

OPEN WORLD:

THE CULTURAL EXPANSION OF GAMING

Prosumer Report

HAVAS

2026





How Gaming Became Reality

For decades, video games were dismissed as an escape from reality—a pastime for children, hobbyists, and self-described geeks retreating into fantasy worlds. Today, that narrative no longer holds.



GAMING HAS BECOME ONE OF THE DEFINING CULTURAL FORCES OF OUR TIME.

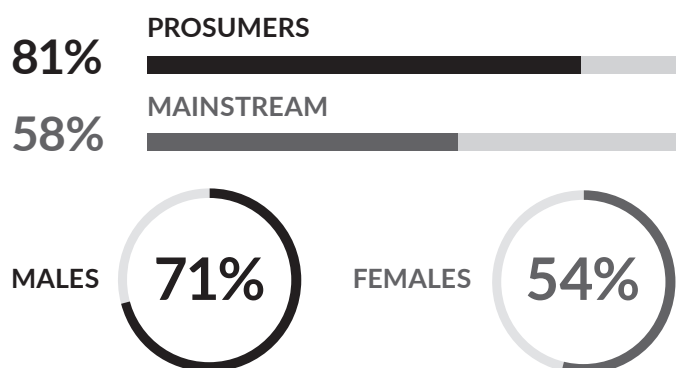
What began with a blinking dot in *Pong* has **evolved** into a global ecosystem of more than 3.2 billion players and an industry worth \$184 billion—larger than film and music combined. And where once gaming borrowed from TV, film, and literature, now the opposite is true, as evidenced by popular titles such as *The Last of Us* and *Fallout*.

Gaming is no longer a subculture. It is culture.

And the most important shift is not economic. It is psychological.

In early 2026, Havas Group surveyed 11,000 adults across 25 markets to explore a question that would have sounded absurd a decade ago: *Has gaming become the cultural space that best reflects contemporary life?* The results suggest the answer may be yes.

Casual/hardcore gamers (net)



Today's video games are environments where people build friendships, experiment with and express identity, acquire skills, pursue careers, manage stress, debate politics, confront social issues, and imagine the future. Gaming no longer offers an alternative to reality. It extends reality.

At the same time, real-world tensions—economic anxiety, political polarization, identity debates, concerns around addiction, and demands for regulation—have migrated into the gaming ecosystem.

The findings reveal three major shifts transforming the category: gaming as an extension of life, reality reshaping gaming culture, and emerging expectations for brands.



Gaming as an Extension of Life

The popular stereotype of the isolated gamer no longer resonates with most players. In fact, many people believe the opposite: that gaming is a meaningful and enriching part of life. Four in 10 Prosumers say some of

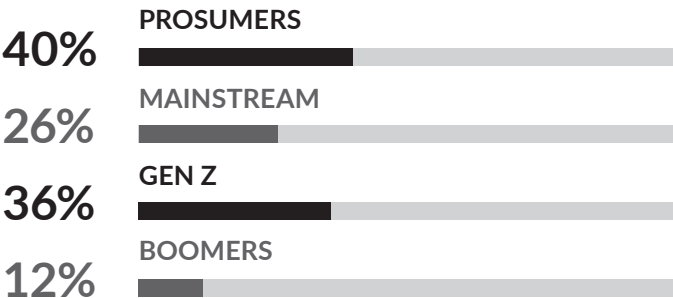
their greatest emotional experiences have occurred inside video games rather than in real-world settings, while a similar percentage believe non-gamers are missing out on an important aspect of life.



I'm convinced that the stereotype of the lonely basement gamer is outdated and offensive

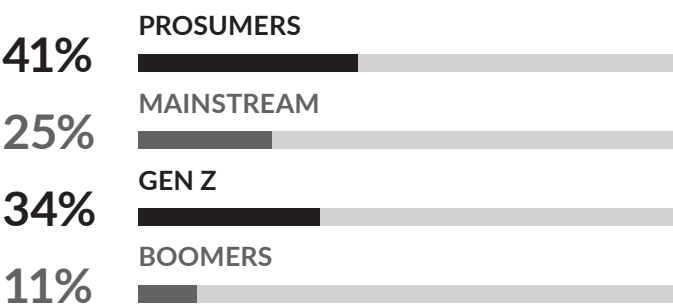


My peak emotional experiences happen more in video games than in actual life



(% agreeing strongly/somewhat)

Non-gamers are missing out on an important part of life



(% agreeing strongly/somewhat)

The implication is profound. Gaming is no longer viewed as a distraction from reality. It is increasingly experienced as reality itself.



For most players, games are opportunities for self-actualization. Asked to choose between two options, only 39% of Prosumers said they prefer to invent an entirely different identity when gaming; this compares with 61% who use gaming to express their authentic self.

When I am playing video games, I prefer... (Choose one—showing Prosumers.)

To be completely my authentic true self

61%



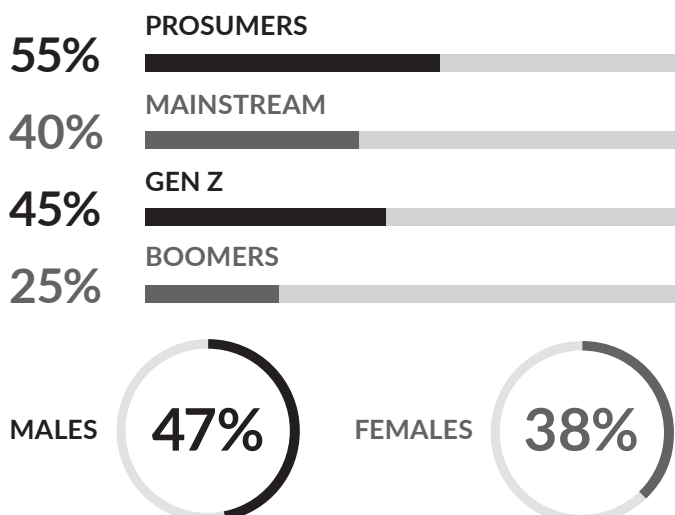
39%

To invent myself in a totally different way

IDENTITY BEYOND THE SCREEN

One of the most impactful findings is the extent to which gaming has become embedded in personal identity. More than half of Prosumers say being a gamer is as important to their identity as their profession is.

Being a gamer is as much a part of my identity as my profession



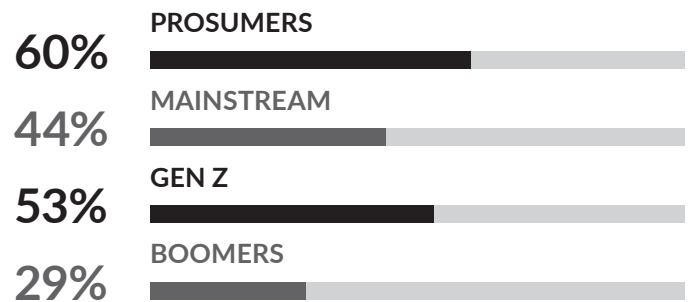
(% agreeing strongly/somewhat)

This marks a major shift from earlier perceptions of gaming as role-play and escapism. Players increasingly view virtual worlds as spaces of self-discovery and expression.

What social media became for identity performance, gaming may be becoming for identity formation.

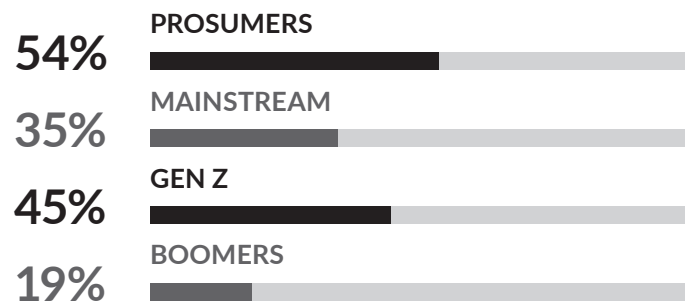


My gaming friends are as important as real-life friends



(% agreeing strongly/somewhat)

Guilds/clans provide stronger community bonds than most real-world organizations



(% agreeing strongly/somewhat)

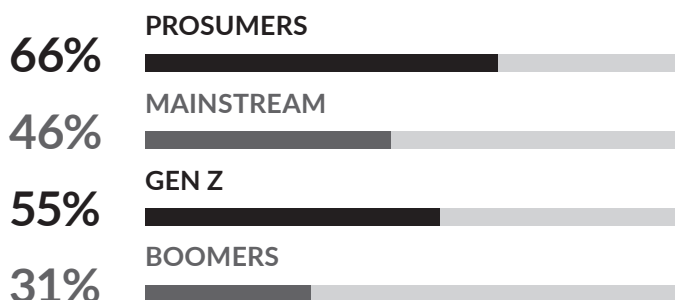
These findings challenge long-standing assumptions about social capital. For younger generations especially, friendship is increasingly platform-agnostic. Whether relationships originate at school, work, on Discord, or inside a multiplayer game matters less than the emotional significance of those connections.

Virtual does not mean less real.

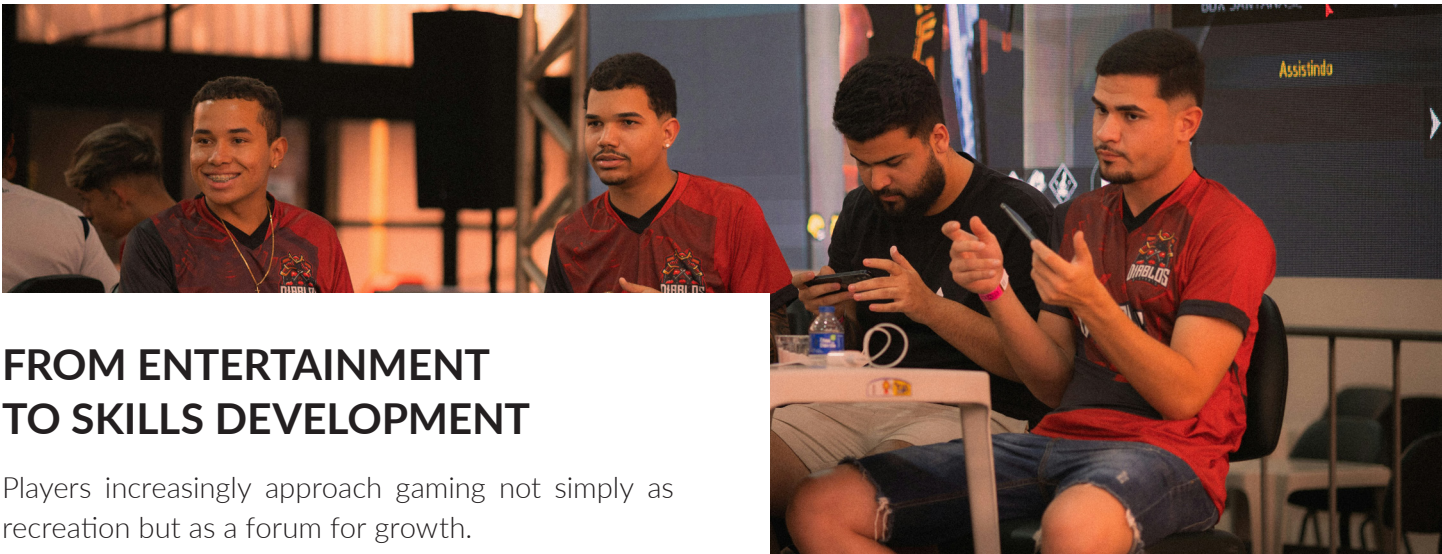
FRIENDSHIP HAS GONE DIGITAL

Another outdated assumption is that gaming isolates people socially. Two-thirds of Prosumers believe the opposite: that gaming has made them more socially connected, not less. A majority consider their gaming friendships as important as those they build IRL and believe that gaming guilds and clans are stronger communities than many real-world organizations.

Gaming has made me more socially connected, not less



(% agreeing strongly/somewhat)



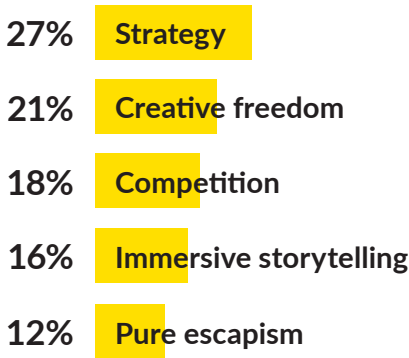
FROM ENTERTAINMENT TO SKILLS DEVELOPMENT

Players increasingly approach gaming not simply as recreation but as a forum for growth.

When asked what they most expect from video games, Prosumers prioritize strategy, creativity, competition, and storytelling over pure escapism. Moreover, most believe gaming helps them develop valuable real-world skills.

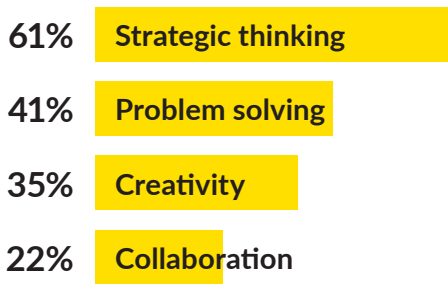
The most important thing I expect from a video game is...

(Choose one—showing Prosumers.)



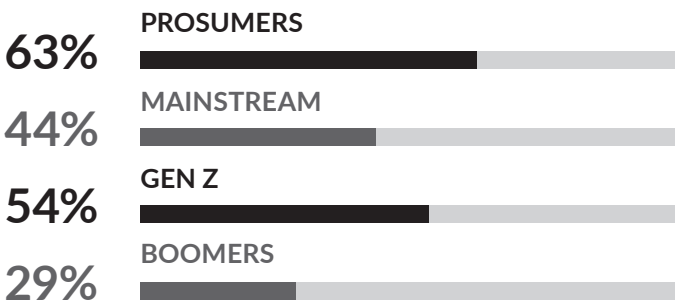
Playing video games can teach crucial skills like...

(Choose all that apply—showing Prosumers.)



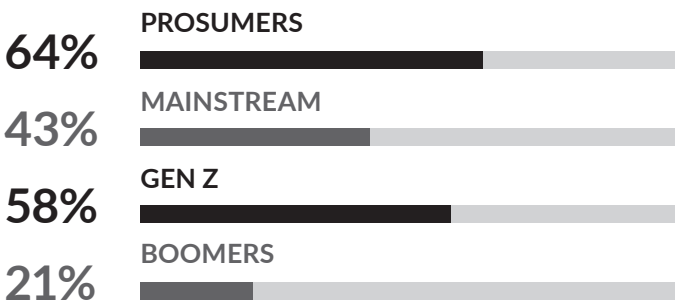
The emergence of esports further strengthens the perception that gaming ability represents a legitimate form of achievement. Nearly two-thirds of Prosumers believe esports will eventually rival traditional sports in mainstream acceptance, and an equal share say they would be proud if their children became professional esports champions.

Esports will soon rival traditional sports in mainstream acceptance



(% agreeing strongly/somewhat)

I would be proud if my children became esports champions



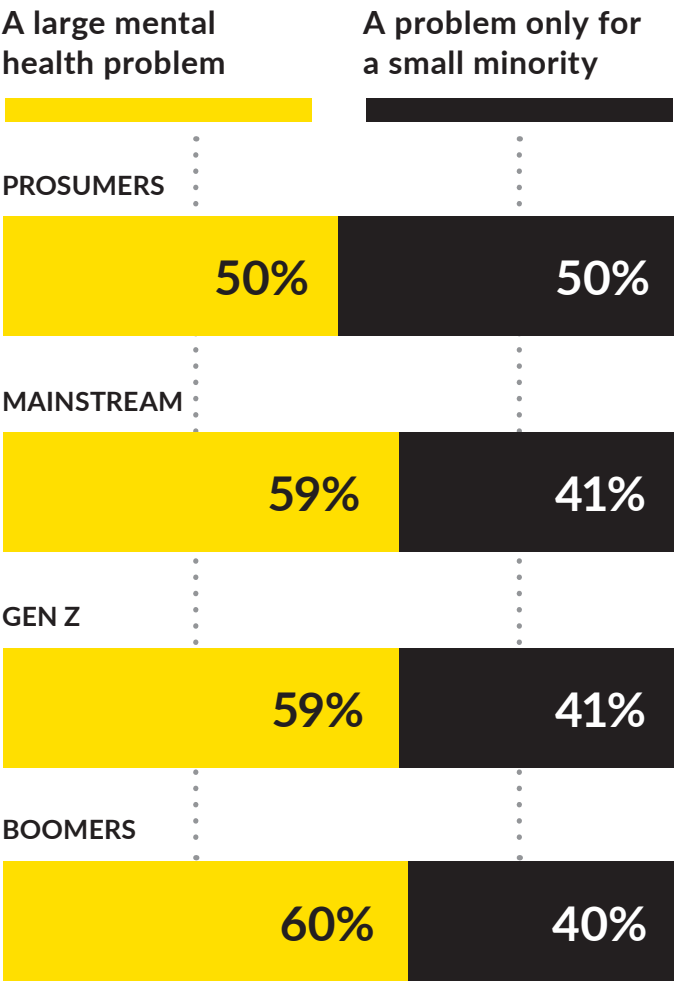
(% agreeing strongly/somewhat)



A NEW TOOL FOR MENTAL HEALTH?

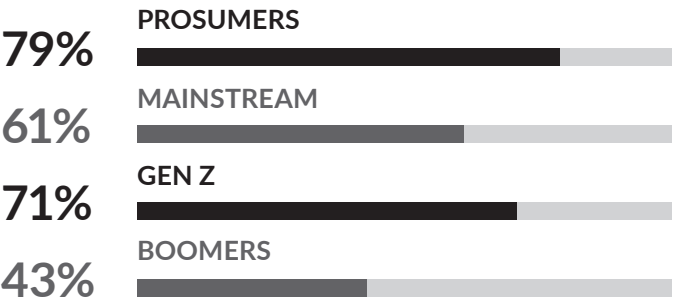
While concerns about gaming addiction persist, half of Prosumers consider it an issue affecting only a minority of players.

Gaming addiction is... (Choose one.)



Moreover, nearly 8 in 10 Prosumers believe that gaming can benefit mental health.

Gaming, if practiced responsibly, is good for mental health



(% agreeing strongly/somewhat)

Many players describe gaming as a “safe space”—an environment offering agency, achievement, community, and control when the outside world can feel increasingly difficult. This is particularly apparent in the rise of so-called *cozy games*, experiences designed less around competition and more around comfort, creativity, and emotional regulation.

Gaming’s role is evolving from entertainment platform to emotional infrastructure



When Reality Enters the Room

If gaming increasingly mirrors reality, it also inherits reality's tensions. The survey reveals two major fault lines reshaping the industry: economics and culture.

THE COST OF PLAY

Nearly two-thirds of Prosumers believe gaming has become too expensive. An even higher proportion blame this on gaming companies putting profits above all else, marking a break from the time when game creators were seen as part of the community.

Gaming has become a passion that is too expensive

62% PROSUMERS



60% MAINSTREAM

(% agreeing strongly/somewhat)

Major gaming companies are more driven by money than real gaming passion

70% PROSUMERS



69% MAINSTREAM

(% agreeing strongly/somewhat)

This tension helps explain the rise of free-to-play gaming, a model that more than 8 in 10 Prosumers credit for democratizing the pastime.



Free-to-play video games on mobile have democratized gaming

81% PROSUMERS



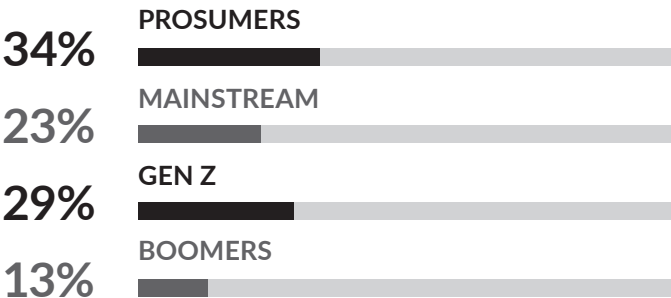
78% MAINSTREAM

(% agreeing strongly/somewhat)

Yet players also recognize the tradeoff.

Gaming's democratization has come with new forms of monetization pressure. Instead of eliminating spending, free-to-play often transforms purchases into ongoing transactions driven by convenience, competitive advantage, exclusivity, or FOMO. Today, only about a third of Prosumers see value in paying for a virtual good rather than a real-world one.

Paying for a skin in a video game is wiser than paying for an expensive T-shirt with a logo



(% agreeing strongly/somewhat)

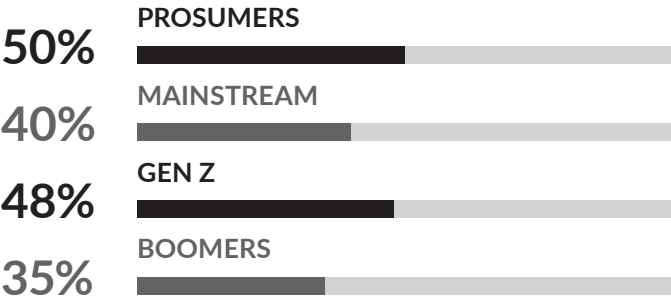


THE CULTURE WARS ARRIVE

Players increasingly expect games to reflect society—and to do so authentically.

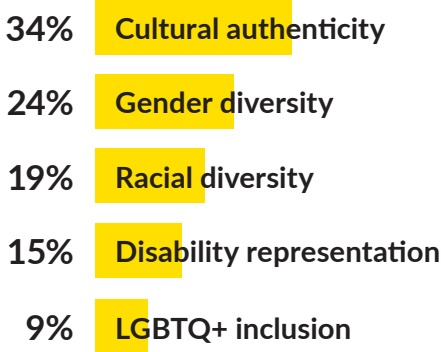
Half of Prosumers believe insufficient diversity among protagonists remains a significant issue, and many want stronger representation of women and underrepresented groups.

The lack of diverse protagonists in video games is a major problem

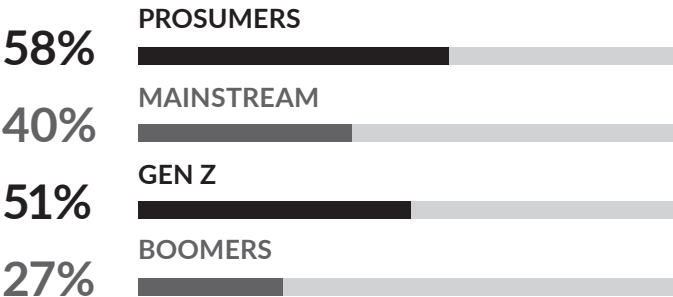


(% agreeing strongly/somewhat)

The most important representation issue in gaming is... (Choose one—showing Prosumers.)



I would like to see more video games where women save men



(% agreeing strongly/somewhat)

At the same time, gaming has become a battleground for broader social debates around identity, race, gender, and representation.

The decision by the creators of *Assassin’s Creed Shadows* to make Yasuke, a historical figure from Africa, one of two playable characters in a game set in feudal Japan and the second character female sparked **loud condemnation** of so-called “woke culture”—demonstrating how creative decisions now can become flashpoints in larger political and cultural conversations.

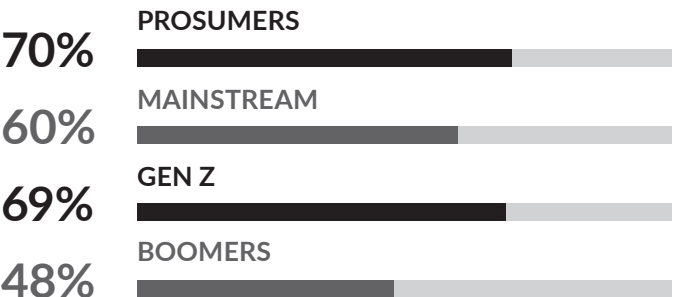
Gaming no longer reflects culture from the sidelines. It sits at the center of cultural debate.



THE SAFE SPACE PARADOX

Games can be a world to retreat into when real life overwhelms. Seven in 10 Prosumers describe gaming as a refuge from an increasingly difficult world.

The world has become so hard that video games are a refuge for people

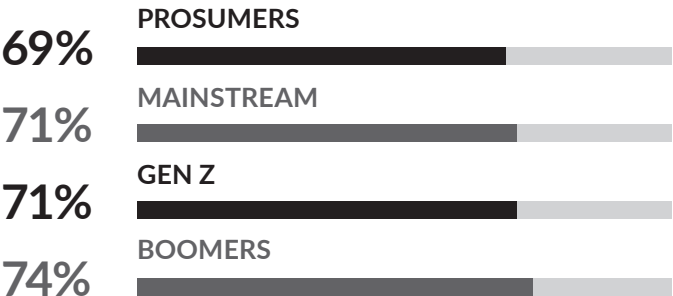


(% agreeing strongly/somewhat)

Yet that refuge is showing signs of strain.

Nearly 7 in 10 Prosumers believe gaming’s darker side—including addiction, toxicity, and gambling-like mechanics—is worsening. Large majorities identify harassment, cheating, and toxic behavior as major threats to the player experience.

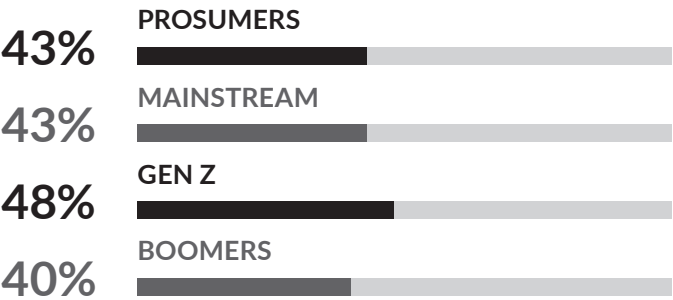
Gaming’s dark side (addiction, toxicity, gambling) is getting worse



(% agreeing strongly/somewhat)

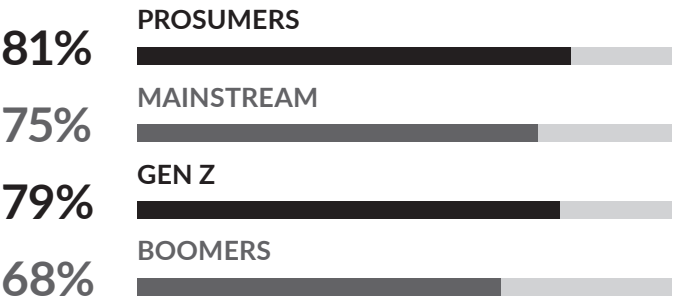


Gaming communities have become more toxic than any other online space



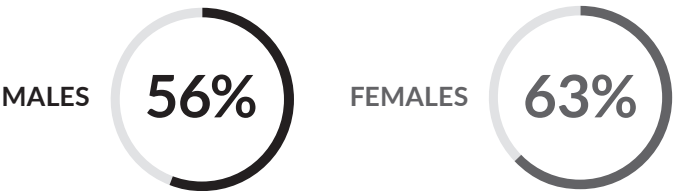
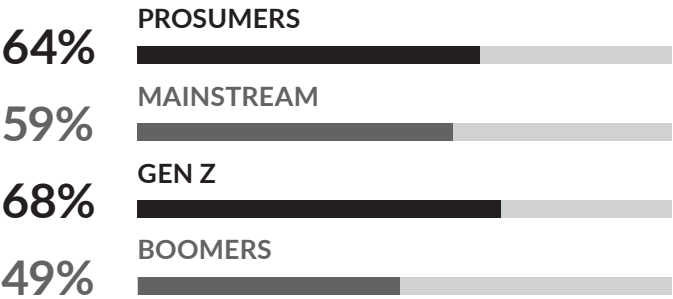
(% agreeing strongly/somewhat)

Cheating in online video games ruins the experience for everyone



(% agreeing strongly/somewhat)

Harassment in video games has become a huge problem

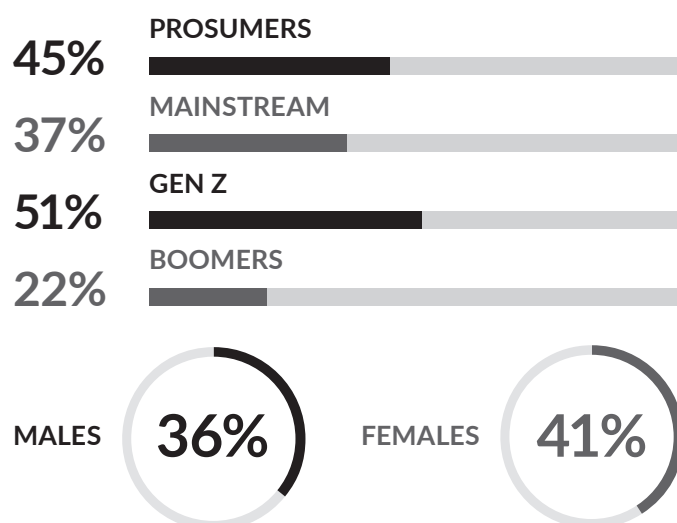


(% agreeing strongly/somewhat)



Girls and women remain particularly affected. A [report](#) by *Psychology Today* revealed that more than half of so-called “gamer girls” use masculine-sounding usernames or voice-altering headsets to disguise their gender. Other research has [found](#) that more than three-quarters of women experience unwanted behavior while gaming, including skills judgment/denigration, gatekeeping, patronizing comments, sexual advances, and even threats of sexual violence. (For additional insights, see the Prosumer Report “[Alpha Rise](#),” released earlier this year.)

Being a woman in gaming is too hard because of harassment



(% agreeing strongly/somewhat)

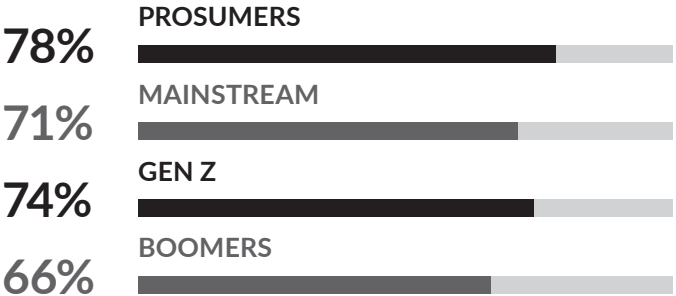
The challenge facing the industry is no longer whether gaming deserves legitimacy. The challenge is how to protect gaming’s value as it risks becoming a concentrated environment for society’s worst instincts.



A GROWING DEMAND FOR REGULATION

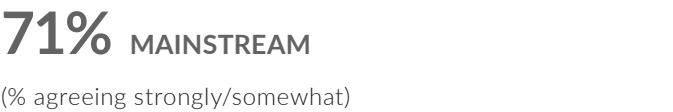
Tellingly, players no longer reject oversight. Strong majorities want harsher penalties for harassment and support regulation of reward mechanisms that resemble gambling.

I would like to see harsher penalties for harassing behavior in gaming communities



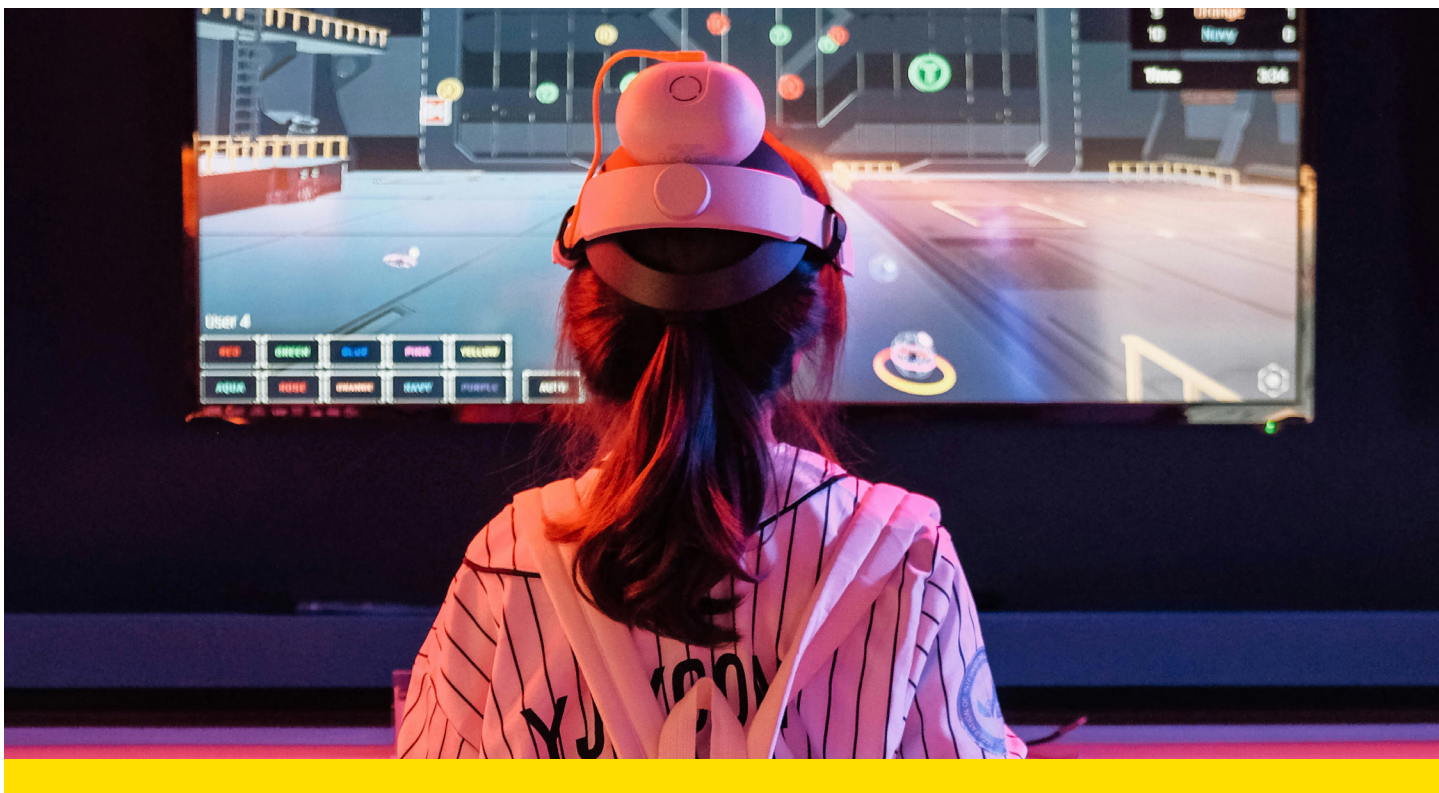
(% agreeing strongly/somewhat)

Video games that use random reward mechanics to make players spend money should be regulated as gambling



(% agreeing strongly/somewhat)

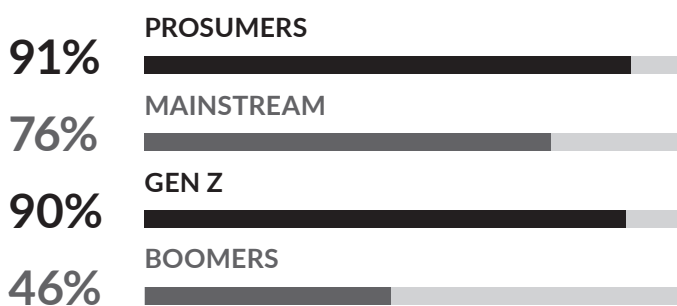
The industry's maturation has changed expectations. As gaming becomes more meaningful, players expect greater accountability from platforms, publishers, and communities.



The New Role of Brands

There was a time when brands were perceived as outsiders attempting to force their way into gaming culture. That era is over. Today, more than 9 in 10 Prosumers recognize the value brands can bring to the gaming world.

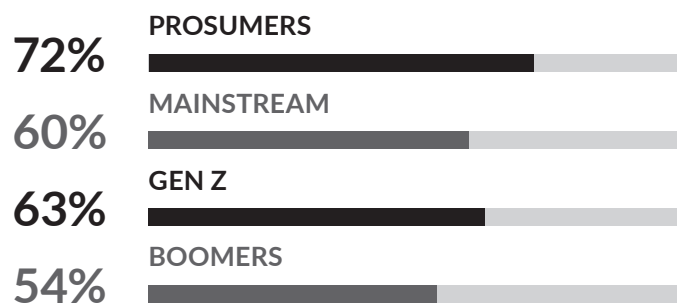
Brands can add value on gaming platforms



(% agreeing strongly/somewhat)

However, acceptance comes with conditions. Players reject opportunistic commercialism and fear a future where gaming spaces become little more than advertising platforms.

In 10 years, gaming will resemble advertising and be completely saturated with brands



(% agreeing strongly/somewhat)

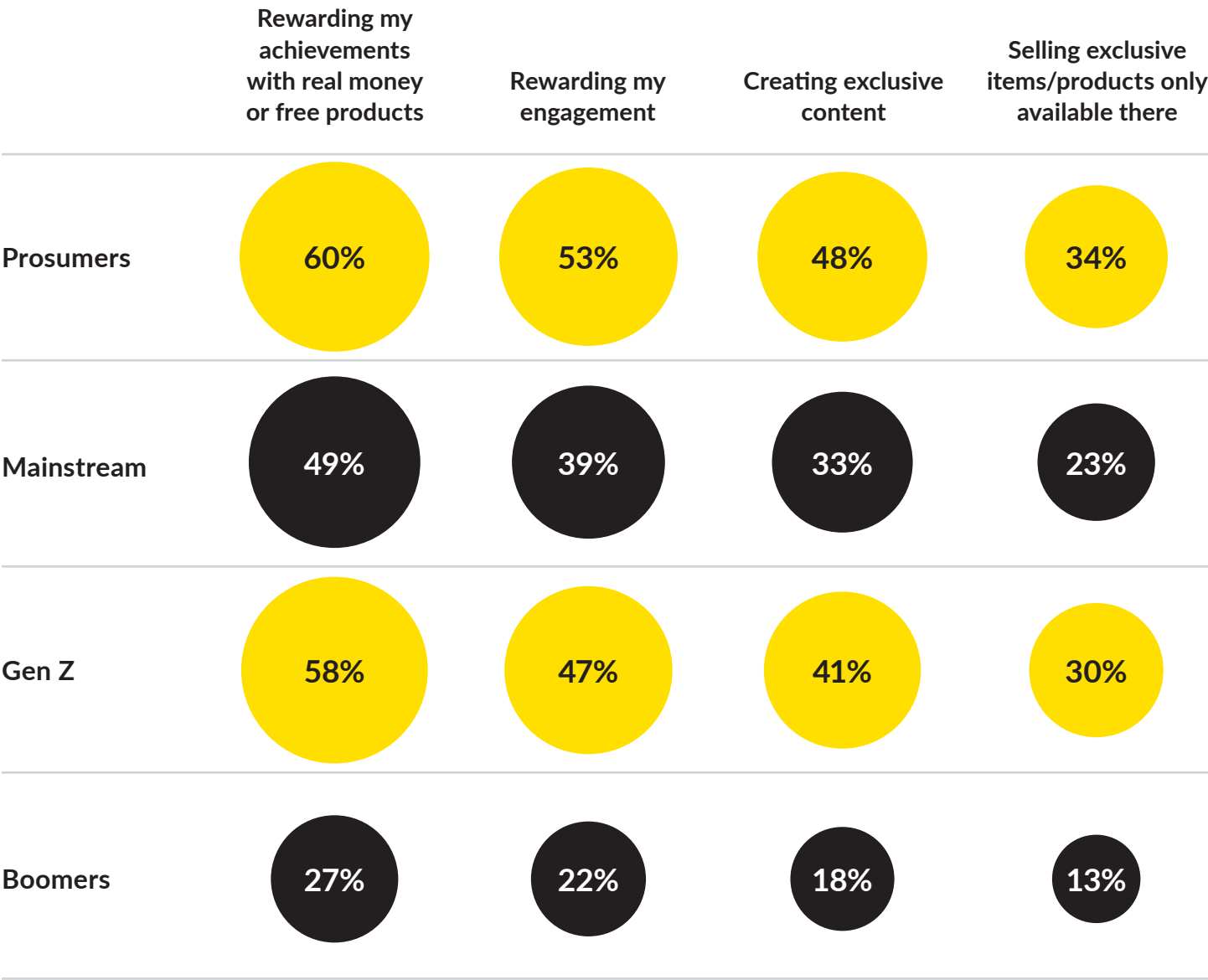
Brands must earn their place. The research points to two preferred roles: Rewarder or Protector.



THE REWARDER

Players appreciate brands that recognize effort, achievement, and participation. This includes brands offering rewards, exclusive content, or other tangible benefits tied to engagement.

Brands can add value on gaming platforms by... (Choose all that apply.)





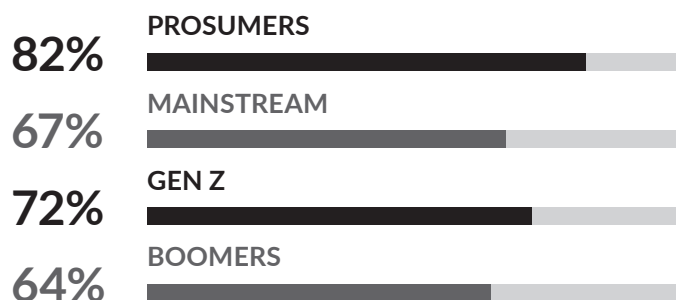
The most effective brands operate less as advertisers and more as patrons—creating value for communities before asking for attention in return. Burger King demonstrated this approach in Belgium with its **Burger to King** campaign, which tapped into the passion and creativity of fantasy football fans. Participants were challenged to build teams featuring players named “Berger,” “Burger,” or “King” and orchestrate passes between them during matches, prompting commentators to exclaim “Burger! King!” When fans shared clips of these moments on social media using the hashtag #BurgerToKing, they were rewarded with a free Whopper.

Xbox’s **The Everyday Tactician** campaign for the launch of *Football Manager 2024* created a competition that invited gamers to apply for a real “Tactician” role with Bromley FC, with applications submitted through the game on Xbox. The winning applicant joined the club’s backroom team and applied skills developed through gameplay to support real-world football strategy and decision-making. Bromley FC went on to achieve the most successful season in its 132-year history and secured promotion to the English Football League for the first time, demonstrating how gaming can foster transferable skills such as analysis, strategic thinking, and leadership.

THE PROTECTOR

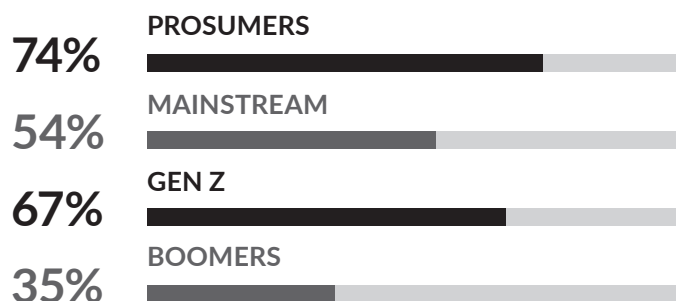
Players also expect brands to improve gaming communities, including by raising awareness of important social issues, tackling toxicity, and supporting underrepresented groups, particularly women.

Video game brands should be more committed to raising awareness about social issues



(% agreeing strongly/somewhat)

I'd like to see more brands support female video game players



(% agreeing strongly/somewhat)

In this role, brands act not as marketers but as stewards of healthier ecosystems.

The Protector role comes to life when brands use gaming environments to make players safer, not just more engaged. During the COVID-19 lockdowns, French child protection association L'Enfant Bleu recognized that many vulnerable children were spending more time in online games and less time in the offline spaces where abuse might otherwise be detected. Its award-winning **Undercover Avatar** initiative, created in partnership with Havas Sports & Entertainment, placed an avatar in Fortnite, serving as a safe point of contact where children could talk with trained professionals and representatives of L'Enfant Bleu about troubling experiences and be directed to appropriate support channels. Rather than interrupting gameplay, the campaign worked within the game's social dynamics, transforming a virtual world into a safeguarding tool and demonstrating how gaming platforms can be leveraged to address real-world safety concerns.

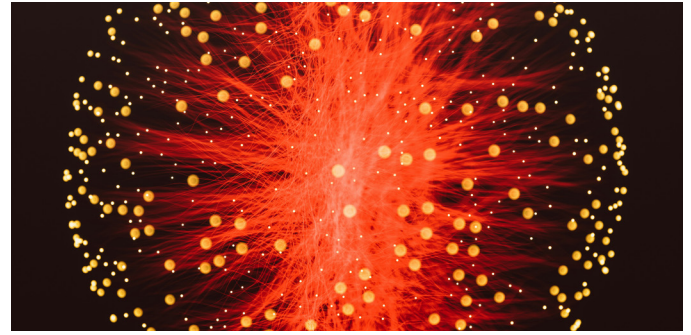
Brands can also act as Protectors by challenging the norms and biases that shape gaming culture. Created by BETC and Women in Games, the **Gender Swap Mod** reimagined familiar game mechanics by giving male characters the hypersexualized animations and visual treatments typically assigned to female avatars. By reversing expectations, the experience exposed how deeply gender stereotypes are embedded in game design and highlighted the unequal treatment of women in gaming spaces. Rather than relying on a traditional awareness campaign, the initiative used gameplay itself as a form of critique, showing how brands can foster more inclusive communities by challenging industry conventions and advocating for fairer representation.

THE BIG OPPORTUNITY

Gaming's transformation is ultimately a story about legitimacy.

Video games have evolved from entertainment products into social spaces, learning environments, cultural battlegrounds, wellness tools, economic ecosystems, and identity platforms.

The industry no longer sits outside society. It increasingly functions as society.



In the future, technology will integrate gaming into all aspects of life

72% PROSUMERS



52% MAINSTREAM

(% agreeing strongly/somewhat)

The growing influence of gaming communities is perhaps best illustrated by initiatives that channel player attention toward real-world problems. Havas Play's **Firecatchers** campaign transformed Twitch's familiar "Starting Soon" screen into a live forest-monitoring network, allowing viewers to watch surveillance feeds from high-risk areas and report signs of smoke directly through chat. Alerts were then escalated to emergency services for verification, helping firefighters respond more quickly to potential wildfires. By recognizing that gamers are highly skilled at spotting subtle on-screen changes and mobilizing that collective vigilance for the public good, the campaign turned passive viewership into active civic participation. It is a powerful example of how gaming culture can extend far beyond entertainment, creating tangible social value and demonstrating that digital communities can become an important force for collective action in the physical world.

For brands, the opportunity is not to interrupt gaming culture but to contribute to it. The future of gaming will belong not to the brands that advertise the loudest, but to those that participate most meaningfully.

IN A NUTSHELL



1.

Gaming has evolved from a niche pastime into one of the world's most influential cultural forces.

2.

Players increasingly view gaming as an extension of reality rather than an escape from it.

3.

Video games have become critical spaces for identity formation, friendship, and self-expression.

4.

Many players see gaming as a powerful tool for developing skills and supporting mental well-being.

5.

Economic pressures, monetization practices, and free-to-play models are reshaping how people experience games.

6.

Cultural debates surrounding diversity, authenticity, and representation increasingly play out inside gaming communities and franchises.

7.

Concerns about toxicity, harassment, addiction, and gambling-like mechanics are driving demand for stronger regulation.

8.

Brands are most welcome when they act as Rewarders—recognizing effort and providing value—or Protectors—making gaming spaces safer, more inclusive, and more rewarding for everyone.



About the Study

In the first quarter of 2026, Havas partnered with Market Probe International to survey 11,000 people aged 18+ in 25 markets: Australia, Belgium, Brazil, Canada, China, Colombia, Egypt, France, Germany, Greece, India, Indonesia, Ireland, Italy, Japan, Mexico, Philippines, Poland, Saudi Arabia, South Africa, South Korea, Spain, Turkey, United Kingdom, and United States.

The survey sample was made up of **18% leading-edge Prosumers**



and **82% mainstream consumers.**

Who Are Prosumers?

Prosumers are today's leading influencers and market drivers. They have been a focus of Havas studies for more than two decades. Beyond their own economic impact, Prosumers are important because they influence the brand choices and consumption behaviors of others. What Prosumers are doing today, mainstream consumers will likely be doing 6 to 18 months from now.

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