COMMUNITIES TO WATCH

GAMING REFORMERS

A progressively-minded community seeking to reform the gaming landscape and create a more inclusive, fun and equal 'third place' online.

EXEC SUMMARY

Connecting to a rapidly-growing cultural community, based on AI-driven content engagement data

This new report from Codec shares research identifying one of the fastest-growing communities within gaming - the Gaming Reformers.

The gaming landscape has become a hot topic for the advertising industry, seeking to connect to new growth audiences through their passions and interests.

Video gaming has exploded over the last year - a global market worth $180 billion and projected to reach $287 billion by 2026.

Based on +1.8M content engagements analysed over 12 months on the Codec platform, and a survey of 1000 community members (UK + US), we blend quantitative cultural data and survey data with quotes from Gaming Reformers to bring this community to life.

Progressively-minded and diverse, spanning gender and demographic lines, this emerging group aim to create a more inclusive, fun and equal 'third place' online.

15%
Gaming Reformer **community growth** over 12 months.

58%
of Gaming Reformers believe a **lack of accessibility** is an issue in gaming

80%
of Gaming Reformers are **excited to see brands** entering the gaming space

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EXEC SUMMARY

Practical steps for brands, and how to connect with authenticity

40%
of Gaming Reformers identified **wealth distribution** as getting worse

11%
increased engagement with **social inclusion** on the Codec platform

15%
increase in **strategy games** on the Codec platform

How to engage Gaming Reformers

Diving in to the three key topics Gaming Reformers are passionate about. Featuring AI-driven content engagement analysis from the Codec platform highlighting big community needs.

01 **Removing barriers to access**
02 **Tackling toxicity and stereotypes**
03 **Promoting purposeful play**

How can brands connect?

Approaching this community with authenticity - Codec cultural strategists detail winning brand behaviours and rules of engagement with the Gaming Reformers.

01 **Work with the community**
02 **Focus on scaleable actions**
03 **Promote positive experiences**

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THE RISE OF GAMING
Gaming has soared in popularity during Covid

Over the past year, video gaming soared globally in popularity.

As the pandemic took hold and physical isolation became the norm, people the world over found themselves stuck at home, seeking new forms of entertainment, experiences and connection. Gaming became the new social, forging new audiences and communities in the process.

The global gaming market is worth $180 billion and projected to reach $287 billion by 2026*.

Additionally, gaming is now the largest category on Reddit with 172 million monthly visitors** and over 3 billion monthly views. At the beginning of 2021, the platform saw a 34% year-over-year growth across its gaming communities.

"
Video-game industry revenues grew so much during the pandemic that they exceeded sports and film combined

- IDC Gaming Report

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MAPPING THE GAMING LANDSCAPE ON CODEC

Our AI analyses millions of content interactions to map the cultural opportunity spaces connected to any audience.

Within the broad gaming landscape we identified a wide range of communities united by shared interests, values and behaviours.

Each community tracking live on the Codec platform offers an on-demand audience view that moves at the speed of culture.

Codec insights help brands create community-driven strategic and creative decisions, as well as plugging into media targeting for activation across social and contextual programmatic targeting via any DSP.
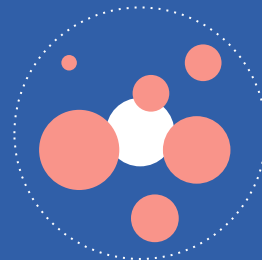
01 — Capture the broad audience to explore - through engagement with relevant content
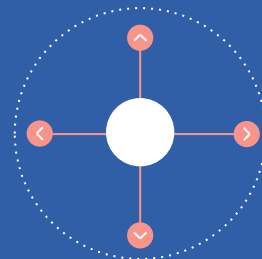
Enrich with wider content interactions over 12 months

02 — Identify cultural communities connected to gaming

03 — Track + activate through the Codec platform

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GAMING COMMUNITIES TRACKING ON CODEC

Live activation audiences identified within the gaming universe

866M Mobile Gamers

52M Memesters

57M Twitch Queens

291M Gaming Reformers

48M DIY Devs

42M Cosplayers

372M Second Lifers

617M eSports Evangelists

47M Gaming Nostalgia

349M Strategists

32M Spectators

21M Family Fun

395M Football Fanatics

* Global sizing through GWI

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A COMMUNITY THAT DEMANDED OUR ATTENTION

Whilst we've seen growth across all gaming communities tracking on the Codec platform over the past 12 months, one community in particular stood out for three reasons:

01
Fast-growing;
increased +15% in size over past 12 months

02
Unexpected demographic;
representation across age groups, including older gamers

03
Progressive themes;
engagement topics mirror broader shifts in society

"

[in 2020] Gaming growth was most pronounced in a surprising demographic: 35-54 year olds increased gaming time +60% and dollar spend +76%

- IDC Gaming Report

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GAMING REFORMERS

A progressively-minded community seeking to reform the gaming landscape and create a more inclusive, fun and equal 'third place' online.

United by what they stand for and against, Gaming Reformers are challenging the status quo. Their core desire is to create a space that champions and celebrates the joy of gaming. A space that's accessible and welcoming to all.

Size
291M
Global audience (GWI)

Growth
+15%
Prev. 12 months (GWI)

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COMMUNITY OVERVIEW

GAMING REFORMERS

A progressively-minded community seeking to reform the gaming landscape and create a more inclusive, fun and equal 'third place' online.

United by what they stand for and against, Gaming Reformers are challenging the status-quo.

Their core desire is to create a space that champions and celebrates the joy of gaming.

A space that's accessible and welcoming to all.

Size
291M
Global audience (GWI)

Growth
+15%
Prev. 12 months (GWI)

60% Male
40% Female

18-34 **- 54%**
35 - 54 **- 37%**
55+ **- 9%**
Avg. age 36

$40 avg. monthly gaming spend*

Key engagement themes:

Removing **barriers to access**

Tackling **toxicity and stereotypes**

Promoting **purposeful play**

Gaming motivations:

1. Excitement (70%)
2. For the challenge (61%)
3. To learn new skills (58%)

+50% play games to **socialise with like-minded people**

65% describe themselves as **'play fair win or lose'** gamers
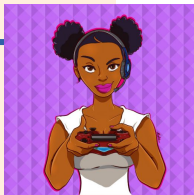
* based on UK/US survey respondents
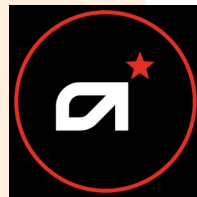
Key influencers / media

SUMMIT1G

MEG JAYANTH

TWITTER GAMING

TWITCH

BLACK GIRL GAMERS

ASTRO GAMING

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CONTENT ENGAGEMENT THEMES

Three key topics Gaming Reformers are passionate about:

Barriers to access	Toxicity & stereotypes	Purposeful play
01	02	03
The question of access manifests itself in many ways for this community. From removing barriers to play for those with disabilities, to speaking out around affordability and the unequal advantages raised by micro transactions within games, they're keen to remove obstacles that get in the way of enjoyment.	From sexual harassment and trolling to threats of violence and doxing, the anonymity of online gaming environments can fuel toxic behaviour. Building on this, a feeling that representation - particularly of women in video games - remains harmful and stereotypical.	For Gaming Reformers, having fun and learning new skills are prioritised over winning or beating others. They are pushing back on 'win at all cost' behaviours that detract from the joy of gaming, focusing instead on socialising and learning new skills with like-minded people.

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BARRIERS TO ACCESS

The question of access manifests itself in many ways for this community.

From removing barriers to play for those with disabilities, to speaking out around affordability and the unequal advantages raised by micro transactions within games, they're keen to remove obstacles that get in the way of enjoyment.

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Are in-app purchases ruining mobile video games?
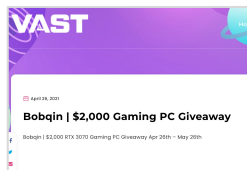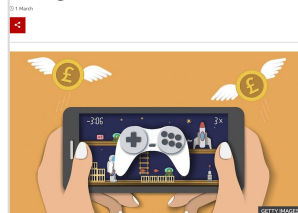
VAST
April 29, 2021
Bobqin | $2,000 Gaming PC Giveaway
Bobqin | $2,000 RTX 3070 Gaming PC Giveaway Apr 26th – May 26th

PS5 games are $10 more expensive. Is that fair?
The truth is about as complex and murky as it gets.

40%
of Gaming Reformers identified **wealth distribution** as getting worse.

How Charity Gaming Marathons Have Changed Fundraising
By Rachel Kolman · February 24, 2021

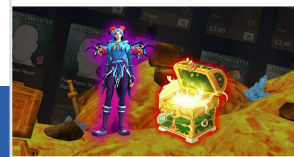What's The Difference Between GOOD and BAD Microtransactions?
Microtransactions aren't going away, but they don't need to. After all, some microtransactions can actually be good, while many are simply bad.
BY GINA
PUBLISHED MAY 14, 2021

$83M+ Raised And Counting In 2020: Are Twitch Streamers The New Philanthropists?
Chris Strub Contributor ⓘ
CMO Network
I highlight successful social media strategies from savvy nonprofits.

+8%
increased engagement in **social economics** on the Codec platform

WEALTH INEQUALITY
Ability to spend is creating new barriers to access

Whilst adding new dimensions to gameplay, the rise of in-game microtransactions is creating unequal experiences.

Pay-to-win structures break gameplay by giving players who spend money advantages over non-spenders.

Gaming Reformers find this problematic; creating new barriers to access which are detracting from the enjoyment of gaming.

While this community values rewarding skill and ability to play over ability to spend, they understand the benefits that have come to gaming though microtransactions.

"More money trickling into the video game industry creates more stability and allows developers and publishers to plan games for the foreseeable future" - Gamebyte

With wealth inequality becoming more evident, gamers are taking the initiative to raise money for those less fortunate than themselves E.g. charity fundraisers.

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"...open the door for anyone to compete, the moment that happens is the moment esports becomes a real league and not one filled with only those privileged enough to afford thousand dollar gaming equipment. "

- Gaming Reformer survey respondent
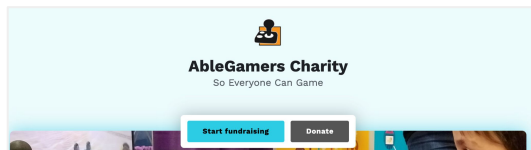

2006

WOW! He must have done
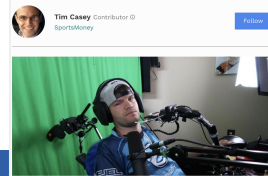something really difficult
to earn that armor!

2019

WOW! He must have spent
so much of his money
to buy that armor!

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AbleGamers Charity
So Everyone Can Game

Start fundraising   Donate

AVENGERS

Marvel's Avengers: Devs Discuss Representing Disability, Introduce a New Superpowered NPC

Embrace your powers.

By Matt Purslow Updated: 29 May 2020 3:52 pm Posted: 29 May 2020 11:04 am

+6%
increased engagement with **Disability Rights** on the Codec platform

Aureylian ⚠ ✓
@aureylian

Happy to see Twitch has listened to everyone who shared feedback and removed the "Blind Playthrough" tag to encourage more inclusive language for our community.

You can still use "First Playthrough" or opt to use it in combination with "No Spoilers" for the same sentiment. 💜

8:56 PM · Dec 4, 2020

♡ 1.5K   ♻ 4.2K   🔗 Copy link to Tweet

Rocky Stoutenburgh Becomes First Quadriplegic With Professional Esports Contract

Tim Casey Contributor ⓘ
SportsMoney

Follow

Players without sight can Platinum The Last of Us Part 2 - a look back at accessibility in 2020
From Miles Morales to The Game Awards.

58%
of Gaming Reformers believe **lack of accessibility** is an issue in gaming

RETHINKING INCLUSIVITY

Removing barriers for gamers with disabilities

Whilst gaming still has a long way to go when it comes to accessibility for all, positive change is happening.

Gaming Reformers are engaging with content that speaks to these positive actions; championing manufacturers and developers that are engaging the community and striving to create truly inclusive experiences.

Content championing positive actions, like

The Last of Us Part 2 featuring over 60 accessibility settings, cuts through with the community. As does conversation around what more can be done, like allowing for 'flash images' to be turned off in games.

Pro gamers with disabilities like Rocky Stoutenburgh, who is paralysed from the neck down, are raising awareness and demonstrating that nothing is impossible.

Gaming Reformers are looking to support and amplify people and stories demanding action in this space and are fortunately receiving positive feedback from brands and developers listening to their requests.

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+50%
of Gaming Reformers feel **positive change is coming from gamers** vs developers, forums and manufacturers

"

I suffer from vestibular and neurological conditions and there are a lot of games that I can't play...

...I wish games had more options to disable certain graphics or sounds.

‑ *Gaming Reformer survey respondent*

"

Work with disabled people to come up with better peripherals and have better measures in place to tackle hate speech.

‑ *Gaming Reformer survey respondent*

"

I only know of one controller that's accessible for people with disabilities; we need more creative thinking.

‑ *Gaming Reformer survey respondent*

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COMMUNITY NEED:

GREATER EFFORT AND ENERGY FROM THE INDUSTRY AND BRANDS TO SUPPORT AND SUPERCHARGE POSITIVE ACTIONS HAPPENING AT THE COMMUNITY LEVEL

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TOXICITY & STEREOTYPES

From sexual harassment and trolling to threats of violence and doxing, the anonymity of online gaming environments can fuel toxic behaviour.

Building on this, a feeling that representation - particularly of women in video games - remains harmful and stereotypical.

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Toxicity in Gaming Is Dangerous. Here's How to Stand Up to It

Players often rationalize behaviors like harassment as a part of video game culture. But new research shows it has long-term negative effects.

Better representation in games promotes better diversity in development

FPA   FAIR PLAY ALLIANCE   ADL. FIGHTING HATE FOR GOOD.

FAIR PLAY ALLIANCE AND ADL RALLY INDUSTRY TO COMBAT HATE AND HARASSMENT IN VIDEO GAMES

Home / Sports News
SPORTS
Toxicity in video games: Analysing cause and effects of abusive online behaviour

It is hard to say what would be the most effective solution to removing or reducing toxicity in gaming. One of the most important points to keep in mind would be that most misbehaving players are only doing so because they have been exposed to abusive behaviour while gaming.

Anand Krishnaswamy | May 12, 2021 12:47:38 IST

+11%
Increased engagement with **social inclusion** on the Codec platform

63%
of Gaming Reformers believe **toxicity** is a an issue in gaming

This Software Will Let You Censor The 'N-Word' And Other Offensive Speech—But On A Sliding Scale

Riot Games to record Valorant voice chats and review for harassment, hate speech

Only **20%** of Gaming Reformers feel the industry is **doing enough to tackle prejudice**

TACKLING TOXICITY
De-normalising negative behaviour online

For this community, there is a sense that toxicity has become deeply entrenched and normalised as part of gaming culture.

Online anonymity, together with a perceived lack of consequences (or deterrent) for negative behaviours in spaces such as chat rooms, means toxicity can often go unchecked. This can discourage many from play.

Voice chat in particular was highlighted as a tool misused to harass other gamers.

Cultivating inclusive, safe spaces is deeply important for Gaming Reformers. They're looking for support from the industry and believe more can be done to protect play (and players!).

Companies and organisations such as the Fair Play Alliance are working to combat hate and harassment in video games. Elsewhere, Intel have introduced new AI software called Bleep, which censors offensive speech in gaming audio.

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Most issues come from lack of follow through for violators and lack of diverse characters in games.

- Gaming Reformer survey respondent

[We need] inbuilt algorithms that monitor for abuse and aggressive behaviour towards others, especially in online games.

- Gaming Reformer survey respondent

Better control over what people say over voice chat when playing games. People can get away with saying practically anything.

- Gaming Reformer survey respondent

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Lenovo's 2021 Game Survey Shows Most Girl Gamers Pose as Men: In-Game Abuses to Know

59 per cent of women hide their identify in games, survey reveals

FEMALE VIDEO GAME CHARACTERS REDESIGNED WITH REALISTIC BODIES

Only **29%** believe forums are creating **safe spaces for women**

Only **5%** of video games **showcase a female protagonist** - Forbes.

Female Gamers Are On The Rise. Can The Gaming Industry Catch Up?

+8% Increased engagement in **gender equality** on the Codec platform

Better representation in games promotes better diversity in development

REPRESENTING WOMEN

Challenging negative attitudes + representation

The rise of female gamers in recent years has demonstrated that the appeal of gaming extends far beyond what long-held gender stereotypes might suggest.

Gaming Reformers are keen to celebrate this increased visibility of women in gaming, but are calling on developers and industry to do more to empower them, both inside the game and outside of it.

In games, they feel that representation of female characters is often one-dimensional; hypersexualised, unrealistic and reinforcing negative stereotypes.

When it comes to players themselves, research reveals that women tend to hide their identity in games as a result of experiencing harassment based on their gender.

Groups such as Women in Games are harnessing creativity and activism to shape the future of an industry free from discrimination.

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"

I think [developers] need to tone down the anatomy of female characters - they all have thin waists and large breasts that stick out.

- Gaming Reformer survey respondent

"

You see strong female characters...but they're always so underdressed, it infuriates me.

- Gaming Reformer survey respondent

"

Female characters are generally sexualised in the way they look and this needs to change.

- Gaming Reformer survey respondent

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Toxicity & stereotypes

COMMUNITY NEED:

WORK IS UNDER WAY TO TACKLE TOXICITY IN GAMING, HOWEVER MORE CAN BE DONE TO CREATE SPACES AND EXPERIENCES FREE FROM DISCRIMINATION AND HARM

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PURPOSEFUL PLAY

For Gaming Reformers, having fun and learning new skills are prioritised over winning or beating others.

They are pushing back on 'win at all cost' behaviours that detract from the joy of gaming, focusing instead on socialising and learning new skills with like-minded people.

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Posted by u/orangesony 11 months ago
29.8k
Can someone explain this unwritten rule of cod
Video

Vikkstar
@Vikkstar123
This is why I quit Warzone: youtube.com/watch?v=T7Lhin...
The fact players can livestream themselves blatantly hacking with zero repercussions blows my mind. This guy is 2nd prestige & broadcasts hours of himself hacking.
This NEEDS to be addressed & fixed @CallofDuty @RavenSoftware

Call of Duty: Warzone streamers suspended for cheating after Mara actor calls them out
By Morgan Park 3 months ago
A duo of suspected Warzone cheaters are in the crosshairs thanks to Mara herself.

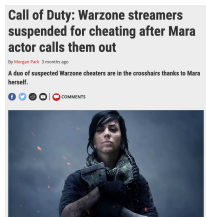Unwritten Rules | Minecraft Servers | Multiplayer Games | Online Multiplayer Gaming
Minecraft (video game) | +1
What are some of the unwritten rules about playing Minecraft in multiplayer?
Answer | Follow · 6 | Request
11 Answers | Asked in 1 Space

Is BitTorrent Dying?
FILE-SHARING TIPS | MAY 7, 2021

Cheating PUGB Player Banned During Twitch Livestream
A PUBG community manager visits a known cheater's Twitch livestream and hits him with the ban hammer in front of an audience.
BY PAX X FERDINAND
Published March 23, 2020

CALL OF DUTY: WARZONE
Warzone dev says "no one hates cheaters more than we do"
Following Season 3's update, a Warzone senior developer has said that cheaters are "ruining some of the best work" of his life.
By Liam Mackay
Published 1 month ago on April 23, 2021

-5%

decrease in **torrenting + streaming** on the Codec platform.

Only **23%** of Gaming Reformers are **seeking recognition** from other gamers

PLAY ~~TO WIN~~ FOR FUN
Reconnecting with the purity of gameplay

The unwritten rules that surround gameplay are seen as a code that should be followed by all gamers to create a more enjoyable experience for everyone.

These 'codes of conduct' are rooted in effort, fairness and fun.

Learning from others to complete stages of gameplay is considered honest behaviour and a fair method of 'levelling up'; they know

their achievements have been rightfully earned.

The decrease in interest with adjacent topics like torrenting speaks to this 'fair play' sentiment bleeding into other areas of online culture.

The rise of hacking and cheating is seen as antithesis to this mindset. Negative behaviour that detracts from the fun and fairness of gaming.

Gaming Reformers' cooperative nature and desire to preserve the enjoyment of gameplay is evident in their following of these unwritten rules and feeling proud of others when they do the same.

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"

[The industry should do more to tackle] hackers, scud pads, cheats etc…companies need secure programs and better written unhackable code.
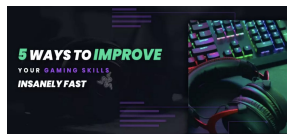
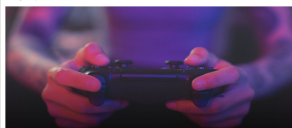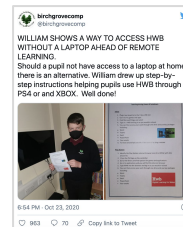‐ *Gaming Reformer survey respondent*

"

Stop hacking and cheating in games…it ruins the fun for other players.

‐ *Gaming Reformer survey respondent*

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57 per cent gamers admit that they can learn practical life skills through online games: AIGF report

June 3, 2021 / Poonam Mondal

5 WAYS to **IMPROVE**
YOUR *GAMING SKILLS*
INSANELY FAST

How The Xbox And PlayStation Can Help Children Learn During U.K. Lockdown

Matt Gardner Senior Contributor ⓘ
Games
I'm a British writer who covers current and retro gaming

Duolingo ✓
@duolingo

#StreakOfTheWeek is extra special today because we've launched Streak Society – our most ✨exclusive ✨ club only for those with 365+ day streaks!

Find the badge in your Profile tab on iOS.

Part of the #DuoStreakSociety? Share a screenshot of your badge & we'll pick a winner!

#DuoStreakSociety

3:00 PM · May 24, 2021 · Sprout Social

birchgrovecomp
@birchgrovecomp

WILLIAM SHOWS A WAY TO ACCESS HWB WITHOUT A LAPTOP AHEAD OF REMOTE LEARNING.
Should a pupil not have access to a laptop at home, there is an alternative. William drew up step-by-step instructions helping pupils use HWB through a PS4 or and XBOX. Well done!

6:54 PM · Oct 23, 2020

963   70   Copy link to Tweet

15% of
Gaming Reformers value **learning and developing skills** through gaming

15% increase
in **strategy games** on the Codec platform

pogchamps3   Chess.com
Sunday, February 28
CONSOLATION FINAL   CHAMPIONSHIP FINAL
Neeko MichelleKhare   Rainn Wilson Sardoche
2.0 - 0.0   1.0 - 2.0
GUAYAKÍ YERBA MATE   GRIP6

Over $150,000 Raised For Charity As Sardoche Wins PogChamps 3

LEARNING NEW SKILLS
The gamification of learning and development

Far from being a mindless activity or just pure entertainment, Gaming Reformers value gaming as an educational tool that aids learning and developing new skills.

The positive, rewarding environment of gaming makes it an inherently encouraging medium through which to facilitate learning.

From the gamification of language learning through apps like DuoLingo through to children using their gaming consoles to learn during lockdown, the role and potential of gameplay in helping to acquire new life skills is clear.

The popularity boom of online chess demonstrates an increasing interest in games that provide strategic and cerebral training. Pogchamps is an online chess tournament on Twitch, where organisers donated winners' prize money to their chosen charities.

Gaming Reformers value positive gaming environments and outlets that allow personal development, learning and upskilling.

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Purposeful play

COMMUNITY NEED:

ELEVATED EXPERIENCES AND OCCASIONS THAT CELEBRATE THE JOY OF PLAYING AND LEARNING OVER COMPETING AND WINNING

GAMING REFORMERS

A community with clear interests, values and needs:

01

Help them break down barriers

Greater effort and energy to support and
supercharge removal of barriers to access

02

Support them in creating safe spaces

Help to create spaces and experiences
free from discrimination and harm

03

Facilitate fun and help them upskill

Elevated experiences and occasions that
celebrate the joy of gaming and learning

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WHAT DOES THIS MEAN FOR BRANDS LOOKING TO CUT THROUGH IN THIS SPACE?

HOW CAN BRANDS BEST SERVE THIS COMMUNITY AND DRIVE GROWTH?

LEARNINGS FROM TWITCH

A gaming space where positive change is happening

Barriers to access	Tackling Toxicty	Purposeful play

Tangible actions

Committed $1M to Able Gamer, a charity to improve accessibility in the gaming space

Community engagement

Rolled out player tags that individuals can add to their videos to aid inclusion

Elevated experiences

Live Chess tournaments on Twitch; winners' prize money donated to their chosen charity

AUG 21 - SE

/botezlive /gmhikaru /danielrensc

Chess.com

codec

BRANDS WELCOME
A community excited to see brands entering the gaming space

The good news for brands is that nearly...

80%

of Gaming Reformers are excited to see brands entering the gaming space.

They **value brands creating positive change** in the world (62%) and brands that **help them achieve their goals & develop skills.** (51%)

Providing clear focus for how to connect, add value and ultimately recruit Gaming Reformers.

A trend that's here to stay

67% of gamers 35+ continuing increased gaming time post lockdown

- GWI, March 2021

67%

are welcoming of **fashion and beauty** brands, whilst almost

50%

of respondents were excited to see more **personal tech and food brands** in gaming.

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GAMING REFORMERS

Community needs

Gaming Reformers are seeking to create and support positive change across all aspects of gaming. Contributing to and championing gaming as a space that celebrates the joy of positive play, and is accessible and welcoming to all, is what unites and drives them.

Barrier to overcome

As individuals they feel powerless to affect positive change at scale. They see pockets of progress, but it's not happening quickly enough to combat persistent negative behaviours that detract from the enjoyment of play.

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How to engage

GAMING REFORMERS

01 **Work with the community**. Create feedback loops and allow them to input and co-create.

02 **Focus on scalable actions**. Connect the community and give them the tools to collectively drive change at scale.

03 **Promote positive experiences**. Enable moments of shared joy and occasions for self-development within positive environments.

Consideration: Whilst Gaming Reformers are focused on improving the image and experience of gaming, **they are also looking to socialise and have fun.**

WE ARE A CULTURAL INTELLIGENCE PLATFORM

Fusing AI-driven cultural intelligence with human imagination, Codec helps brands to discover and tap into the pockets of culture that drive growth.

We harness cultural data to inform every step of the marketing process - from brand strategy through to creative approaches, to activating in media.

Scholl **rb Reckitt Benckiser**

2 x increase in sales

NESPRESSO **Nestlé**

51% engagement rate increase

eve

3 x brand awareness increase

"Codec-powered media strategies have led to an over 2X increase in sales versus our approach in targeting generic audiences."

Reckitt Benckiser Health UK

GET IN TOUCH

Speak to a strategist
info@codec.ai

codec