



YouGov<sup>®</sup>

GAME-CHANGERS:

# The power of gaming influencers

PART 2:

# Profiling the gaming influencer follower

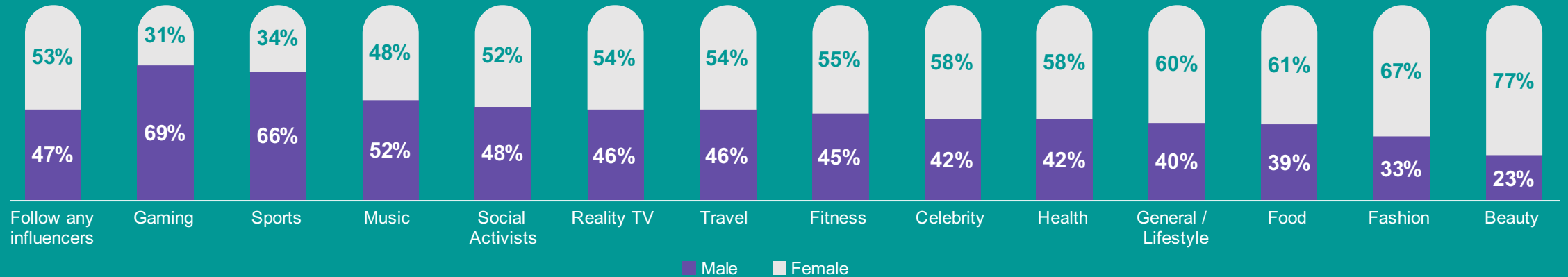
# Introduction

**With over two thirds of adults across the world playing video games at least once a week, and in-person activities continually restricted due to COVID-19, video gaming has continued to grow in both strength and influence in 2021. Outside of personal game play, nearly three in ten global consumers have also watched a live gaming video stream (YouTube Gaming, Twitch, etc.), and almost one in ten currently follow a gaming influencer.**

Gaming personalities entertain and engage with audiences that are highly loyal, and receptive to their opinions and brand recommendations. This makes the value of influencer marketing for the gaming industry compelling and attractive for brand sponsors. This report is Part 2 of a three-part series that digs into the profile and consumer behavior of gaming influencer followers, highlighting who they are, and how they differ by country. It also unearths what makes them distinct from followers of other influencer types. Further, we explore how gaming fans connect with influencers, and where.

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

Gender profile of different types of influencer followers - global



# Profiling the gaming influencer follower

YouGov data reveals that almost one in ten global consumers (9%) follow gaming influencers, but how do they engage with these personalities, and what makes the gaming influencer fan base different from other influencer audiences?

When looking at adult followers of any type of influencer by gender across all markets surveyed, we see that 53% are female, and 47% are male.

However, among all types of influencer followers, gaming influencers have the highest proportion of males (69%), closely followed by sports influencers (66%). Alternatively, influencer types where female followers outweigh male include beauty (77% female), fashion (67%), and food (61%).

Whilst gaming influencer followers skew heavily male, we do see some variations in the gender balance by market. The countries with the highest proportion of female followers of gaming influencers include France (38%) and Singapore (37%); in Great Britain, US, and China, 36% of gaming influencer followers are female.

Countries with the highest proportion of males who follow gaming influencers, representing over three quarters in each market are Indonesia (79%) and Denmark (78%), with Poland, Germany and UAE all 76% male.



### Gender profile of gaming influencer followers by country

COUNTRY	MALE	FEMALE
<b>Global total</b>	<b>69%</b>	<b>31%</b>
Indonesia	79%	21%
Denmark	78%	22%
Poland	76%	24%
Germany	76%	24%
UAE	76%	24%
Sweden	69%	31%
Mexico	69%	31%
Italy	68%	32%
India	67%	33%
Australia	67%	33%
Spain	66%	34%
Hong Kong	65%	35%
China	64%	36%
US	64%	36%
Great Britain	64%	36%
Singapore	63%	37%
France	62%	38%



## Influencer gender trends

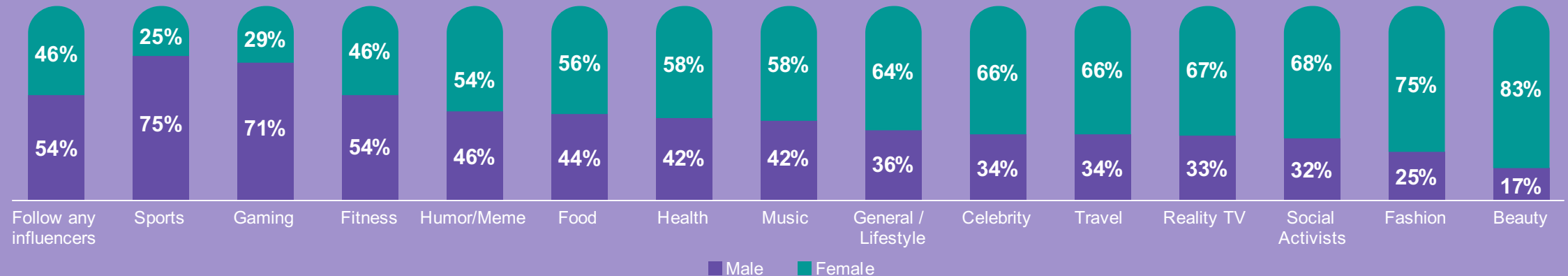
Whilst 3 in 10 game influencer followers globally are female, it's worth noting that currently the top game streaming personalities skew overwhelmingly male. In fact, in Q3 2021, 95 of the top 100 live streaming channels on Twitch and YouTube were owned by male streamers, with only 3% of hours watched across top influencers contributed by females. This disparity between the proportion of female influencers vs. male followers presents a major opportunity for the industry to attract and support more female gaming personalities.

Gender of Top 100 game streaming influencers on Twitch and YouTube (Q3 2021)

GENDER	AMOUNT	TOTAL HOURS WATCHED	% HOURS WATCHED
Male	95	1,019,777,088	96.7%
Female	5	34,815,305	3.3%
<b>Total</b>	<b>100</b>	<b>1,054,592,393</b>	—

Source: Stream Hatchet, Q3 2021

Gender profile of different types of influencer followers - US teens

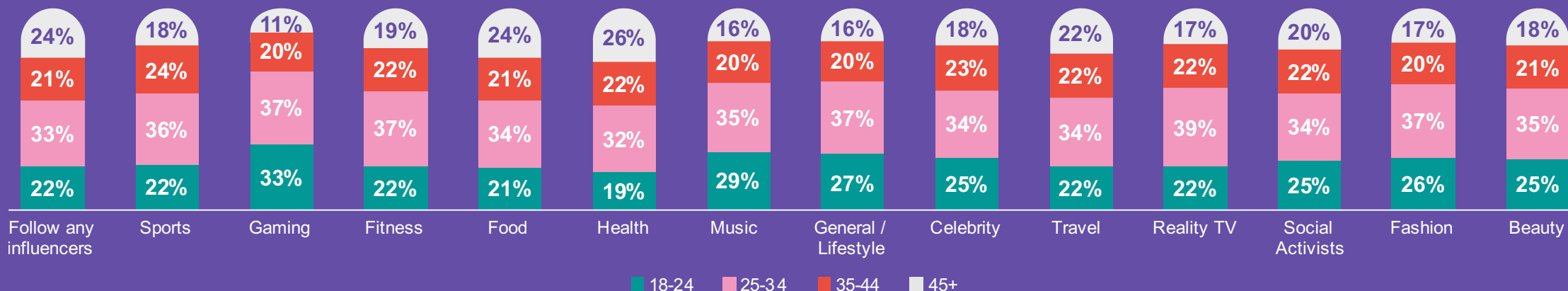


# Teen gaming personality followers disproportionately male

In contrast to American adults, US teens who follow any type of influencer are more likely to be male (54%, vs. 41% US adults). In particular, a very high proportion of teen gaming and sports influencer followers are male (71% and 75%, respectively). Teenagers have developed a close relationship with gaming. Playing and competing in groups heightens the sense of belongingness among teen gamers. Reflecting this, teen followers of gaming influencers are more likely to agree with the statement 'My friendship group is a really important part of my life,' (81% vs. 73% all US teens).

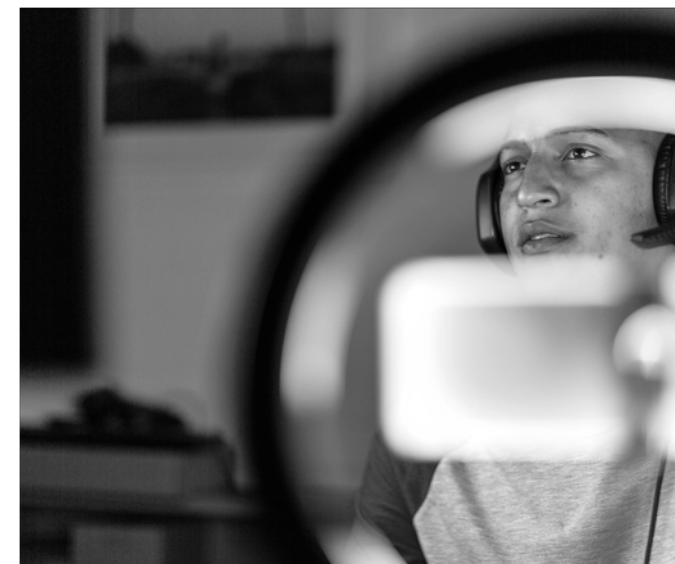


Global profile of different types of influencer followers by age



## Gaming influencers have a stronghold on Gen Z

Followers of gaming influencers are also more prevalent in younger age groups. Across the 17 markets surveyed, the gaming influencer fan base has the highest proportion of adults aged 18-24 of any influencer category, representing a third of these personalities' followers. An additional 37% fall within the 25-34 age group, a combined 70% ranging between ages 18-34 – again, the highest of any influencer type.





# In peak markets, more than 8 in 10 gaming influencer followers are 18-34s



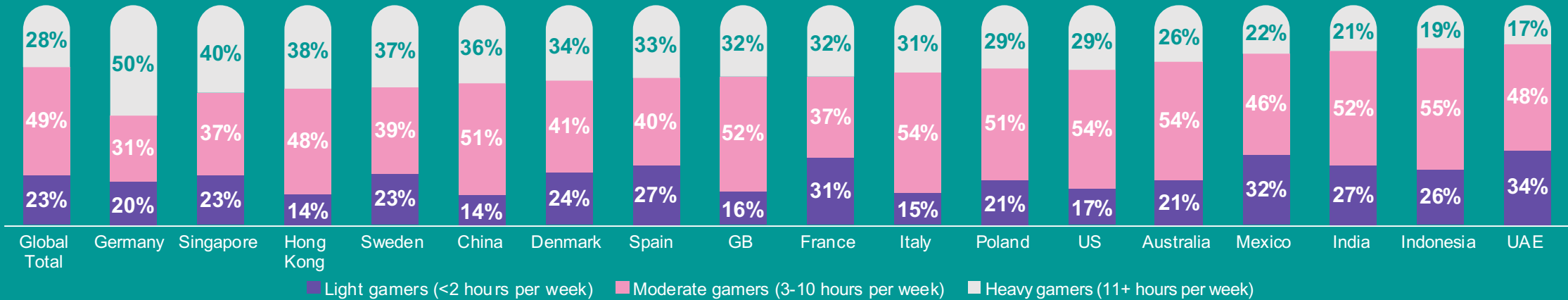
The countries with the highest proportion of 18-24s include Indonesia (46%), Germany (44%), Mexico (42%), and China (39%), whilst the US (51%), Sweden (46%) and Denmark (45%) lead for 25-34s' contribution to the gaming influencer audience.



Global profile of gaming influencer followers by age and country

COUNTRY	18-24	25-34
<b>Global total</b>	<b>33%</b>	<b>37%</b>
Indonesia	46%	35%
Germany	44%	28%
Mexico	42%	32%
China	39%	40%
Italy	38%	29%
Denmark	38%	45%
France	33%	36%
US	32%	51%
Poland	31%	33%
Great Britain	30%	29%
Australia	29%	40%
Spain	26%	42%
Sweden	25%	46%
Singapore	24%	36%
India	24%	32%
Hong Kong	21%	35%
UAE	18%	34%

Followers of gaming influencers - number of hours spent gaming in a typical week



## Gaming influencer followers spend more time playing video games

It is also useful to explore the personal gameplay behavior of gaming influencer followers. On the whole, those who engage with gaming personalities spend more time playing video games relative to the broader gamer base, globally. More than 1 in 4 gaming influencer followers (28%) are classified as “heavy gamers” (play games on any device 11+ hours per week), which is more than double the global population (12%). In addition, almost half (49%) of those who follow gaming influencers fall within the ‘moderate’

gaming frequency category (playing video games for between 3-10 hours per week), compared to 26% among the global population.

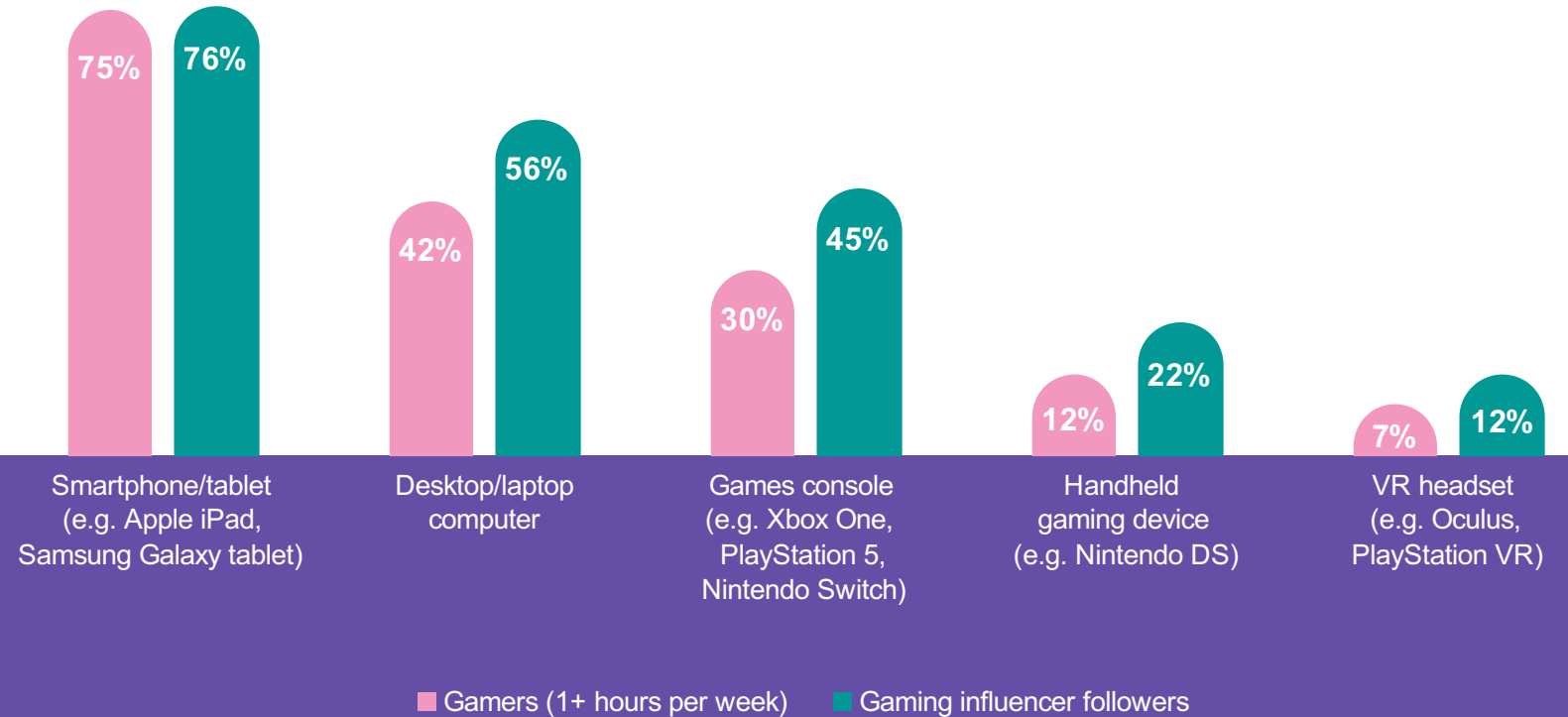
Countries where gaming influencer followers are more likely to be heavy gamers vs. moderate include Germany, Hong Kong, and Singapore. Conversely, gaming influencers are most likely to be light/casual gamers (play 2 hours or less weekly) in UAE, Mexico, and France.

# Smartphones/tablets most common device for gaming globally



Turning to devices used for gaming, over three quarters (76%) of gaming influencer followers use their smartphones/tablets for gaming, on a par with all gamers (75%). However, when looking at other devices used, those who follow gaming influencers are considerably more likely to use PCs, game consoles and other gaming devices compared to broader gamers.

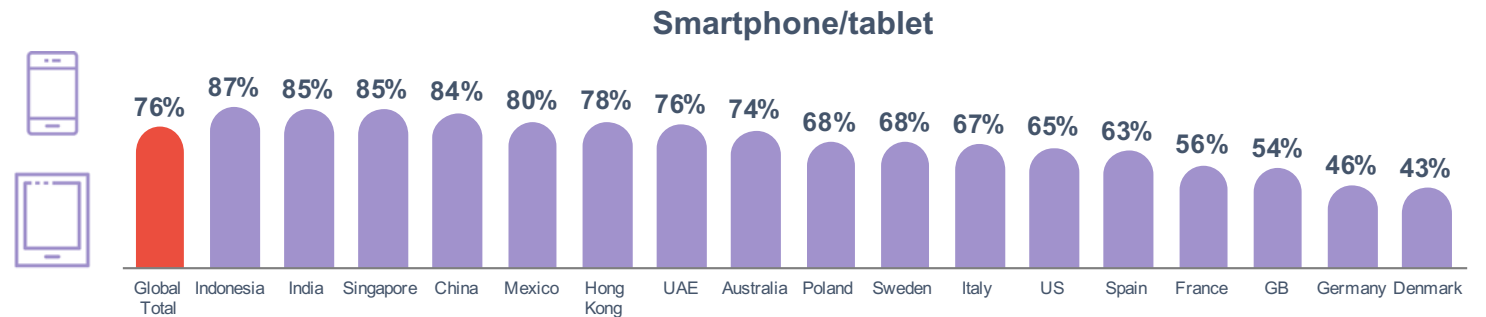
Gaming device played by gamers and gaming influencer followers - globally



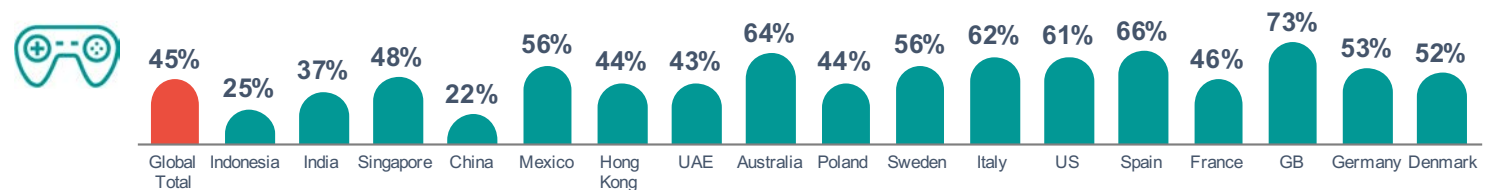
Looking across the 17 international markets surveyed, for 12 out of the 17 countries, smartphones/ tablets are the most popular device used for playing video games among those who follow gaming influencers. Expectedly, Asia's mobile-first countries including Indonesia, China, India, and Singapore have the highest proportion of gaming influencer followers playing games via their smartphones/ tablets registering more than 80% mobile gamers in each market.

Desktops/laptops are the second most popular device used among gaming influencer followers; however, nuances exist within different countries. In Great Britain for example, games consoles are the top gaming device used among followers of gaming influencers (73%), outweighing PCs (55%) and mobile gaming a close third (54%). Other countries where consoles are top include Germany and Spain. In Poland and Denmark, PCs are the most popular gaming device among followers of gaming influencers.

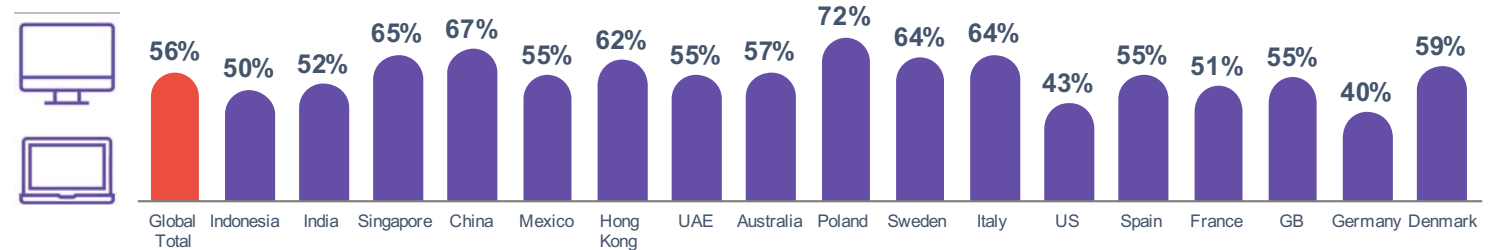
### Gaming device played by gaming influencer followers - by country



### Games console (e.g. Xbox One, PlayStation 5, Nintendo Switch)

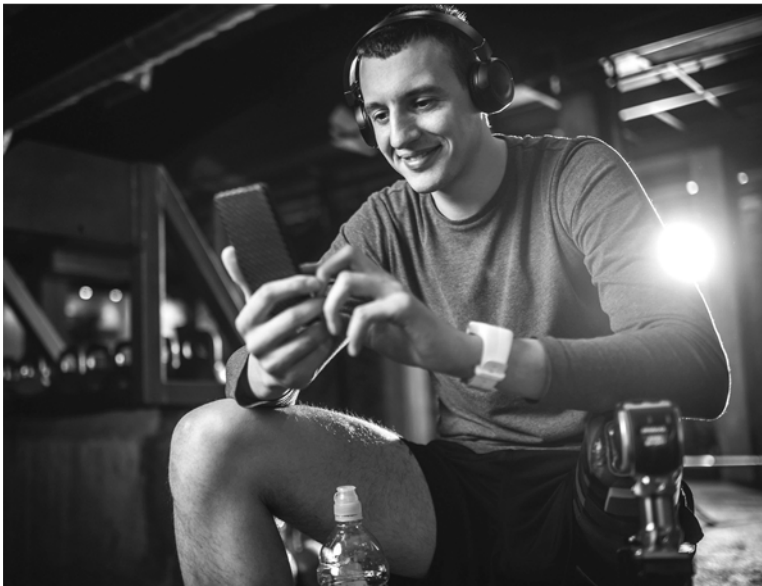


### Desktop/laptop computer



# Franchise & genre trends among gaming content fans

Interestingly, YouGov BrandIndex data in the US shows that the top gaming franchises played by fans of gaming personalities are not dissimilar to the broader gaming audience. In fact, 8 of the top 10 franchises are consistent across both groups, with Call of Duty and Grand Theft Auto appearing in the top three game franchises for both gamers and those who stream gaming content.




## Top 10 video game franchises played amongst gamers and live video game streamers in the US

RANK	GAMERS	GAMING CONTENT STREAMERS
1	Call of Duty	Grand Theft Auto
2	Super Mario Bros.	Call of Duty
3	Grand Theft Auto	Minecraft
4	Minecraft	Super Mario Bros.
5	Fortnite	FIFA
6	Animal Crossing	Madden NFL
7	The Sims	NBA 2K
8	Mortal Kombat	Fortnite
9	FIFA	Animal Crossing
10	Madden NFL	Roblox

However, we do see two clear types of video games where streamers heavily over-index versus broader gamers. Firstly, streamers are three times more likely to play franchises with an active esports scene, such as Hearthstone, TFT and Dota; PUBG and VALORANT also over-index among this audience. Secondly, niche sports titles such as Tony Hawk, NHL and UFC also have a stronger foothold amongst the streaming audience than broader gamers, where they are twice as more likely to be playing these titles.

As highlighted in part one of our *Game-Changers: The Power of Gaming Influencers* report series where we identify [the global reach of gaming influencers](#), there is a strong correlation between followers of gaming influencers and sports influencers. Gaming influencer followers are more than three times more likely than the global average (index 356) to follow sports influencers, so it's not surprising that popular basketball simulation game NBA 2K also resonates strongly amongst this audience. Further, with many pro athletes also streaming their own personal gameplay of the power of live streaming and the cross-over effect it has on viewers is clear.

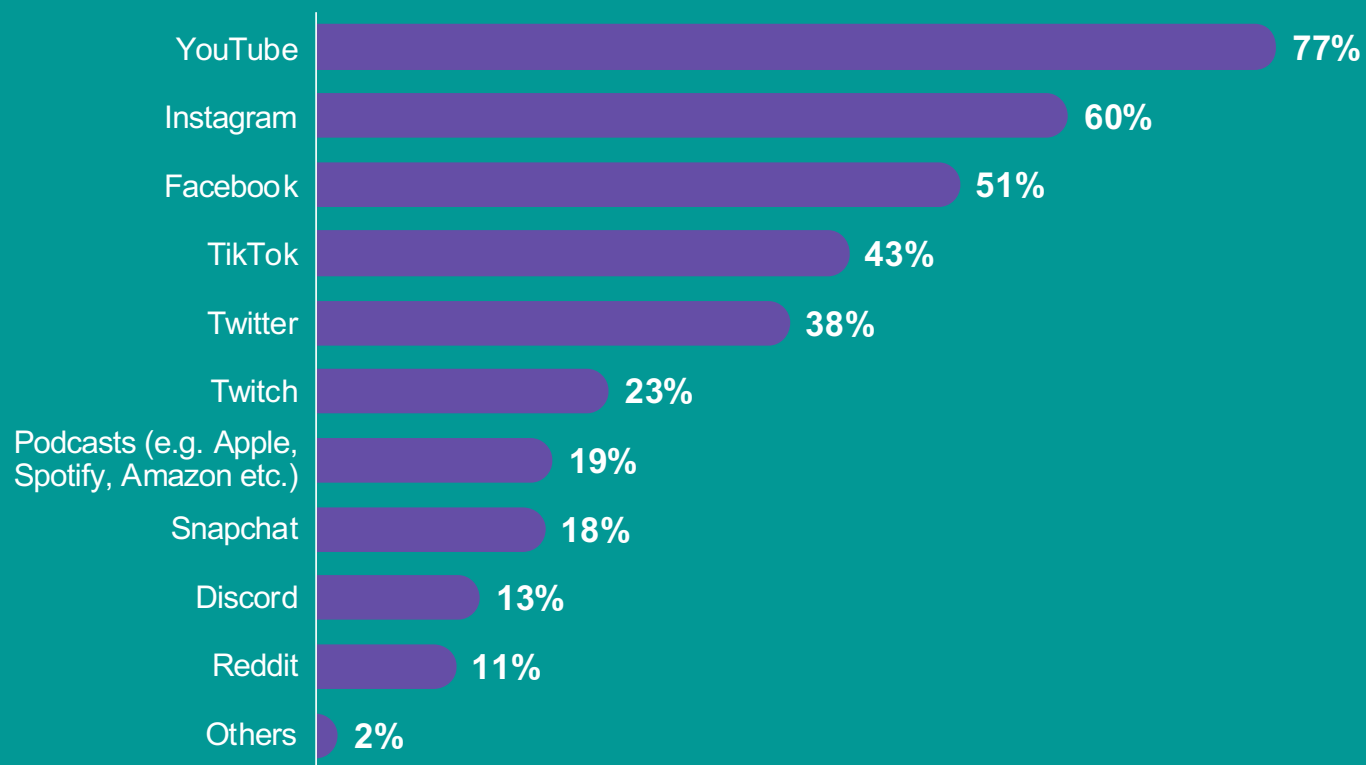
GAME FRANCHISES PLAYED BY GAMING CONTENT STREAMERS INDEXED TO TOTAL GAMERS - TOP 10 HIGHEST INDICES			
1		Hearthstone	365
2		League of Legends: Teamfight Tactics	342
3		Dota	306
4		Tony Hawk's Pro Skater	286
5		NHL	261
6		PlayerUnknown's Battlegrounds	258
7		VALORANT	230
8		NBA 2K	223
9		Destiny	223
10		UFC	222



## **Accessing gaming influencers: platform engagement**

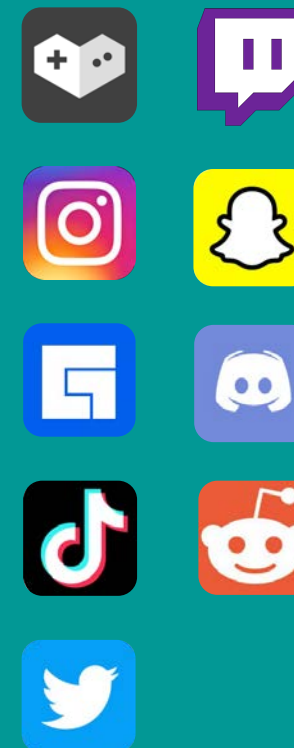
Understanding how followers reach and engage with personalities is crucial to successfully leveraging influencer marketing. Enabling 'anytime, anywhere' access to the gaming ecosystem, smartphones and social media platforms are the glue binding the gaming community together. This section explores which platforms act as consumer points of access to gaming influencers.

Channels used for following influencers among global gaming influencer fans



Gaming influencers indexed against any influencer

129
103
111
141
157
273
165
165
224
218
100



Chinese-exclusive streaming platforms not included

## Twitch over indexes among gaming influencer fans

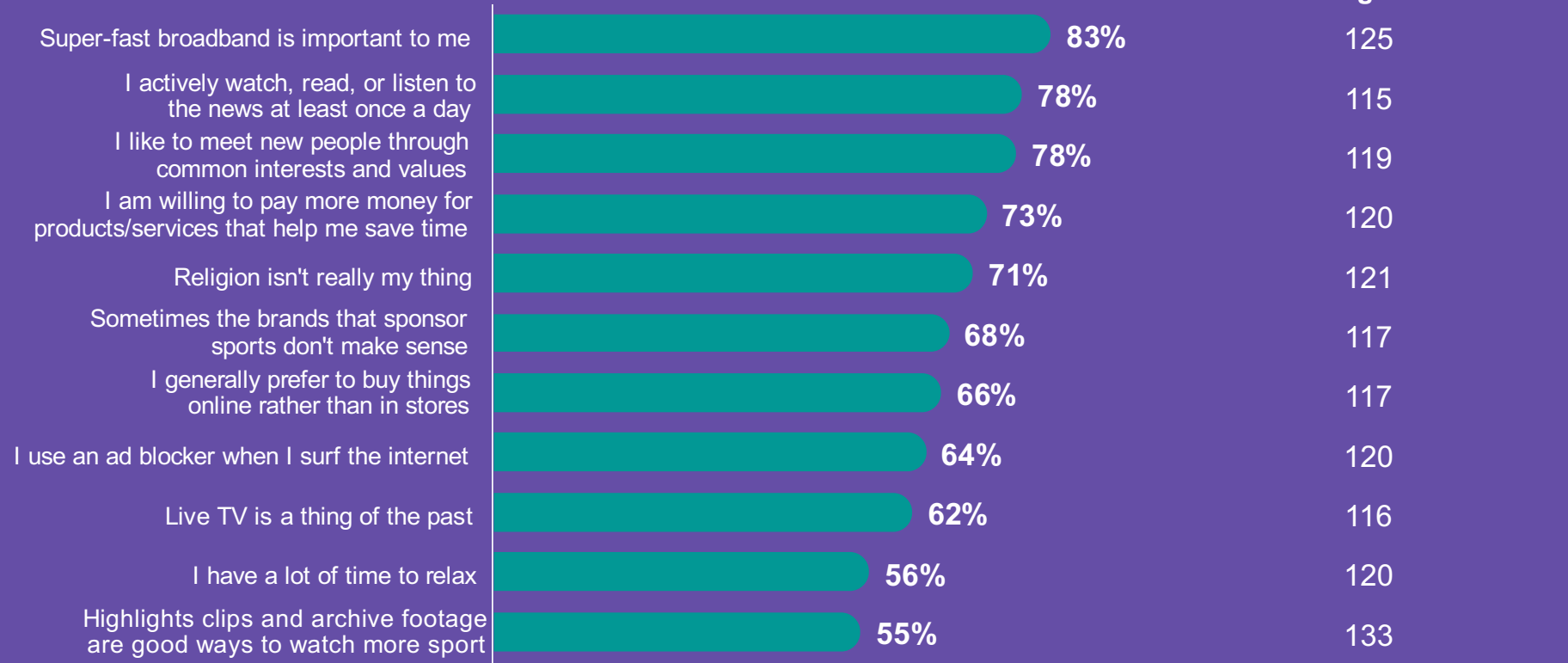
Turning to channels used to follow influencers of any type, YouTube, Instagram and Facebook are the top three channels, all registering 50% or more globally. Whilst gaming influencer fans also use these platforms at high rates, gaming-centric platform Twitch is almost three times more likely (index 273) to be used by gaming influencer followers, compared to followers of influencers in general. And not surprisingly, gaming influencer fans

are twice as likely to use Discord (index 224), the group-chat app built for gamers. Outside of these gaming-specific platforms, both Reddit and Twitter have higher usage rates among gaming influencer followers; and, interestingly, TikTok exhibits relative strength among this audience. With many influencers and even esports teams experimenting on the platform over the past year, fans have clearly taken notice.





% agreement with statements among Twitch users in Germany



Beyond their demographics and gaming engagement, YouGov's Profiles tool allows us to understand a 360 degree view of the gaming influencer audience around the world, to identify what distinguishes them from other consumer segments. Better understanding these fans' underlying preferences, attitudes, and motivations can help both platforms and advertisers connect with them in more meaningful ways.

# Profiling the Twitch user in Germany

For example, profiling Twitch users in Germany uncovers several characteristics that likely contribute to why gaming content is appealing to them: they are highly tech and digital savvy, prefer to engage with short-form video clips on digital platforms, and find long-form content and linear TV less appealing. In turn, fast broadband is a major priority for this audience, with 83% agreeing that 'Super-fast broadband is important to me', 25% above the average for adults aged 18-34 (Index 125). Interestingly, they are also more likely

to want to meet new people through common interests and values – likely what has attracted them to the chat-driven Twitch community.

Other things with higher importance to German Twitch users include the news (more than 3 in 4 consume news at least daily), convenience-driven products and services, and online shopping. Two things not as high on their list? Religion (71% say it's not their thing), and online ads – 2 in 3 use ad blockers.

# Differences in channels used among gaming influencer fan base

Looking at three distinct markets when it comes to gaming influencer culture, across Great Britain, Indonesia, and the US we see that the channels used by gaming personality fans to engage with influencers varies substantially. For example, in GB, Amazon-owned Twitch leaps ahead with 47% using its live streaming services - almost twice as high as the US (26%), and six times higher than Indonesia (8%). Notably, Twitch continues to be a preferred platform for live streaming in many markets – in fact, according to viewership analytics platform Stream Hatchet, the top 20 gaming live streamers so far in 2021 all stream content on Twitch.

Regional differences are in part a reflection of Twitch's global rollout strategy, which has only recently begun to expand its presence into Southeast Asia, whereas top titles such as Mobile Legends: Bang Bang and PlayerUnknown's Battlegrounds (PUBG) Mobile have leveraged other channels as they've grown in popularity, particularly YouTube. YouTube still leads the influencer channel agenda across all three markets, with Indonesia registering the highest levels of use (89%), followed by GB (85%) and US (66%), driven especially by its dominance in video-on-demand (VOD) viewership, whilst at the same time constantly expanding its live content partnerships in the gaming/esports space.

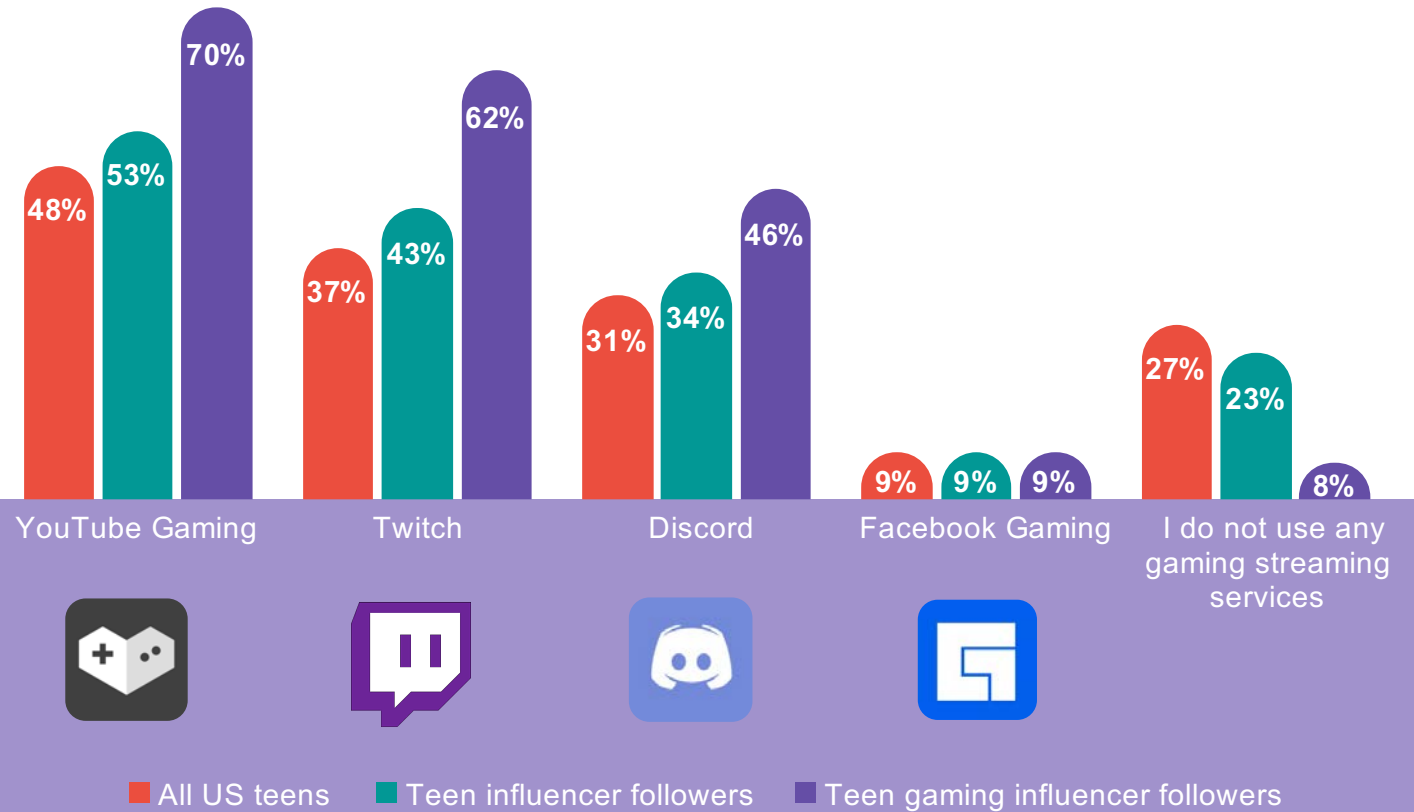
Influencer channels followed among gaming influencer fans

	US	GB	INDONESIA
YouTube	66%	85%	89%
Instagram	52%	54%	75%
Facebook	42%	26%	56%
Twitter	35%	43%	34%
TikTok	35%	29%	47%
Snapchat	27%	13%	9%
Twitch	26%	47%	8%
Reddit	15%	10%	7%
Podcasts (e.g. Apple, Spotify, Amazon etc.)	11%	10%	21%
Discord	10%	19%	12%

# YouTube Gaming and Twitch most used game streaming platforms among US teens

Streaming channels used for gaming content among US teens

In 2020, boosted by the pandemic, YouTube Gaming had its **biggest year ever** reaching 40 million+ active game channels and 100 billion watch time hours. Unsurprisingly, YouTube Gaming and Twitch are the two most used game streaming platforms among US teens, with YouTube in primary position. Discord is also heavily used by US teens, at rates nearly 5X those of adult gaming influencer followers in the market.



**40 million+**  
YouTube active gaming channels and 100 billion watch time hours.

## Fan loyalty: to platform, or influencer?

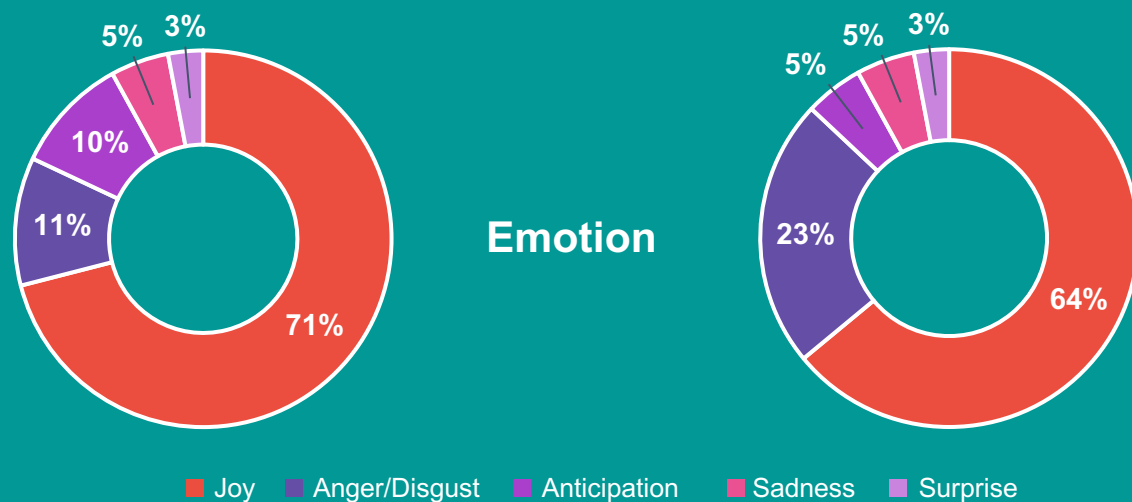
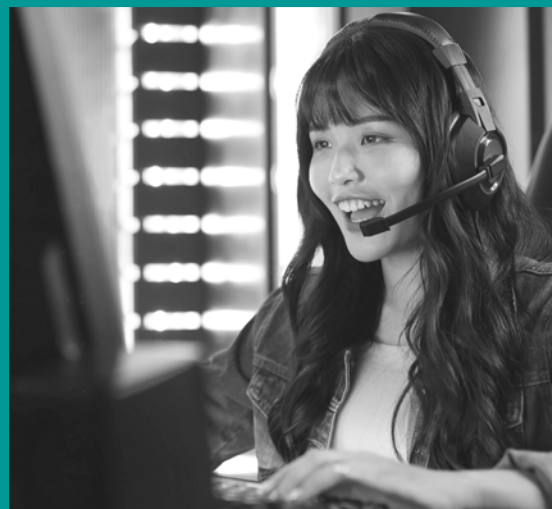
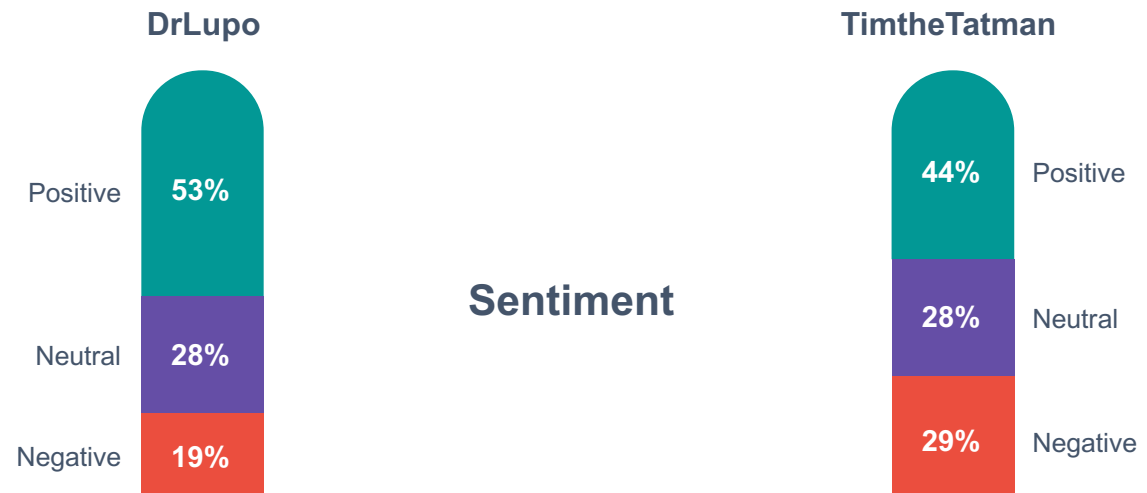
As of late, gaming personalities have been signing more and more exclusive deals with streaming platforms. For the streamers, the financial benefits associated with exclusivity can be extremely lucrative. And for platforms, drawing loyal audiences in through individual influencers is a way to expand reach of the platform overall – with a hope that further engagement via cross-content consumption will follow.

In late August and early September 2021, two of Twitch's highest profile streamers, DrLupo and TimtheTatman, shocked the gaming world by moving away from the platform, signing exclusive streaming deals with YouTube Gaming instead.

The move generated a significant amount of buzz and conversation among fans, with YouGov Signal digital engagement data showing that for both influencers, consumers responded mostly positively to the news, with overall sentiment around Lupo's move slightly more positive vs. TimtheTatman.

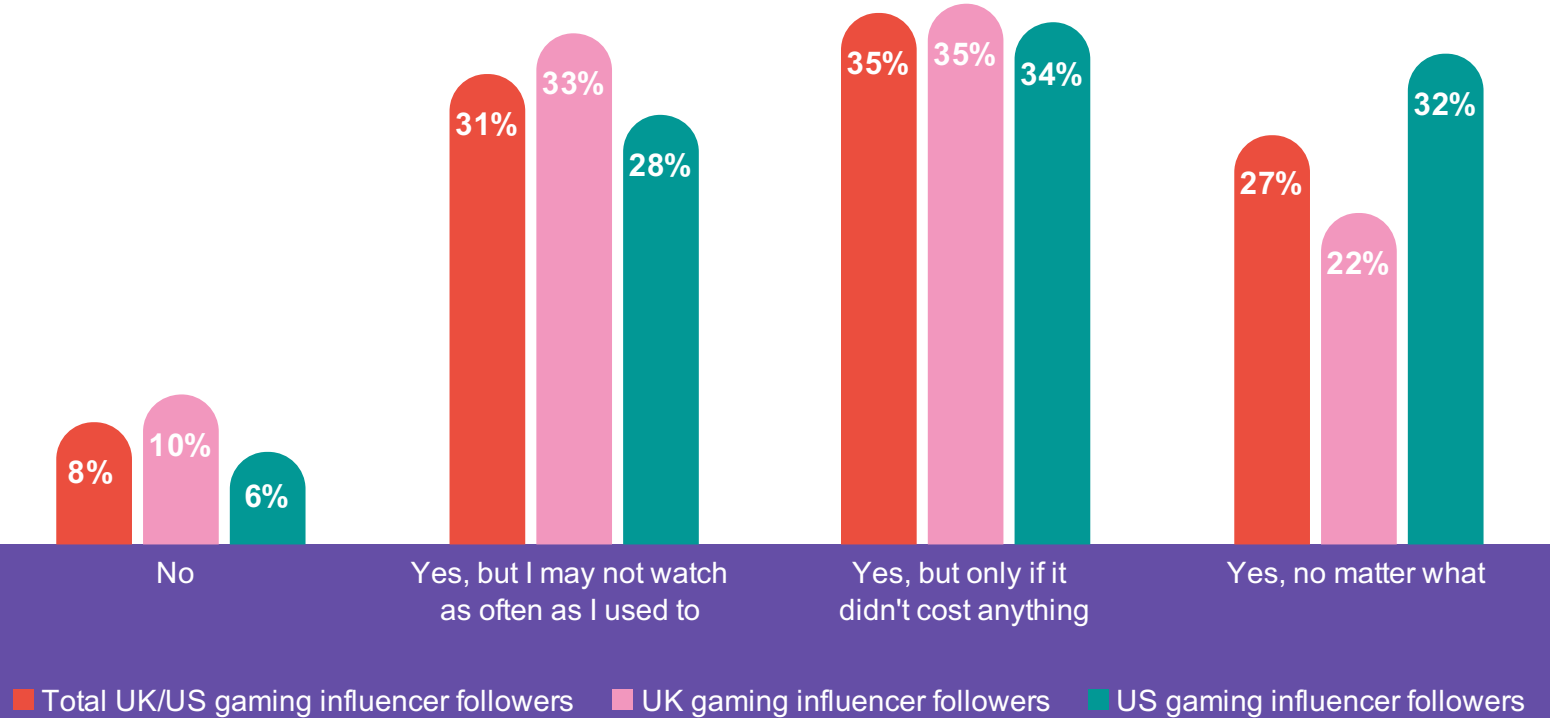
In particular, nearly a quarter of commentary surrounding Tim included feelings of anger or disgust; though still over 60% of conversation was also optimistic/joyful.

### Online conversation sentiment & emotion for DrLupo & TimtheTatman August 31 – September 30, 2021



## Likelihood of gaming influencer followers switching channels if their favorite influencer moved

To better understand fans' loyalty to their favorite gaming personalities, a recent YouGov Chat survey conducted in the US and UK among 13-40 year old game streaming fans explored consumer sentiment specifically around platform switching. Whilst the majority indicate they would switch channels to follow their favorite gaming personality, the degree of commitment is more fragmented. In the US, 32% indicate they would follow their favorite streamer "no matter what," though this is significantly lower (22%) in the UK. 3 in 10 streaming fans would watch on the new platform, but not as often.



In both markets, one in three fans would only transition if the new platform was free – perhaps speaking to the difficulty Microsoft's Mixer had in displacing Twitch fans despite its investment in major streamers like Ninja and Shroud.

This emphasizes the importance of channel appeal, existing usage/familiarity, accessibility, and scale as just some of the important factors for influencers considering a potential switch.

This is key area we will explore in some depth in Part 3 of this series of reports where we look at why people follow gaming influencers.



## Summary

**With gaming influencers' popularity booming, it is more important than ever for marketers to understand their dynamic fan base to be able to connect and engage them on their level. YouGov research across 17 international markets reveals that gaming influencers attract a higher proportion of followers within the 18-24 Gen Z cohort (33%) than followers of any other influencer type, and this increases to 70% those aged 18-34! Gaming personality fans are also more dedicated gamers themselves, and more likely to game on PC/console than the average gamer globally.**

At a global level, top platforms YouTube, Instagram, and Facebook are also most commonly leveraged by those following gaming influencers; but significantly, this audience is almost three times more likely to use Twitch, and twice as likely to use Discord and Reddit, with TikTok emerging

as a popular platform among them as well. Gaming influencer followers are more likely to access all channels to keep track of their gaming personalities, than overall influencer followers.

Channel partnerships with gaming influencers is big business. Deals with well-known personalities can have significant financial, and audience benefits for both the channel, and personalities involved, and gaming influencers need to be confident that if they switch from one streaming channel to another, their fan base will follow. While gaming influencer followers perceive themselves as loyal, this commitment is stronger when there is no cost involved, and may not translate in terms of the total hours of content consumed vs. their viewing habits on the streamer's previous platform.

# What next?

In Part 3 of this report series, we provide a deeper understanding of why people follow gaming influencers, we explore the importance of loyalty, engagement, and trust and why it is important for brands to engage with gaming influencers.

[Access the full series here.](#)

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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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