GDC EDITION

BGA BLOCKCHAIN GAME ALLIANCE

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MERSO.IO

THE FIRST-EVER PLAY NOW, PAY LATER FOR GAMING:

CASE STUDY

ANGRY DYNOMITES FISHING FRENZY

GLYPH

RETENTION AND REWARDS WITH BEHAVIORAL INTELLIGENCE

A WORD FROM BGA PRESIDENTS

There is a lot of noise out there. We read the headlines too: "Web3 Gaming is Dead," "Tokens Won't Recover." It is easy to look at the market prices and the quiet trading floors and feel the weight of that pessimism. We won't stand here and tell you those challenges aren't real. They are. But we will tell you that what we are experiencing isn't death. It is a reset. And resets are where serious builders separate themselves from the speculators.

Let's address the elephant in the room: our acquisition costs are too high, and our retention is too low. For years, we relied on blockchains and wallets to act as our distribution channels, expecting the infrastructure itself to deliver users. It didn't. We built castles but forgot to build the roads leading to them.
Furthermore, we have been stuck in an outdated tokenomic cycle. We saw it happen repeatedly: a hyped launch, a rapid pump, and a brutal dump. The "pump-and-dump" reputation wasn't just unfair press; it was a symptom of models designed for short-term speculation rather than long-term economies.

However, this reset has forced us to evolve. We are finally moving past the era of "token for token's sake." We are entering the era of sustainable utility.

And the positive signals are no longer just promises; they are live products. MapleStory, the largest game in our space right now, is demonstrating that world-class IP can successfully integrate Web3 without alienating its core fanbase.We also now have concrete, auditable proof that interoperability drives revenue. The Angry Dynomites x Fishing Frenzy collaboration is the blueprint that is a token that unites two communities while respecting the sanctity of the gameplay itself. The $40 million raised by ZBD also demonstrates that the infrastructure for Bitcoin-powered micro-transactions has massive institutional backing. Meanwhile, iBloxx studio securing $5 million proves that investors still see massive potential in user-generated content platforms built on Web3 rails.

The rise of stablecoins as payment rails is quietly the most significant infrastructure shift we have seen since the invention of the smart contract. They slash crippling cross-border fees, enable instant settlement, and unlock a universe of micro-transactions. As we detailed in the proprietary research we published last year in our Stablecoins in Gaming report, this isn't a theory. It is a new monetization engine that finally treats players like customers rather than collateral.

The next 12 months won't be about the highest valuation; they will be about the highest retention. We are focused on building games people want to play, backed by economies people trust. Today we are at GDC to witness this new wave firsthand and we hope to see you there, ready to build.

Yasmina Kazitani &
Sebastien Borget

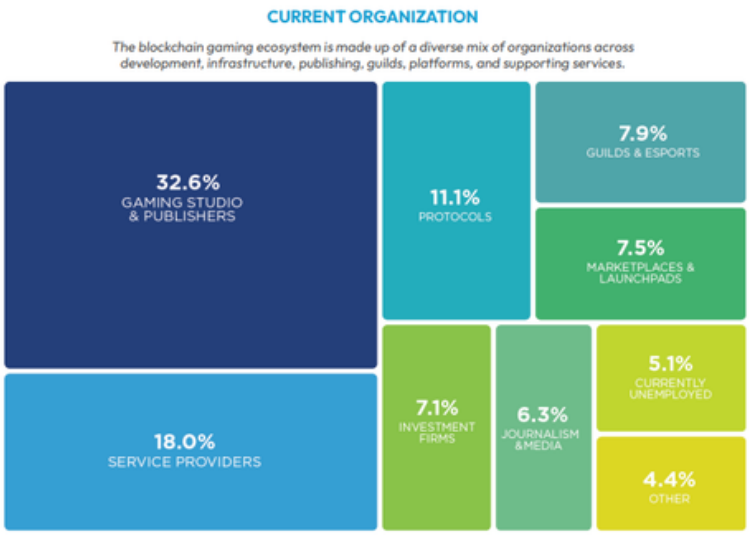
CONTENT

BGA Annual Report

2025

State of the Web3 Gaming Industry Report 2025

Now in its fifth year, the Blockchain Game Alliance (BGA) State of the Industry Report presents data collected from an online survey to provide a viewpoint of the current state and trajectory of the blockchain gaming industry from the perspective of its professionals. It highlights the challenges, opportunities, and trends in the ecosystem heading into 2026.



KEY TAKEAWAYS

RESPONDENT DEMOGRAPHICS

19.8%
of respondents come from the Middle East and North Africa (MENA), up from 1% in 2021.

22.7%
female participation marks the highest level recorded in the survey's history.

32.6%
of respondents work in studios or publishing, dominating industry representation.

INDUSTRY DRIVERS

64.4%
expect policy and regulation to have a positive impact on industry development.

29.5%
cite high-quality game launches as the primary driver of future industry success.

27.5%
point to sustainable, revenue-driven business models as a key growth factor.

INDUSTRY CHALLENGES

36.0%
view scams and fraud as the greatest threat to industry credibility.

32.6%
report lack of funding or investment as their company's biggest operational challenge.

38.9%
fear AI-enabled cheating, bots, and exploits as the largest risk of AI adoption.

GAMING×FINTECH

The First-Ever Play Now, Pay Later for Gaming

How Merso Is Unlocking a New Era of Game Revenue

Flexible payments are a proven GMV multiplier. Merso brings that power to gaming—purpose-built for digital goods, from $2 consumables to $1,000 premium assets.

What Merso Does

Merso's model is deceptively simple but architecturally ambitious: let players purchase in-game items immediately and split the cost into manageable payments—while the studio receives the full amount upfront. It sits alongside existing payment methods as an additional option at checkout. For players, it removes the psychological barrier of a lump-sum purchase. For developers, it transforms browsing intent into completed transactions. This isn't layaway. It's instant gratification paired with financial flexibility—a combination that reshapes how live-service economies operate from the inside out.

It works at every price point. A $5 skin pack and a $1,000 legendary weapon both benefit from the same mechanic: lower the perceived cost at checkout, and more players convert. Basket sizes grow because players add items they would have skipped. Purchasing power doubles because the upfront barrier disappears.

The result: studios capture demand that already exists but was previously unreachable.

Why It Outperforms Traditional BNPL

Traditional BNPL is a credit product—it works, but it introduces friction that kills conversion in digital goods: sign-up flows, KYC checks, credit underwriting, and soft declines. Merso's LTO model eliminates all of it. No new account. No credit check. No approval logic. Players choose their payment plan inside the native checkout in one click.

Entitlement enforcement replaces debt collection: access continues while payments are made. If payments stop, the license expires. No debt, no collections—just clean commerce. And because Merso operates at the edge of Web2 and Web3, it supports both credit card and crypto rails. Players are never blocked by the form in which they hold value.

The Numbers That Matter

Studios integrating Merso's LTO model are seeing measurable, auditable results across every core metric in the purchase funnel:

These metrics are split into two auditable buckets: transaction-level data from Merso logs (GMV, AOV, completion rates) and merchant analytics (conversion rates, checkout drop-off, adoption share). Everything is verifiable from existing data infrastructure.

"Flexible payments are a proven GMV multiplier. Merso applies that principle in a way that is structurally better suited to digital goods—removing credit, friction, and exclusion while preserving the conversion lift."

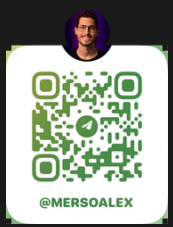
Built for Every Item, Every Price Point

Merso isn't limited to high-ticket premium items. The LTO model works across the entire in-game catalog—consumables, season passes, cosmetic bundles, and rare collectibles alike. Flexible payments change the buyer's mental accounting: players evaluate the periodic payment rather than the full price, making even mid-tier items feel more accessible.

This is especially powerful for seasonal or time-limited assets, where urgency and fixed availability combine with flexible payments to unlock purchases that would otherwise require discounting. Studios maintain price integrity while converting more players. The effect compounds: larger baskets, higher-tier selections, and repeat purchasing behavior that feeds long-term retention.

The Bigger Picture

Merso doesn't replace existing payment methods—it's an additional option that sits alongside them. Players who want to pay in full still can. But for those who would have abandoned checkout, Merso converts that lost intent into revenue. It applies proven flexible payment principles in a way that is structurally better suited to digital goods. By removing credit, friction, and exclusion—while preserving payment flexibility—Merso enables platforms to capture demand that already exists but was previously unreachable. That is where the GMV increase comes from.



Alex Kosloff
Head of the Americas, Merso Board Member,
Blockchain Game Alliance (BGA)
merso.io/games

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CASE STUDY: UNLOCKING CROSS-GAME ECONOMIES VIA BLOCKCHAIN

The Angry Dynomites x Fishing Frenzy Collaboration

The gaming industry often theorizes about the potential of "interoperability" ; the ability for assets and currencies to move seamlessly between different game worlds. This case study analyzes the live collaboration between Angry Dynomites (specifically their Craft World mode) and Fishing Frenzy. Both titles utilize the Ronin blockchain to demonstrate how cross-game token utility can drive user acquisition, monetization, and economic volume.

The data confirms that blockchain integration delivers tangible Key Performance Indicators (KPIs), generating over $300,000 in trading volume and attracting 15,000 paying participants during a single event

1. The Opportunity: True Asset Interoperability

In traditional gaming, in-game currency is usually siloed within a single title. This collaboration sought to disrupt that model by allowing the native token of one game (Fishing Frenzy) to function as a critical resource in another (Angry Dynomites).

The Mechanics:

· Token Integration: Players of Craft World (an Angry Dynomites game mode) were able to import $FISH, the native token of Fishing Frenzy.

· Utility: Within Craft World, $FISH was not just a speculative asset; it was a functional utility token used to purchase "worms," the foundational resource required to start the event's production loop.

· Seamless Exchange: Players could acquire $FISH directly using "Dinocoin" (the Craft World currency), demonstrating a seamless swap of value between two distinct gaming ecosystems on the Ronin blockchain

2. Performance Metrics (KPIs)

The integration of blockchain technology translated into high-value engagement metrics that traditional user acquisition strategies often struggle to match. The collaboration resulted in Angry Dynomites' "biggest event yet"

Key Financial & Engagement Stats:

· Economic Velocity: The event generated $300,000 USD in trading volume for in-game resources.

· Monetization: There were 15,000 paying event participants.

· Cross-Pollination: Users imported 20 million $FISH tokens (valued at approximately $57,000) into the Craft World ecosystem.

· User Growth: New installs peaked at 1,100 per day during the collaboration.
These figures illustrate that blockchain mechanics can drive significant liquidity and paying user conversion rates.

3. Technical Architecture & User Experience

The collaboration leveraged the Ronin blockchain to ensure transparency and asset ownership.

· On-Chain Resources: All resources in Craft World function as ERC20 tokens. This means items like "worms," "fish," and "bone soup" are not just database entries but actual blockchain elements,.

· Dynamic Prize Pools: As players spent $FISH to buy worms, that spent token revenue was redirected into a prize pool. This created a circular economy where player participation directly incentivized the reward structure

4. Balancing "Play-to-Earn" with Fair Play

A common criticism of blockchain gaming is that "whales" (high spenders) dominate the economy. This collaboration implemented specific design choices to ensure gameplay retention over simple pay-to-win mechanics.

· Forced Gameplay Loops: The developers restricted the ability to simply convert resources instantly via the "Masterpiece" leaderboard. Instead, they forced players to engage with the game mechanics (creating resources through time-based clicks) rather than just buying their way to the top.

· Level Playing Field: By preventing the automated conversion of materials, the developers ensured a more equitable environment where "power players" could not simply scoop up all rewards without spending time in the game

Conclusion

The Angry Dynomites x Fishing Frenzy event serves as a proof-of-concept for the benefits of blockchain in gaming. By enabling permissionless interoperability—where a token from Game A drives the economy of Game B—developers can unlock new revenue streams and user bases.
The resulting $300k trading volume and 15k paying users provide hard evidence that Web3 technologies, when applied to engaging game loops, deliver superior KPIs compared to siloed Web2 economies

OLIVER LÖFFLER
CEO VOYA GAMES

PIONEERING THE INTERCONNECTED 'UNIVERSE' ECONOMY ON BASE

In the rapidly evolving landscape where gaming meets blockchain, the Base platform has emerged as a crucial testing ground for new economic and design models, seeking to overcome the traditional Lifetime Value (LTV) constraints of the Web2 "hybrid casual" genre. In this exclusive interview, we sit down with John Hyukshin CHO, Head of Web3 Gaming at Grampus, who is pioneering a shift from single-game economies to an interconnected model by leveraging on-chain assets.

You mentioned that because LTV is a constraint in hybrid casual games, it's crucial to plan how one game grows into the next. With Chef Universe, are you designing the on-chain assets (like the ingredients or burgers collected in Rolling Burger) to be transferable? Will a player's progress in the first game explicitly unlock value or status in the second, creating a 'Universe' LTV rather than a single-game LTV?

In Web2, hybrid casual games carved out a strong space between hyper casual and mid core, but over time live ops became a real burden. Sustaining LTV often depends on a constant cycle of content updates and events. We see Web3 as a way to approach this differently, by letting value created in one game extend beyond that single title instead of relying entirely on in game live ops.

In Rolling Burger, players can break down burgers earned through play into ingredient tokens, and those assets aren't locked to one game. The result of a session carries forward across the series and can even connect to broader cultural or market trends outside the game. For example, when K food gains global attention, a K food themed restaurant game can naturally emerge and drive demand for specific ingredients.

If demand for a gochujang token increases, players who specialized in gochujang burgers in Rolling Burger benefit directly from that shift.
This structure is possible because Chef Universe is built on top of the Base app. Players move across multiple series games using a single Base app account, and all 129 ingredient tokens can be held and traded under the same identity. Assets and progress aren't fragmented by individual titles, but instead accumulate across the universe.
Ultimately, interoperability for us isn't just about moving items between games. It's about allowing value created inside a game to exist outside of it, where it can meet new participants, contexts, and demand. With tradable ingredient tokens at the center, the game economy and LTV are no longer capped by the lifecycle of a single title, but can continue to expand at the universe level on Base.

In this genre, success isn't about difficulty but it's about how the session feels and how players return. Do you find that the 'ownership' aspect (actually owning the dice or the resulting burgers on-chain) impacts retention ?

In this genre, we tend to think about hybrid casual games through a hook, habit, hobby lens, and Rolling Burger is very deliberately designed to live in the hook stage. That's why we built the core loop around dice. Every roll creates a different outcome, player choices shape the quality of the burger, and there's always room for a surprise or reversal. All of that comes together to create a strong short

session experience, which is what really matters early on. Our focus is on making each session feel fresh, lightweight, and emotionally complete on its own.

When it comes to retention, we don't see ownership of the burger itself as the primary driver. What really shapes retention is the meta around ingredient tokens. Burgers are the immediate output of play, but ingredient tokens introduce longer term context, strategy, and anticipation. As players start to understand which ingredients matter, how demand shifts, and how those ingredients can be used or traded across the universe, that meta layer becomes the reason they come back. Ownership still matters, but more as an enabler of an evolving ingredient economy than as a standalone retention mechanic.

What are the most effective non-monetary ways you've found to acquire genuine users for a Base game today?

To acquire genuine users for a Base game without relying on monetary incentives, everything starts with structure. Rather than tokens or airdrops, the product needs to be designed from day one with visibility on the Base app and Farcaster in mind. Mini apps can surface repeatedly through rankings, picks, and featuring, so the real objective is to build something people naturally open, share, and come back to. That loop itself becomes the acquisition strategy.

This also means thinking about the social feed early. If result screens or shared images are not instantly understandable in a feed, users simply won't click. Visual clarity and shareability aren't marketing add-ons, they're part of the core product, especially in the Base and Farcaster environment.

Community targeting is just as important. Farcaster has strong topic based channels, and posting everywhere at once rarely works. Choosing communities that match the intent of the app and tailoring the message to each channel consistently leads to much higher quality early users.

There are also lightweight ways to bootstrap attention inside the Base ecosystem. Tools like Amps or Surge can amplify early launch posts or support small scale exposure experiments at very low cost. This is less about advertising and more about quickly learning how the product resonates within an existing social graph, which is critical in the early validation phase.

Finally, working with Country Leads, Ambassadors, or game focused communities that are actively growing the Base ecosystem can be very effective. These groups often act as natural distribution hubs and help surface apps to users who are already aligned with the ecosystem. In Korea, for example, there is a dedicated Base game builder community called the Daehan Base Games Guild.

We are seeing a lot of discussion around 'Agentic Commerce' and the x402 protocol, which allows AI agents to handle payments without human intervention. How do you see this changing the monetization model for games on BASE? Specifically, do you think we will move away from subscriptions toward the 'pay-as-you-go' micro-payment models

Agent based x402 clearly makes micro payments easier, but using it in a way that actually fits games still needs more real world experimentation. Today, most AI agent use cases in games are focused on productivity or

operational efficiency, rather than being woven into moment to moment gameplay.
Where it becomes compelling is around immersion and flow. Take Rolling Burger as an example. Players constantly face a small but emotional decision: do I roll the dice one more time, or stop now? An agent could make that call for the player, triggering a tiny payment only when the expected upside justifies it. That keeps the session smooth and uninterrupted, while preserving the underlying tension and strategy. In auto play RPGs, agents could step in only at key moments, like activating a temporary buff or retrying a failed encounter. In those scenarios, payment feels less like a transaction and more like a natural extension of automation.

Base is a strong environment to explore these ideas. With built in distribution, on chain payments, and lightweight mini app architecture, teams can test small experiments quickly and at low cost. Because of that, I expect some of the earliest and most practical examples of x402, agents, and gameplay mechanics coming together to emerge on Base.

Do you see similar 'Web2-style' UX hurdles we could notice on other chains, that Web3 developers need to overcome?

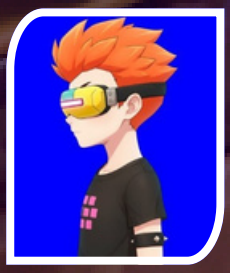
Base already removes many of the Web2 style UX hurdles that Web3 games still struggle with on other chains. Wallets, accounts, and payment flows are unified inside the Base app, so players can jump into a game without being constantly reminded that they are dealing with blockchain infrastructure. Treating games as discoverable, launchable apps rather than isolated dApps brings the experience much closer to what players already expect from Web2.

Because that foundation is in place, the builder's focus naturally shifts. Instead of spending most of their energy reducing onboarding friction, teams can spend more time on a more fundamental question: how Web3 can actually expand the game experience itself.

That might mean making payments lighter and more contextual, or using AI agents to extend and automate parts of gameplay. In that sense, Base lets builders move beyond basic UX fixes and start experimenting with the bigger ideas shaping Web3, in ways that players can actually feel.

There are still challenges, of course. One of the remaining ones is how users initially on ramp assets. This isn't unique to Base, it's an industry wide issue closely tied to regulation across different regions. That said, it's an area where shared standards and gradual improvements are already happening, and it's likely to become less of a blocker over time.

The interview with John Hyukshin CHO highlights how the Base platform is enabling a fundamental shift in Web3 gaming from single-title economies to interconnected "Universes" like Chef Universe, overcoming Web2's LTV constraints by making on-chain assets, such as ingredient tokens, transferable and central to long-term retention. By unifying UX on the Base app and focusing on an evolving ingredient-based economy over simple in-game ownership, the architecture supports continuous player engagement.



JOHN HYUKSHIN
HEAD OF WEB3 GAMING AT GRAMPUS

How Alien Worlds Rewrote the Rules of the DAO

For years, the technology sector was intoxicated by the promise of the Decentralized Autonomous Organization, or DAO. The pitch was revolutionary: entities run by code and community consensus rather than boardrooms and CEOs. However, as the initial euphoria of the blockchain boom subsided, a stark reality emerged. The landscape was littered with organizations paralyzed by voter apathy, directionless governance, and an inability to ship actual products. Amidst this graveyard of good intentions, Alien Worlds has quietly charted a different course. By pivoting away from the abstract ideal of "governance" and toward a tangible model of incentivized creation, they have effectively vouched for the DAO not as a political experiment, but as a sustainable production engine.

The core of the Alien Worlds philosophy lies in a recognition that a community needs more than just voting rights; it needs a shared history. In the early days, developers were building isolated projects without a unifying thread. To solve this, the team didn't just write a rulebook; they hired sci-fi author Kevin J. Anderson to craft a foundational "lore". This wasn't merely flavor text—it was a strategic "North Star." By providing a canonical blank canvas, they allowed the community to expand the universe rather than just consume it. The results argue for themselves: a staggering 1.1 million words of lore have been generated by AI and community writers, with hundreds of users submitting content validated by millions of Trillium (TLM) votes.

However, a shared story is not enough to keep the lights on. Alien Worlds identified that the fatal flaw in most DAOs is a reliance on volunteerism, which inevitably leads to burnout or dominance by a wealthy "Old Guard". To vouch for the viability of a DAO, Alien Worlds professionalized the contributor. Through the Galactic Hubs grant program, they shifted the paradigm from passion projects to paid work. This system allows newcomers to "get their feet wet" with smaller grants, eventually graduating to complex developments. It has spawned a "mini-worker system" where writers and developers are headhunted by studios within the ecosystem to craft narratives for titles like Starblind, Mission Control, and Meta Battler.

This economic engine is reinforced by a governance structure designed specifically to combat the volatility inherent in crypto. Alien Worlds circumvented the traditional single-DAO risk by establishing multiple specialized DAO layers that run parallel to the main governance. These include:

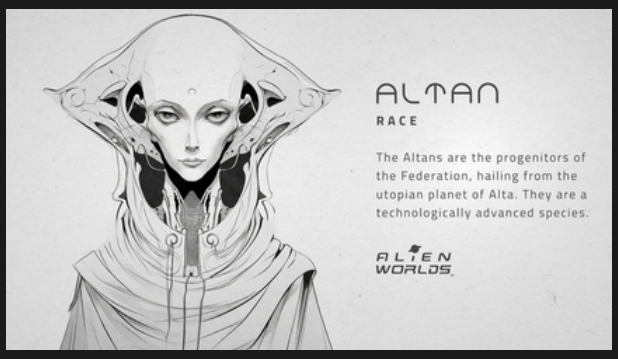
- Lore DAO: Focused on canonical storytelling and community-validated content.
- Planetary Syndicates (or the six Planetary DAOs): Responsible for guiding planetary development and setting priorities.
- Union DAOs: Providing a worker proposal system for longer-term initiatives, complete with a designated arbiter to step in if needed.

This pragmatic, multi-layered approach ensures stability, allowing developers to commit to ambitious roadmaps for next-generation titles like Alien Legends and Siege Worlds without the looming fear of political instability.

This higher level of governance though manifests primarily through the role of the Planetary Custodians. These are not merely accountants rubber-stamping invoices; they operate as distinct, specialized cabinets for each of the six Planetary Syndicates.

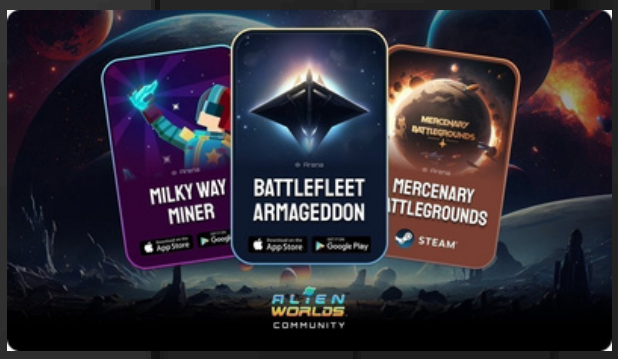
By decoupling these bodies from the volatility of general elections, Alien Worlds has created a layer of "middle management" that shields long-term projects from the chaos of the mob. This structure ensures that when a developer commits to a six-to-nine-month roadmap for a complex title like Alien Legends or Siege Worlds, they are dealing with a stable executive partner rather than a fickle crowd.

However, the most striking evidence of this "command" maturity is the DAO's ability to execute complex foreign policy. In the digital nation-state, "foreign policy" is interoperability, and Alien Worlds is aggressively expanding its borders. The Galactic Hubs program acts as the diplomatic arm of this government, negotiating cross-chain alliances that no disorganized collective could manage.



A prime example of this diplomatic reach is the recent treaty with Taco Studios on the Taiko blockchain. This isn't just a simple token swap; it is a full-scale cultural integration where the Alien Worlds "government" has successfully exported its citizens—specifically the refugee character Xenoth Vargian—into a completely different sovereignty, the pixel-art game Brigade. This required high-level coordination: setting up technical bridges for "burning" Alien Worlds NFTs on the WAX blockchain to trigger asset releases on an EVM-compatible chain. This serves as a masterclass in digital governance: the DAO is leveraging its assets to colonize new markets, requiring players to hold dual citizenship (wallets on both WAX and Taiko) to participate

Ultimately, Alien Worlds understands that a DAO cannot survive on ideology alone. Ben McGowan of the Alien Worlds team notes an exciting shift in community psychology: while financial incentives started the engine, the "tokenized lore" has taken hold, and creators are now prioritizing content that enriches the canon over simple cash grabs. By providing the tools, funds, and stability to build, Alien Worlds has moved beyond the hype, offering a blueprint where the DAO serves not just as a bank, but as a validation layer for a living, breathing digital civilization.



Designing Web3 Retention and Rewards with Behavioral Intelligence

Current metrics in Web3 gaming are failing the industry by mistaking anonymous token activity for genuine player growth and retention. This interview explores, with our member Glyph, the "Behavioral Economy" framework, which offers a new path to long-term profitability by giving ecosystems the tools to finally see and reward their most valuable, loyal players.

What was the original problem you believed YGG : and Web3 gaming more broadly : were failing to see?

We believed Web3 gaming was missing its most critical ingredient: personification.
In a world of anonymous wallets, everyone looks the same. Without a way to distinguish players by behavior, intent, and progression, the industry has been optimizing the wrong things. Token activity was treated as a proxy for player growth : but on-chain signals like quests completed or tokens moved don't tell you whether someone is actually progressing in a game.

Our hypothesis was simple: much of what looked like "growth" was really surface-level activity : wallets touching tokens without entering meaningful gameplay loops. This isn't unique to YGG. Across Web3 gaming, user counts, DAU, and engagement are inflated by one-time actors and incentive hunters, while the players creating long-term value remain invisible.

The economy wasn't failing : it was being measured through the wrong lens. Progression is behavioral, not transactional. That's why a privacy-preserving identity layer is essential: it allows ecosystems to understand continuity without de-anonymizing players, and finally see who is actually growing with the game.

Can you explain your "Behavioral Economy" framework?

Web3 lacks the infrastructure that allowed Web2 games to scale: understanding people, not just accounts.

Our Behavioral Economy framework is built on one idea: to design sustainable economies, you must understand three dimensions together:

1. Behavioral Intelligence : how players act, what loops they repeat, where they deepen or drop off.

2. Economic Intelligence : how value flows: who reinvests, who extracts, who sustains the system.

3. Mobility Intelligence : how players move across chains and ecosystems, revealing intent and fluency.

Individually, these signals are incomplete. Combined, they reveal true progression: who actually advances, who stabilizes value, and where loops break or compound. In YGG's case, this made it clear that a smaller mid-tier cohort drove most meaningful activity, while many "active" wallets showed no real progression.
That's what we mean by a behavioral economy: understanding why an economy behaves the way it does, not just what's happening on-chain.

What's fundamentally broken about how Web3 measures success today?

Web3 still measures activity, not players.
Metrics like DAU, wallets, quests, and TVL are easy to count on-chain, but they collapse very different behaviors into the same bucket. A loyal player and a one-time reward claimer look identical. Multi-wallet users inflate growth. Bots and Sybil activity distort engagement. As a result, ecosystems mistake noise for traction.

The YGG case study showed that once you analyze users through behavior, value flow, and mobility, the story changes. What looked like growth often wasn't progression. What looked like churn was sometimes exploration and return. Real retention only became visible when activity was interpreted as patterns over time.
Success isn't about how many actions occur : it's about how many players deepen their relationship with the ecosystem.

How does this change the conversation around retention?

It shifts retention from **guesswork to precision**.
Most Web3 retention strategies rely on pushing more incentives and hoping users stay. Behavioral intelligence changes that by revealing who can actually be retained : and who won't be, no matter how much you spend.

It allows teams to stop overpaying mercenary users, allocate rewards based on real progression, predict churn instead of reacting to it, and align retention with economic health rather than emissions.

Instead of asking "How do we keep everyone active?", studios finally ask: **"Who should we keep, why, and at what cost?"**

You highlight mid-tier and whale cohorts as YGG's real core. What does that say about reward design?

It's not about favoring one cohort : it's about **precision**.

Different players respond to different incentives. Newcomers need confidence. Mid-tier players need progression. High-value contributors need recognition. Flat, generic reward systems fail because they ignore intent.

With behavioral intelligence, rewards become adaptive: progression-based, contribution-aware, and aligned with long-term value rather than short-term extraction.

Rewards shouldn't be equal : they should be intentional.

If a studio wants to stop overpaying mercenary users, what should they optimize for?

One shift: stop measuring activity, start measuring alignment.
Mercenaries spike once and disappear. Aligned players repeat loops, reinvest, and progress even when incentives are modest. Signals like repeat behavior, upward progression, and reinvestment matter far more than one-off actions.
When rewards target alignment instead of presence, mercenaries naturally fall away : without aggressive filtering.

Ultimately, what future are you trying to build with this intelligence layer?

OA future where Web3 gaming is durably profitable, not perpetually subsidized.
The play-to-earn era failed because it optimized for token velocity over player value. Web3 lacked the behavioral and identity foundations that underpin Web2's $180B industry.

With privacy-preserving identity and behavioral intelligence, ecosystems can finally design retention instead of bribing it, monetize progression rather than speculation, and back aligned cohorts instead of inflated metrics.

The goal isn't more wallets. It's more clarity.
Behavioral intelligence is the missing economic infrastructure. Unified ID and SITA9 are the rails that make it usable : allowing Web3 to adopt the best of Web2's growth foundations while staying true to ownership, privacy, and openness.

“PROVE THE GAME IS GREAT FIRST.”

Zingy Labs on crossing the Web2/Web3 divide and the 5M-view campaign that did it

BGA sat down with Zingy Labs to unpack how the studio thinks about the chasm between traditional gamers and blockchain-native audiences. Their recent campaign for Off The Grid sailed past 5,000,000 views without leading with tokens or jargon. Here’s how they did it, what surprised them, and where they think AI and Web3 gaming go next.

Flavien (BGA) : For readers new to Zingy Labs: what problem do you solve and how did that shape the Off The Grid campaign?

Troy Cooper: Web3 games live between two worlds. On one side, you’ve got traditional players who care about fun and fairness; on the other, blockchain enthusiasts who care about ownership and value. Most campaigns treat those as separate universes. We don’t. Our job is to fix fragmented audience strategy and low-trust messaging.

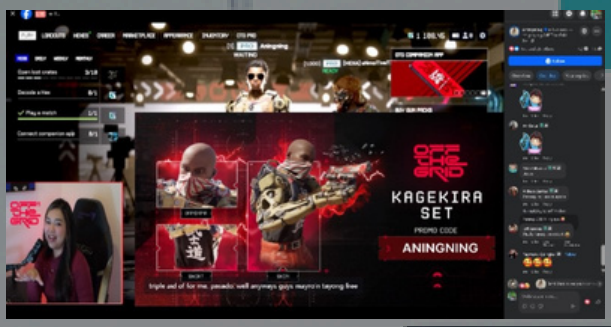
For Off The Grid, we built a single, truthful narrative anchored in the game’s AAA craft and core loops. We showcased the experience first fast, visceral, readable gameplay and let ownership mechanics appear as an added benefit, not the headline. That fusion earned attention from both camps and helped push the campaign past five million views.

If you had to distill the playbook into three pillars, what are they?

1) Audience Fusion, not Segmentation. One cohesive story that’s fun-first for the mass market, while quietly validating long-term ownership for the Web3 core. Move beyond the Web2/Web3 binary; sell the superior player experience.

2) Narrative-Driven KOLs. We prioritized creators who love the genre and can demonstrate skill and enjoyment on camera, not pure “crypto-fluencers.” Authenticity is the amplifier.

3) Real-Time Feedback Loops. 24/7 sentiment tracking and rapid iteration. When a content theme spikes, we double down; when a concern surfaces, we address it quickly and professionally. Strategy is a living system.



Everyone carries reputational risk : studios, players, token/NFT holders. How do you validate each without inviting backlash?

Zingy Labs: Radical transparency and value focus.

- Studios: Frame Web3 as optional, value-add tech. The product’s quality is the proof of commitment, no hype, no pressure to speculate.
- Players (Web2): Keep progression free, fair, and skill-based. Tackle “pay-to-win” fears head-on in the content.
- Web3 Stakeholders: Communicate utility and milestones consistently. Separate short-term speculation from long-term ecosystem participation.

Above all: never over-promise. Entertainment value leads the conversation.

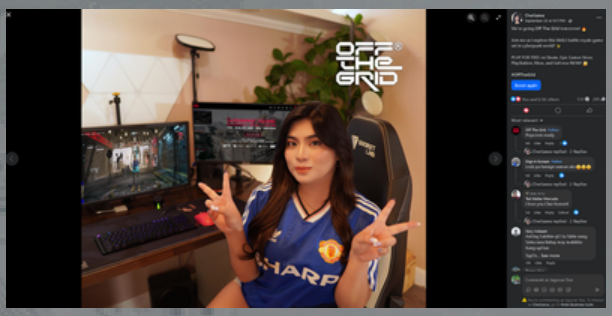
Part of your audience cares about wallets and perks; others just want fun and fair progression. How do you design for both?

Zingy Labs: We use a Layered Content Architecture:

- Layer 1 — The Hook (≈90%): Pure gameplay, high-fidelity visuals, lore : the universal language of a great game.
- Layer 2 — The Bridge: Ownership ideas explained with familiar gamer terms ("rare drops," "player-driven economy"), not blockchain jargon.
- Layer 3 — The Deep Dive: Targeted activations for the core Web3 crowd, with technical detail and "alpha," kept to the right channels so the broader audience isn't alienated.

This keeps the mass-market campaign clear and welcoming while still serving the on-chain faithful.

What turns a "gameplay beat" into a "social beat"? Has blockchain culture changed your checklist?



Zingy Labs: We translate features into feelings. A new weapon combo isn't just "new"; it's mastery, surprise, flow. Our internal checklist (which we share with partners) asks: What's the human emotion? What's visually legible in 3–7 seconds? Is there a skill moment? A narrative hook? A payoff? Blockchain adds a few new items like clarity around ownership or community rewards but the core is timeless: make it watchable, repeatable, and relatable.

Can engagement and community activations truly enhance retention in Web3 gaming?

Zingy Labs: More than in Web2. You still need updates, social connection, and progression but ownership adds a tangible reason to stay. Tokenized loyalty, DAO-style voting, and community quests with tradable rewards turn casual players into stakeholders. When players feel the ecosystem evolving and that they have a voice retention compounds.

How will AI change social ops for games over the next 12 months?

AI is going to move human teams up the value chain. Instead of grinding through asset resizing, captioning, or first-draft copy across ten platforms, your strategists will spend more time on positioning, taste, and creator relations. The machines handle speed (rapid copy variants, instant localization, and a steady flow of testable visuals) so a lean team can run a global schedule without losing coherence.

More interesting is what happens to judgment. We're already seeing models that don't just tag sentiment after the fact but anticipate where a post might backfire or where a theme could break out, giving you a chance to defuse a negative feedback loop before it forms or to double down on something that's about to resonate.

On the front lines, autonomous agents will take over the repetitive ninety percent of community queries (links, how-tos, eligibility, patch timing) without pretending to be the community itself. That frees human managers to do the work that actually builds trust: acknowledging concerns, celebrating skill, and crafting the moments that feel personal rather than programmatic.

TROY COOPER
CEO & CO FOUNDER
ZINGY LABS

2025 Gaming Report Dramatically Supports the YOM Decentralized Cloud Solution

It is always very satisfying to see data and hear conclusions that match with our core thesis, that cloud gaming is the future of gaming and that sound economics paired with new technology will be the key. The renowned Boston Consulting Group released their video game guidance report in December titled How Platforms Are Colliding and Why This Will Spark the Next Era of Growth. The data they found and conclusions they reached will look very familiar to those who have followed YOM and our roll out of the first truly decentralized cloud gaming network.

Cloud gaming is already "proven" by players (not just hyped by platforms)

First, cloud gaming is spreading. BCG reports that 60% of players surveyed have tried cloud gaming, with 8 out of 10 coming away with an overall positive experience. That matters because the historical blocker for cloud gaming has always been: "Does it feel good enough?"

Now with "yes" for the majority of people who have actually used it, the constraint shifts away from consumer acceptance toward distribution, unit economics, and reliable capacity.

And BCG adds a second nuance that's even more important for infrastructure builders: About 70% of cloud gamers still spend less than a quarter of their time playing from the cloud. However, when asked if economics are a major factor in their purchasing decisions in this current climate, 75% responded yes.

In other words, cloud gaming has crossed the "it works" threshold, but there's still headroom to convert occasional use into default behavior. That conversion is where YOM wins.

Cloud gaming is already validated by players

BCG projects cloud gaming revenue to grow from $1.4 in 2025 to $18.3B by the end of 2030. This comes with a player user base growing from just 5M in this past year to 65M that same year.

These numbers matter less as "market sizing" and more as a signal of what's coming operationally:

more concurrent sessions,	more geographic coverage requirements	more variability (spikes, launches, events),	and more pressure on cost per hour

Cloud gaming scales like a utility. If the model can't scale supply elastically, which is the struggle that centralized data centers are up against, the economics will choke it. Additionally, because the centralized system is not able to be very local to the player base, especially in emerging markets, the experiences will suffer and they will surrender that ground to our decentralized network.

Gaming is moving toward hardware-agnostic, omniplatform access

BCG's language mirrors ours regarding the cloud transition. They agree that we are moving to a hardware-agnostic era, where games become accessible across devices and the boundaries between "platforms" start to matter less than the ability to play instantly, anywhere. So the cloud becomes the layer that makes gaming portable across screens, sessions, and contexts, turning access into a service rather than a box you own.

They are also explicit about what this unlocks for distribution:

- Frictionless gameplay enables new acquisition funnels. If players can start a session without installing a game, publishers can convert interest directly into play from places like ads, emails, store pages, or community links, reducing the drop-off that normally happens between discovery and first gameplay.
- Libraries and progress become truly portable. Players can carry their games and save states across devices (laptop, phone, tablet, low-spec PC), which increases play frequency and makes "play anywhere" a realistic default expectation rather than a premium feature.
- Gaming shifts from units sold to hours played. When the game and the compute are effectively bundled as a cloud service, the business emphasis moves away from hardware cycles and one-time purchases toward engagement, retention, and ongoing usage.

For YOM, this is the core demand thesis: if the consumer expectation becomes "instant play, anywhere," then the winning infrastructure will be the one that can place high-performance compute close to users, globally, at scale — and do so with a materially better cost structure than centralized hyperscaler-only delivery.

Spend behavior is bifurcating: price pressure + premium demand

BCG's monetization section is a blunt read on the consumer environment. More than 75% of survey respondents say that game prices will impact their purchase choices, reflecting clear price sensitivity. At the same time, about 65% of gamers report using tactics to save money, such as waiting for discounts. The outcome is a split market: approximately 45% of gamers are "serious fans" who are willing to buy even at higher prices, while roughly 23% are neutral — and about 30% say their purchasing will fall if prices rise. This is the infrastructure wedge.

When gamers are price-sensitive, platforms can't simply raise prices to cover higher compute costs. But premium segments still demand premium experience.
So the industry has to do something harder: Deliver premium experience at a better cost curve. That's exactly where our decentralized supply networks become structurally relevant.

The takeaway
BCG's describes a world where cloud gaming demand is rising quickly, the consumer experience is already "good enough," and spending trends force the industry to compete on cost-per-hour — without sacrificing quality. That is the exact environment where a decentralized, elastic, edge-first compute network can become not just viable, but necessary.

Visit https://yom.net

HOW ARBO: ARENA TACTICS IS DEFINING THE FUTURE OF AI CO-PLAY

In a strategy landscape often defined by high skill floors and complex system mastery, ARBO: Arena Tactics is pioneering a new form of gameplay: the hybrid-play experience. It empowers players to act as a Commander, issuing natural-language instructions while the AI handles execution, dramatically widening accessibility to the deep-mechanics strategy genre.
In this exclusive interview, we speak with Aru Sri to delve into the core design philosophy of ReBlink's innovative title. We explore the frustration that led to "Language should be the control surface," what constitutes a "good command," the fine line drawn between player intent and AI interpretation, and the long-term vision for ARBO: Arena Tactics to define the future of AI co-play in games.

In one line: what new player fantasy does ARBO: Arena Tactics unlock that other strategy games can't?

Arena Tactics lowers the traditional strategy "skill floor" by letting players act as a Commander who issues natural-language instructions while the AI handles execution, creating a hybrid-play experience accessible to both core and casual players.

In one line: what new player fantasy does ARBO: Arena Tactics unlock that other strategy games can't?

Traditional tactics games require deep system mastery, which limits the addressable market. Auto-battlers simplify too far; complex tactics games demand too much. Using language as the control mechanic lets us keep depth while dramatically widening accessibility—opening the genre to casual and hybrid-casual players.

What does a "good command" look like in ARBO: Arena Tactics (structure, context, brevity)? How do you teach that without turning the game into a prompt tutor?

The great thing about Arena Tactics is that a player, regardless of their experience with games like ours, can get entertainment value with the simplest of commands. Much like the first experience people have with ChatGPT where a prompt may have been simple, players can start with simple commands and learn how the AI responds and alter their commands.

Much like Prompt Engineering, the best commands are clear about the objective, aim to reduce inconsistencies or redundancies, provide clear instructions and are nuanced in specifying constraints or details for execution.

Example of great commands:

- "Use the Specter to create a Noxious Mine adjacent to the Enemy Base as soon as possible. The Squad shall not use any other Protocols until the Noxious Mine is placed."

- "Use Specter to collect closest Cache, then have the Specter create a Noxious Mine adjacent to Enemy Base as soon as possible. If out of range, spend all MP to close distance first. The Squad shall not use any other Protocols until the Noxious Mine is placed. The other two reavers must play normally, focusing on attacking the enemy heroes."

- Example of basic commands that deliver immediate entertainment value:
  - "Retreat to our home base and play defensively"
  - "All units to the enemy base and destroy it"

Where have you drawn the line between player intent and AI interpretation to avoid "the game playing itself"?

The experience in Arena Tactics strikes a balance between two extremes: the open-endedness of ChatGPT, where prompt quality and context can drastically affect results, and the precision of a purpose-built deterministic AI. While our system leans closer to the former, it is tuned specifically to our game mechanics, ensuring that the AI's decisions remain contextually relevant.

The AI plays the deck the player builds, guided by the initial instruction set defined during deckbuilding, always working toward the player's goal of winning within that framework. However, during gameplay, player prompts may not always align with the current game state, in which case the AI interprets them as best it can within its constraints.

This mode allows players to choose their level of involvement, from fully automated play where the AI executes strategies defined during deckbuilding, to active in-game command and control. While the system supports both styles, most players choose to issue commands mid-game to influence outcomes directly.

Who benefits most from language control —newcomers, controller users, or neurodiverse players?

Newcomers, neurodiverse and non-core players of the genre benefit most with language control, as it provides low barriers to entry to enjoying the limitless entertainment value of deep mechanics strategy games like Arena Tactics.

The language control also allows core strategy players an alternate game mode to battle test their decks in quick games and engage in economy mechanics that allow them to maximize their resource gathering to enhance their goals in the traditional game mode.

What are the key supervision signals you capture (command → plan → micro-actions → outcome) to improve future inference?

Our primary objective is to produce rights-clean, structured gameplay telemetry at scale. So we capture high-fidelity, temporally aligned action-state data. Every action, from a move, using an ability, casting a card, and even ending a turn, is all valuable action data, when paired with the resulting state, allows us to improve the performance of the AI but also provides valuable insights for game design.

Arunan Sri
Founder, Creative Director and CEO
ReBlink

THE BGA MAGAZINE: A RESOURCE FOR WEB3 GAMING

The BGA is a place to find features on the latest developments in blockchain gaming. Pooling from the wealth of expertise across the web3 gaming ecosystem, this is a hub of shared knowledge, advancements, and the coolest web3 games in the space.
You can find all the latest editions on our website via the QR code. -------->

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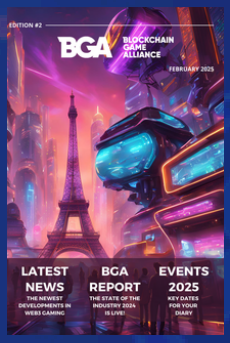

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GET INVOLVED

Blockchain gaming empowers players, spurs creativity, and fosters growing and vibrant communities. The BGA's mission is to drive the adoption of blockchain technologies to the wider gaming industry and unlock new capabilities in games that were not possible before. By joining the BGA, members can gain access to:

- Industry introductions
- Educational and networking opportunities
- BGA panel invitations
- Invites to BGA-organized events
- Access to exclusive members only Discord and Telegram
- Listing in the BGA members directory
- Speaking opportunities
- BGA voting rights

BGA members will set the standard for best practices in blockchain gaming and be a part of a collaborative and supportive environment with peers. With a network of over 500 members, members can be a part of large-scale events such as Play the Game, Demo Days, and other panels, which creates opportunities for visibility, partnerships, and building relationships.

Visit the BGA website to learn more about the Alliance's initiatives and the different tiers of sponsorships. Updates are also available on the BGA X and LinkedIn pages.

JOIN THE BGA COMMUNITY

WHAT THE BGA IS

The Blockchain Game Alliance helps entrepreneurs navigate and apply blockchain technologies to build viable, gamified products and digital economies

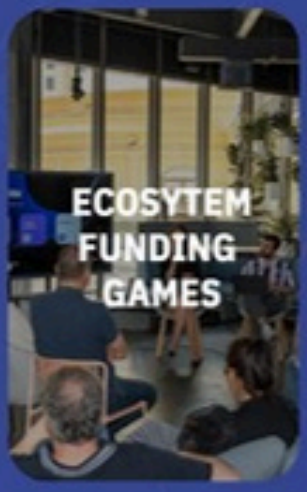
WHAT YOU GET

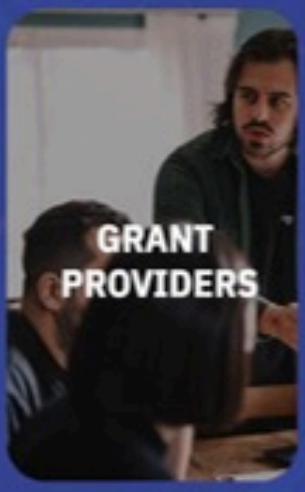
Access Visibility Growth Influence

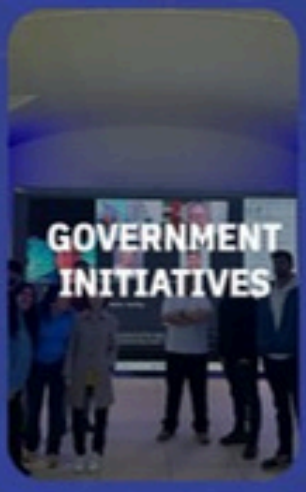
WHO IT'S FOR

Game studios • Tech providers • Chains & infra ecosystems • Payments / Stablecoins / Wallets • Marketplaces & Asset infrastructure • Compliance / Legal / Advisory teams • Investors / Accelerators

OUR IMPACT WITH PARTNERS







BGA IN 2025

5
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