



YouGov[®]

GAME-CHANGERS:

The power of gaming influencers



PART 1:

The global reach of gaming influencers



Introduction

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

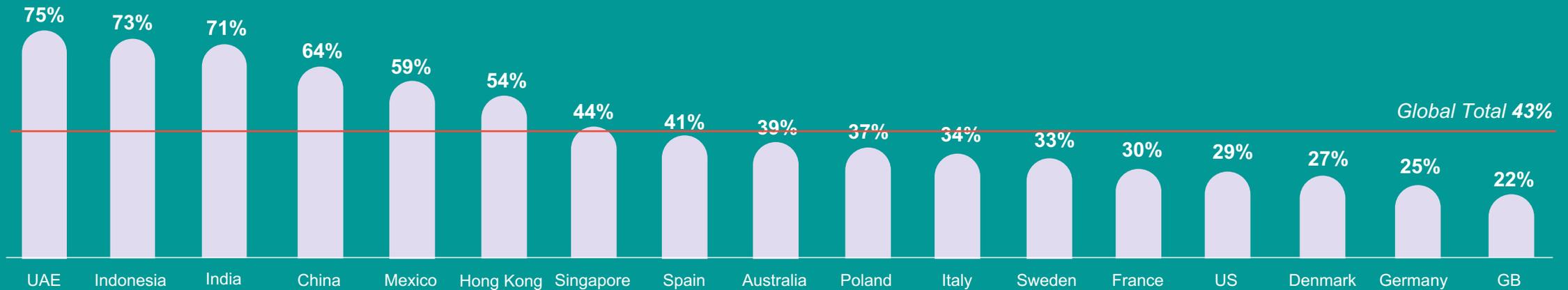
In today's social media age, influencer marketing – individuals or groups with significant numbers of followers on social media who are involved in endorsements and product placements for brands – has proven its potential. Brands of all shapes and sizes are increasing their attention and spend on influencers to promote their products and marketing messages through social channels including YouTube, Instagram, and Twitch.

The global pandemic has fueled the growth of the social media influencer fanbase, and with more time spent at home due to COVID-19 restrictions, this has encouraged the rise of the gaming influencer – influencers primarily known for live streaming or posting videos of themselves playing video games, and/or commenting on video games via social media. Gaming influencers no longer attract niche or fringe audiences, some have loyal followers in the tens of millions. New data from YouGov shows that over four in ten

of the entire global adult population now follow a social media influencer across a range of interests and almost one in ten consumers now follow a gaming influencer, increasing to 17% amongst those aged 18-34, and 23% among men aged 18-34. But how does the size of the gaming influencer sector vary by country? How does this compare to other types of influencers? And will younger generations continue to follow this trend?

This report is Part 1 of a three-part series. Part 1 sizes the gaming influencer global fanbase across 17 international markets and reveals where gaming influencer followers sit within the global influencer sector as a whole. Part 2 digs into the profile and consumer behavior of the gaming influencer audience and unearths what makes them different from those following other influencer types. In Part 3 we explore the value of trust within the influencer sector, and how brands can benefit from these partnerships.

Follow any influencer by country - Nat Rep / Gen Pop 18+



Global reach of the gaming influencer market

Piggybacking on the popularity and pervasiveness of social media platforms, influencer marketing enables brands to reach and engage with millions of consumers at pace.

New data from YouGov shows that almost half (43%) of the global population across 17 international markets surveyed now follow a social media influencer of any type. Although influencer marketing has seen dramatic growth over the last few years, demographic differences, social media usage, and other technological factors translate into varied levels of influencer following across countries.

With one of the highest internet penetrations in the world, UAE has the biggest percentage of influencer followers (75%) across the 17 markets, followed by Indonesia (73%). Looking at other markets, in the US, 29% of consumers follow influencers. In general, countries with older populations have lesser influencer followers, and penetrations of influencer followers in European countries are generally lower than in Asia. For example, in Great Britain, just over a fifth (22%) of the total population follow an influencer, and this is slightly higher in Germany (25%), and France (30%).

NB. Across the 17 countries researched, China, Hong Kong and Indonesia are representative of the online population, India is representative of the urban population and Mexico has an urban bias, all other countries are nationally representative aged 18+. [See the full methodology here.](#)

Types of influencers followed globally



Where do gaming influencers fit in the global influencer landscape?

When we delve into the types of influencers that are followed across the 17 markets surveyed across adults of all ages, YouGov data reveals that food, health, and celebrity influencers have the highest following globally (12% or more), and just under one in ten consumers worldwide follow gaming influencers (9%).



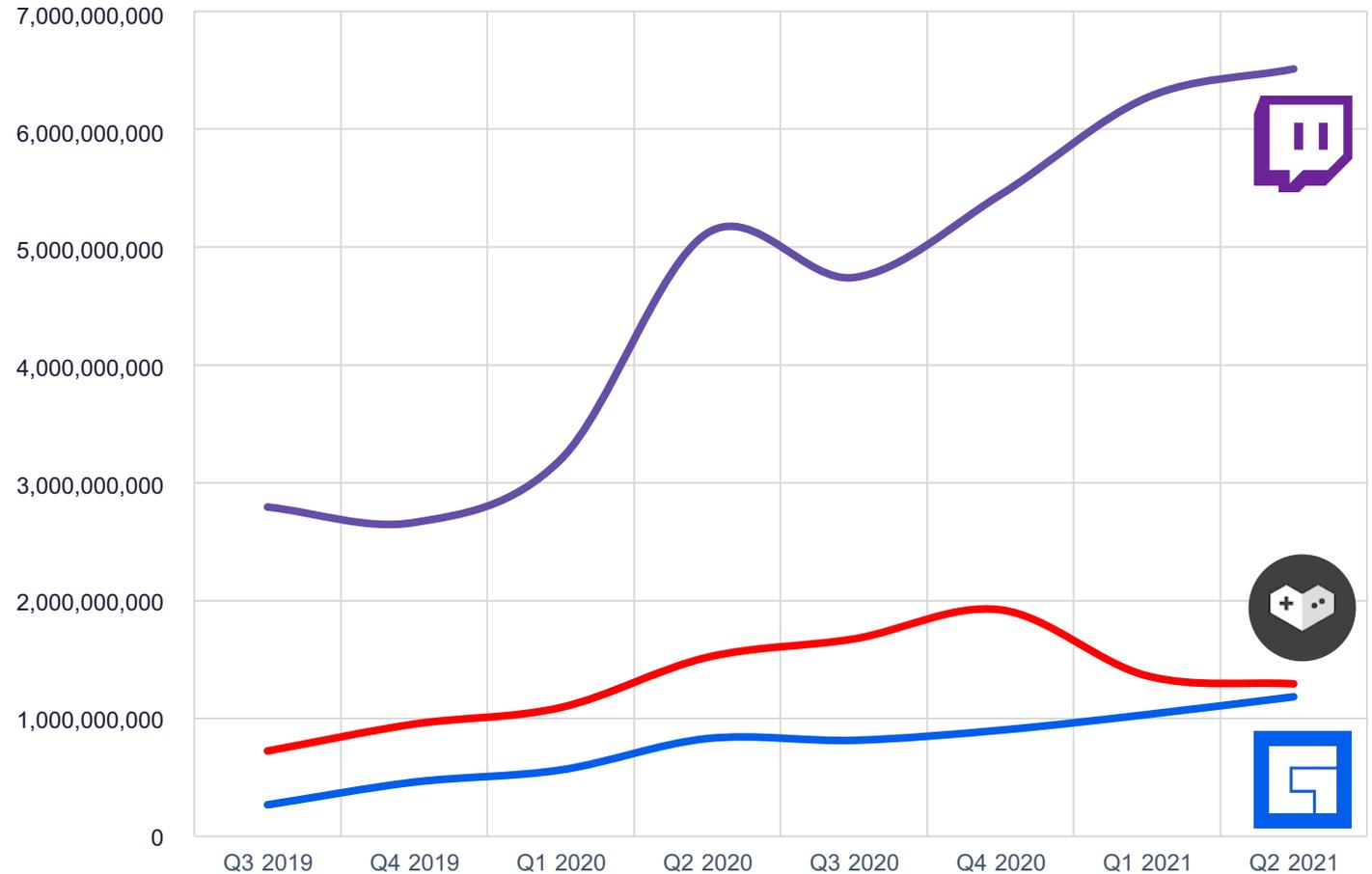
A growing demand for live gaming content



Zooming in on the video games market, gaming influencers have grown in popularity significantly in recent years, with leading personalities reaching audiences of loyal followers in the tens of millions. The growth in demand for gaming content has also driven a significant increase in the number of game streamers who broadcast content, with more and more mid-sized and micro influencers entering the scene: in Q3 2019, for example, 4.3 million channels on Twitch broadcasted live content; in Q2 2021, this number had nearly tripled, reaching 11.4 million channels (source: Stream Hatchet).

Looking across the three major gaming live streaming platforms (outside of China), audiences are consuming content from gaming influencers at a steadily rising pace. Since Q3 2019, the number of hours of live gaming content watched has more than doubled, from 3.8 billion hours to 9.0 billion in Q2 2021. While YouTube Gaming and Facebook Gaming have both seen increases in viewership, Twitch has dominated the gaming live stream market, driving nearly 7 billion viewed hours in Q2 2021 alone.

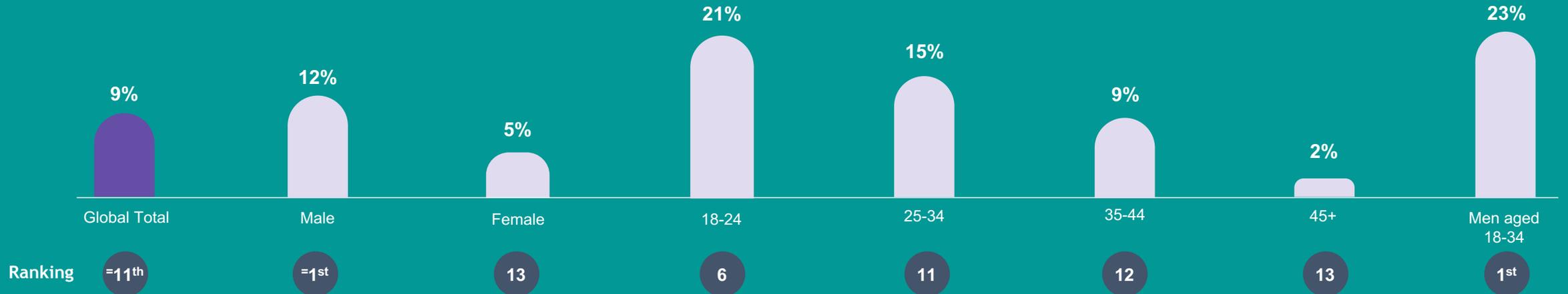
Total hours watched (live): by platform



Source: Stream Hatchet, Q3 2019 – Q2 2021

● Twitch ● YouTube Gaming ● Facebook Gaming

% who follow gaming influencers globally by demographic groups



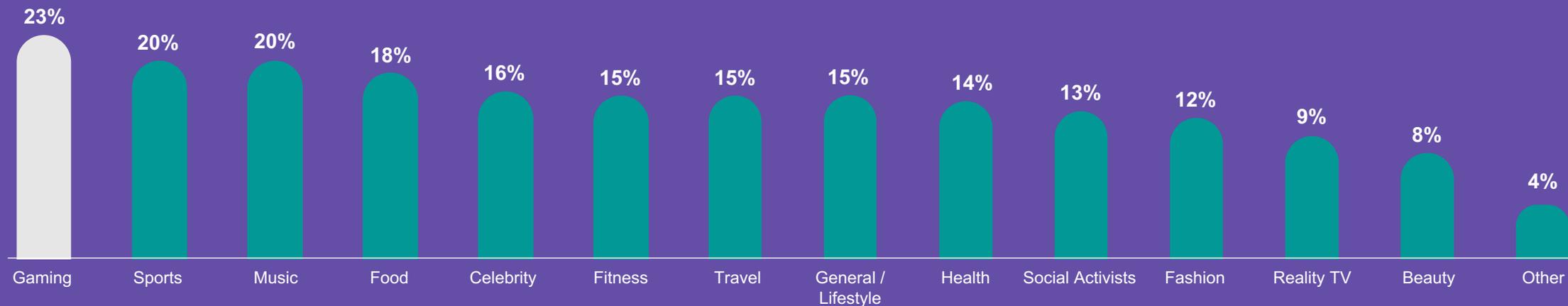
Gaming influencers rank top

AMONGST MEN, GEN Z / MILLENNIAL MALES

When looking at influencer types followed, although gaming influencers rank in joint 11th position globally (alongside social activists), this changes significantly when we look at different demographic groups. Gaming influencers move up the ranking into 6th position globally (21%) when we delve into Gen Zs aged 18-24. Even more notably, gaming influencers are the top influencer group followed by men (12%), on a par with sports, music, and food influencers (all achieving 12%); whilst only 5% of females follow gaming influencers globally.



Types of influencers followed by men aged 18-34 globally



Gaming influencers are number 1

AMONGST MEN
AGED 18-34

Gaming influencers are the most popular type of influencer followed by males aged 18-34, with almost a quarter (23%) of all adults in this demographic segment following gaming personalities. Music and sports influencers are the second most popular influencer types globally, both followed by one in five men aged 18-34.



High popularity of gaming influencers

ACROSS GLOBAL MARKETS



In 12 out of the 17 countries surveyed, the proportion of men aged 18-34 following gaming influencers tops the list of influencer types followed. In addition, gaming influencers rank in the top three in 15 out of 17 international markets, and are more popular than sports influencers in 14 out of 17 countries surveyed among this demographic.



Differences in influencer popularity by country among men aged 18-34

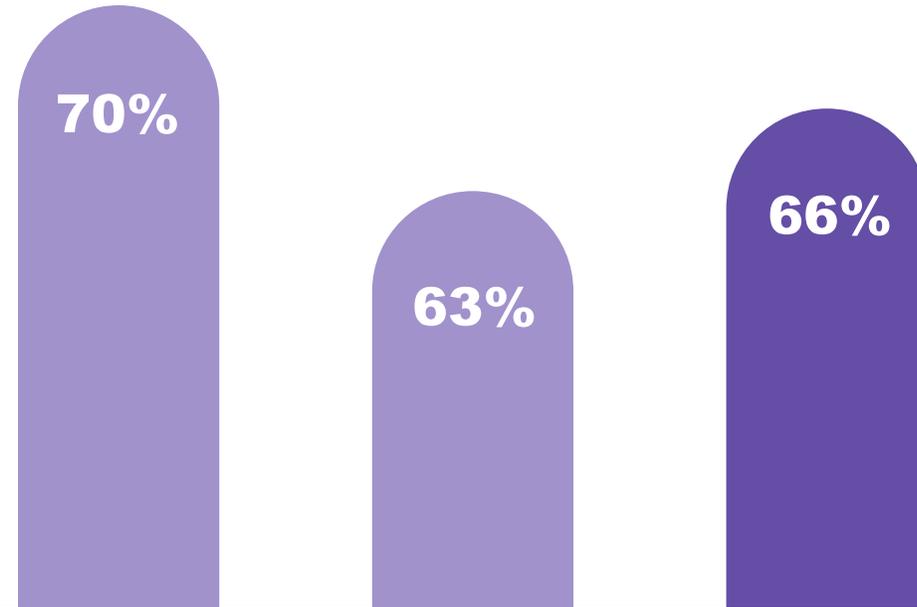
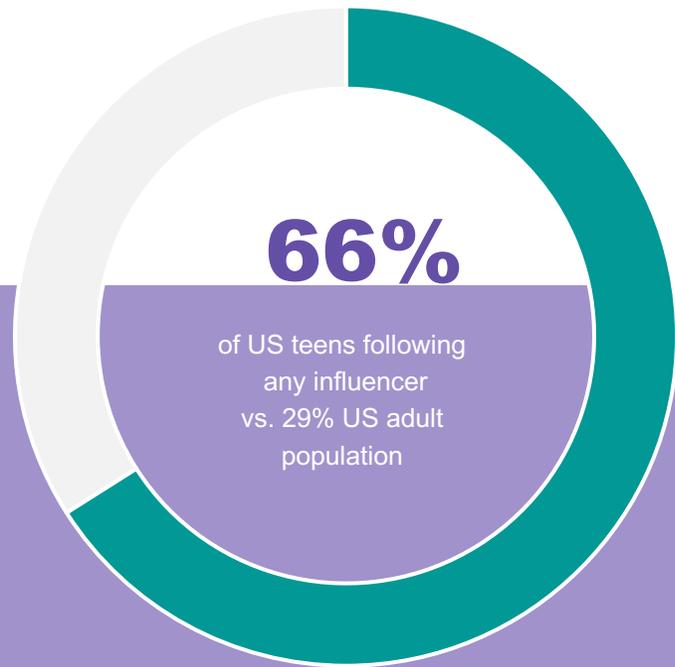
MARKET	TOP INFLUENCER	SECOND INFLUENCER	THIRD INFLUENCER
Great Britain	Gaming (11%)	Sports (10%)	Food (8%)
Germany	Gaming (21%)	Sports (14%)	General / Lifestyle (14%)
France	Music (18%)	Celebrity (16%)	Gaming (15%)
Italy	Gaming (23%)	Music (22%)	Food (21%)
Denmark	Fitness (15%)	Gaming (14%)	Celebrity (12%)
Sweden	Sports (17%)	Health (16%)	Gaming (15%)
Spain	Gaming (28%)	Food (22%)	General / Lifestyle (22%)
Poland	Gaming (22%)	Sports (20%)	General / Lifestyle (19%)
US	Gaming (19%)	Food (18%)	Social Activist (14%)
Mexico	Gaming (29%)	Music (25%)	Sports (23%)
UAE	Sports (30%)	Health (27%)	Music (27%)
India	Health (33%)	Sports (32%)	Fitness (31%)
Australia	Gaming (25%)	Music (24%)	Sports (24%)
China	Gaming (29%)	Food (27%)	Music (20%)
Indonesia	Gaming (36%)	Music (30%)	Sports (27%)
Hong Kong	Gaming (42%)	Food (22%)	General / Lifestyle (22%)
Singapore	Gaming (22%)	Celebrity (21%)	Travel (19%)

Influencers have become

A CENTRAL PART OF US TEENS' LIVES

According to YouGov Teen Profiles data in the US, influencer following is skyrocketing among this younger demographic, with two thirds of US teens (66%) following any influencer (compared to 29% for the US adult population as a whole).

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Follow any influencers



Female US teens

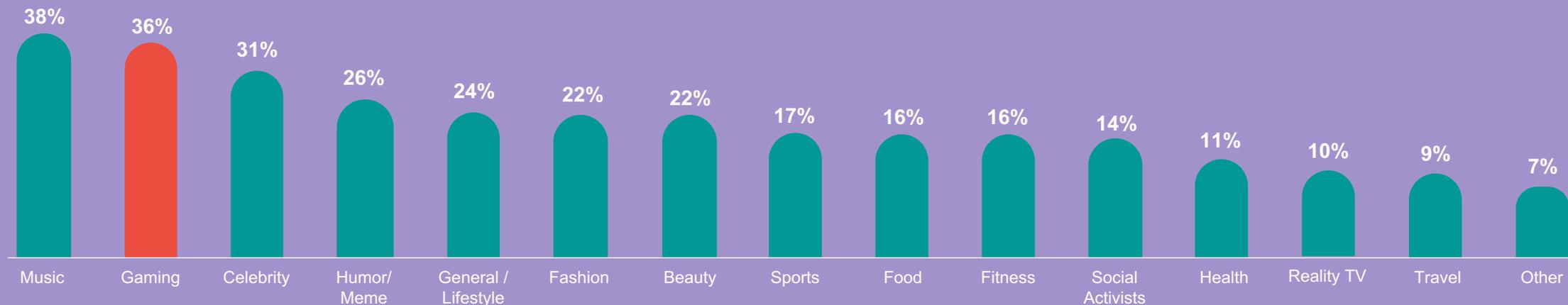


Male US teens



All US teens

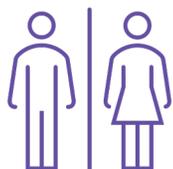
Types of influencers followed by US teens

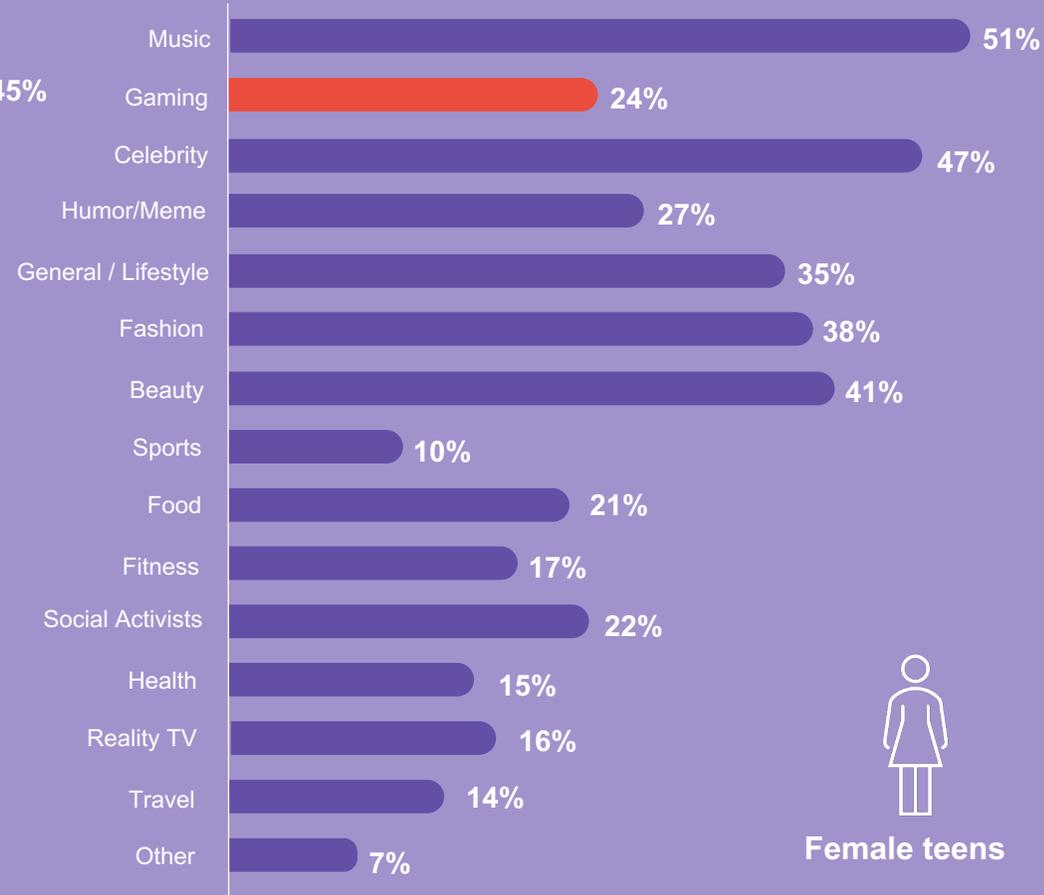
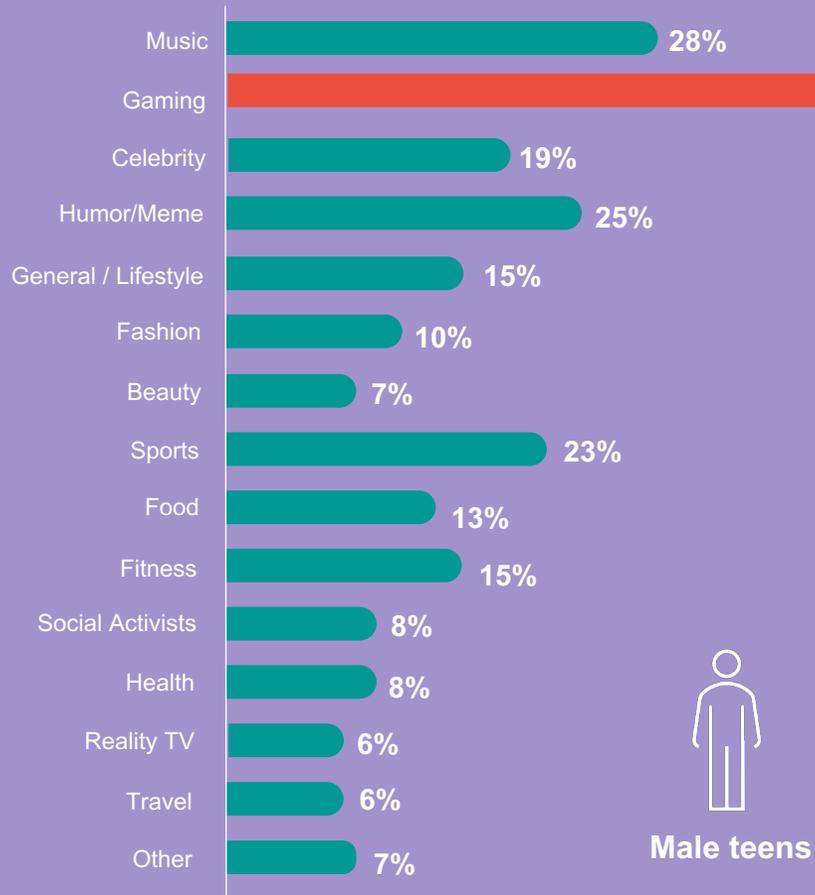


High popularity of gaming influencers

AMONGST US TEENS

Among all US teens, gaming influencers are the second most popular type of influencer (36%) after music influencers (38%). Celebrity influencers are the third most popular influencer type for this younger demographic.





Types of influencers

FOLLOWED BY MALE AND FEMALE US TEENS

Although US female teens are more likely to follow any influencer compared to their male counterparts (70% vs. 63%), there are significant differences when we explore the types of influencer followed by gender.

Gaming influencers are by far the most popular influencer types among young American males, followed by 45% of the US male teen population. On the other hand, music and celebrity influencers are more popular among female young Americans, reaching 51% and 47% of female teens respectively.

Asian markets



HAVE THE LARGEST GAMING INFLUENCER FOLLOWING

YouGov data shows that China and Indonesia have the highest penetrations of gaming influencer followers, representing a fifth of the population in both markets. Gaming influencer followers are less prevalent in Europe with Denmark, Great Britain, and Sweden, all with less than 5% of their respective populations following gaming influencers.

When we compare the proportion of men aged 18-34 to the total populations in each country, penetrations of gaming influencer followers increase across all markets with the most significant uplift in lower penetration markets.

In France for example, three times as many men aged 18-34 follow gaming influencers (15%), compared to 5% of the total population.

Follow gaming influencers by country

COUNTRY	TOTAL POPULATION	MEN AGED 18-34
Global total	9%	23%
China	20%	29%
Indonesia	20%	36%
India	17%	25%
Hong Kong	14%	42%
UAE	13%	15%
Mexico	11%	29%
Australia	8%	25%
Singapore	7%	22%
Spain	6%	28%
Poland	6%	22%
US	6%	19%
Italy	5%	23%
France	5%	15%
Germany	5%	21%
Sweden	4%	15%
Great Britain	4%	11%
Denmark	3%	14%

Gaming influencer following increases

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AMONG FREQUENT GAMERS

The global gaming sector is enormous - YouGov data shows that 68% of adults across the 17 international markets surveyed currently game at least once week. Importantly, frequency of playing video games is on the rise, and this is growing the size of the gaming influencer fan base, since nearly all gaming influencer followers are gamers themselves.

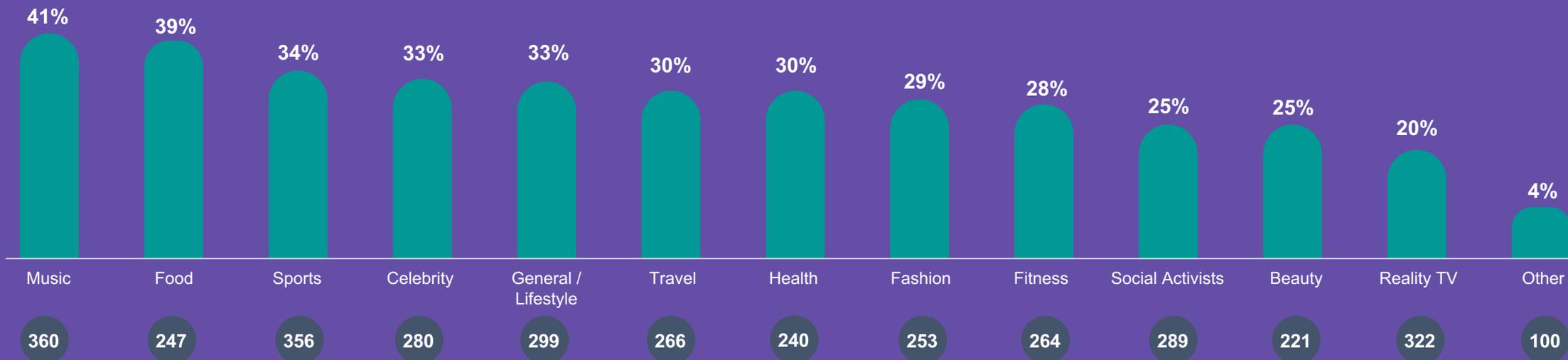
The relationship between gaming frequency, and the size of the influencer sector is clear when we explore the amount of time spent gaming.

For those actively engaged in gaming (playing video games 1+ hours per week), the global proportion who follow gaming influencers increases from 9% overall to 15%, and we see a multiplying effect among heavy gamers (playing video games 11+ hours per week) with double the amount globally (20%) following gaming influencers. Among heavy gamers, the countries with the highest penetration of gaming influencer followers, and consequently most likely to drive the growth of the gaming influencer sector are within Asia.

Follow gaming influencers by country and gaming frequency

COUNTRY	Gamers spending 1+ hour per week playing video games	Heavy gamers spending 11+ hours per week playing video games
Global total	15%	20%
India	25%	33%
Indonesia	25%	30%
China	24%	29%
Mexico	18%	25%
Spain	12%	24%
Hong Kong	18%	24%
UAE	19%	23%
Singapore	13%	22%
Poland	11%	19%
Australia	15%	19%
Sweden	10%	18%
France	8%	18%
Germany	9%	17%
Italy	9%	16%
Great Britain	8%	12%
US	10%	12%
Denmark	7%	11%

Other types of influencers followed globally by gaming influencer followers



Fans of gaming influencers

HAVE A WIDE VARIETY OF OTHER ENTERTAINMENT INTERESTS

While fans of gaming influencers are heavily invested in gaming as a whole, they also have a wide variety of other entertainment interests. It follows, then, that this audience also engages with several other influencer types across social media channels. Among gaming influencer fans, the top 'other influencer' categories followed include music (41%), food (39%), and sports (34%). Gaming influencers are over three times more likely to be following music influencers compared to the global total (Index 360) and

sports influencers (index 356). Although only 20% of gaming influencer followers also follow reality TV influencers, this is another influencer follower that they are three times more likely than the global total for following. Brands, advertisers, and sponsors keen to both extend and reinforce their influencer marketing messages beyond gaming could also consider partnerships and cross-collaboration opportunities with music and sports influencers.

Other types of influencers followed by US teens who are gaming influencer followers

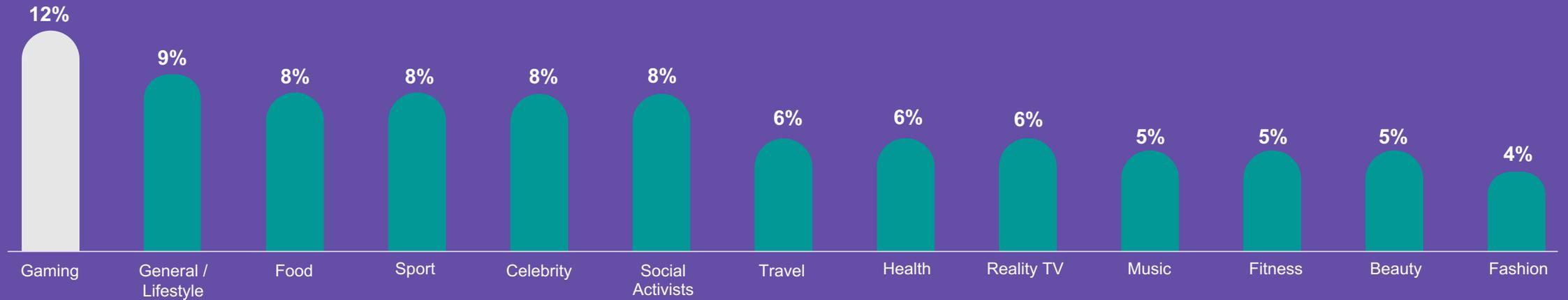


American teens follow multiple influencers

Consistent with the broader US teen population, there is also a high level of interest in music among teen followers of gaming influencers, with almost six in ten (57%) also following music influencers. They are also twice as likely to follow channels with high entertainment and humor quotients. Content creators in the humor/meme space are followed by over half (52%) of US teen gaming influencer followers.



Global influencer followers who 'do not' follow any other influencer



Reaching a unique global audience

Whilst categories such as food, health, travel, and fashion, dominate the wider influencer community, gaming influencers are on the rise, and are now competing with their counterparts in other categories in terms of their appeal and influence, especially among younger demographics.

Despite the overlap in the different types of influencer followed, gaming influencers also reach a unique untapped audience. Across the 17 international markets surveyed, a higher proportion of gaming influencer followers (12%) 'do not' follow any other influencer type, than followers of influencers in any other influencer category. In addition, this 'solus' audience represents 1% of the entire global population and offers a unique value proposition for brands looking to reach an exclusive audience of influencer followers.



Summary

Gaming influencers are rapidly increasing in popularity and are emerging as the promotional rock stars of the influencer marketing community, which as a whole reaches nearly half of the global adult population.

While nearly one in ten consumers worldwide follow gaming influencers, these personalities are reaching a higher portion of adults in several global markets, especially in Asia. And among males globally, they are the most followed influencer type – while even more dominant among the hard-to-reach male 18-34 and teen demographics.

With a massive 68% of the global population playing video games weekly, gaming influencers are offering gamers yet another way to engage with their favorite titles – and discover new games, too. With a key driver of today's gaming experience being social, the opportunity to hear from and speak with a streamer and his or her community further feeds this need state. While the vast majority who follow gaming influencers are already playing games themselves, influencers can help to deepen this relationship, and that sense of connection and belonging can ultimately be of high value to marketers looking to have a conversation with these audiences.

What next?

This report is Part 1 of a three-part series exploring the global gaming influencer landscape. In Part 2 we profile the gaming influencer fanbase, and Part 3 focuses on the value of trust within the influencer sector, and how brands can benefit from partnering with gaming influencers.

[Access the full series here.](#)

In Part 2 we dig into the profile of the gaming influencer follower highlighting who they are, and how they differ by country. Unearthing what makes them different to followers of other influencer types. Exploring how gaming fans connect with influencers, which devices they use, and which channels they access.

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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.

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