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GAMING. CULTURE. CROSS POLLINATION. SOCIAL CONVERSATION.

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I WANT TO DO ESPORTS.

This should be an opening line for a gaming movie (yes, that's a BIG thing and we'll get to that later). This is just another common misconception about this complex space. As marketers, we have been wired to think a certain way, replicating strategies past and adjusting them to new surroundings as if the approach applies just the same and localization (so many spoilers!) happens solely through rewording from one sport to esports.

Speaking of which, esports offer marketers a chance to take the plunge into the world of gaming in a space that carries many familiar elements to traditional sports sponsorship, however, built differently. Whether through gaming or esports, understanding those differences, identifying nuances, local traits, communities' lingos, wishes, and pain points will help one cut through the clutter.

Whether through one, the other, or both, brands are given the power of going hyper local whilst maintaining regional–and even global–relevancy, multiplying touch points, becoming part of a whole and engaging in actual two-way conversations.

More on that later.

WHAT IS GAMING CULTURE, AND WHERE DOES ESPORTS FIT IN?

Gaming is more than just watching and playing games, gaming is culture. Gaming encompasses music, movies, fashion and beyond. You must only look at Hollywood's latest blockbuster movies or TV shows to recognize the influence of gaming on pop culture.

On the Hollywood front, success is not hard to find. 'Sonic 3' became the franchise's largest grossing film with **+$420M** global box office. As of late May 2025, 'A Minecraft Movie' grossed **$940M** worldwide. On the TV front, shows like Netflix's 'Arcane', Amazon Prime Video's 'Fallout' and HBO Max's 'The Last of Us' continue to garner the attention of generational fandom. Gaming continues to drive culture and further cement its influence on younger generations.

When it comes to gaming content, surprisingly the most watched channels fall under the 'Variety' category on Twitch. In 2024, there were **+5.4B** non-gaming hours watched on the platform, an increase of **12%** over 2023. To start 2025, Q1 saw another jump in non-gaming content with **1.56B** hours being watched alone! That's a **+25%** increase in content that includes 'Just Chatting', 'Travel', 'Fitness', 'Music' and beyond.

But esports are not dead...despite what some in the mix may believe. In 2024, the gaming community consumed **2.9B** hours of esports content. While that is only a **1%** increase versus 2023, context is important. Esports saw **8%** growth in 2023 and **12%** in 2022.

> **'SONIC 3' BECAME THE FRANCHISE'S LARGEST GROSSING FILM WITH +$420M GLOBAL BOX OFFICE. AS OF LATE MAY 2025, 'A MINECRAFT MOVIE' GROSSED $940M WORLDWIDE.**

Esports has its place in gaming culture and presents unique opportunities for brands looking to engage a younger audience around their key passion point. In APAC alone, a report by PwC projects esports to be valued at **$1.64B** by 2028. This is largely driven by the massive rise of mobile esports (in China, more than **50%** of esports tournaments are now on mobile games).

Esports continue to innovate and open new opportunities to engage a live stream audience. In 2024, co-streamed esports accounted for **44.6%** of all esports viewership. Read that again. Think of co-streamed esports as a watch party with your favorite creator with a massive community for real time engagement and discussion. A prime example of the rise of co-streamed esports is former pro and current top creator Tarik co-streaming the VALORANT Champions event to **+268K** concurrent viewers while Riot's official broadcast drew **+90K** for the same event. We'll let that one sink in.

THE ECOSYSTEM

Understanding the way the industry is built is paramount for any company looking to set up its gaming strategy, be it through sponsorship, strategic collabs, advertisements, or any other form of marketing.

The first thing to get out of the way is that you won't find either gaming or esports at the centre of it. That's where the gamers are at. That's how the entire ecosystem is built, and the purpose of all the players involved in the industry. Take note of this, because you are not marketing to fans.

You are becoming part of a community, and while we're on the topic, understand that each community (each game and its genre) is unique.

FPS (First Person Shooter) and MOBA (Multiplayer Online Battle Arenas) communities are very different from one another, as is the case with gamers of different titles under the same genre. As you don't market the same way to tennis fans as you do for basketball or surfing, a similar philosophy applies among different gaming communities, genres and titles.

But we are getting ahead of ourselves again. Back to the ecosystem.

The traditional lenses have us wired to create a parallelogram between gaming and sports. But beyond some nuanced distinctions, there are some key differences we must consider.

Firstly, there isn't a governing body, which creates a much more segment-controlled and unregulated environment. Secondly, the "activity" is digital native, making it much more fluid from experience to interaction. Lastly, the distribution is increasingly more complex (tied to the point above), with the addition of a key new player: The Creator (religion-less speaking).

The diagram below illustrates the ecosystem value chain, building correlations between the many players that constitute the space. *(Ref 01)*

As we have discussed, the digital native nature of gaming blurs the lines between fans, gamers and players, creating proximity, relatability, and encouraging exchanges and conversation (not one-way monologues).

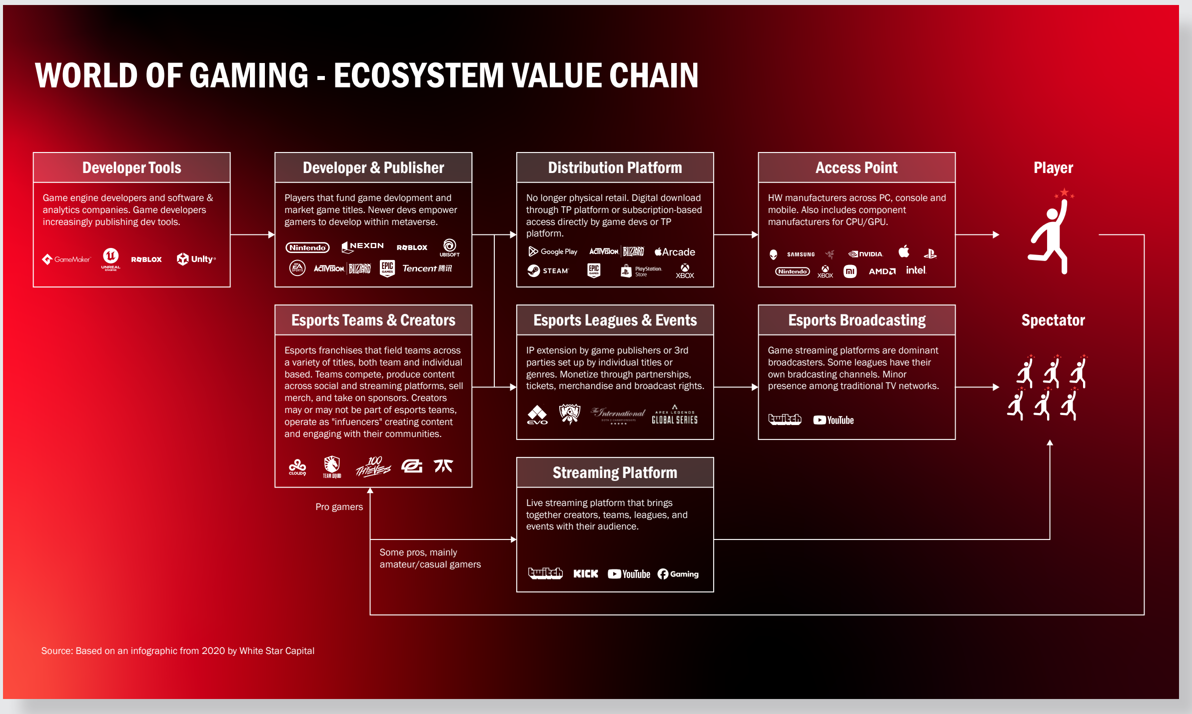
Zooming in to the esports section, the following infographic from Nicolas Besombes & Seth E. Jenny from 2024 provides visual aid at its complexity. *(Ref 02)*

We are not expecting you to look at it and say *"ok, I get it now, thank you very much".*

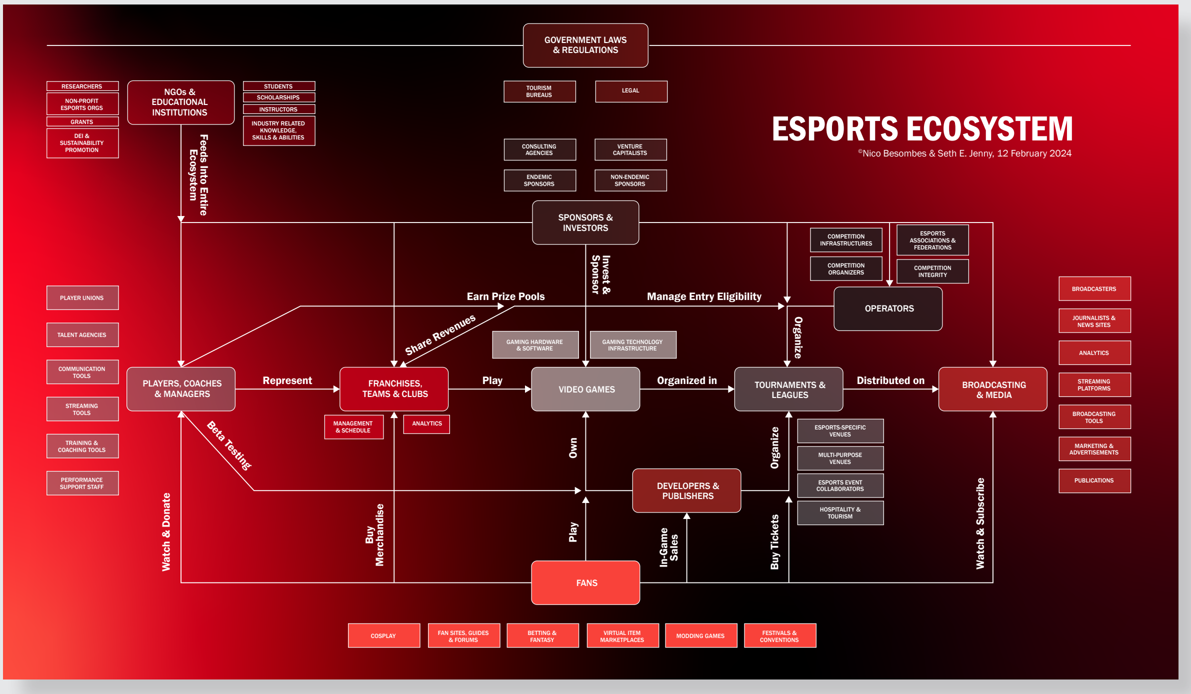
Our goal with this is to plant a seed in your brain (dear marketer) that there is a lot more to gaming and esports, and that the way to bring your brand into the mix, connect with the right audience and make you an essential part of the community might just extend beyond sponsoring that tournament or athlete.

Afterall, gaming is culturally integrated into several layers of society, from movies to music, sports (yes, the traditional ones) to fashion and a lot in between.

1



2



RULES OF ENGAGEMENT

Gaming and esports have been around for a while. The first tournament goes all the way back to the 1970s. Gamers weren't born at the turn of the millennium.

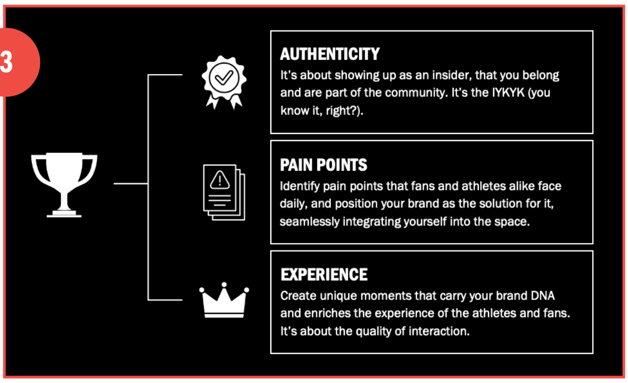
Here is why we are saying this: Gaming has been a passion point of many for decades, and gamers have been looking and longing for sponsors that would help develop the space and make their experience better since the early days. Fast forward to the gaming boom–we can pin it (although not exclusively) to around the launch of Twitch in 2011–and suddenly all those brands that turned their backs on gaming and gamers are now eager to be a part of it. If you were a gamer, how would you feel?

Don't be discouraged. That's not the intent. Gamers are very welcoming of brands coming into the space, but they are wary of those using it solely as an advertising platform due to their size and appeal.

Case in point, in the US, our clients at Chipotle were applauded by the crowd for their thoughtful partnership at Evo and around the fighting game community. *(Ref 03)*

So, how did we do it? In a very high-level way, we have crafted a simple success formula we apply to ensure a brand belongs and is embraced by the community.

3



As we continue to explore how to make a brand win in gaming (no pun intended), and discuss different approaches, tactics and players within the ecosystem, it's important to take a step back to look at the behavioural aspect of gaming.

According to Statista, there are approximately **2.7** billion gamers worldwide.

Understanding the diverse motivations that makes these billions of people turn to gaming on a regular basis gives brands an upper hand to find a meaningful way to belong, and this all starts at a much deeper level than one would assume; it's inherently part of the human need for play.

This is what we gain insight through the State of Play study by WGSN, the global leader in trend forecasting.

WGSN RESEARCH

STATE OF PLAY

Play is essential for wellbeing and innovation and alleviates stress and anxiety. Research by organisations like the Global Wellness Institute links play to mental health benefits, including stress reduction and better cognitive function.

Play is a win-win strategy for brands, driving business and product innovation and deepening customer engagement, while also bringing joy, optimism, and improved wellbeing to a world facing multiple challenges.

As research highlights the positive effects of play, and brands increasingly promote it, consumers now expect it in products and experiences.

In 2025, companies must incorporate play into their brand storytelling, products, and operations to increase consumer engagement, deepen relationships and form stronger loyalties.

Meanwhile, brands must facilitate play internally, allowing employees to play with individual expression to boost creativity and productivity.

We unpack four ways to practice play in your business and product strategies.

CELEBRATE PLAY AS A FOUNDATIONAL HUMAN NEED

Brands must connect with consumers in more memorable and engaging ways by offering playful experiences when offering a service or product.

Play has been listed as one of seven primary emotions we are born with, making it as fundamental to our drives as food and sleep.

Companies without their own brand mascot should consider licensing deals to meet the demand for playful branded items.

For example, Louis Vuitton's playful consumer-facing touchpoint, the 'Vending Dreams' vending machine, where shoppers received tokens as a bonus gift and a chance to win special collectables. The 'Vending Dreams' machine, launched as part of the Louis Vuitton 'Takashi Murakami' experience, brought a unique element of play into luxury retail, blending gamification with the brand's high-fashion persona.

Brands must tap into mascots and merchandise to increase consumer demand for their playful branded items.

For example, the success of Chinese animation ‘Nhe Zha 2’ spurred significant demand for its merchandise, demonstrating the power of branded experiences to drive product sales.

Internally, brands should cultivate a culture of play to inspire creativity and foster innovation within their teams. For example, Google’s ‘20% time’ policy allowed employees to playfully explore new ideas, resulting in the creation of products like Gmail.

Use play to cultivate a culture of innovation: identify how your standard business practices can be reinvigorated with a sense of play. Ring-fence time for open-ended exploration and consider where you can replace brainstorming with ‘playstorming,’ which can help employees strengthen their relationships with each other and enhance your business’s creative problem-solving capabilities.

Finally, companies must facilitate the ‘play state’ by creating an engagement hook that welcomes people to play for its own sake–for example, ‘House of Erikalust’, Europe’s first immersive erotic experience. Created by ethical adult film production company Lust Films and AR studio Layers of Reality, the event blends augmented and virtual reality with art to invite visitors to explore the diversity of human play and pleasure.

Key takeaway: Companies need to prioritise play across products and experiences for a deeper connection with consumers while internally cultivating play in-house to boost productivity.

LEVERAGE THE WELLNESS OPPORTUNITY

Play is closely linked with wellness, making it an essential tool for brands in this industry and an opportunity for other brands to tap into wellness play.

Companies should incorporate play to build stronger social connections and promote social fitness, which fosters community and emotional wellbeing.

For example, Lego’s ‘Inner Piece’ pop-up in London introduced the ‘Adults Welcome’ range, where visitors collaborated to build a communal garden, experiencing the joy of collective creation.

Strengthen social fitness to build brand loyalty: play is a great unifier, making it an ideal tool for connecting people and helping them build their social fitness amid a loneliness epidemic.

Play is closely linked with health and wellness, making it an essential tool for brands in these industries. Scientific research shows it has the potential to remedy loneliness, anxiety and even addiction.

Both online and offline interactive brand experiences allow brands to increase customer engagement and unlock future commercial opportunities. For example, the Offline Club hosts events where guests leave their phones at the door to chat and play board games without distraction.

Consumers are increasingly reconnecting with their inner child, seeking out experiences and products that evoke nostalgia and innocence. Companies must cater to the demand for products and experiences that nurture the needs of people's younger selves, fostering child-centred positioning and communication strategies.

For example, Mexican artist and designer Sofia Elias uses her work to reconnect people with their inner child, which she describes as "the purest versions of ourselves; always curious, with no boundaries, and without control."

Key takeaway: Companies must align their strategies with consumer wellbeing, social health, and introspection by creating products and experiences that embrace play.

MAKE PLAY INCLUSIVE

Play isn't one size fits all. Brands must cater to the underserved, marginalised, disabled and ageing consumers, who wield significant spending power.

Marginalised, disabled and ageing consumers are underserved, yet they wield significant spending power. Return on Disability estimates that people with disabilities, as well as their friends and family, account for over 73% of consumers and control more than $13tn in annual disposable income.

Align your products with play personalities: maximise the play potential of your offer by identifying which play personality your products are most aligned with, whether it be kinesthetes (people who like play through movement) or directors (who like planning and executing scenes and events).

For example, Arup's 'Playful Cities Toolkit' provides resources to support local governments, urban practitioners, and local communities in designing play that includes different age groups, abilities, and identities.

Brands should consider diverse play personalities when designing products, from kinesthetic play to strategic, director-style engagement.

For example, TikTok's viral 'home café' trend, where participants give followers insights on bringing play cafes to life, including ingredients, equipment and furniture.

Finally, companies will benefit from incorporating multisensory play into their offering, enhancing neural stimulation and consumer engagement.

For example, Crayola infuses fragrance into their crayons, whose scents are designed to fill retailers' aisles, evoking childhood memories.

Key takeaway: the brand must explore modular, open-ended and multisensorial designs to make your products and services more accessible and reach new markets, including the marginalised.

USE KID INTELLIGENCE

Kid Intelligence (KI) is seeing the world through a child's perspective. KI can be applied to product development, retail environments, and even marketing campaigns, helping brands resonate with both children and parents alike.

Companies must unlock curiosity, wonder and innovation across processes and products, and develop more authentic connections with influential young consumers and their families. Children 14 and under make up 25 percent of the global population, and they are innately connected to their need to play, making them valuable co-creators.

Co-design with kids: consider assembling a youth advisory board to integrate a child's-eye view into your business, using workshops and user-testing to integrate their ideas into your products.

For example, New York-based Space Club is an elevated indoor playground experience that boasts artist-designed immersive play spaces, branded merchandise and gourmet snacks to appeal to the whole family.

Key takeaway: brands must embrace KI to gain new insights, increasing brand relevance with kids and parents.

FINAL THOUGHTS

By integrating play into products, workplace culture, and customer engagement, brands can remain relevant in a market that increasingly values play as a critical component of wellbeing. This approach fosters deeper connections with consumers, drives loyalty, and positions brands as leaders in a modern, wellness-driven landscape.

FUTURE OUTLOOK

We've talked a lot about belonging. About being part of a whole and ensuring that you are coming into gaming in a meaningful way. Lots of big words and bold statements, but how does one go about doing it?

With a global outlook and zooming into APAC, below we unlock 10 trends shaping the industry, how they are impacting gamers, enhancing the experience and what opportunities they offer for brands, alongside some amazing work being done around several of them.

1 – HYPER CASUAL & SOCIAL GAMING

Yes, we are starting like this, and we are doing it on purpose. One of the main messages we've tried to embed thus far is that gaming is far bigger than the sold-out O2 Arena for League of Legends Worlds in 2024 you probably read about.

That friend playing 'Candy Crush Saga', 'Block Blast', or 'Royal Match' is also a gamer, and is part of an incredibly large piece of the pie when it comes to revenue and downloads.

Let us paint a picture for you: **25%** of all mobile game downloads come from hyper casual and idle games, and since 2020, the year with the lowest number of downloads of the top **1,000** casual games was 2023 with **15.3B** downloads, with 2025 projected at **16.4B.** That's B for billion.

Furthermore, social network games–those that grow through social invites and interactions–are played by **1.2B** (that B again) people globally.

We can stop here for a minute. Breathe.

If we zoom in to APAC, the impact is equally impressive with the casual gaming market projected to be valued at **$180.7B** by 2028, with **70%** of online consumers in SEA and Oceania identifying as gamers.

In China alone, casual games on WeChat attract **400M** users per month. That's only China. And that's only on WeChat.

Alright, you're hooked, the numbers are huge. Does it mean this is a wide net you cast to catch a large audience? Not necessarily. The beauty of it is that it allows you to go both big and hyper local.

25% OF ALL MOBILE GAME DOWNLOADS COME FROM HYPER CASUAL AND IDLE GAMES, AND SINCE 2020, THE YEAR WITH THE LOWEST NUMBER OF DOWNLOADS OF THE TOP 1,000 CASUAL GAMES WAS 2023 WITH 15.3B DOWNLOADS, WITH 2025 PROJECTED AT 16.4B. THAT'S B FOR BILLION.

A brand that nailed such an approach was Balenciaga. They launched a new AR farming mini-game on WeChat (all right, **400M** monthly users is not necessarily niche or hyper local) to raise awareness on sustainable farming, educating gamers on best practices as part of its **520** campaign. (Are we all familiar with what **520** means? Localize people!) From avatar dressing to educational messaging and a rewarding system through stickers, the brand reached and connected with a highly engaged audience.

Another brand that successfully leaned into hyper casual games to engage and interact with its target audience was McDonalds Singapore, designing and launching a mobile-friendly fishing game integrated with OOH displays across the city-state to promote its Filet-O-Fish.

> **MOBILE GAMES SAW AN INCREASE OF 17.9% IN APP DOWNLOADS IN 2025 COMPARED TO 2020, WITH THE MOBILE GAMING MARKET EXPECTED TO REACH $160B IN 2025.**

Whether targeting a large audience, going hyper local, marketing in English or in Tagalog, selling high-end fashion or a sandwich, focusing on brand awareness or product promotion, and everything in between, hyper-casual games may just be another way to get there.

2 – MOBILE GAMING

Is mobile gaming still considered a trend? Perhaps not in the traditional sense of the word. But it's still growing, and it's growing a lot.

Mobile gaming is being pinned by many experts as the leading force behind the industry's continuous growth. When we talk about cross-platform gaming as a trend–don't worry, we are not going down that route here–it's because big players are understanding the need to have their games available on mobile devices to keep gamers and consumers engaged.

An example is big name brands such as Disney and Nintendo recruiting companies such as Tencent to develop mobile games for them. And here is why they are doing this:

Mobile games saw an increase of **17.9%** in app downloads in 2025 compared to 2020, with the mobile gaming market expected to reach **$160B** in 2025.

This is particularly important for APAC, having contributed **64%** of the worldwide revenue (2023) in mobile gaming. This surge can be explained by a growing young demographic, rapid smartphone adoption, and the advent of innovative technologies, with the market now having an estimated **1.5B** mobile gamers and a record-breaking 80B+ game downloads in 2024 alone.

Just in India, a recognized untapped gaming market, the mobile gaming population is projected at **700M** people, while **96%** of gamers in Indonesia state they prefer mobile games, with **61%** gaming daily.

Look at the sheer volume of it all.

But as we have explored earlier in this paper, gaming is not homogenous. It's composed of a multitude of players and layers, forming numerous communities under regions, game categories, genres and titles.

We must look beyond the numbers alone. Gaming marketing is not an ad buy exercise.

In APAC, action games grabbed the biggest share of app installs in 2023 with **18%**, followed by hyper casual (listen to us) accounting for **14%**, and a show in growth of emerging sub-genres such as racing **(61%)**, simulation **(53%)** and arcade **(38%)**.

We started this portion highlighting that mobile gaming is not a "new" trend, which makes it familiar territory for brands and marketers. Travelled waters offer structured feedback and learnings.

88% of marketers who explored gaming and esports in Singapore reported using in-game advertisements, with **79%** of those reporting improved brand awareness and **66%** a higher ROI.

In-game ads is just a tactic of many on how a brand can come in the space, and as said before, it all comes down to how you show up to the gamers.

Is your ad disruptive or does it add value?

3 – CLOUD GAMING

Remember when we talked about the magic formula to win in gaming and esports?

"Downloading this game is taking forever."

"Why is it not working properly on my device now?"

"Where did all my space go?!"

Think of a pain point. Cloud gaming may be as disruptive–in a good way, unlike that annoying ad we just talked about–as Netflix was to Blockbuster (feeling old or nostalgic?).

This might explain why there are today an estimated **295M** cloud gaming users worldwide and searches for "cloud gaming" have grown **975%** since 2021.

But it's not all roses. To stream a game, you need steady, reliable, and fast internet. Which is why cloud gaming is tied to growth, investment and adoption of 5G network infrastructure, coverage of which is projected to exceed **5.3B** subscriptions by 2029.

APAC has embraced the trend with several local markets investing and developing infrastructure.

South Korea accounted for **15.93M** 5G subscribers in 2023, whilst China and Japan are expanding their networks to cover the majority of their populations.

In SEA, operators have invested over **$30B** to develop these networks. The Thailand True & DTAC merger created a giant with a market capitalisation of **$8.6B** and **51M** customers.

Cloud gaming is a trend set to become the norm, and the democratization of access to games it provides must not be overlooked by brands.

4 – ESPORTS
I want to do esports.

You can, and we want you to do esports too, if that's the right thing for you to do.

First things first, think of esports as a subset of gaming. In a simplified manner, esports is competitive gaming.

This is important to answer the next question: Is it big? It's massive. It's exciting. It's trendy. (See what we did there?) It's la crème de la crème. And it speaks to a highly engaged audience. It's where heroes are born and histories are made.

Sold-out arenas (hello O2, hello Bird's Nest), record-breaking prize money (Esports World Cup 2025 is offering a **$70M** prize pool), and incredibly talented and influential athletes. Yes, athletes. And while we are here… one of the biggest misconceptions behind esports is that it doesn't have the big-name stars we see in traditional sports or cultural icons we have in music and entertainment.

Google Faker.

The global esports industry is projected to be valued at **$9.29B** by 2032, with its growth mainly driven by mobile esports. See how the trends are interconnected?

With the growing industry, wide array of tournaments and professional leagues, brands start to pay attention to the space. Sponsorship of infrastructure from endemic brands offers a shortcut for seamless integration. An example is Samsung coming in as the 'Official Device Provider' for the FFWS (Free Fire World Series) in SEA for 2024 and 2025.

THE GLOBAL ESPORTS INDUSTRY IS PROJECTED TO BE VALUED AT $9.29B BY 2032, ITS GROWTH DRIVEN BY MOBILE ESPORTS.

Esports is not exclusive to endemic brands. There a million examples. Louis Vuitton and League of Legends (game), DHL and ESL (tournament organizer), Red Bull and Bacon Time (team).

In the same token of what we discussed in previous topics, esports also open the door for global plays and hyper localized ones.

In fact, localization through curated content–we don't mean video–is especially important in APAC, where over half the gamers (in SEA-6) are involved in esports. Over **59%** of gamers in Indonesia, Thailand, and Vietnam prefer to play games and consume gaming content translated into their local languages, but please don't assume that localization equals translation.

A study from YouGov found out that APAC esports fans favour regional teams, with **84%**, **76%**, and **60%** reporting their preference for local teams from Indonesia, Thailand, and Malaysia, respectively, instead of the global powerhouses. Different from football fandom in the region, isn't it?

Furthermore, and through gaming lenses rather than esports, we have been seeing a rise in popularity of locally developed games, with some notable examples such as Coral Island (Indonesia), GigaBash (Malaysia), Cat Quest (Singapore) and Home Sweet Home: Online (Thailand).

When we look into localizing campaigns for communities and local markets, a way of doing so is by partnering with top players and athletes. Lenovo brought this to life through a campaign where it sponsored a series of meet & greet events for esports players in India to promote its LOQ gaming notebooks.

Finally, an aspect that can't be overlooked from brands in esports and particularly in APAC is the regulatory concerns, as this directly impacts success of campaigns and access to gamers.

An example is China limiting playtime for gamers who are minors to 3h per week, and India's frequent bans–under the ambit of data privacy concerns–of popular games such as PUBGM.

IN CHINA ALONE, CASUAL GAMES ON WECHAT ATTRACT 400M USERS PER MONTH. THAT'S ONLY CHINA. AND THAT'S ONLY ON WECHAT.

Convinced? Scared? Both?

Esports is where traditional sponsorship packages will be found, but there isn't a one size fits all approach. The secret in winning–as is the case in traditional sports–lays with how you activate the partnership, the stories you tell, the connection you build, and the way you make yourself belong in the ecosystem.

5 – ESPORTS CO-STREAMING

It's not the same thing. Yes, it sits within the esports category, but it warrants its own dedicated space.

In the early pages of this white paper, we talked about some of the key differences between gaming and its distant cousin traditional sports, and one highlight was the existence of the creator.

The term "Creator Economy" is now commonly mentioned in meeting rooms and business conferences–is it in yours yet? It's hyped, and there is a reason for it.

In the attention recession era, consumers are looking more and more into relatable characters in whom they can trust (save this word for later).

The rise of micro and growth of mid-tier influencers are creating a pool of creators with whom gamers are looking to engage and connect with (save that word too). And this is where gaming and esports start to show differently: they offer and deliver a two-way conversation, not the usual run of the mill, one-sided narrative.

It's more than talking to someone, it's about co-creating with them. It's the CO-llaboration aspect that this trend was born with that makes it so powerful. It gives people a voice, and the chance to belong.

> **60% OF MOBILE FEMALE GAMERS SPEND UP TO 7H PER WEEK PLAYING, WITH 30% OF THEM MAKING GAMING RELATED PURCHASES, COMPARED TO 22% OF THEIR MALE COUNTER PARTS IN SEA.**

Let us give you some perspective. In 2025, there were over **450K** streaming channels on YouTube Gaming Live alone. On that note, streaming viewership is projected to have reached **500M** in APAC in 2024, driven by mobile gaming and esports, with high marks for Indonesia and India.

What's more, Twitch has an estimated **30M** DAU (daily active users), reemphasizing the rising interest in live-streamed competitions.

As this movement continues to grow and solidify itself in the gaming ecosystem, brands must look into creators with a focus on long-lasting partnerships, crafting bold campaigns that add value and resonate with their communities.

It can be a stand-alone vertical, or complementary to other actions, but something that shouldn't be ignored.

We have exemplified this in the introduction to this white paper with how Tarik's co-streaming of VALORANT Champion's event overperformed Riot's official streaming channel by almost **3x**.

Brands will also start to pay more attention to this space. An example was Razer–arguably one of the players with the highest brand appeal and share of mind–turning to Gorgc (one of the most famous Dota streamers) on an activation around TI 11 (The International) in Singapore.

It's about building trust, creating meaningful connections, and promoting a sense of belonging, for your brand and for the community.

6 – FEMALE GAMERS

What's the gamer stereotype? 15–24-year-old male?

Start over and think again.

Globally near **45%** of all gamers are female, and this reaches greater heights in APAC, where new female gamers are growing almost twice as quickly as male ones, already accounting for **44%** of gamers in China.

And there's more. GenZ female gamers were already almost equal to their male counterparts in Thailand (**50%**) and Singapore (**46%**) in 2023.

From a behavioural standpoint, **60%** of mobile female gamers spend up to **7h** per week playing, with **30%** of them making gaming related purchases, compared to **22%** of their male counter parts in SEA.

However, with every new booming movement, comes growing pains.

Female gamers still suffer abuse and harassment when playing online. And that's not specific to one region or another. Reports and articles cover cases from the UK to India, China to the Americas, and everything in between.

Misrepresentation in gaming is another area that carries complaints from female gamers, with over half of them feeling dissatisfied on how women are represented in gaming.

Did you notice that? Pains.

Although the mitigation for online abusive behaviour is a much larger conversation, and that in-game representation technically sits with game developers and publishers, this is a dormant-ish opportunity for brands.

Brand must show up for this cohort, and there are a few already doing it.

Be inspired by Hello Kity's activation with Honor of King in China (2023), that allowed for players to win skins for the female characters of the game when accomplishing tasks and quests, with its announcement reaching over **140M** views in just 24 hours on Weibo.

Showing up for female gamers in a meaningful way is taking action to fix one of the biggest pain points in the ecosystem.

7 – GREEN GAMING

Alright, no exercise on trends is complete in 2025 without talking about sustainability. Be it on gaming, aviation, or textile.

But sustainability in gaming is growing and gamers are paying more attention to how games, developers, and brands show up from that perspective.

And that concern is extending beyond the gamers. In 2024, Playing for The Planet and Pan Africa Gaming Group organized the first Green Games Summit in Nairobi, attended by **100+** government ministers from around the globe.

Game studios have identified the trend and are starting to act, with over **200** of them having implemented eco-conscious and sustainable measures by switching to renewable-powered servers, optimizing them, and repackaging.

Back to the gamers, **80%** of them want to see more green messaging in gaming, with **78.6%** believing gaming can help educate people on the environment, and **35.3%** saying they would choose a game with green themes versus one without.

Games with eco-messaging embedded are gaining popularity, combining the power of play with educational messages that impart hope for change.

To illustrate this, in 2023 there were **41** wild-life themed games, which combined reached **85M** DAU.

An example is Terra Nil and Alba, teaching players about conservation through gameplay, or Lifebuoy with its 'Gift of the Ganga' campaign, where it engaged gamers to clean the Ganga River in-game, committing to match their efforts IRL (in real life).

Green game is moving from being a niche to becoming how games are made, and players are engaged. You should join in early and become part of the solution.

8 – AI & THE GAMING EXPERIENCE

Now it just feels we are going from hot topic to hot topic but trust us on this one. (If you made it this far, we would like to think you do.)

AI is making its way into every aspect of our lives, and it isn't any different with gaming. Well, what is different is that gaming is digital native, which makes this integration that much more natural and expected.

Fine. What will it do in gaming?

Well, it's already doing. The opportunities are limitless, and we are just scratching the surface, but generative AI and machine learning are now being used by game studios to write quests, dialogues and storylines, improve NPCs (non-Player Characters) behaviours and how they interact with you, dear gamer marketer, and testing the games.

This will impact game development efficiency, and player experience, with expanded storylines adapting dynamically and reacting to each individual style and level of play, creating personalized and immersive experiences. In fact, **72%** of major studios already use generative AI tools.

As a proof point, games featuring AI-driven adaptive interactions report a **20%** boost in player retention.

As you might have guessed by now, what one can do in gaming is limited only by their imagination. It's a very fertile field of play, and this is amplified by AI.

Brands have started to leverage generative AI to integrate themselves into game play in a natural, fun, engaging and non-intrusive and disruptive way.

A perfect example is the collaboration between KFC and PUBG in SEA and Korea, whereby activating NPC's, the fast-food chain promoted exclusive items redeemable IRL.

9 – MIXED REALITY

It's understandable if the first thing that comes to your mind when we talk about mixed reality as an upcoming trend in gaming is that the barrier of entry is too high. Products are too expensive, and the trend will not reach mass market. Well, perhaps it doesn't have to.

But let us give you something to think about.

The number of AR headsets is expected to grow 30% in 2025, with the global market for VR gaming expected to reach $12.2B by the end of this year.

In the big scheme of things, this might not look as significant, but it is, and it's at the beginning. AR games (think Pokémon GO) have over 600M downloads since its release.

We can argue that hardware is still finding its footing with it. Maybe. Some VR headsets like Meta's Quest Pro have been investing heavily and unveiling upgraded versions with positive feedback and response from the market.

Creating immersive experiences is taking things to a whole new level, and this is something gamers long for, and can now access the devices at a more affordable price tag.

This offers a blank canvas for brand play, with some already taking the plunge as it can be seen in the immersive Squid Game virtual experience at Singapore's Sandbox VR.

AR/VR is also showing up in esports, which can be illustrated via EVA (Esports Virtual Arena), who in their own words, are reinventing esports by blending physical and gaming skills. With 55 arenas spread around the globe, they are one of the first to tap into the trend, and gamers are loving it.

10 – HOLLYWOOD CROSSOVER

Back in the 1980s the Nintendo Entertainment System (NES) was dominated by games based on Hollywood movies such as Back to the Future, The Goonies, Star Wars, and more. This trend continued for **30+** years but in present day the script has been flipped. Hollywood is now taking inspiration from gaming and gaming has delivered for Hollywood.

Today's biggest TV shows and movies are based on video games. Recent examples include the global phenomenon such as the Minecraft movie, which grossed **$940M** across its global box office release. 'A Minecraft Movie' success comes a year after The Super Mario Bros. movie, which to date is the 17th highest lifetime grossing movie achieving a whopping **$574B**. With Zelda, Sonic 4, Mario Bros 2, and more planned, Hollywood is not slowing down tapping gaming for new stories.

On the TV front, HBO Max's hit 'The Last of Us', Netflix's 'Arcane' and Amazon Prime Video's 'Fallout' shows have created can't miss cultural moments. 'Arcane' generated over **1.5M** hours watched during its premiere weekend and knocked hit shows such as 'Squid Game' off Netflix's top trending show titles.

So how do brands unlock these cultural moments?

This question depends on your category and goals. McDonalds tapped the Minecraft movie for a best-in-class activation to support the movies launch, featuring special themed sauces, happy meals and a line of adult collectible toys.

When 'Fallout' hit Amazon Prime Video, the latest game in the series, 'Fallout 76', saw a **+1128%** increase in viewership. For context, 'Fallout 76' made its debut in 2018, showcasing how Hollywood's crossover fuels a resurgence in an older game which could also be a unique opportunity for brands to tap into creators in that game's community.

Hollywood tapping gaming IP will continue, providing brands opportunities across both pop culture moments such as show or movie launches along with tying to the gaming community. Unlocking these opportunities requires time and relationships with the studios along with an appetite to collaborate.

CONCLUSION

We have covered a lot. If you made it this far, well done, you!

We will keep this one short, although it is fair to say we are too late for that.

What we want you to take from this?

- There is room for everyone in gaming.
- Respect your brand and respect the community.
- Don't just market to gamers, co-create with them.
- Focus on belonging.

Gaming is an extraordinary space, waiting for those committed to doing extraordinary things.

GGWP!

GAMING. CULTURE. CROSS POLLINATION. SOCIAL CONVERSATION.

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