

# THE FUTURE OF GAMING°

A Portrait of the New Gamers

**THE FUTURE OF GAMING** is one installment of Latitude 42s, an ongoing series of innovation studies which Latitude, an international research consultancy, publishes in the spirit of knowledge-sharing and opportunity discovery for both established companies and emerging entrepreneurs.

Latitude°

Summer 2011

42°

PEOPLE CONNECTED

# WE ASKED A FEW HUNDRED GAMERS AND GAME MAKERS, “WHAT SHOULD THE FUTURE OF GAMING LOOK LIKE?”



In 2011, Latitude set out to profile the new gaming landscape by conducting a Web survey amongst 290 smartphone owners who self-identified as at least “casual gamers,” with nearly half labeling themselves “game enthusiasts.”<sup>1</sup> Participants were ages 15-54, with an equal 50/50 gender split. Nearly three-quarters considered themselves technologically “ahead of the curve,” and 84% use social media at least several times per week. More than two-thirds expect to be gaming even more over the next few years.

Latitude also conducted a series of in-depth interviews with both game makers and game en-

thusiasts for a deeper-dive investigation into the psychology of gaming and opportunities for the future. For interview content, see The Future of Gaming video documentary: <http://vimeo.com/28065109>

<sup>1</sup>Smartphone ownership was a criterion for survey participation, but engagement with mobile games was not. See infographic on page 4 for gaming platforms preferred by participants.

<sup>2</sup>Only select interviewees are pictured above. From left to right: Buster Benson, Jack Graham, Amber Cyr, Michael Critz, Dan Robles.

---

METHOD OF STUDY:

EXPERT INTERVIEWS  
QUANTITATIVE PROFILING

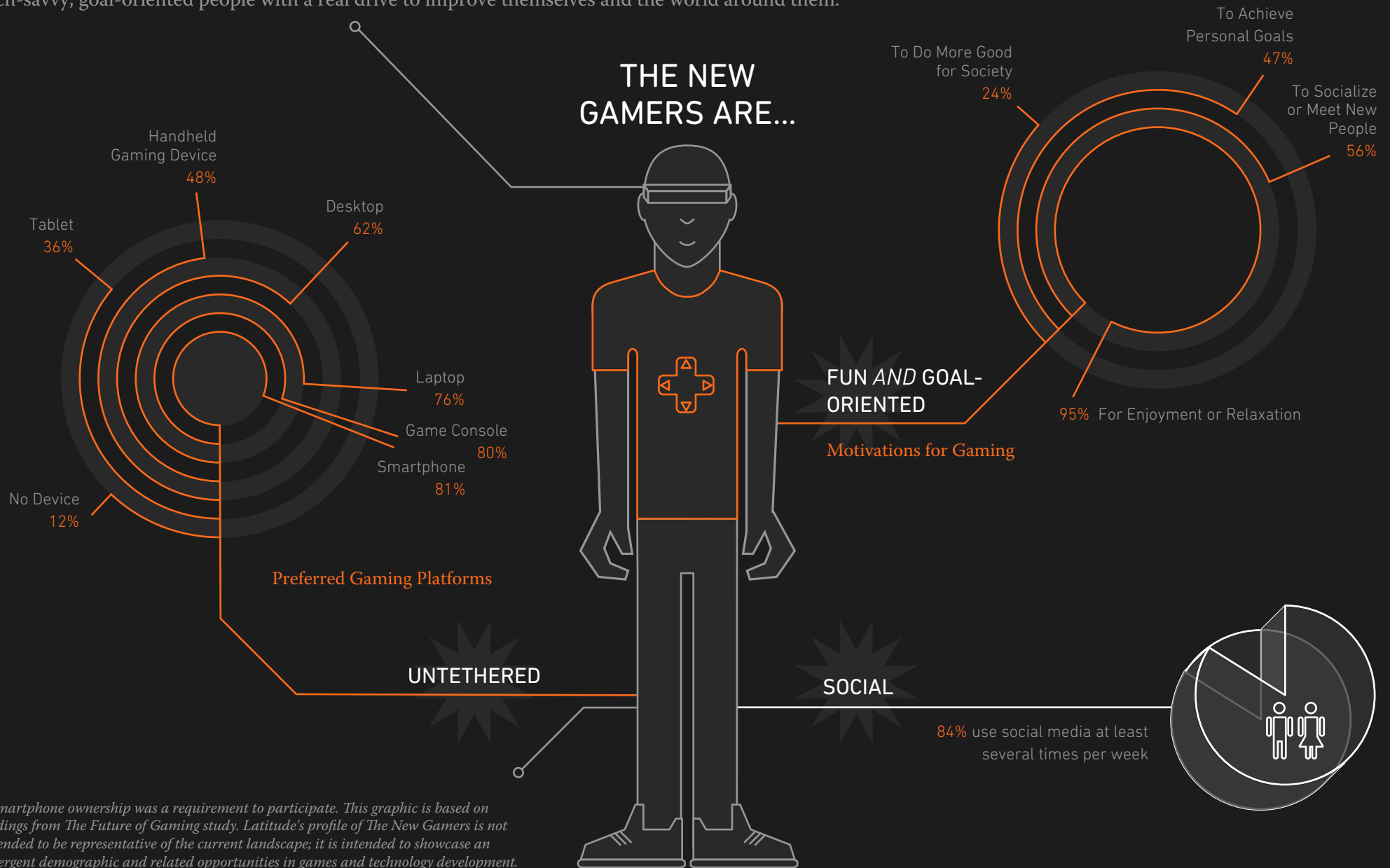
---

# OUR QUESTIONS

1. Why are more people gaming now than ever before, and who are tomorrow's gamers?
2. How will technology continue to bring games out of the screen and into the "offline" world, and what are the resulting opportunities for companies across industries?
3. Can games motivate positive change for both individuals and society at large?

# WHO ARE THE NEW GAMERS?

The stereotype of the reclusive gamer is outdated. These days, games are everywhere, and gamers are social, tech-savvy, goal-oriented people with a real drive to improve themselves and the world around them.



\* Smartphone ownership was a requirement to participate. This graphic is based on findings from *The Future of Gaming* study. Latitude's profile of *The New Gamers* is not intended to be representative of the current landscape; it is intended to showcase an emergent demographic and related opportunities in games and technology development.

# HOW WOULD YOU LIKE TO INTERACT WITH GAMES IN THE FUTURE?

I'd like it if **objects could sense** when I'm interacting with them, and register that online or convey that information to other objects.



56%

I'd like a game that I could interact with just by **thinking**.



44%

I'd like to see more **location-aware** games that register when I'm at a certain place, or near a certain person.



38%



I'd like a game that automatically senses and **reacts to my mood** or bodily state.

71%



I'd like if I could take action in games by **gesturing** or moving my body.

53%



I'd like to see **virtual environments** or digital content overlaid onto the real world.

43%



# INSIGHT° GAMES GO BEYOND THE SCREEN

## Today: a Mobile Reality

Thanks to portable, connected devices like smartphones and tablets, gaming anywhere and anytime is now second nature to many people. As a result, people expect that “online” games will continue to move out of the traditional screen environment, blending seamlessly with the real world in new and engaging ways that go beyond just “checking in” with apps like Foursquare and SCVNGR.

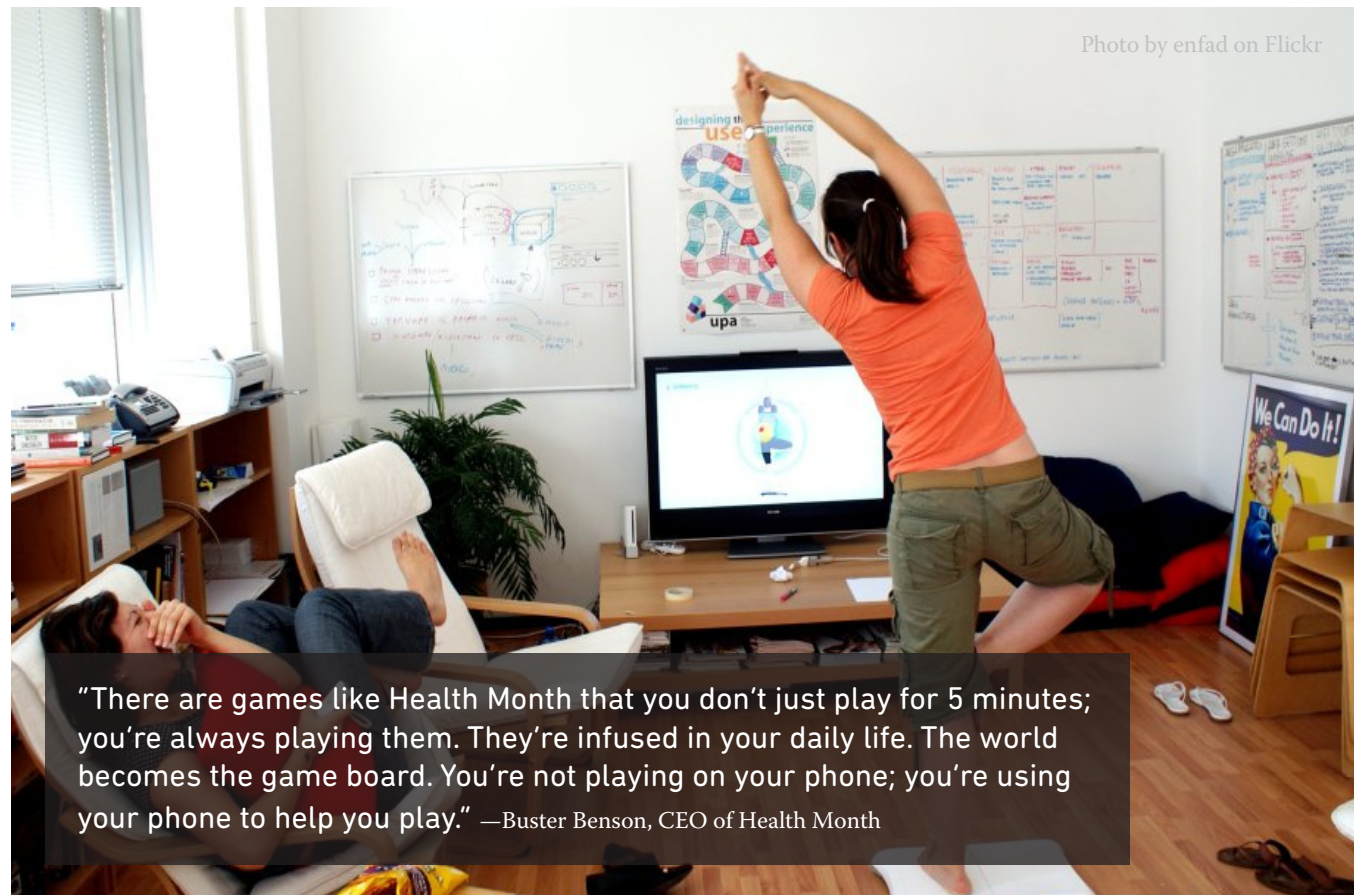
## Tomorrow: Physical World as Platform

Eager to get beyond their smartphone screens, gamers are actively seeking new levels of interactivity, more intuitive interfaces (e.g., gestural or telepathic controls), and personalization of the physical world that mirrors what's possible online. Future games should register and respond to people as they exist in the offline world, which may mean using a player's location, mood or stress level as metrics in a game, or allowing players to overlay virtual environments or information onto their actual surroundings, as with augmented reality.

# INSIGHT<sup>o</sup>

## LIFE BECOMES PLAY

Photo by enfad on Flickr



"There are games like Health Month that you don't just play for 5 minutes; you're always playing them. They're infused in your daily life. The world becomes the game board. You're not playing on your phone; you're using your phone to help you play." —Buster Benson, CEO of Health Month

### Make Me Better

Over two-thirds of participants now view games as a medium for self-improvement. Women were more likely than men to want games that would help them achieve personal goals; specifically, they tended to request games that would assist with personal wellness and learning.

### But Meet Me Where I Am

Games should offer players added incentive to do things they want or need to accomplish anyway, not rope them into taking actions that aren't personally meaningful. More than 90% requested games that fit into their daily life activities, such as exercising or running errands, and half wanted to gamify boring or repetitive tasks. Chromaroma, a public transit game allowing riders to earn points for distance traveled, makes taking the bus more fun while encouraging eco-friendly choices and local discovery.

# INSIGHT<sup>o</sup>

## SOCIAL MATURES INTO SOCIETAL

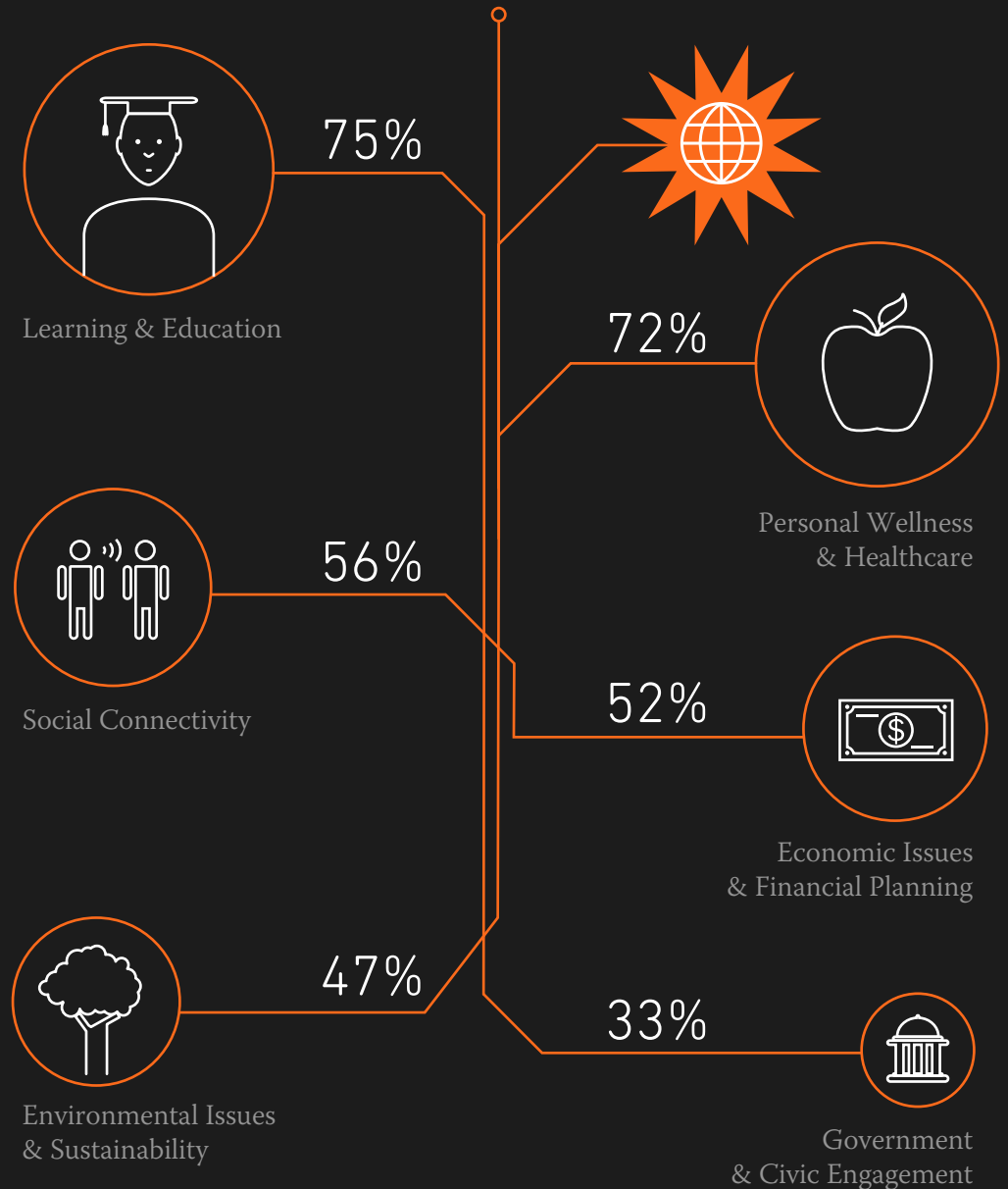
### Xbox is My Generation's Golf

Today, games are social networks in themselves, providing opportunities for people, locally and remotely, to participate in meaningful, shared experiences. More than half of participants wanted to see games that do a better job of connecting people in new ways—including face-to-face interactions. Three in four people said they would be more interested in getting to know their neighbors if local meet-ups incorporated games (such as team challenges or scavenger hunts).

### Games for Change

However, “social” gaming can mean more than just having fun with friends; it can leverage the power of communities to tackle important issues on a significant scale. More than 4 in 5 people agree that games, if executed well, can create positive change in the world, and 96% said they would like to see more games geared toward this objective. Taking advantage of new possibilities in technology and storytelling, projects like the World Bank Institute's alternate reality game, Evoke, have shown that games can have a tangible effect on individual behaviors that impact society at large—relating to sustainability, civic engagement, and awareness of global issues like healthcare, poverty, or social injustices.

## WHERE WOULD YOU LIKE TO SEE MORE GAMES APPLIED?



# IMPLICATIONS°


Tomorrow's gamers are more than reclusive basement-dwellers or casual gamers seeking "bite-sized" escape and fun. They are dynamic, social, and interested in applying elements of play to the world around them. This creates opportunities for companies across industries to reach users in new ways. **A few best practices to keep in mind:**

**BE ORGANIC.** Follow your users' leads, see what they value, and build game elements around the negotiations or exchanges they may naturally be initiating with each other or with your brand.

**PLAY TO PROGRESS.** Games needn't be just a source of relaxation or escapism; to add lasting value, give people an opportunity to achieve real goals, learn new things, and even get undesirable tasks done—not to mention, track and share their progress along the way. In many cases, achieving a meaningful, personal goal *is* the reward for playing.

**MAKE SOCIAL A MEANS, NOT AN END.** Social gaming isn't new; what's new is the way shared experiences are motivating individual behavior "offline"—often for the collective good. Games aren't just a place where social interactions play out; more and more, they are the catalyst for forming new social ties around a common interest across remote distances and, increasingly, for mobilizing local communities.

**FOR ADS, CONTEXT MATTERS.** Advertising can work in a variety of ways within games: as sponsorships, placements, interactive ads, and so on. However, it's key that they relate—and, ideally, add value—to the experience game players intend to have in the first place.



"The real disruptors are likely to be those who use gamification as a significance-amplifier, as a tool to help people achieve durable, tangible gains that are difficult, challenging, or downright impossible otherwise."

—Umair Haque, "Unlocking the Mayor Badge of Meaninglessness"

# A FEW FORWARD-THINKING IDEAS FROM PARTICIPANTS<sup>o</sup>



Photo by Paco Olvera Montero

## REMAKE YOUR ENVIRONMENT

“[With augmented reality], you’re going to have people with the ability to tag their environment with whatever they want to create in the virtual world and leave it there for others to find. Who wouldn’t want to paint the Prudential Building pink and put an elephant on top of it, and leave it there so that anybody looking through their mobile device, tuned into the right channel, could see it? That speaks to this powerful tendency everybody has to want to remake their environment in a way that they’re going to enjoy it more.”

—Jack G., Game Designer

## PLAY ‘TIL YOU GET IT RIGHT

“I would like to see education and learning become more like games. Games have long mastered a primary difficulty of education: providing feedback. If you have not mastered a skill or subject, a game has mechanisms that prevent you from progressing while also giving you the ability to practice and develop. This is immediately applicable to education and is something that needs to be embraced to help our struggling system. Games are also more engaging and can take away some of the burden of rote memorization.” —Brian G., Study Participant

## WALK IN SOMEONE ELSE’S SHOES

“Games are being used as interactive social commentary. For example, the game Hey Baby leads a player to think about street harassment and women’s reactions to it—and the sense that no reaction will ever stop it. The game Braid surprises the player by ultimately inverting the ubiquitous story line of a male agent journeying to rescue a damsel in distress, leading the player to think about the effects of that role.”

—Caroline R., Study Participant

# THE FUTURE OF GAMING°

This study was prepared by:

## Latitude°

Latitude is an international research consultancy helping clients create engaging content, software and technology that harness the possibilities of the Web.

To learn more about working with Latitude, contact:

Ian Schulte / Director of Tech & Business Development / [ischulte@latd.com](mailto:ischulte@latd.com)

**Lead Researcher: Natalie Stehfest, Senior Research Analyst**  
**Video Director: Dan Hemmerly-Brown, Innovation Engineer**

Kim Gaskins, Director of Content Development  
Neela Sakaria, Senior Vice President  
Steve Mushkin, President

For press inquiries, contact: Kim Gaskins / [kgaskins@latd.com](mailto:kgaskins@latd.com)

## A Video Portrait of the New Gamers

---

A thought-provoking portrait of game makers and game enthusiasts, this video documentary serves up fresh perspectives on how games have evolved, and who exactly is playing today—or will be tomorrow. This mini-feature was filmed and compiled in conjunction with The Future of Gaming survey, offering insider takes on gaming drivers, dos and don'ts for game makers, and possible future opportunities in games and technology development. Available in HD on Vimeo.

<http://vimeo.com/28065109>

## Upcoming Latitude 42 Study: The Future of Storytelling

---

Currently in progress, this study is designed to investigate user expectations and future desires around storytelling, both fiction and non-fiction, across platforms and in the real world. It will identify core elements of good storytelling and possibilities for new offerings in content, advertising, and technology.

<http://bit.ly/futureofstorytelling>