold for £45, while VIPs could pay extra for better seating, merchandise, signed score pages, and meet-and-greets after the show. Profits from the series went to War Child.

SO WHAT: Sweeping soundtracks are often crucial to a game's success, and many have become iconic pieces of music in their own right. In fact, the prevalence of classical music in sweeping gaming scores is inspiring a whole **new generation of classical music fans** (the BBC Proms series in 2022 even **featured a gaming night**). This campaign identifies an adjacent hobby to gaming that might not be immediately obvious (classical music) and brings it to life for the community.

Doritos



'Doritos Silent' brings new crunch-cancelling tech to PC gamers. Those who play online co-op games over microphones will be familiar with the frustrating crunching sound that most gamer-favourite snacks make. In response to this insight and the fact that **85% of gamers** consistently eat Doritos, the brand set out to create a new, silent chip.

SO WHAT: This is a prime example of a brand choosing their activations carefully, and only engaging to improve the gaming experience. Doritos simply identified a problem which fell in their wheelhouse and created a solution.



Image Source



Prize-led Fundraising

It's time to talk about the elephant in the room: gambling. For many charities, internally gaming equates to lotteries (which comprises everything from traditional lottery games to raffles, sweepstakes, tombolas, prize-led etc.). They're a fun way to donate money to a good cause, with the added benefit of having a chance at winning a prize. With a whopping **44% of British adults** engaging in gambling, the potential reach is enormous. In the UK, these charity lotteries are capped at **£50m annual sales**, and although there have been calls to scrap this limit, no decisions have been made as of yet.

"With a whopping 44% of British adults engaging in gambling, the potential reach is enormous."

The argument against charities engaging in gambling is an ethical one. Approximately **246,000 people in the UK** are problem gamblers, and 2.2 million more are 'at-risk' gamblers. The convenience of mobile gambling and wallets has **made betting more accessible**, and advertising around sports events makes it appear to be standard behaviour and an acceptable social norm.



However, whilst the National Lottery may have been established as a UK institution since 1994, and charity lotteries have been a respected and established form of fundraising for most of the last century, the public tide is turning against gambling and gambling-linked products.

The UK government is taking steps to hold the gambling industry accountable for the societal costs of addiction, with online gambling firms being required to allocate **1% of their earnings towards treating gambling addictions**, and physical gambling locations contributing 0.4% of their earnings; The Guardian media group has **banned gambling ads on all of their platforms**; and over in Norway, advertising for foreign gambling companies was banned in 2021, leading to a decline in addiction.

Gambling is also a feature that has seen increasing popularity (and concern) in the wider gaming industry. Features like loot boxes in popular games like Fortnite have given younger kids access to gambling mechanics in games, well before they are legally allowed to gamble. In fact, almost all adolescents aged **12-17 have played a game with loot boxes**, nearly **1 in 4 11-16 year olds** have paid money to open loot boxes, and emerging research suggests that loot box purchases **could lead to problem gambling later in life**.

"Almost all adolescents aged 12-17 have played a game with loot boxes, nearly 1 in 4 11-16 year old have paid money to open loot boxes"

"Emerging research suggests that loot box purchases could lead to problem gambling later in life."

The gaming industry itself is unlikely to stop this mechanic – it generates **tens of billions of cash every year**, and major studios rely on these for their revenue. However, **90% of this income** comes from a tiny number of gamers called 'whales', who tend to already be addicted to gambling from other platforms. A number of EU states have placed **regulations on loot boxes**, where they qualify as gambling and require a licence. Whilst others, like Belgium, have **made them outright illegal** (although this is incredibly hard to enforce). The UK government similarly considered bringing in regulation, but ultimately decided in 2022 that **loot boxes are not included in gambling regulations**. The reasoning is that while they have similarities with traditional gambling, the ability to legitimately cash out rewards is different, as loot boxes don't normally hold real-life monetary value. Regardless, engaging with these games doesn't automatically mean engaging with loot boxes, and there's plenty of games that don't include these features at all.



Case studies

Great Ormond Street Hospital



GOSH first introduced a raffle programme in 2011, as a way to introduce new products to new audiences. The programme, which now hosts three raffles a year, is now a booming source of income, aiming to raise £12m this decade. On top of that, the charity launched a lottery in 2020, looking to net £47m in profit over the course of the decade. These prize-led initiatives are building long-term relationships as well: 23% of their legacy income from 2015–2019 was attributed to supporters who had engaged with the charity's prize-led fundraising.

SO WHAT: The raffle isn't just a great fundraising product, but also offers new pathways to engagement. It introduces new audiences to GOSH, and provides an alternative way to give for existing, warm cash audiences. Clearly, these prize-led fundraising initiatives offer the ability to build life-long relationships, from donation through to legacy giving.

Omaze



This fundraising platform offers prize draws for funds. The prize? Luxury homes. The company is a for-profit fundraiser, making money for itself and its charity partners through prize draws. It guarantees a minimum £1m donation to its partners, irrespective of entry sales. Winners of the draw can either live in the home (Omaze gives the winner a cash prize of £100k to help with maintenance costs), rent it out, or sell it. On top of that, the company makes direct donations to small, local charities in the areas where their prize draws take place.

SO WHAT: The company complements charities' existing fundraising, helping them reach audiences who wouldn't normally donate and raising awareness for their causes. The company's partnership model allows charities to engage with prize-led fundraising with limited risk and cost.

LidOnLoots

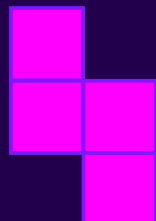


The #LidOnLoots campaign is run by the Gambling Health Alliance and campaigns for loot boxes to be re-classified as gambling. Their philosophy is that too many kids are exposed to a gambling-like activity that could be dangerous to their wellbeing. The campaign encourages a boycott of games which contain paid-for loot boxes, calling out publishers who use predatory loot box mechanics, and open conversation with young people about the risks of gambling.

SO WHAT: While some loot boxes could be classified as kids spending money on their in-game hobby, others use far more predatory practices. Opening conversations about loot boxes and educating kids (and parents) about the risks will be crucial for reducing their harm.

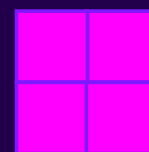


SO WHAT?



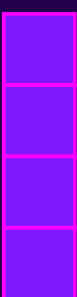
SHARED CONTROL

For gamers and streamers, the goal is community; gaming is just the vehicle. To be part of this community, you'll have to relinquish some brand control.



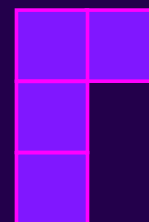
STRATEGIC PARTNERSHIPS

Recognise what you bring to the table and what your partners want from the relationship (sometimes, that might be brand rehab).



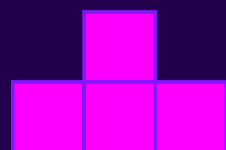
NO CAP

Be authentic to who you are as a brand and a cause, but also recognise the diverse identities of those you engage. These audiences will look different from your traditional charity audiences, so be prepared to generate new insight and ditch the stereotypes.



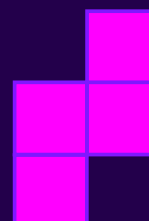
EVENTS

You don't have to create your own event from scratch, either. Consider partnering with existing live events that already have strong connections to the gaming community.



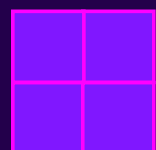
MULTIPLAYER

Find the right partners for your cause. Take your time lurking and learning before you dive in. Draw on the knowledge of the community to build your skills. It's ok to be a noob.



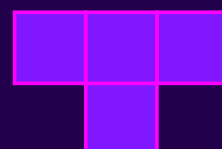
CO-CREATION

Handing over the keys to your brand can be intimidating, but co-creating with your audiences can amplify your combined creativity and earn you a share of the financial rewards.



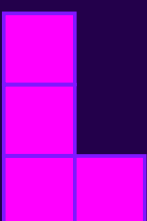
GRINDING

Be prepared to fail at your first few attempts. You're unlikely to go viral with the first live stream. Failure doesn't mean the game is over, it means you get to try again with more XP.



OUTSIDE THE GAME

Think about your brand licensing and retail opportunities outside of the game. From drinks and snacks to furniture and clothing.



NO CHEESING

There are no shortcuts. It's taken charities like St Jude's a decade to build their base of gaming supporters. Gaming will deliver financially in the long run, but gathering momentum may take a while.



BUILD YOUR STRATEGY

If income generation is your primary motivation for getting in on gaming, then think creatively about where you can drive growth. Go beyond traditional fundraising mechanics (like sponsorship) to see the potential of commercial activity, content creation and impactful brand partnerships.



CUTSCENE

TREND BYTES
10 FOR 10
GLOSSARY

CONTINUE?

YES

NO



Your progress
has been saved.

TREND BYTES



Nostalgia

8-bit graphics, retro colours, and familiar IP: audiences want games that remind them of the good old days. With polycrisis raging on IRL (political turbulence, climate change, cost of living crisis, conflict breaking out, etc.), these games are transporting audiences back to simpler times with a healthy dose of medicinal nostalgia and escapism.

As Seen In

Atari 2600+: Atari's new release can play almost all of the original console's cartridges from the 70s and 80s.

Final Fantasy VII Rebirth:

This game is a follow-up to a massive *Final Fantasy VII* remake for PS5, based on a franchise popularised in the 1980s.

Videoverse: 2023 video game based on the early 2000s social gaming experience.

Horror

We've had plenty of horror games over the past decade, but 2023 (and early 2024) saw a slew of true hide-behind-the-sofa, cover-your-eyes horror games. These terrifying games tap into the **Dark Comforts trend**, which sees audiences turn to dark spaces and content to find psychological safety and coping mechanisms during turbulent times.

As Seen In

Alan Wake 2: One of 2023's critical darlings, this game Lovecraft and Silence of the lambs into a fear-drenched nightmare.

Sons of the Forest: Apocalyptic horror is back – this game gives a stark (and terrifying) depiction of post-apocalyptic survival.

Film: We've seen a few big game adaptations hit the screen recently, including some famously scary titles like cult-classic *Five Nights At Freddy's* and zombie-horror *The Last of Us*.





Fighting Games

The fighting game has existed since the dawn of gaming, but the depth and range of experiences on offer nowadays are the start of a new era for this genre. We're seeing more intricate combat systems, incredible graphics, lightweight fighters that feature less gore, and the introduction of narratives. This genre is ready to introduce itself to a new, wider audience.

As Seen In

Mortal Kombat 1: This pioneering franchise of the fighting genre brought its first successful narrative into play with its new release.

Street Fighter 6: With new combat systems, more varied fighters, and a range of customisation features, this franchise got more depth and more accessibility.

Party Animals: Not a fan of gore? This fun and breezy brawling game where you play as puppies and kittens has got you covered.

Co-op

The number of gamers who play cooperative games (whether online or in-person) is rising. This is no longer a niche hobby, but a widespread passtime for people to bond over. We're seeing the comeback of co-op games, from thoughtful two-player narratives to party staples.

As Seen In

It Takes Two: This two-player couch co-op sees players step into the role of a couple on the brink of divorce, in a story told with humour and surprising emotional depth. It also includes a 'Friend Pass', which lets players play for free as long as their friend has bought the game.

Scrabble Together: Mattel is launching a new version of Scrabble, which sees players team up to complete challenges together.

Fortnite: *Fortnite* didn't become one of the biggest games in the world for no reason – their massive battle royale multiplayer mode is today's gold standard for big co-op games.

Existentialism

Games are getting existential. What is a game? What is a virtual environment or digital world? What relationship does the player have to the narrative you're watching? Games are getting more philosophical as people play with the power of narrative.

As Seen In

Cocoon: This game played with the concept of our surroundings, featuring worlds within worlds, which were also portable orbs, or set locations at times.

Wanted: Dead: A caricature of an RPG, this turned the genre on its head, questioned its conventions, and constantly broke the fourth wall.

Slay the Princess: A visual novel and game in one, this narrative examines how player decisions shape narratives.



NO CAP

Be authentic to who you are as a brand and a cause, but also recognise the diverse identities of those you want to engage. These audiences will look different from your traditional charity audiences, so be prepared to generate new insight and ditch the stereotypes.

TAKING A STAND

Navigating the Lobbying Act (especially during election periods) can be a perilous tightrope for charities. But that doesn't mean you can't take a stand, especially in the gaming metaverse.

MULTIPLAYER

Find the right partners for your cause. Take your time lurking and learning before you dive in. Draw on the knowledge of the community to build your skills. It's ok to be a noob.

DIY

Building a game might seem daunting, but it doesn't have to be. Low- to no-code alternatives make it easier (and cheaper) than ever.

BUILD YOUR TEAM

Don't rely on one team member with a Twitch account to be your sole gaming authority. Build your internal muscle and expertise.

10 FOR 10

BUILD YOUR STRATEGY

If income generation is your primary motivation for getting in on gaming, then think creatively about where you can drive growth. Go beyond traditional fundraising mechanics (like sponsorship) to see the potential of commercial activity, content creation and impactful brand partnerships.

REPRESENTATION

Gaming needs better representation of underrepresented and minority communities and voices. Champion more inclusive characters, narratives and gamers who reflect the diversity of the communities you work with.

CHALLENGING NARRATIVES

Games can create a psychologically safe space to explore incredibly challenging and emotional topics. Don't be scared to bring your stories to life.

NO CHEESING

There are no shortcuts. It's taken charities like St Jude's a decade to build their base of gaming supporters. Gaming will deliver financially in the long run, but gathering momentum may take a while.

GRINDING

Be prepared to fail at your first few attempts. You're unlikely to go viral with the first live stream. Failure doesn't mean the game is over, it means you get to try again with more XP.

GLOSSARY

Gamer Lingo 101

AFK	Away from Keyboard.
Combo	Attacks in rapid succession to deal additional damage to an in-game opponent.
FF	Forfeit.
Finisher	Usually a flashy, specially-animated 'killing blow' attack.
GG	Good Game.
Git Gud	Deliberate misspelling of 'Get Good'. A call to raise your skill level in response to a particularly tricky game.
HP	Hit Points: the amount of damage a player can take without dying.
Noob	Shorthand for newcomer. Often used in a derogatory way.
Permadeath	When a character can't be revived if they die.
Ragequit	Stopping a play session out of frustration.
Rekt	Misspelling of 'Wrecked'. To wreck an enemy is to best them.
Respawn	Reviving after death.
Spamming	A player repeatedly using the same attack or strategy.
Troll	A player who doesn't take the game seriously. Often makes the gaming experience worse for other players.
XP	Experience Points. A unit of measurement for player progress in a game.

Glossary

AAA (or Triple A)	Informal classification for video games made by a major publisher. Tend to have higher development and marketing budgets than other games.
Avatar	A digital representation of the player. Can be standardised or personalised.
Battle Royale	A game in which you win by being the last one standing.
Boss	A unique, typically very powerful, enemy to beat in a game.
Bot	A computer-controlled character playing alongside regular players in a multiplayer setting.
Bug	An unexpected glitch in a game due to programming errors.
Console	Device to play games on. Can be connected to a screen (home console) or include its own screen (handheld).
Couch Co-op	Games that are played together locally, ie. by players sat together on the couch.
Cutscene	A non-interactive sequence in a video game. Usually used to show conversations between characters, set the tone, further the plot, or reward the player.
Developer (or Dev)	These creators transform games from a concept to a playable game.
DLC	Downloadable content. Usually extra content made for a game after release.
Dialogue Tree	A network of conversation options that a player has with an NPC.
Discord	Voice and text chat app designed for gaming.
Dungeon Game	A game designed around a series of challenges set in a single area or location. These normally comprise puzzle and combat elements.



Glossary

Easter Egg	A type of secret hidden in a game by developers that's there as an inside joke for players, rather than contributing to the gameplay.
Esports	Video games played competitively for spectators.
F2P	Stands for free-to-play.
First-Person Shooter (FPS)	A shooting game in which the player sees the actions through the eyes of the player they're controlling.
Gamification	The practice of making non-game activities more like games by incorporating game-like mechanics (ie. leaderboards, polls, or challenges).
Haptic Feedback	A feature of some console controllers, where sensory feedback is given through vibrations when something happens in-game.
LAN Party	Stands for Local Area Network Party. A gathering of players coming to game together on personal computers or compatible game consoles, connected to the same Local Area Network.
Lobby	An in-game waiting room where players in multiplayer games come together before launching into a match or quest.
Loot Boxes	In-game rewards granted to a player for completing certain tasks (or they can be bought), which are often associated with a certain amount of chance. Could include things like customisation options for avatars, or equipment like weapons and armour.
MMORPGs	Stands for Massively Multiplayer Online Role-Playing Games. These games are role playing games that typically let all online players interact with each other in the game's world.
Narrative	Spoken or written account of connected events (a story). See also: Video game narrative.

NPC	Non-player character. These characters are controlled by the computer, and have a predetermined set of dialogue and actions.
RPGs	Role-Playing Games. A genre of game which sees players step into the footsteps of characters in fictional settings.
Party	A group of player characters, usually individually controlled by players in a multiplayer setting.
Producer	Producers typically manage the video creation process and play an executive role. They tend to be investors.
Publisher	A company that publishes video games that have been developed either internally or externally.
Quick-time Event (QTE)	Gameplay scenario that challenges the player to respond to a number of on-screen prompts, like pressing the right button at the right time.
Side Quest	A quest given to a player that has no direct bearing on the main story.
Steam	Video game digital distribution platform.
Story Mode	A version of a computer game in which the player controls a character in a story.
Streaming (Game)	Making or watching live or recorded broadcasts of other people's gameplay.
Studio	A company that specialises in the development of video games.
Tabletop Games	Games that are played on a table, like board games, card games, dice games, or miniature wargames.
Tiltify	Charity-focussed livestream fundraising platform.



Glossary

Twine	Online platform to create interactive stories.
Twitch	Live-streaming video platform.
UGC	Stands for User-Generated Content. Stands for any content or assets (ie. text, videos, images, reviews, etc) made by people rather than brands.
Video Game	A game played by electronically manipulating images produced by a computer program on a screen.
Video Game Narrative	A representation of a series of events through storytelling, player interaction, music, and 2D/3D imagery.
Visual Novel	A style of game focused on story elements and dialogue exchange, with few (if any) action elements.
VR	Virtual Reality. A unique hardware feature that lets players immerse themselves in the game world, usually through means of headset and/or controllers.

GAME OVER

RESTART?

YES

NO



Get in touch for a coffee

goodfutures@goodinnovation.co.uk