

UK CONSUMER NAVIGATOR

READY PLAYER BRAND



PART OF THE DENTSU CONSUMER NAVIGATOR SERIES

INNOVATING TO IMPACT

dentsu

EXECUTIVE FOREWORD

Gaming has become one of the main stages where modern culture, community and commerce play out. It is no longer just something people play; it is something they watch, follow and spend time around, spanning play, streaming, social and creator ecosystems.

Once a niche pastime, gaming is now central to everyday life. 70% of our nationally representative UK sample of 1,000 consumers play in some form, and for many it shapes identity: 52% of players say gaming is a meaningful part of who they are, rising to 69% of Gen Z and 70% of Millennials. PwC forecasts the UK market will grow from £7.0bn in 2023 to £8.4bn by 2028, reinforcing its position as Europe's largest gaming market.

Attention is shifting with it. One in four UK gamers expect to spend less time on social media over the next five years to make more time for gaming; one in five say the same about streaming TV and film. At the same time, two-thirds of players say brand presence in games either doesn't bother them or feels natural when it fits, and 32% show interest in real-world rewards linked to gameplay (rising to nearly half of Gen Z).

Gaming is becoming one of the environments where habits form, loyalty builds and culture takes shape. This report brings together new UK dentsu Consumer Navigator research* and industry perspectives to answer a single question:

Given that games are where culture is being built, how should brands show up?

Flora Kong (MD, dentsu X) & Brent Koning (EVP & Global Head of dentsu Gaming)

*This report is based on a November 2025 nationally representative survey of 1,000 UK adults aged 18+, with analysis focused on the 691 respondents who reported playing games in any form (mobile, tablet, PC, console, streaming or AR/VR).



PART OF THE DENTSU CONSUMER NAVIGATOR SERIES

dentsu





Gaming doesn't just have a large audience in the UK. It's actively gaining time at the expense of other media.

We found that one in four UK players say they expect to spend less time on social media over the next five years to make more time for gaming. One in five say the same about streaming TV and film. This is not incremental growth. It's a reallocation of attention inside a zero-sum system.

THE GREAT ATTENTION REBALANCE



GAMING IS EMBEDDED IN THE DAY-TO-DAY

This shift is being driven by how embedded gaming has become in everyday life. Among UK players, 53% now play daily and a further 33% weekly. Gaming is no longer an occasional activity; it's a habitual, repeatable part of people's media routines.

This helps explain why gaming is now pulling time away from social feeds and streaming platforms. It is replacing where people go to spend their attention.

For brands, this reframes the growth challenge. It just isn't enough to buy attention more efficiently – you must be where attention is moving. Increasingly, that place is inside games.

86%

of people who game now play at least weekly

53%

play daily

70%

of UK adults engage with gaming in some form, across mobile, console, PC and emerging platforms

As an integrated team, we're thinking less about how we place messages into gaming and more about how we authentically become part of the worlds that players care about. As attention shifts into gaming environments, brands have to earn their place through relevance, entertainment and cultural fit.

For Pringles, gaming now represents an integral part of our marketing mix because it's where our audience is increasingly spending time.

Gavin McGuinness, Senior Marketing Manager, Pringles



BRANDS ARE ACCEPTED IN GAMING SPACES

Just as importantly, players are not resistant to brand presence within games. 43% of UK gamers say this presence “doesn’t bother them”, and a further 24% say it “feels natural when it fits.” The constraint isn’t permission; it’s imagination and execution.



How do you feel when brands appear inside a game?

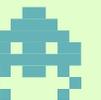
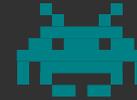
43%
Doesn't bother me

24%
Feels natural when it fits

15%
Only like it if it gives me something

12%
Actively dislike it

6%
It pulls me out



THE EMOTIONAL ENGINE OF PLAY

To understand why gaming is winning time, we have to understand the role it plays in people's lives.

For most UK players, gaming isn't driven by competition. It's driven by how it makes them feel.

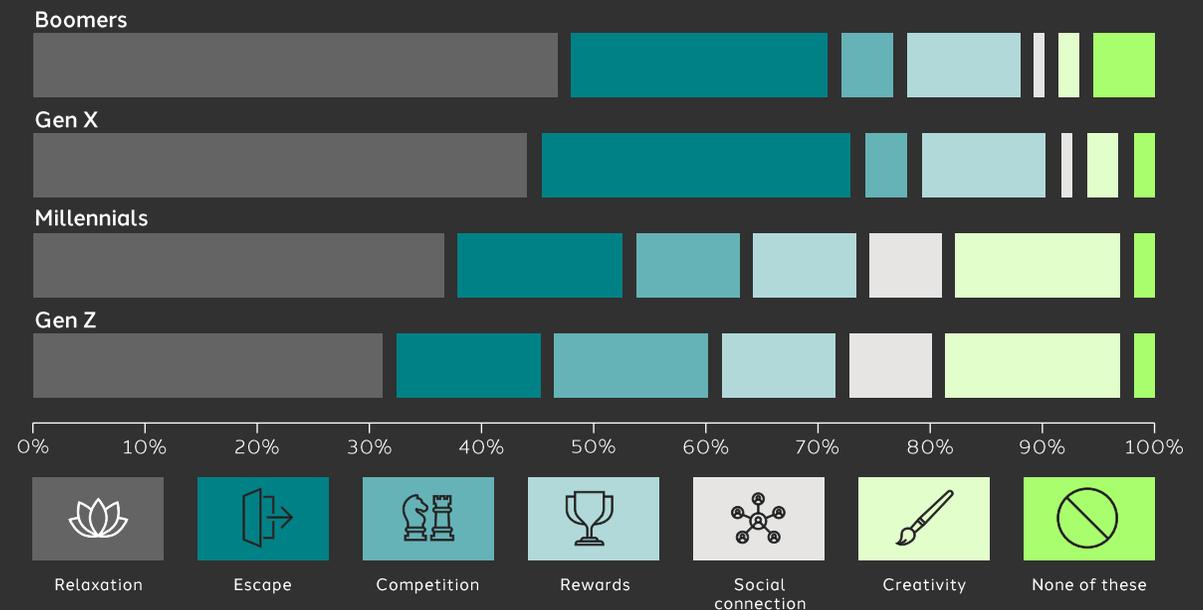
42% say their main reason for playing is to relax. A further 21% say they play to escape. Only 8% say competition is their primary motivation.

It's important to note that while social connection is less likely to be selected as the single primary reason for playing, our wider data shows it is central to how gaming becomes culturally and personally meaningful.

Overall, **49% of UK players feel strongly part of a community around a favourite game or franchise**, rising to nearly three quarters of Gen Z and two thirds of Millennials. Community and shared experiences are often what turns play into long-term engagement.

What people want from gaming, by generation

(% selecting each as their primary motivation)

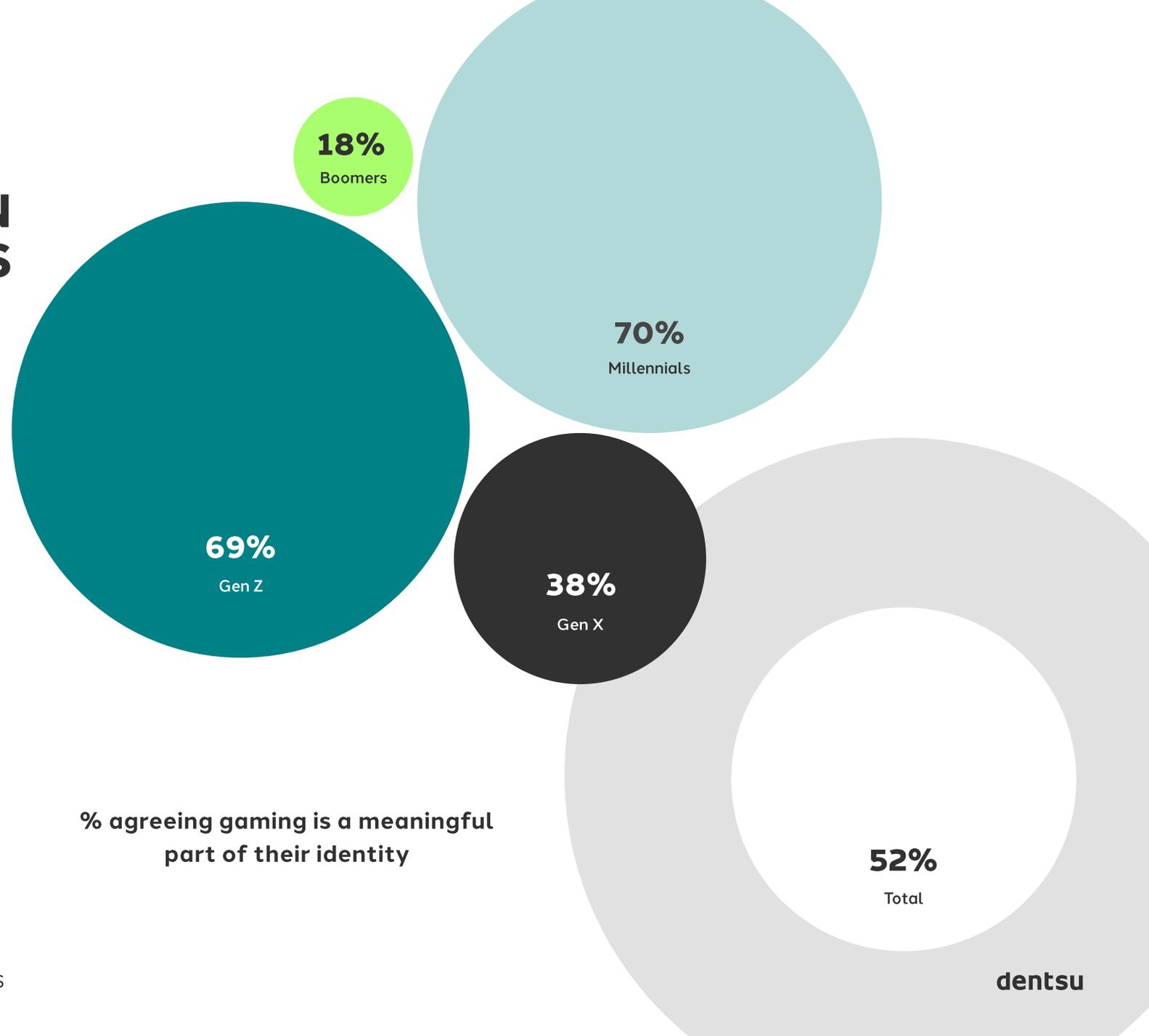


GAMING REPRESENTS A MEANINGFUL EXPRESSION OF IDENTITY FOR PLAYERS

Gaming has become one of the country's most reliable decompression rituals: something people return to at the end of the day to switch off, reset, or temporarily step into another world.

This emotional function is what turns play into habit, and habit into time people choose to protect, even as other media competes for attention.

For younger audiences, the emotional role of gaming runs even deeper. Globally, **65–70% of Gen Z and Millennials who play say they can express themselves more easily in games than in real life** ([Gaming & Transmedia IP: The Multiplier Effect For Brands report, dentsu](#)). In the UK, the majority of players (52%) report that gaming is a meaningful part of their identity, peaking at 69% of Gen Z and 70% of Millennials.



THE EMOTIONAL ENGINE OF PLAY

ENTERING PLAYERS' EMOTIONAL TERRITORY COMES WITH RISK AND OPPORTUNITY FOR BRANDS

Gaming has become a safe rehearsal space for identity.

This is what makes gaming structurally different from most media environments. It isn't built around a single emotional state. It supports multiple emotional needs at once: calm, achievement, identity, connection, escape.

And because it does, it becomes hard to displace.

For brands, this changes the nature of the opportunity. When you enter gaming, you're entering someone's emotional territory, not simply their content feed.

That raises the bar, but it also raises the upside – because when brands add to the experience, rather than interrupt it, they aren't borrowing attention. They're being welcomed into it.



PART OF THE DENTSU CONSUMER NAVIGATOR SERIES

“Gaming is the format of the future, a true second life for players, with at times much more real and visceral connections than real life.”

Shahar Sorek, CMO, Overwolf



dentsu

CARAT X PRINGLES:

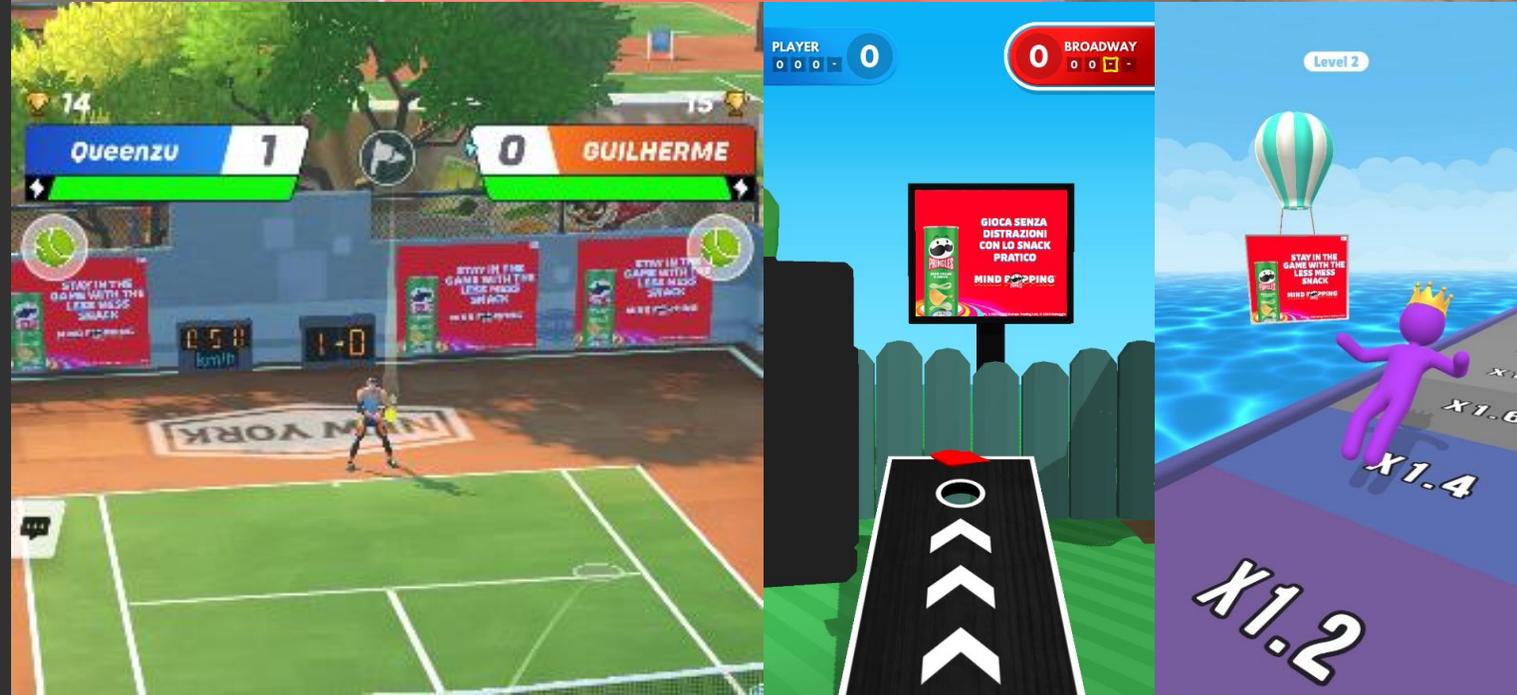
BECOMING PART OF THE PLAY

Pringles set out to deepen its relevance among players by building a presence that fit the emotional and cultural logic of play.

Working alongside partners Xbox and Dovetail Games, our media agency Carat supported the brand in the creation of the world's first paid NPC (non-playable character) role inside a video game. We offered £20,000 for someone to literally exist as part of the gaming environment, restocking Pringles vending machines in **Train Sim World**.

The campaign blended real-world and virtual touchpoints: social recruitment, out-of-home, in-game advertising, and a live Twitch transformation where the selected player became the NPC.

It struck a chord because it added to the experience players already valued (humour, surprise, community participation and cultural insider-ship) rather than interrupting it. By blurring reality and play, Pringles shifted perception among gaming audiences, generating **over 30 million impressions, 2.8 million minutes watched on Twitch, and a 38% increase in brand awareness.**



THE CREATOR LAYER: HOW DISCOVERY, TRUST AND CULTURE ACTUALLY WORK

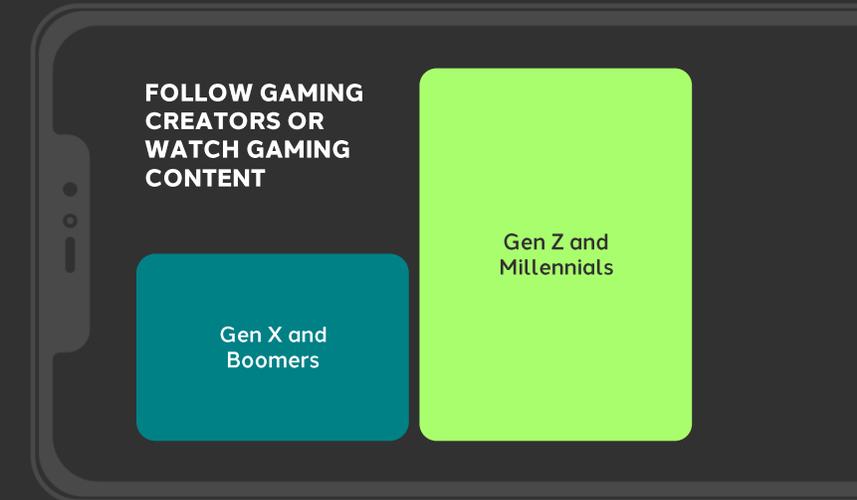
For most brands, the biggest change in advertising through gaming isn't technological. It's cultural.

In our study, gaming consistently shows up not just as a place people play, but as a place they watch, follow, discuss and belong. **50% of players (indeed, 72% of Gen Z players) feel strongly that they're a part of the community around their favourite game or franchise.**

Discovery, influence and trust increasingly flow through people, not platforms. And in gaming, those people are creators.

This isn't a marginal behaviour. Among younger players in particular, creators are a primary route into new games, new trends and new worlds. Our data shows that compared with Gen X and Boomer players, **Gen Z and Millennials are more than twice as likely to follow gaming creators or watch gaming content**, and are over four times as likely to feel part of gaming communities. They don't experience gaming as a closed product ecosystem, but as a living cultural layer that extends across platforms and formats.

FEEL PART OF GAMING COMMUNITIES



GAMING CREATES AND EXPRESSES CULTURE

“ If you let creators integrate a brand in the way they think works best, the content performs better. The creator wants it to perform well, because when it does, it gets shown to more people. When brands over-control it, people just skip it.

Seb Carmichael-Brown, co-founder of football and esports club, Hashtag United

Players aren't hostile to brands (**only 12% of players overall state that they actively dislike brands showing up in gaming platforms**, falling to just 5% among Gen Z and Millennials) but they're highly sensitive to **how** brands show up. This is why creators now sit at the centre of how trust works in gaming.

Acceptance is conditional on relevance and tone, and it's worth noting that **54% of UK consumers are uncomfortable with brands using AI influencers** ([dentsu MKTG AI Trends Autumn 2025 report](#)).

In gaming culture, attention is earned through participation, not placement. Communities respond to brands that understand the rhythm, tone and context of the environment they are entering – and quickly disengage from those that don't.



CREATORS ARE CULTURAL TRANSLATORS FOR ADVERTISING BRANDS



Our audience can tell when we're reading from a script or use jargon we normally wouldn't. It is important for brands and creators to have a genuine relationship. It means a lot to me when a brand I work with is open to my input, and we push together to get the best results for each side.

Maddie Mead, one of the UK's leading gaming creators (better known as @littlebunny_x)

For advertisers, this changes the role creators play. They aren't simply distribution channels. They are cultural translators, shaping how brands are interpreted, accepted and shared inside gaming communities.

This is also where gaming begins to look less like a media channel and more like a social platform: a place where people form relationships, build identities and spend time with personalities they trust. Our UK Consumer Navigator data shows that **over half of Gen Z players have made real-life friends through gaming**, and globally, seven in ten players say games are a place to connect with others ([Gaming & Transmedia IP: The Multiplier Effect for Brands report, dentsu](#)).

The implication is profound: brands don't enter gaming culture alone. They enter through people.



PROOF IN PRACTICE: IPROSPECT X MITCHUM

GIVING PLAYERS THE POWER TO SKIP A SHOWER

Mitchum's move into gaming began with a cultural insight rather than a media plan. Working in tandem with our media agency iProspect and JOE Media, the conversation started with a simple cultural truth: players often joke about skipping showers to stay in the game. Rather than interrupting that culture, the brand built an idea inside it to target the hard-to-reach young male demographic.

Working with creators, Mitchum launched the "Skip the Shower" activation to promote their male deodorant: a tongue-in-cheek, creator-led campaign that turned a gaming in-joke into participatory entertainment. Streamers integrated the idea naturally into their content, inviting audiences to engage, play along and share in the joke, rather than sit through a traditional ad reel. The brand didn't just appear in gaming culture; it behaved like part of it.

The campaign delivered impact at scale. Mitchum's creator-led activation generated **over 13 million video views and 790,000 live-stream views, with 469,000 engagements** from audiences actively interacting with the content. Crucially, this attention translated into brand impact: **awareness rose by more than 90% and consideration increased by over 150%**, with Mitchum climbing three places in purchase consideration and overtaking key competitors.

By showing up inside gaming culture, rather than around it, the brand turned cultural relevance into measurable growth.

"We are thrilled with the success of our Mitchum Male Partnership with iProspect and JOE Media; our venture into esports has been a game-changer.

It spotlighted Mitchum in front of a new target audience and new territory, setting us apart and driving exceptional reach and engagement. The results, outstanding performance across channels, increased sales, and market share, have been nothing short of spectacular. This collaboration has propelled our brand to new heights, leaving an indelible mark on our journey." Laura Watson, Head of Marketing, Revlon UK



PART OF THE DENTSU CONSUMER NAVIGATOR SERIES



AI, REWARDS & THE NEW

VALUE

EXCHANGE

As AI becomes part of gaming, what excites you most? (18–45 year olds)

31%

Smarter, more lifelike NPCs



29%

Worlds that adapt to my choices or emotions



28%

Games that learn my play style and personalise stories



23%

AI-generated characters that play with or as me



13%

It makes gaming feel less human



NEARLY
60%

of Gen Z and Millennials are comfortable with real-time AI personalisation when it delivers something useful or rewarding in return.

Consumers and gaming brands are between them evolving a new relationship with digital experiences: one that's more personally tailored, more responsive, and more explicitly based on value exchange.

Players are open to this future, but they are also selective.

Our data shows strong appetite for AI-enhanced play among younger audiences. Gen Z and Millennials are most excited by smarter NPCs (non-player characters), adaptive worlds and personalised narratives.

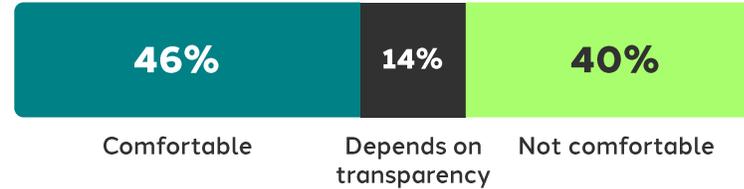


AI OPENNESS IS CONDITIONAL

Only 16% of players say they are “very comfortable” with AI monitoring their gameplay, and nearly a quarter are “not comfortable with this at all”.

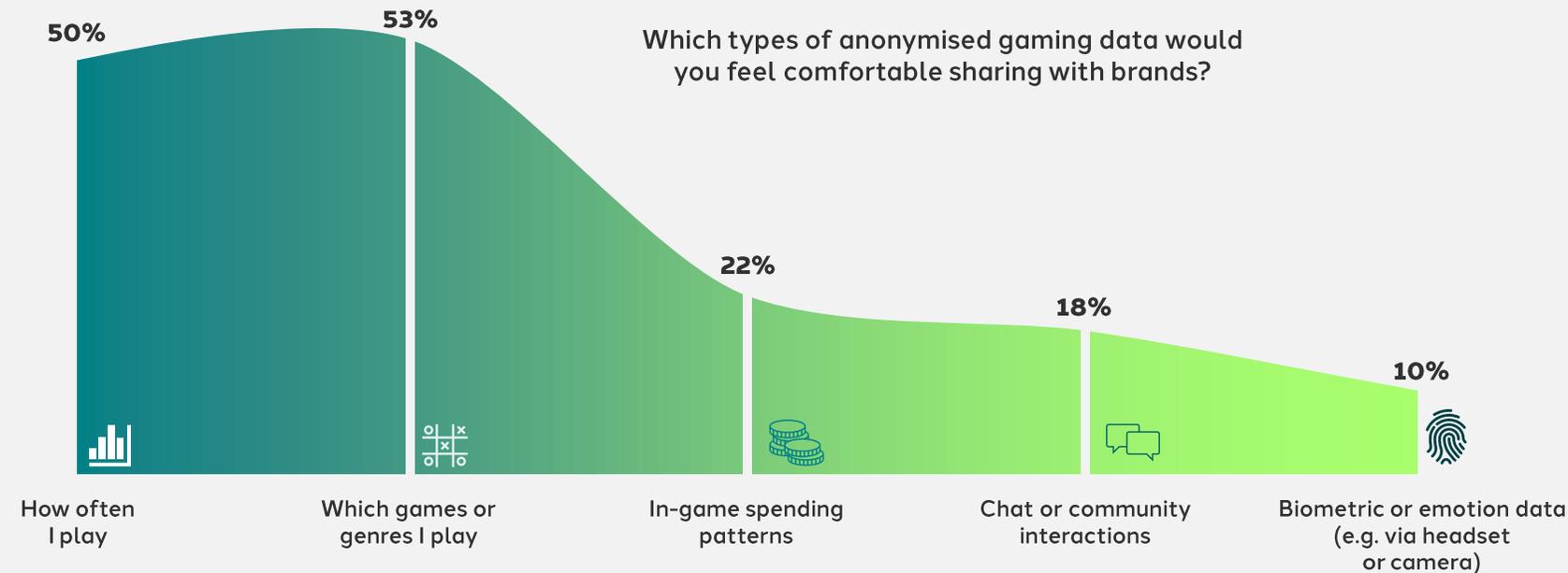
Willingness to share data drops sharply when it becomes more intimate: around half are happy to share play frequency or genre preferences, but only 10% would share biometric data.

How comfortable would you be if AI monitored your gameplay in real time to offer personalised rewards or ads?



This creates a clear design challenge – and opportunity – for brands.

The next era of digital experiences won't be built on passive targeting. It will be built on explicit value exchange: players trading data, attention or time in return for something tangible, meaningful or entertaining.



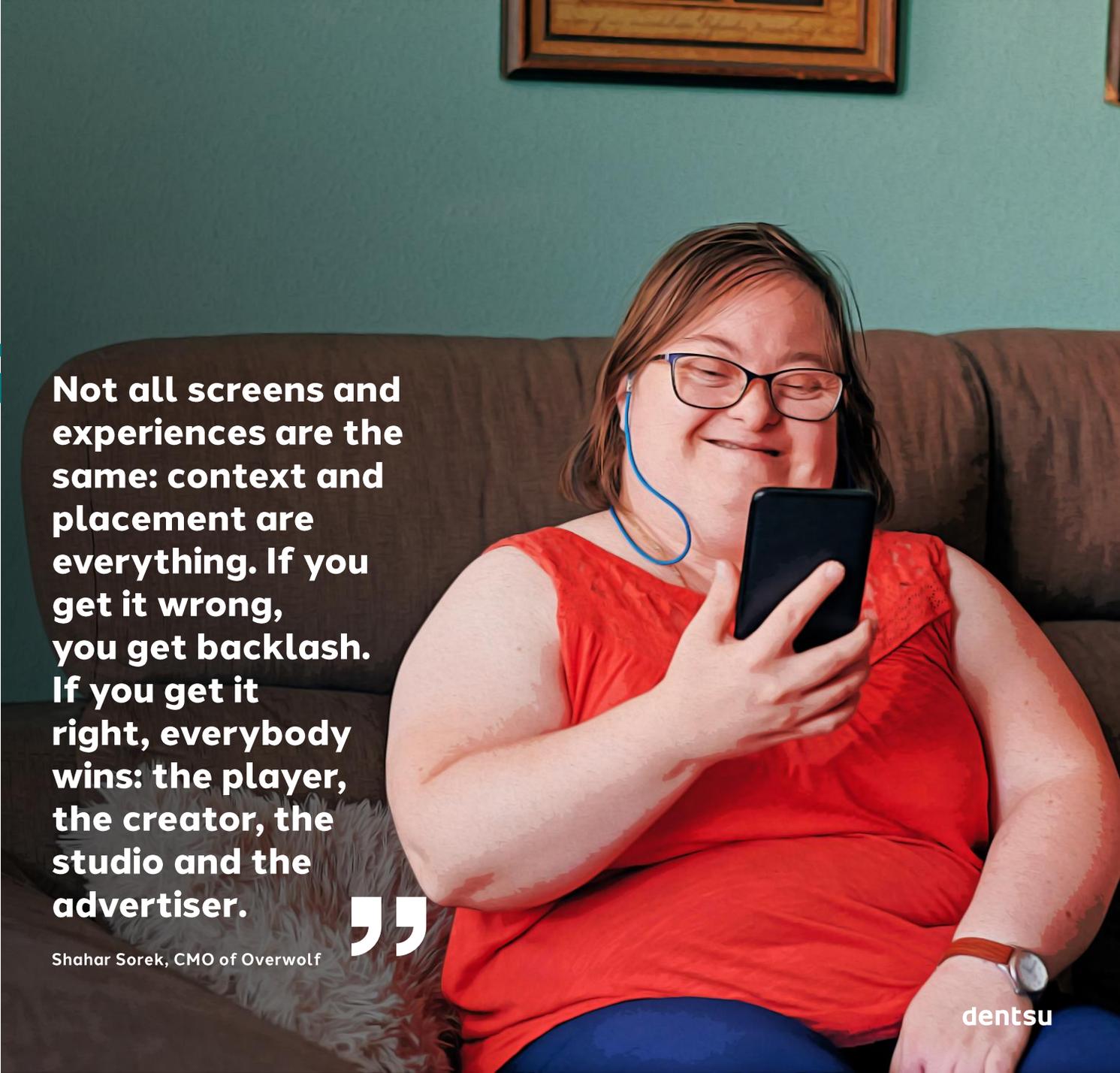
PLAYERS ARE KEEN TO TRANSACT AND TO BE REWARDED

We can already see this in how players respond to rewards.

Nearly half (49%) of Gen Z say they have strong interest in unlocking real-world benefits through gameplay. Globally, almost half of gamers say they are interested in buying physical items inside games, rising to well over half among Gen Z and Millennials ([Gaming and Transmedia IP: The Multiplier Effect for Brands report, dentsu](#))

What this points to isn't "gamified marketing". It's the normalisation of reward-based relationships between brands and consumers, with gaming acting as the training ground.

That shift is already playing out in practice. Working with our media brand dentsu X, and our partner Overwolf, a leading in-game creation ecosystem, Naked Smoothie built a campaign around a simple behavioural insight: players naturally take breaks around 78 minutes into longer play sessions. Instead of interrupting gameplay, the brand appeared at that moment with rewarded in-game messages across multiple PC titles, turning a natural pause into a useful, contextually relevant brand experience. The campaign reached over one million players and delivered **+54% uplift in purchase intent, +42% in brand favourability and +12% in brand sentiment.**



Not all screens and experiences are the same: context and placement are everything. If you get it wrong, you get backlash. If you get it right, everybody wins: the player, the creator, the studio and the advertiser.

Shahar Sorek, CMO of Overwolf

TRUST IS THE ESSENTIAL POWER-UP FOR SUCCESS

Crucially, all of this depends on trust – i.e. how clearly brands explain what they're doing, and what players get in return.

A third of UK players say brands and developers should take much more responsibility for how chance-based purchases (e.g. loot boxes) and monetisation systems work. As AI, dynamic pricing and adaptive experiences become more common, expectations around transparency, fairness and control are rising just as fast.

The brands that win in this environment won't be the ones that use AI most aggressively. They'll be the ones that use it most responsibly and most clearly in service of the player.

For marketers, gaming offers something rare: a live environment where new models of value exchange (personalised, reward-based, opt-in, transparent) can be tested, learned from, and then scaled into the wider experience economy.

“

AI really starts to work when it understands how people play, not just that they play. One player wants to rank up, another just wants to relax with friends. If you personalise for the wrong thing, you break the experience. If you personalise for the right thing, you unlock it.”

Marty Mercado, Head of 427 Innovation Lab, Braze



THE NEW RULES FOR BRANDS

Gaming is where attention is consolidating, culture is being shaped in real time, and identity, creativity, community and technology are colliding. It's no longer just somewhere brands can appear, it is somewhere they can meaningfully participate.

But winning here requires a different operating mindset.

Across our quantitative data and qualitative interviews, five clear shifts emerge in how brands need to think and act:



1 START WITH EMOTION, NOT INVENTORY

One of the strongest signals in the data is why people play.

Relaxation and escape dominate gaming motivation. Creativity and self-expression matter deeply to younger players. Community amplifies everything that sticks.

This is why the most effective gaming work does not begin with placement. It begins with emotional context. The opportunity is to earn emotional permission, not just attention.

2 BUILD THROUGH CREATORS, NOT JUST CHANNELS

Players don't simply discover games, brands or ideas through platforms, they discover them through people.

Creators don't just bring reach; they bring taste, context and community permission.

For brands, this changes planning. The creator relationship becomes more important than the channel; integration becomes more valuable than placement.

3 DESIGN FOR PARTICIPATION, NOT EXPOSURE

The most valuable attention in gaming is active and invested. People play, unlock, progress, collect, build and show off. They don't just watch.

This is why rewards and value exchange show up so strongly in the data. Strong gaming activations give something back: status, utility, access, fun or recognition.

Brands that design for participation get used, shared and remembered.

4 USE AI TO INCREASE RELEVANCE, NOT SURVEILLANCE

Players are excited about AI-driven worlds, adaptive experiences and personalised stories. They're also clear about their boundaries.

Players are willing to share basic behavioural data, but push back quickly when things feel intrusive, unclear or one-sided. The opportunity for brands is to use AI to become more helpful, timely and context-aware, while staying visibly on the right side of transparency and control.

5 ORGANISE FOR GAMING AS A CORE ATTENTION ENVIRONMENT

As people increasingly shift their time from social, streaming and other channels and into gaming, the strategic question becomes broader: what does our attention strategy look like if gaming is one of the environments people live in?

Gaming demands tighter integration between brand, content, media and partnerships, with creators, experiences and ecosystems treated as core, not optional.



CONCLUSION:

WINNING BRANDS WILL BUILD WORLDS, NOT JUST CAMPAIGNS

Across every piece of this study, from our UK data to the voices of creators, brands, and platform leaders, one pattern is consistent.

Gaming isn't just another place people spend time.

It's where:

- Identity is expressed
- Relationships are built
- Stories unfold
- Status is earned
- And culture moves at real speed

It's also where some of the highest-quality attention in modern media now lives.

The shift underway isn't subtle. Time is moving and behaviour is changing. Expectations are rising. The rules of value exchange between people and brands are being rewritten in front of us.

For advertisers, this is not a question of whether to be 'in gaming'; rather, it is a question of how intelligently, how creatively, and how respectfully you show up in the worlds people care about.

Gaming offers brands a way to earn time and attention in spaces where people are genuinely engaged and emotionally invested. The question for you now is simple: **What role will your brand play in the worlds where people are choosing to live?**

The brands that win won't be those that "try gaming". They'll be those that integrate gaming strategy into the heart of their marketing and media mix.

If you want to explore what that could look like for your brand, [talk to dentsu.](#)



ABOUT THIS RESEARCH

This report is based on a nationally representative survey of 1,000 UK adults, conducted 25–27 November 2025 by Toluna for dentsu. Quotas were applied to ensure representation across age, gender, region and household income using the latest publicly available UK demographic data. 691 respondents who reported playing games in any form (mobile, tablet, PC, console, streaming or AR/VR) form the core analytical base for this report.

Generational definitions used throughout:

Boomers+

(born 1928–1964)



Generation X

(born 1965–1980)



Millennials

(born 1981–1996)



Generation Z

(born 1997–2012)



All figures refer to UK adults aged 18+.



FLORA KONG
MANAGING DIRECTOR,
dentsu X

Flora Kong is Managing Director of dentsu X, leading the agency and overseeing its strategic direction and client partnerships. Dentsu X helps brands win by designing connected experiences across media, platforms and communities – and gaming is a critical part of that mix, creating immersive, participatory spaces where audiences don't just watch culture, they play in it.

Flora joined dentsu in 2020 and previously led Client Experience at Carat, working with brands including The Co-operative Group, Pandora, Post Office and Lionsgate. With over 20 years' experience across media owners, client-side and agency leadership, Flora brings a rare, end-to-end perspective on how brands stay relevant – and commercially effective – in a rapidly evolving media landscape.

Beyond client delivery, Flora is a passionate advocate for inclusive leadership and talent development. As former co-chair of dentsu UK&I's gender network ONE, she created coaching programmes to build female confidence and improve representation across the organisation. She was recognised in Campaign's 40 Over 40 list, celebrating influential figures driving change in the industry.



BRENT KONING
EVP & GLOBAL HEAD
OF GAMING,
dentsu

Brent Koning is the Executive Vice President and Global Head of Gaming at dentsu, focusing on creating, enhancing, and investing in authentic gaming experiences for clients in publishing, creator worlds, media and esports. With two decades of experience in gaming, sports, and entertainment, Brent has held leadership positions at Electronic Arts (EA), Microsoft, and Roundhouse Agency, overseeing various aspects of advertising, product marketing, account management, and partnerships.

He was inducted into the Leaders Under 40 Class of 2023 at the Leaders Sports Awards for his work at the intersection of sports, entertainment, and gaming. As a leading voice in the gaming and media industry, Brent was recently named a juror for The One Awards, and is a juror for The Webby Awards.

Disclaimer: This report is provided for general information purposes. The conclusions and recommendations reflect dentsu's current views and may be updated over time. Whilst prepared with care, this report does not purport to be exhaustive and may not cover all relevant matters. It does not constitute legal advice; please seek independent advice tailored to your specific circumstances. dentsu accepts no liability for any loss arising from reliance on this report.



WITH THANKS TO OUR REPORT CONTRIBUTORS:



**SEB
CARMICHAEL-BROWN**

CO-FOUNDER, HASHTAG UNITED;
FOUNDER/CEO, NEXT-LEVEL TALENT

Seb Carmichael-Brown is Co-Founder of Hashtag United, a digitally native football club born from the creator economy that blends sport, entertainment and online community. With over a decade in the digital and influencer space, he has built and advised creator-led businesses that connect global brands with online talent at scale. His experience spans both sides of the ecosystem, as a creator (Big Wedge Golf) and operator, giving him a practical perspective on how brands can partner credibly with communities.



**GAVIN
MCGUINNESS**

SENIOR MEDIA MANAGER,
PRINGLES

Gavin leads the paid media experience strategy for Pringles across 28 European markets, driving full-funnel campaign planning and execution. His focus is on maximising marketing investment to deliver strong consumer engagement and commercial impact across the region.

Gavin spearheads innovation by piloting and road-mapping new martech opportunities, embedding learnings into Pringles' evolving strategies to stay ahead in a dynamic media landscape.



**MADDIE
MEAD**

@littlebunny_x, GAMING
CONTENT CREATOR

Maddie Mead is a UK-based Twitch partner and gaming content creator known online as @littlebunny_x.

She built a positive, engaged community across Twitch, TikTok and Instagram through her love of games and anime, turning streaming into her main platform after the pandemic.

With around 100,000 followers on Twitch and an active cross-platform audience, Maddie brings firsthand insight into how creators build trust, culture and connection inside gaming spaces.



**MARTY
MERCADO**

HEAD OF 427 INNOVATION LAB,
BRAZE

Marty Mercado is Head of the 427 Innovation Lab at Braze, where he helps brands rethink how they connect with people in moments that matter.

An advertising strategist with over a decade's experience across the US, Marty's approach blends behavioural economics, cultural insight and data-led thinking to build experiences that resonate beyond fleeting attention. He champions marketing that adds genuine value, helping brands design more human, context-aware and creatively ambitious engagement strategies.



**SHAHAR
SOREK**

CHIEF MARKETING OFFICER,
OVERWOLF

Shahar Sorek is Chief Marketing Officer at Overwolf, a leading in-game platform that enables brands to reach and engage gamers through creator-built experiences and premium game integrations.

He leads global marketing and growth, investor relations and strategic investments. With more than 15 years in the games and technology sector, Shahar has founded and led multiple startups, including 7 Elements Studios, and brings deep expertise in monetisation, creator ecosystems and the future of advertising inside play.



**LAURA
WATSON**

HEAD OF MARKETING,
REVLON UK

Laura Watson is Head of Marketing at Revlon UK, leading brand strategy and growth across the portfolio.

With over 25 years' experience in FMCG and beauty, she has held senior marketing roles at Henkel, Britvic and JDE, managing power brands across food, beverages, haircare and beauty.

Laura brings deep expertise in brand building, innovation and commercial performance, with a track record of driving relevance and growth in highly competitive consumer categories.

