



YouGov[®]

GAME-CHANGERS:

The power of gaming influencers



PART 3:

The value of gaming influencers to marketers

Introduction

Streamers and gaming influencers around the globe have audiences of loyal followers ranging from tens to tens of millions. These fans are not only engaging with live streamers and gaming personalities to help improve their gaming skills, but they also serve as a valued source of entertainment and information both related to, and outside of gaming.

Whilst the size of their fan bases varies drastically from one influencer to the next, there is an underlying current to the data surrounding gaming personalities: their ability to create deep connections with their followers. This, in turn, makes them desirable allies for brands to partner with. The sense of connection and community between gaming influencers and their fans presents valuable partnership opportunities for brands looking to tap into a loyal and engaged audience.

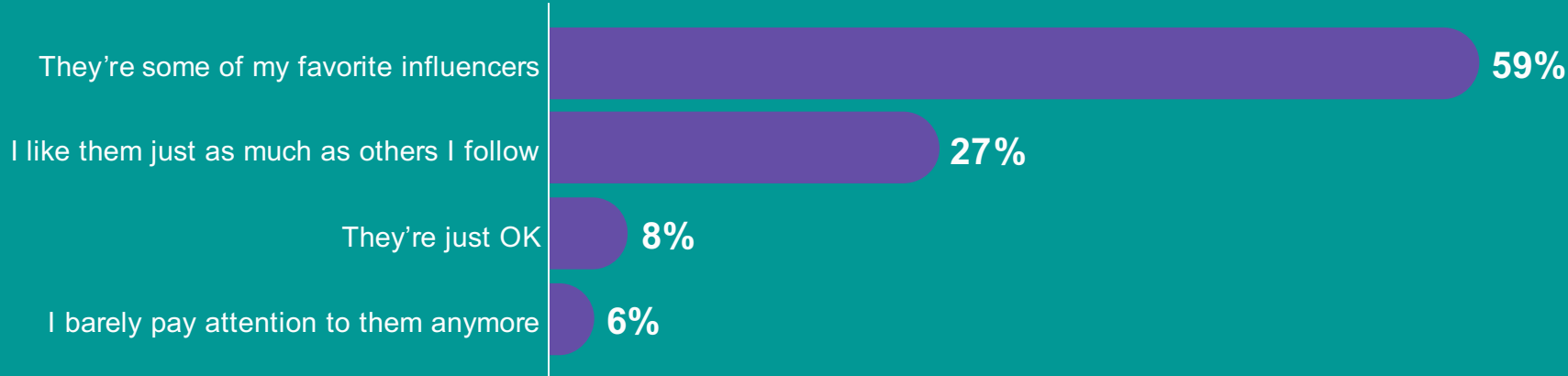
In this report (Part 3 of our three-part series), we explore why millions of people around the world choose to follow gaming influencers, what makes them appealing and trustworthy, and how brands can identify successful partnerships in this space.

This report series combines syndicated YouGov data with deep-dive custom research covering 17 international markets. [See the full methodology here.](#)

Power of Appeal

Perceptions of gaming influencers followed - UK and US gaming influencer followers

YouGov®



“Watching an influencer engage with games and viewers creates a sense of community with gaming as a shared interest.”

US Gaming Influencer Follower

Why do fans follow gaming influencers?

In the [first part of our report series](#), we revealed that almost one in ten adults globally follow a gaming influencer. Gaming influencers attract a higher proportion of the 18-24 Gen Z cohort than followers of any other type of influencer, and are also the influencer type of choice among males, and especially males aged 18-34. But what is it about gaming influencers that makes them so alluring to younger generations?

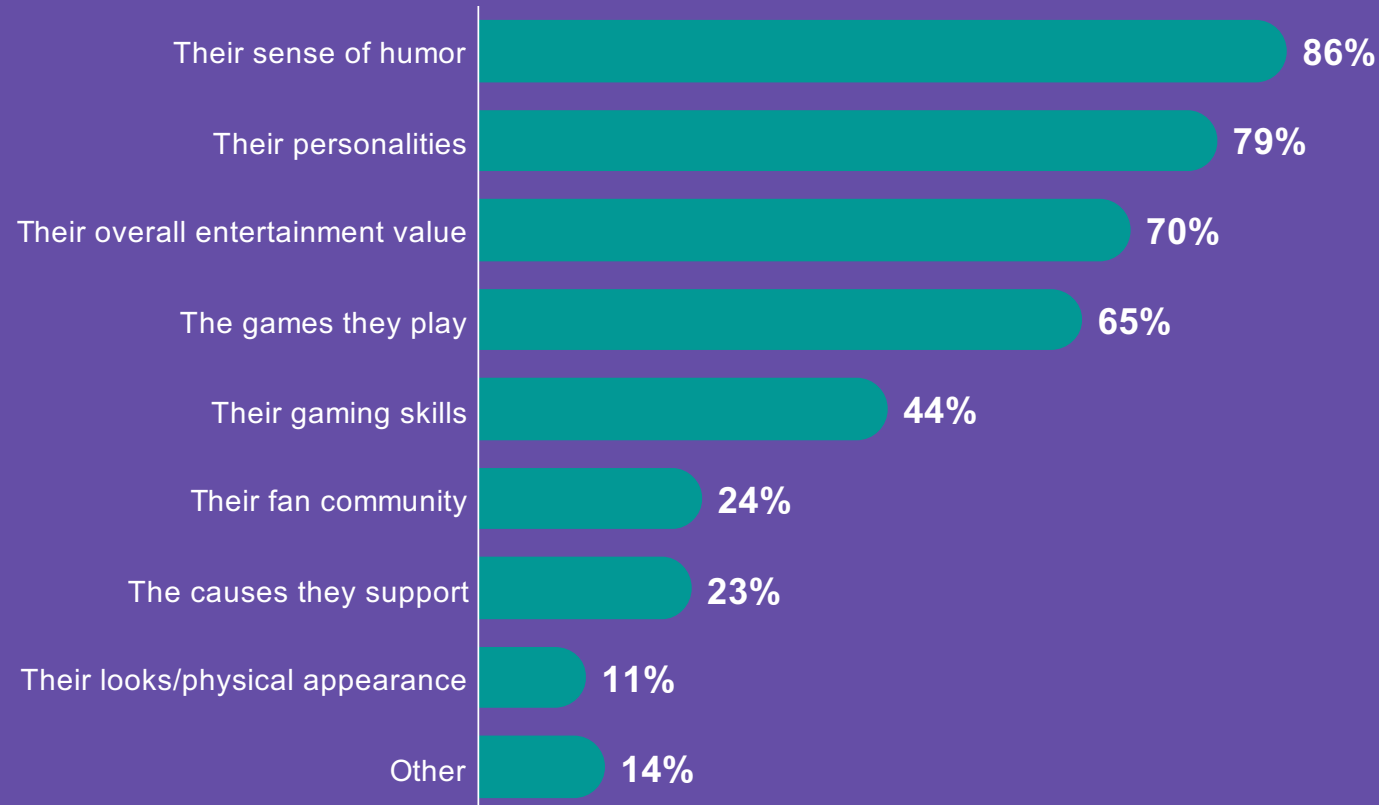
Gaming influencers attract a very loyal and distinctive fan base. [Part 1](#) of this three-part series revealed that a higher proportion of gaming influencer followers across the world ‘do not’ follow any other influencer type, than followers of influencers in any other category.

In [Part 2](#), results from a YouGov Chat poll revealed that over 9 in ten 13-40-year-old gaming influencer followers in UK and US would follow their favorite gaming personality to a new channel if they decided to move. In the same poll, a substantial six in ten who follow gaming influencers (59%) indicate these personalities rank as favorites across the influencer types they follow.

This high level of appeal is significant: the stronger the connection between influencer and audience, the more likely fans are to develop a favorable opinion of the influencer and the content they create. This becomes an important building block for developing the trust that brand partnerships are often centered around.

The Humor Effect

What do you like about the gaming influencers you follow? - UK and US gaming influencer followers



“Gaming influencer video content can be funny to watch, seeing a game played at a higher skill level than my own can be interesting too”

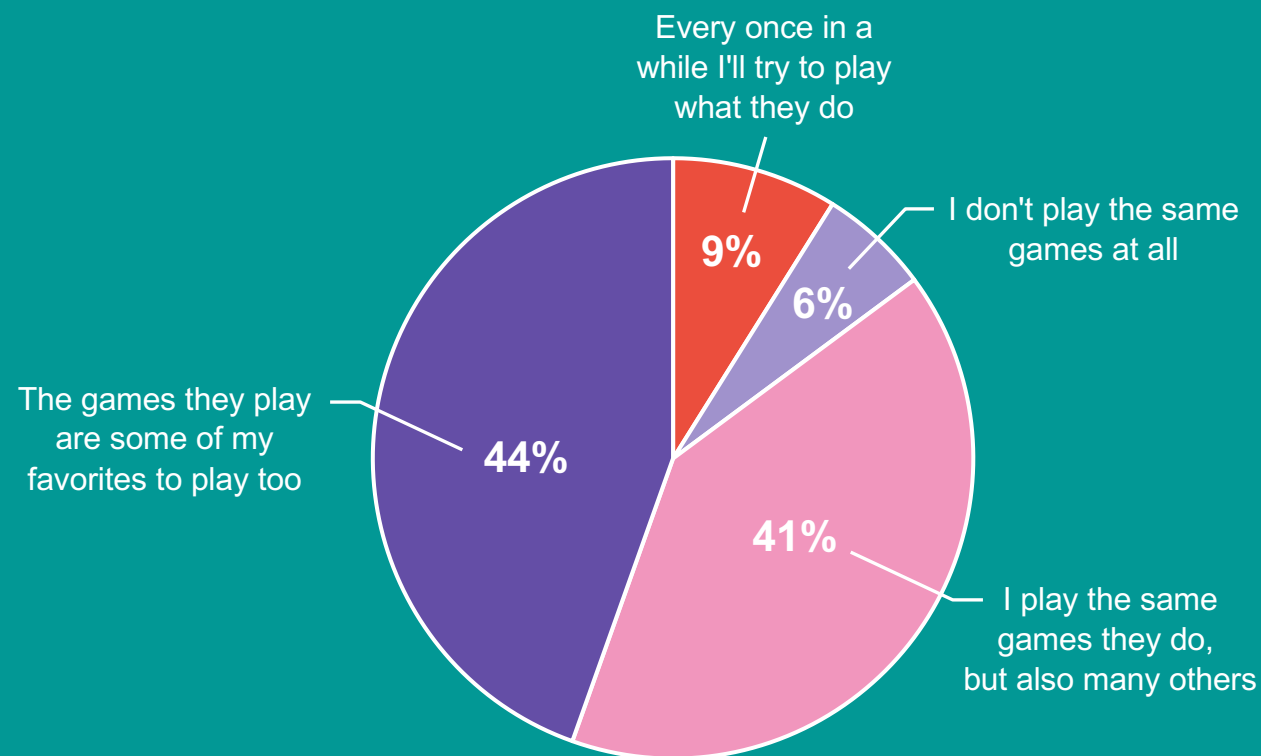
US Gaming Influencer Follower

Whilst the shared interest in gaming is a key ingredient in the glue that binds gaming influencer fans together, there are other attributes that attract audiences to these personalities – in some cases, even more than the games they are playing. In fact, it’s the additional characteristics of humor, entertainment, and their individual personalities that attract followers, and helps create a connection with their favorite gaming influencers.

Almost 9 in ten (86%) 13-40-year-old gaming influencer followers in UK and US identified ‘sense of humor’ as an appealing attribute for gaming influencers, leading all other qualities they like about their favorite personalities. Brands, take note – being able to laugh with an influencer’s audience (and, often, being laughed at BY them, too!) is essential to integrating seamlessly into this community.

Also noteworthy is that an influencer’s gaming skills are less connected to their appeal to fans (44%) vs. their personality

(79%), ability to entertain (70%), or even the specific game titles they play (65%). This in particular is an important distinction vs. fans of esports (competitive, professional video gaming), who are largely driven to watch competitions so they can observe the highest level of gameplay. For gaming influencer fans, being entertained is much more important than being wowed by a player’s skills – audiences are attracted by connection **to** the personality, not necessarily aspiration **to be** them.



What's in a game?

Whilst humor and personality keep fans coming back, it's commonly the games these influencers play that initially attract followers to notice and engage with them. Although nearly all followers personally play the same game titles played by their favorite influencers to some degree,

their level of commitment to these is variable. Nearly half indicate they play the same games as their idols because they are their favorite games (44%), but almost the same proportion suggest these games are just part of a broader set of titles they personally play.

The value of trust



When partnership marketing is executed effectively, fans' trust in an influencer transfers to the brands they partner with, ultimately influencing an audience's purchasing decisions. YouGov data shows that 59% of influencer followers across 17 markets surveyed trust the brand recommendations and advice given by influencers. This is even higher among those following gaming influencers, increasing to 66% - suggesting that, on average, gaming personalities offer more potential upside for brands vs. the average global influencer.

Of note, levels of trust vary substantially by market. In Great Britain for example, 48% of gaming influencer followers trust influencer recommendations, the same as across influencers as a whole. In contrast, gaming personality followers are much more likely to trust influencers in the US vs. the broader influencer audience. And, generally speaking, audiences are more open to influencer recommendations in APAC, and less open in Europe.

Trust in influencers by country % completely/somewhat trust influencers

COUNTRY	ANY INFLUENCER FOLLOWERS	GAMING INFLUENCER FOLLOWERS
Global total	59%	66%
India	80%	91%
UAE	76%	85%
Indonesia	77%	78%
Singapore	70%	77%
US	60%	76%
Hong Kong	58%	67%
Australia	62%	61%
Spain	52%	60%
Italy	45%	58%
Mexico	56%	53%
China	47%	52%
France	35%	51%
Poland	49%	50%
Great Britain	48%	48%
Denmark	37%	45%
Germany	44%	43%
Sweden	34%	41%

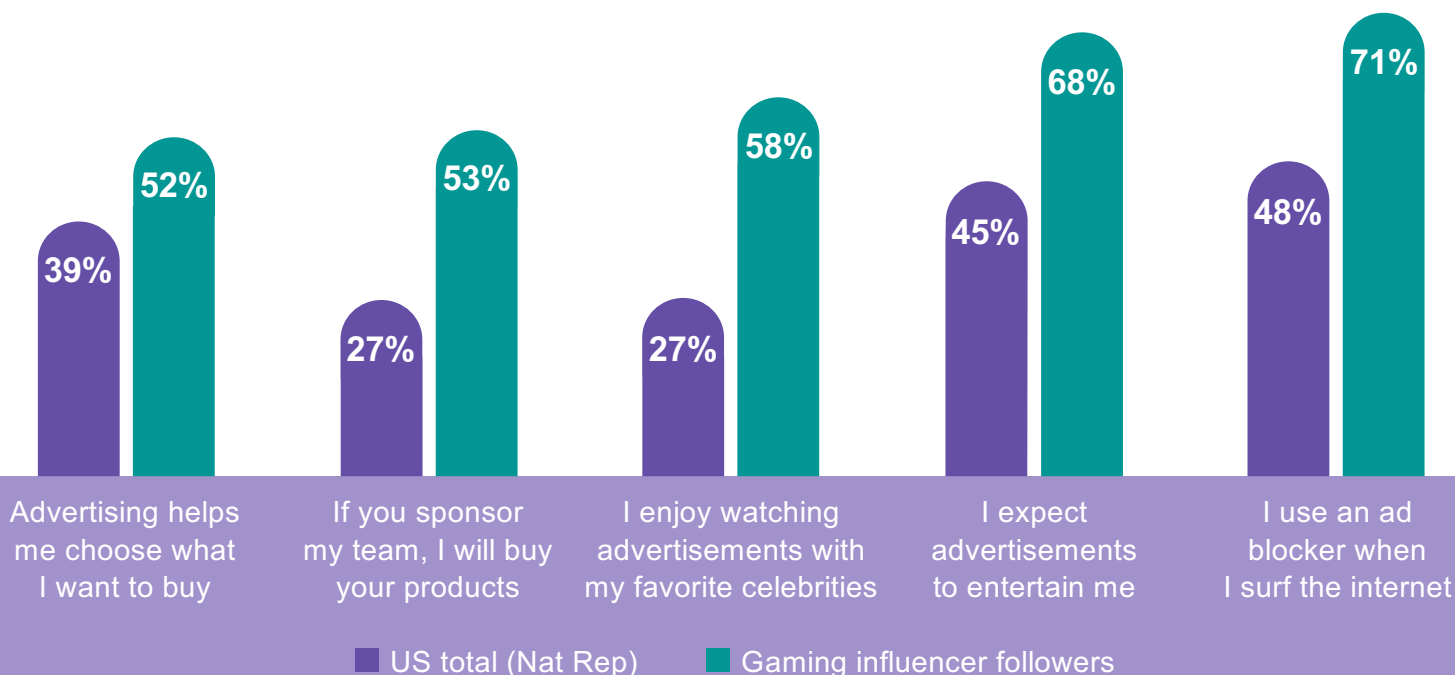
Reach done right

YouGov Profiles data shows that gaming influencer followers are reliant on advertising to make purchase decisions – in the US, 52% indicate this is the case, vs. only 39% among the broader population. However, it is becoming increasingly more difficult to reach these consumers via traditional advertisements, especially online – 7 in 10 claim to use an ad blocker whilst surfing the internet.

So, how can marketers still get their message to this audience? Sponsored posts, in-stream mentions, and product placement are just a few integrated marketing techniques that have effectively helped brands to reach especially younger demographics via gaming influencers. For influencers connected to esports team organizations, team loyalty can especially pay dividends – gaming influencer followers are nearly twice as likely to agree that 'If you sponsor my team, I will buy your products,' than the US population as a whole.

With so much content at their fingertips, brand integrations have another hurdle to clear with the gaming influencer crowd – being entertaining. In fact, 68% expect advertisements to entertain them (vs. 45% of the general population). The good news? As indicated earlier in this paper, gaming influencers are high on the entertainment value scale for this audience, and the majority of this group enjoys advertisements that feature their favorite celebrities.

US attitudes towards advertising and sponsorship



Source of information about new games amongst 18-34 year olds in Brazil



“Gaming influencer videos are... better than news outlets for reviews and footage”

US Gaming Influencer Follower

Back to basics: Game marketing 101

Whilst much attention has been paid to how non-endemic brands (those not native to the gaming space) can leverage gaming influencers in their marketing campaigns, these personalities also serve as an important mouthpiece for the gaming industry itself. In fact, the original “influencer” role gaming personalities played was as grassroots marketers for new game releases – and this continues to be a key way they engage their audiences today.

Using Brazil as an example, gaming personalities are now the top source of information for new video games among 18–34-year-olds, surpassing established gaming websites, store browsing (brick & mortar or online), and word of mouth.

Brand benefits











As we have seen earlier, gaming influencers who are active on gaming channels such as Twitch and YouTube Gaming create a strong sense of connection with their fanbase.

They earn high levels of trust and are seen as valuable sources of information. With a strong foothold amongst the Gen Z cohort, males, and males aged 18-34 they are an alluring group for brand marketers targeting key brands in categories of appeal to these demographics. So which brands and categories are best positioned to connect with these fans via gaming content, and how can they successfully activate in this space?

Based on analysis of Twitch Chat text, one of the most talked about brand categories on the platform is Food and Beverages, with G FUEL, Pepsi and Doritos registering the top mentions in Twitch Chat globally over the past year.



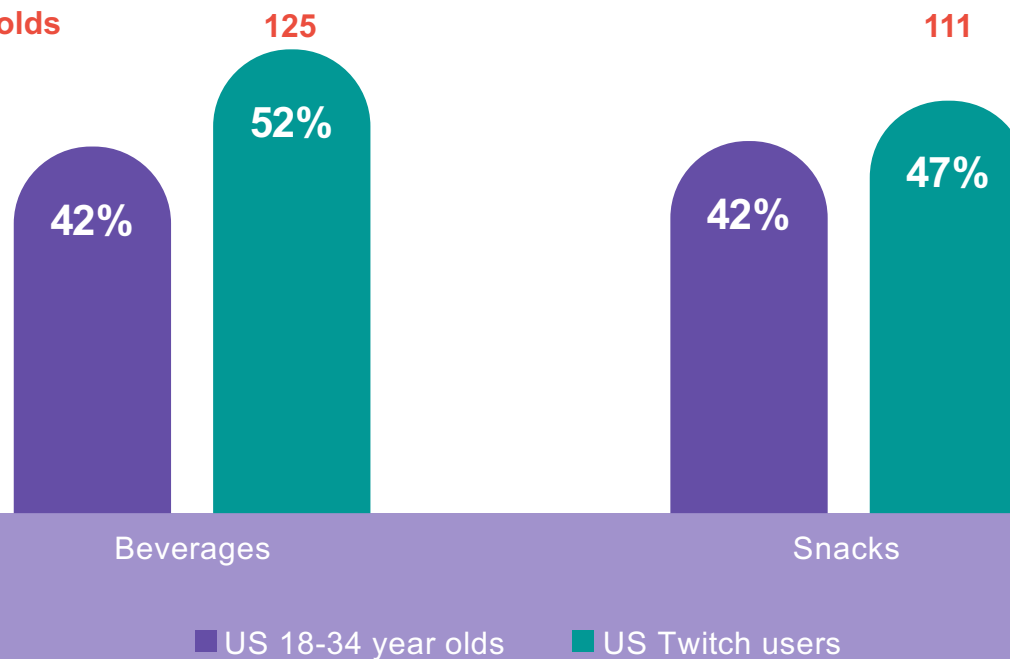
TOP 10 FOOD/BEVERAGE BRANDS MENTIONED IN TWITCH CHAT GLOBALLY (SEPTEMBER 2020 – AUGUST 2021)

#	BRANDS		MENTIONS
1		G FUEL	4.56M
2		Pepsi	2.43M
3		Doritos	2.35M
4		Coca-Cola	1.87M
5		Nutella	1.79M
6		Sprite	1.75M
7		Oreo	1.60M
8		Fanta	1.58M
9		Red Bull	1.55M
10		Cheetos	1.14M

This is no coincidence, as YouGov Profiles data shows that Twitch users in the US are more likely than general 18-34-year-olds to purchase both beverages (52% vs. 42%) and snack foods (47% vs. 42%) in the next 30 days. With such high penetration rates among this audience, brand mentions connected to advertisements or sponsorships appearing during live streams are just as common as viewer-driven conversations spurring from organic mentions, streamers eating snacks in-stream, etc.

Likelihood to buy in the next 30 days in US (% very likely)

Twitch users indexed against 18-34 year olds



Category alignment

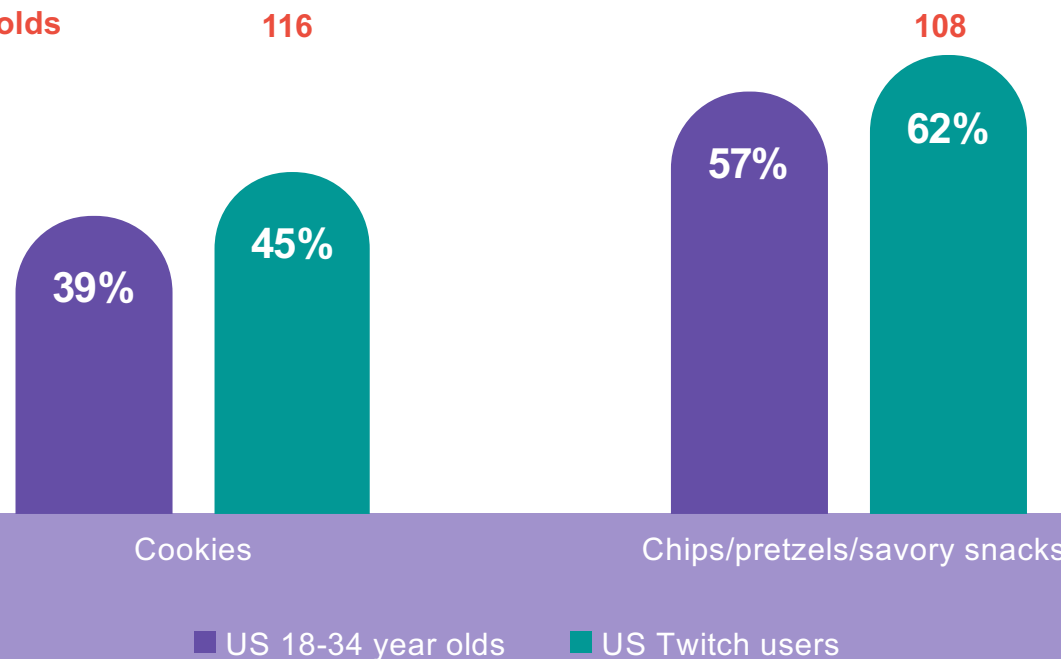


Whilst certain brand categories have natural alignments with the Gen Z and millennial-heavy game streaming audiences, category acceptance does not necessarily predict an activation's likelihood of success. What's more predictive? Nuanced, brand-level data – next, we examine how a brand can use data to understand its opportunity with gaming influencer fans.

Focusing specifically on the snacks appearing in the top-mentioned brands in Twitch Chat, a macro-to-micro data review can help to uncover important insights that can improve the success rate of a gaming influencer activation.

US weekly consumers (Consume at least 1x/week)

Twitch users indexed against 18-34 year olds



At a broad category level, YouGov Profiles data shows that Twitch users are 8% more likely than general 18-34-year-olds to consume savory snacks (chips, pretzels, etc.) at least weekly, with over 60% doing so. For cookies, the over-index of Twitch users is more significant, at 116. This suggests that whilst Twitch can be a successful platform for advertising or sponsoring either category, there may be more efficiency for a cookie brand vs. other 18-34 targeted media outlets.

Data-driven brand strategy

Establishing brand KPIs



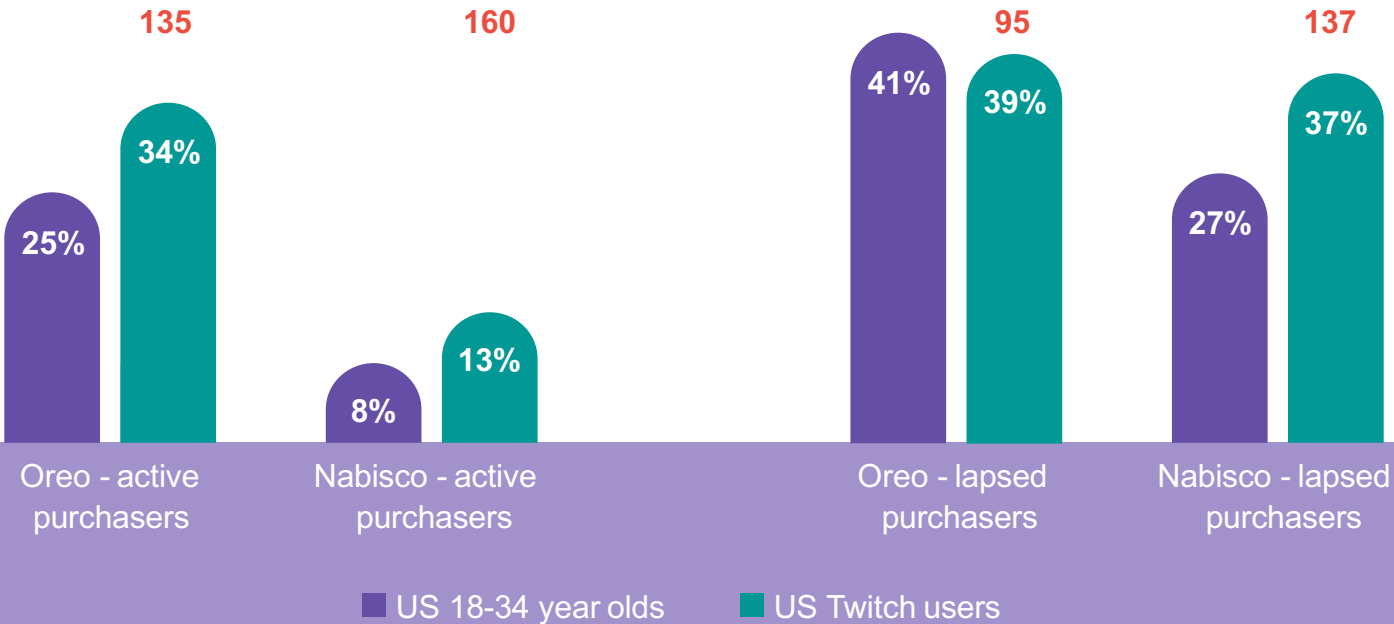
However, not all cookie brands may have the same success rate activating alongside Twitch streamers, nor will they have the same objectives with their campaigns on the platform. By way of example, we can compare one of the top-mentioned brands, Oreo, to their competitor Nabisco.

Looking at current and historical purchase behaviors from YouGov Profiles, 34% of US Twitch users are current purchasers of Oreos (past 30 days), 35% higher than general 18–34-year-olds, and more than twice the rate of competitor, Nabisco. Furthermore, another 39% of Twitch users have previously purchased the Oreo brand, but have not in the past month - encouragingly, this is lower than those aged 18–34, showing Twitch users are more actively engaging with the Oreo brand than their demographic peers. For Nabisco, 3 in 4 Twitch users who have ever purchased the brand are lapsed.

The implications of this data are important – for Oreo, a more actively engaged user base on Twitch means the key focus for the brand on the platform should be keeping Oreo products top of mind with gaming influencer followers, and introducing this audience to new line extensions, such as seasonal flavors, limited-edition offerings, etc. For Nabisco, the high lapsed rate suggests Twitch may be a good platform for both reminding the streaming audience of the brand, as well as reassuring the audience about the quality of their products to entice these gaming fans back into the brand’s fold.

Oreo and Nabisco US purchasers

Twitch users indexed against 18-34 year olds



% of Twitch users lapsed

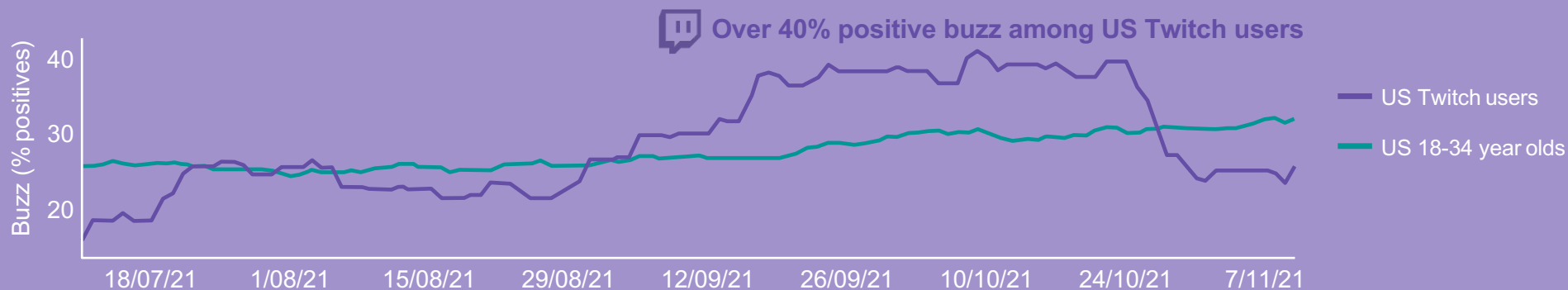




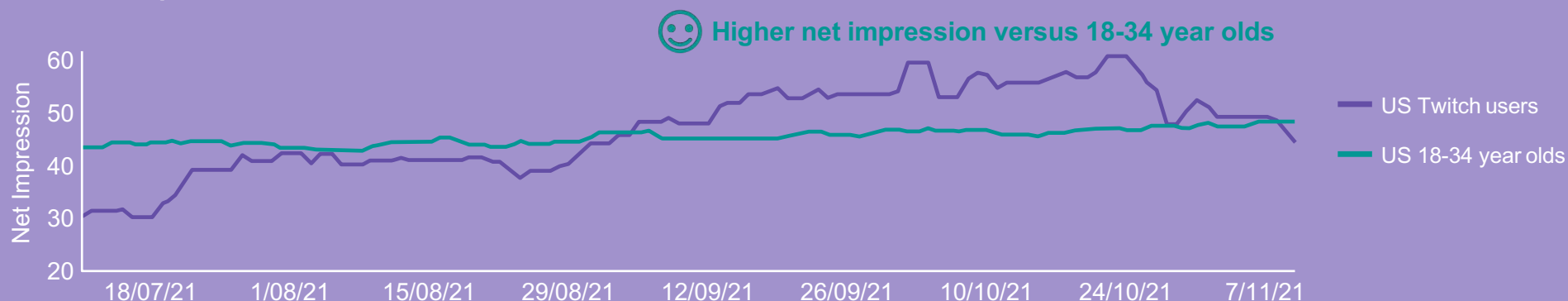
Next, for a brand like Oreo that has succeeded in penetrating fan conversation on Twitch in a significant way, we can use YouGov BrandIndex data to understand the impact this has on the brand across the consumer purchase funnel.

In September 2021, a limited-edition Pokémon x Oreo collaboration saw tremendous success, leading to a high-priced black market for rare Pokémon Oreo designs that was frequently discussed on Twitch by streamers and audiences alike.

Oreo Buzz (% positives)



Oreo Net Impression

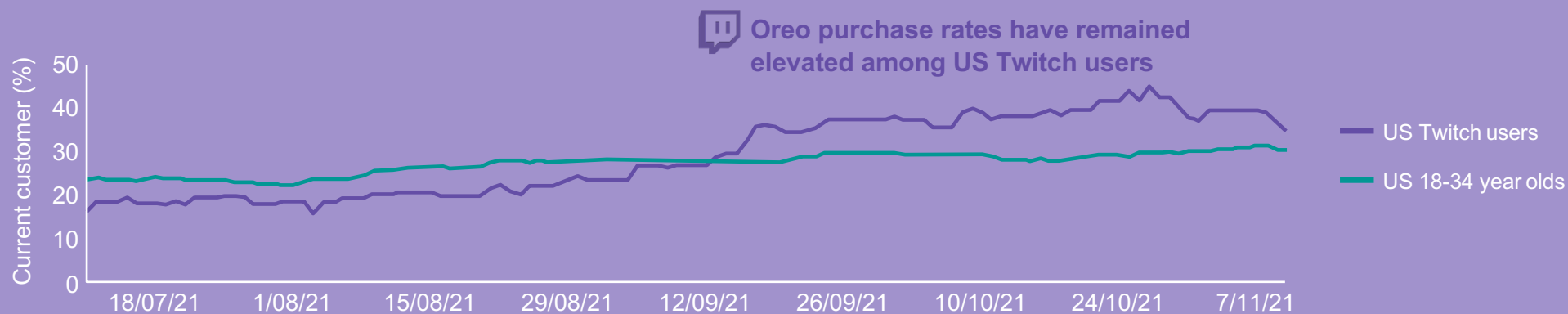


The result for Oreo as a brand was swift and measurable. Over 40% of Twitch users reported hearing something positive about the Oreo brand in the time period directly following the Pokémon collaboration; this was significantly

higher positive buzz versus 18–34-year-olds over the same period. This directly resulted in rising positive impressions of the brand versus the Twitch audience in the months of September and October.

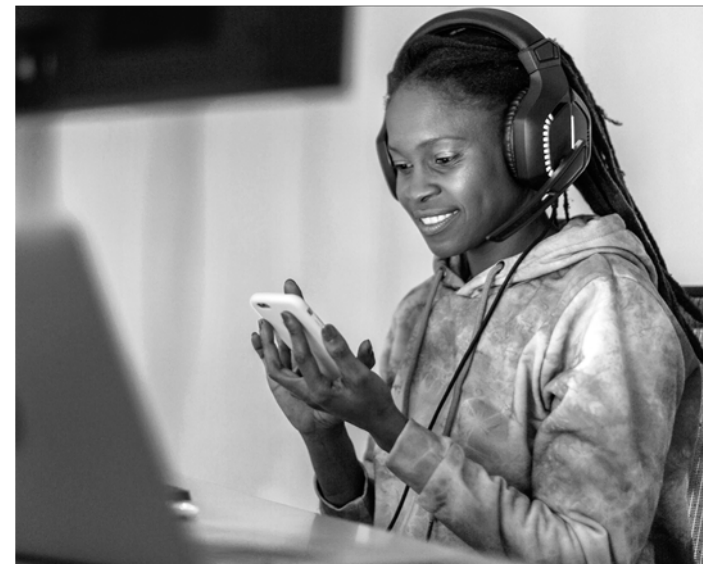
Over the PAST TWO WEEKS, have you heard something POSITIVE about the Oreo brand? (whether in the news, through advertising, or talking to friends and family)? And do you have an overall POSITIVE or NEGATIVE impression of the Oreo brand?

Oreo Current Customers (% purchased in past 30 days)



For a fast purchase cycle category like snack foods, a one-time activation can also result in immediate purchase impact. In the case of Oreo, this was exactly the outcome. Among Twitch users, purchases of the Oreo brand jumped at a time when rates among 18–34-year-olds remained stable. Encouragingly, unlike the buzz and impression

impacts that declined within ~2 months of the Pokémon collaboration, Oreo purchase rates have remained above average among US Twitch users. This is, of course, the ultimate sign of success for a brand activation – changing consumers' ongoing purchase habits.





CHIPOTLE CHALLENGER SERIES

CASE STUDY: Chipotle challenges gamers – and everyone wins

In 2021, Chipotle continued its investments in the gaming space by partnering with influencers across a range of organizations and activation types. This multi-pronged approach to working with gaming personalities made a notable impact on the most important performance indicator for any brand – sales.

For the March 11 US launch of Chipotle's Hand-Crafted Quesadilla, the brand ran a week-long campaign with some of the gaming industry's top influencers, including Nadeshot, TimtheTatman, StarSmitten, and Myth. The alignment with gaming personalities was highly strategic given the

quesadilla's availability only via online or app ordering – the campaign reached a digital-first audience in their native environment, giving away free quesadilla codes during sponsored live streams.



Confirming the validity of this approach, YouGov Profiles data shows that 72% of gaming content streamers have used an online/app-based food delivery service in the past 3 months, vs. 67% of 18–34-year-olds and only 51% of the broader US adult population.



ONLINE ONLY

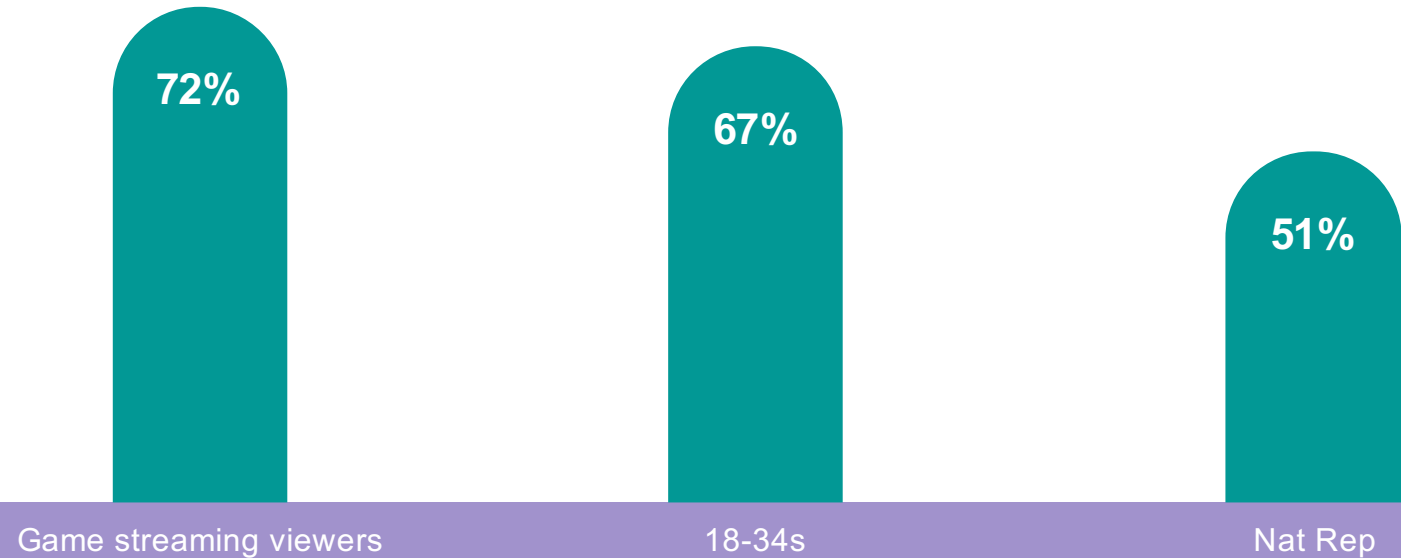
TIM THE TAT MAN BRISKET BURRITO

\$10.10 1220 cal.

Smoked Brisket, White Rice, Fresh Tomato Salsa,
Roasted Chili-Corn Salsa, Sour Cream, Cheese

ADD TO BAG

Used 1+ food delivery services in past 3 months - US

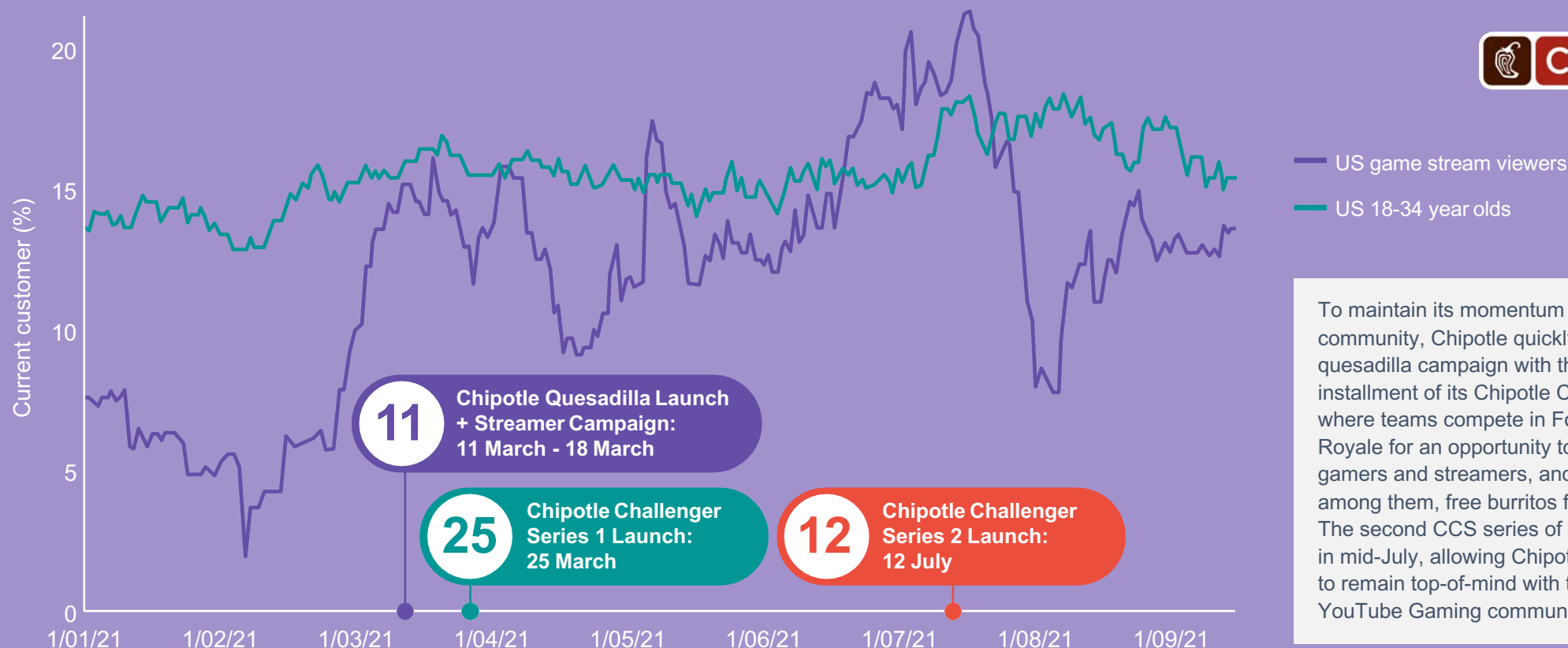


“The strategy around the Quesadilla launch was to leverage year long-partners including, TimTheTatMan, 100 Thieves, and Bugha, combined with content creators across diverse communities in order to cast a wide net in gaming. This creative approach allowed Chipotle to introduce the Quesadilla launch in a holistic way with gamers, knowing each game and creator has their own passionate community.”

Chris Mann, SVP, REV/XP (agency for Chipotle activation)



Chipotle Current Customers (% purchased in past 30 days)



To maintain its momentum with the gaming community, Chipotle quickly followed the quesadilla campaign with the Spring 2021 installment of its Chipotle Challenger Series, where teams compete in Fortnite Battle Royale for an opportunity to play against top gamers and streamers, and win prizes – among them, free burritos for a year. The second CCS series of the year began in mid-July, allowing Chipotle an opportunity to remain top-of-mind with the Twitch and YouTube Gaming communities.

Using YouGov BrandIndex data in the US to measure the impact of Chipotle's investment with gaming influencer activations this year, it's clear their strategy paid off. Prior to the launch of the quesadilla campaign, game stream viewers in the US were significantly less likely to have purchased food or drink from Chipotle in the past month than the average American 18–34-year-old.

However, coinciding with the stretch of the campaign, purchase rates among streaming viewers jumped significantly, nearly tripling in less than a month's time, and right-sizing with their 18–34-year-old peer group.

The March 25 launch of the Chipotle Challenger Series allowed Chipotle to maintain high purchase rates among game streamers through early April. As this event's

impact waned, so too did sales among the gaming content audience. However, shortly after the July 12 launch of the second CCS in 2021, Chipotle purchase rates reached an annual high of nearly 20% of game streaming viewers, outpacing broader 18–34-year-old consumers. Bringing the brand back in front of gaming content fans allowed Chipotle to build on the success they had already achieved earlier in the calendar year.

Summary

The ability to reach hard to target demographics in an authentic way makes gaming influencers powerful allies for brands to partner with. Not only do gaming influencers attract a very loyal and unique audience, but they also have a stronghold among key demographic groups that often prove hard for brands to connect with using traditional media e.g., Gen Zs, males and specifically young men aged 18-34.

United by their common interests, high levels of engagement and interaction exist between gaming personalities and their fanbases. As a foundation, 94% of gaming influencer followers playing the same games played by their favorite influencers.

However, the broader entertainment value of these personalities keeps their fans coming back for more. In particular, the 'humor effect' is a key attraction of gaming influencers: almost 9 in ten gaming influencer followers identify 'sense of humor' as a point of attraction for gaming influencers. The use of humor in marketing messaging can help brands drive engagement, grab consumer attention, and create longer lasting memories.

Followers of gaming influencers also have strong potential to be persuaded by advertising and sponsorship. For example, more than half of US influencer fans agree 'Advertising helps me choose what I buy,' and 'If you sponsor my team, I will buy your products,' significantly higher than the total US population. This endorses the value of advertising and sponsorship in building brand appeal.

Trust is the bedrock for creating brand appeal. Our YouGov data shows that amongst global influencer followers of any type, 59% trust the brand recommendations and advice given by influencers – and this increases to 66% amongst those who follow gaming influencers. Once fans build a trusted relationship with their gaming personalities, they are more engaged in the content they share and the products and services they represent, which can lead to an increase in awareness, appeal, and ultimately sales for brands that align themselves with gaming influencers.

This is the third and final part of our You Gov series the Power of Gaming Influencers. In Part 1 we revealed the reach of the global gaming landscape. In Part 2 we profiled the gaming influencer fanbase.

[Access the full series here.](#)

ABOUT YOUGOV

YouGov is an international research data and analytics group headquartered in London. Our data-led offering supports and improves a wide spectrum of marketing activities for our customer base that includes media owners, brands and media agencies. We work with some of the world's most recognized brands.

Our line of products and services includes YouGov BrandIndex, YouGov Profiles, YouGov RealTime, YouGov Custom Research, YouGov Crunch and YouGov Direct.

With over 15 million registered panel members in more than 55 countries, YouGov's market research covers GB, the Americas, Mainland Europe, the Middle East, and Asia-Pacific. Our panel members come from all ages, socio-economic groups, and other demographic types – allowing us to create representative samples of whole populations and different sections of society.

For more Gaming & Esports insights, visit yougov.com/gaming-esports
Subscribe to our Gaming & Esports newsletter [here](#)

© 2021 YouGov PLC. All rights reserved. All materials contained herein are protected by copyright laws.

Any storage, reproduction or distribution of such materials, in whole or in part, in any form without the prior written permission of YouGov is prohibited. We make no representations, warranties or guarantees, whether express or implied, that the information is accurate, complete or up to date.

We exclude all implied conditions, warranties, representations or other terms that may apply and we will not be liable to you for any loss or damage, whether in contract, tort (including negligence), breach of statutory duty, or otherwise, even if foreseeable, arising under or in connection with use of or reliance on the information. We do not exclude or limit in anyway our liability to you where it would be unlawful to do so.