

STATE OF GAMING & INFLUENCER MARKETING

2025



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Methodology

This report aims to give an overview of the gaming & influencer marketing landscape throughout 2024 & ponder what to expect from 2025.

We've gathered data from trusted sources naming them on each point. Since we do not process raw data, we've relied on analytics platforms, reports, and relevant articles, such as <u>Sensor Tower</u>, <u>Stream Hatchet</u>, <u>Gamalytics</u>, <u>Newzoo</u>, <u>InvestGame</u>, <u>VGI</u>, <u>Statista</u>, <u>Influencer Marketing Hub</u>, <u>HypeAuditor</u>, <u>Circana</u>, <u>Data40</u>, <u>Epyllion</u>'s Report by Matthew Ball.

Part of the paper consists of the rankings, thoughts & conclusions brought by the AAA Team. This is our personal opinion and does not claim to be the ultimate truth. If it differs from someone else's vision, we will be happy to exchange ideas. However, given our experts' experience, this vision is backed by facts and data.

We would like to take this opportunity & thank the experts who contributed their perspectives on gaming and influencer marketing to this report. We really appreciate it.



STATE OF GAMING



Gaming Market Dynamics

From 2011 to 2021, <u>video gaming soared</u>. Spending more than doubled compared to the previous 20 years, with annual revenues rising by 150%, from \$80 billion to \$200 billion.

While some thought growth might slow after COVID, most expected gaming to keep expanding quickly — or even faster.

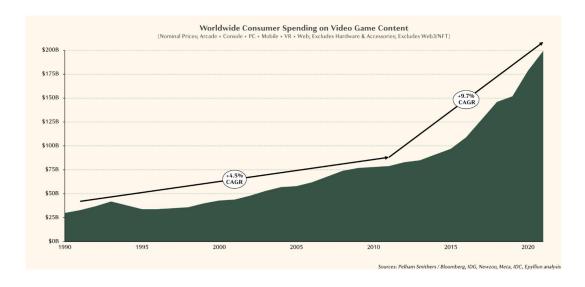


Image credit: Epyllion



Gaming Market Dynamics

Instead, <u>spending dropped</u> by about 3.5% in 2022 and barely grew in 2023 and 2024, staying flat over three years and falling short of revenue forecasts by tens of billions.

Still, some experts remain hopeful.

The Newzoo Report predicts the gaming market to grow by 3.1% annually (CAGR) from 2022 to 2027, reaching \$213.3 billion by 2027.

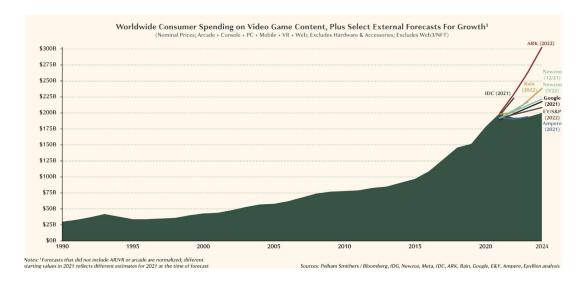


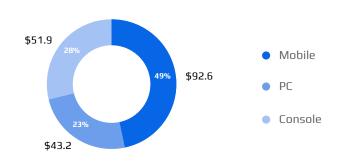
Image credit: Epyllion



Mobile vs. PC & Console

Games market revenue worldwide in 2024

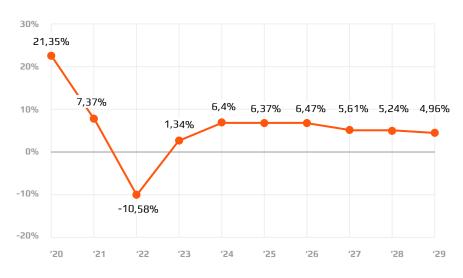
(in billion U.S. dollars)



Data credit: Statista

In 2024, mobile gaming made nearly as much as console and PC gaming put together, <u>earning a huge \$92.6 billion</u>. Console gaming brought in \$51.9 billion, while PC gaming followed with \$43.2 billion.

Global mobile games revenue growth 2020 to 2029



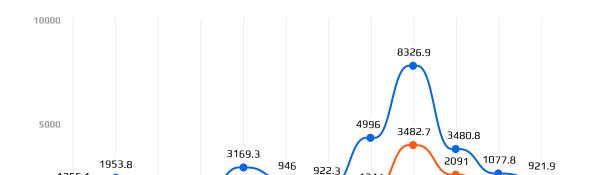
Data credit: Statista

After a sharp drop in 2021 and 2022, mobile gaming revenue <u>is recovering</u>, with a 6% increase in 2024. It's expected to keep growing steadily by 6-4% each year through 2029.



In 2023, worldwide investments in video game companies <u>reached</u> \$4.48 <u>billion</u>.

The gaming tech sector led the way. Mobile gaming followed, attracting around \$1.07 billion in investment. Console and PC are smaller in total figures but showed a similar pattern: a big spike in 2020 and 2021, followed by a sharp drop, but still remaining higher than pre-pandemic levels.



555.8

118

323.8

'19

Mobile

1244

'20

'21

'22

'23

Console/PC

Annual value of investments (in million U.S. dollars worldwide) Image credit: Statista

1150.9 375.6

175.9

'16

141.7

179

115

14.6

1255.1

291.7

'13



427.5

'24 Q1-3

VC investment in the gaming industry hit its highest point in 2021.

In the fourth quarter of 2022, global gaming VC funding reached \$3.33 billion, but it dropped sharply throughout 2022 and 2023. By the third quarter of 2024, VC funding in gaming settled at \$517 million.

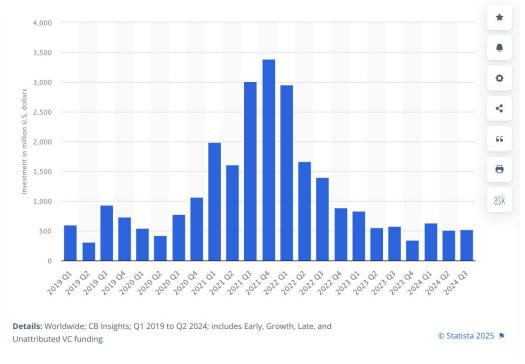


Image credit: Statista

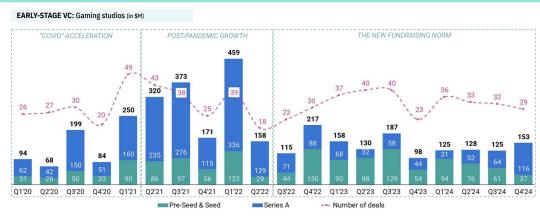


Game studios are finding it harder to raise funds in early rounds (pre-Series A).

After peaking in 2021, investments have decreased, and last year the <u>number of deals</u> <u>has declined</u> even further, and the total funding has stagnated.

12 Gaming Studios

Downward pressure on Early-stage VC financing for gaming studiosPersistent decrease in closed rounds since early 2024



Note: some transactions do not have a disclosed deal value but are counted in the total number of deals

MY.GAMES is investgame

Image credit: Investgame



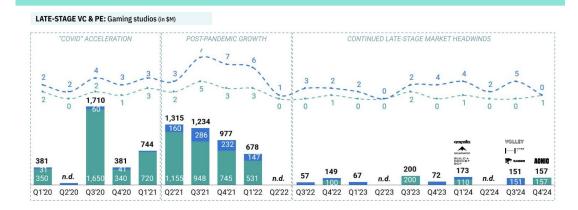
There's cautious optimism for later-stage funding. Compared to 2023, there were 30% more deals closed, and their value grew by 43%.

However, <u>InvestGame analysts note</u> that the market remains volatile. Corporate VC funds are still showing steady interest, with a rise in both joint deals with traditional VC funds and solo investments in Q3 and Q4 of 2024.

14 Gaming Studios

Late-stage VC/PE funding sees improvement yet remains volatile

Modest YoY growth: 43% more capital raised and 30% more rounds closed (vs. 2023)



Note: some transactions do not have a disclosed deal value but are counted in the total number of deals

MY.GAMES is investgame

Image credit: Investgame



Regarding M&A activity, Q4 2024 was one of the most successful quarters in the past two years, with <u>28 deals totaling \$4.9 billion</u>. There were also announcements of \$2.1 billion in deals set to close in 2025.

Many successful gaming and tech M&A deals focused on mobile: Miniclip&Easybrain, Playtika&SuperPlay, MTG&Plarium.

PC and console gaming have also seen some profitable M&A deals: Take-Two Interactive&Gearbox, Jagex&CVC Capital Partners and Haveli Investments, Saber Interactive&Beacon Interactive.

9 Executive Summary

Most notable M&A deals in 2024

Select M&A deals of the year

	OF 2024

Rank	Date	Target	Acquirer	Segment	Upfront EV	Total EV (incl. earn-out)	Upfront EV/Revenue	Upfront EV/EBITDA
#1	Oct-24	Keywords Studios Imagine More	BPEA CPP Investments TEMASEK	Outsourcing	\$2.8B	\$2.8B	3.3x	15.9x
#2	Nov-24 ¹	Easybrain	MINICLIP	Mobile	\$1.2B	\$1.2B	3.8x	9.3x
#3	Feb-24	M JAGEX	CVC FARTHURS III HAVELI	PC&Console	~\$1.18	~\$1.1B	-	-
#4	Nov-24	STEED STORY	Playtika	Mobile	\$700m	\$2.0B	2.6x	negative
#5	Nov-24 ¹	PLANNIN	MG	Mobile	\$620m	\$820m	1.0x	4.5x
#6	Jun-24	gearbox	12 TAKE TWO	PC&Console	\$460m	\$460m	2.9x	n/m
#7	Jul-24	≈ Landvault	R INFINITE	Tech	\$450m	\$450m	-	-
#8	Mar-24	SABER	BEACON INTERACTIVE	PC&Console	\$247m	\$341m	1.6x	8.7x
#9	Mar-24	data.ai	SensorTower	Tech	n/d	n/d	-	-
#10	Dec-24	Chartboost	loopMe	Tech	n/d	n/d	1-	-

Notes: (1) announced date (not closed yet); n/d - not disclosed; n/m - not meaningful

datasets for M&A deals with our premium subscription for Patreon supporters.

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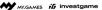


Image credit: Investgame



Despite the challenges, the gaming market still offers significant funding opportunities. However, there's a steep drop in deal values, from the top deal at \$1.5B to others ranging from \$157M to \$30M.

A variety of firms among lead investors reflect a healthy investment ecosystem. Investors are showing interest in diverse gaming segments and emerging technologies like Web3.

Rank	Date	Company	Lead investor	Segment	Deal value
#1	Feb-24	EPIC	WALT DISNEP	Multiplatform	\$1.5B
#2	Dec-24	AONIC	ACTIVE OWNERSHIP METRIC CAPITAL PARTINES	Multiplatform	\$157m
#3	Jan-24	BUILD A ROCKET BOY	REDBIRD	PC&Console	\$110m
#4	Sep-24	SABER	ALEPH	PC&Console	n/d
#5	Aug-24	HYBE	MAKERS	Mobile	\$80m
#6	Jul-24	Volley	Lightspeed M2	Multiplatform	\$58m
#7	May-24	SPYKE	MOONACTIVE	Mobile	\$50m
#8	Oct-24	AZRA	M PANTERA	Mobile (web3)	\$43m
#9	Jan-24	MOUNTAINTOP	ANTHOS (A)	PC&Console	\$30m
#10	Mar-24	طمكعيها	BLIZZARD Coin Fund	PC&Console (web3)	\$30m

Top-10 Gaming Studios Fundraisings Image credit: Investgame

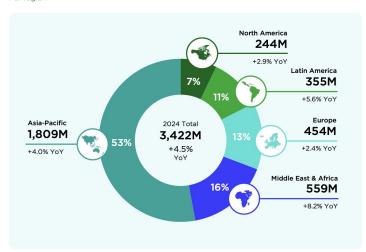


Players

According to the Newzoo predictions, the number of players will grow, reaching 3.76 billion by 2027, with annual growth across all segments ranging from 2% to 4%. DFC is even more optimistic, predicting the global gaming population could hit 4 billion by 2027—almost half the world's population.

2024 Global players

Per region



<u>Total players in all markets will grow</u>. Asia-Pacific, which makes up 53% of global players, will see its player base grow by 4% every year, driven largely by player growth in Central and Southeast Asia.

Mobile-first regions like the Middle East & Africa (16% of global players) and Latin America (10%) will grow faster than other regions. Meanwhile, player growth in North America and Europe will be slower, at 2.9% and 2.4% respectively.

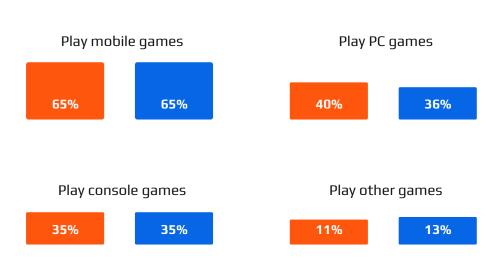
Image credit: Newzoo



Players in U.S.

Gaming habits in the US <u>show variation</u>. In 2024, 71% of U.S. consumers play video games, with mobile gaming leading the way — 65% of the population play on mobile, unchanged since 2022.

Console gaming also stayed steady, while PC gaming saw a 4% decline, although over a third of people still prefer this type of gaming. Meanwhile, other gaming devices, like VR, grew by 2% as more people adopted the technology.



2024

2022

Data credit: Circana



Players

Roblox stands out as one of the leaders, with 350-400 million monthly active users — rivaling the entire AAA ecosystem and surpassing key competitors. It boasts more monthly engagement hours than any gaming console or platform.

Its success is driven by top titles' impressive growth, a focus on user-generated content (UGC), strong R&D investments, and non-traditional goals like sharing, creating, and self-expression.

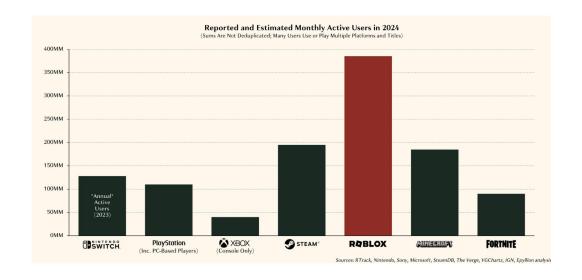


Image credit: Epyllion



Expert Talks



<u>Dean Takahashi</u>, Lead Writer for GamesBeat at VentureBeat

The game industry is waiting for breakout hits, new genres, and new business models to lift growth. We may see boosts from the Nintendo Switch 2 and Grand Theft Auto VI, but 34,000 layoffs and tons of studio closures have left a lot of scars that have made studios risk-averse. We can be encouraged by outlier hits like Helldivers 2 and Palworld, but there are a huge number of studios -- with many in emerging countries -- that are competing for a piece of a market that on an aggregate level is growing too slowly. The result will be winners and losers, like always.



Ali Farha, Senior Technical Producer at Star Stable Entertainment AB, #1 Swedish Gaming Voice on LinkedIn

The gaming industry now competes for attention in an unprecedented way, with social media and streaming services fragmenting entertainment time. With the flood of new game releases, standing out requires both sophisticated influencer marketing and exceptional quality. Games that successfully balance these elements while delivering compelling social features are best positioned to capture and retain player attention in this crowded landscape.

MOBILE GAMING



Mobile gaming has driven much of the industry's growth, now making up 55% of the market, up from 32%. The iPhone brought in millions of new players.

However, after 18 years, future growth depends on population increases and smartphone use in markets where people spend less on games (low ARPU).

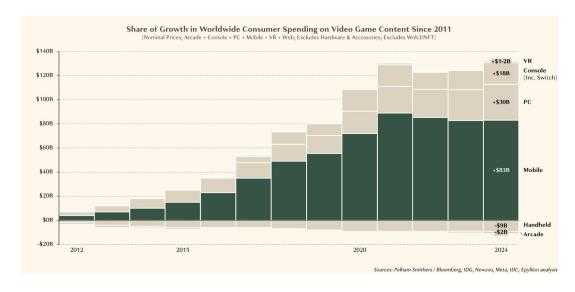
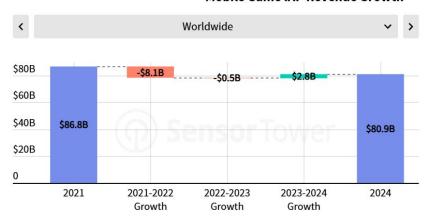


Image credit: Epyllion



Mobile game revenue <u>rose to up 4% over</u> 2024, reaching \$80.9 billion. Turkey led with a 28% increase. Much of the growth was fueled by emerging markets like Mexico (21%), India (17%), and Thailand (16%). Established markets — the US, Europe, the Middle East and Africa — saw steady growth, while Japan saw a 7% decline due to economic and currency challenges.

Mobile Game IAP Revenue Growth



2024 IAP Revenue \$80.9 Billion (+4% YoY)

Image credit: Sensor Tower



Downloads <u>declined by 6% in 2024</u>. While most markets saw a decline, regions like Indonesia and Saudi Arabia provided bright spots of growth.

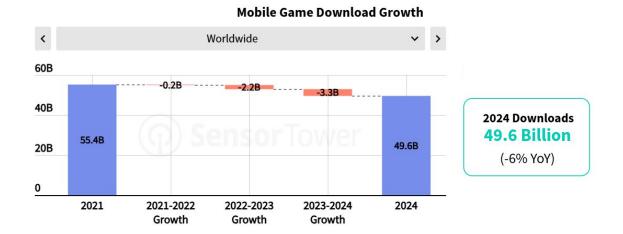
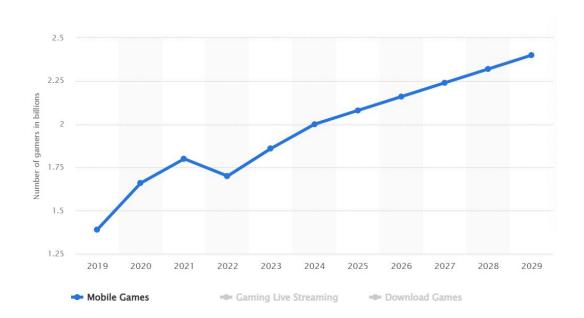


Image credit: Sensor Tower



(Number of video game users WW from 2019 to 2029)



Despite a sharp decline in 2022, in 2023 the number of mobile players resurged back to even slightly higher than in 2021. After that, it grew more, reaching 2 billion players in 2024.

The outlook is highly optimistic, with a significant increase in mobile gamers expected over the next five years, reaching approximately 2.5 billion users by 2029.

Image credit: Statista



Top Mobile Gaming Genres

- Simulation and Puzzle genres <u>led global downloads</u>, each capturing 20%.
- Arcade games, despite a big drop, maintained 19% of all downloads, reflecting their enduring popularity — Runner games lead the pack, driven by the steady popularity of Subway Surfers.
- Lifestyle Customization titles gained traction, showing the growing appeal of personalization.
- Shooter and Strategy subgenres led download growth, driven by hits like Garena Free Fire and Brawl Stars.

2024 | Worldwide Top Mobile Game Genres by Downloads | Powered by Sensor Tower Game Taxonomy

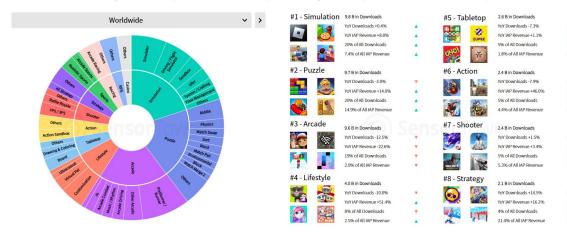


Image credit: Sensor Tower



Top Mobile Gaming Genres

- Strategy games led global consumer spending with \$17.5 billion, making up 21.4% of the total revenue despite only accounting for 4% of downloads. 4X Strategy games, particularly Last War: Survival, were the biggest drivers of this trend, capturing almost 10% of the market.
- RPGs followed closely at \$16.8 billion.
 Puzzle and Casino games secured third and fourth places with \$12.2 billion an \$11.7 billion, respectively.
- Action, Simulation, and Shooter games also saw notable growth, with Action games leading the way (+46%). This goes to show the strong earning potential of competitive and immersive genres.

2024 | Worldwide Top Mobile Game Genres by IAP Revenue | Powered by Sensor Tower Game Taxonomy

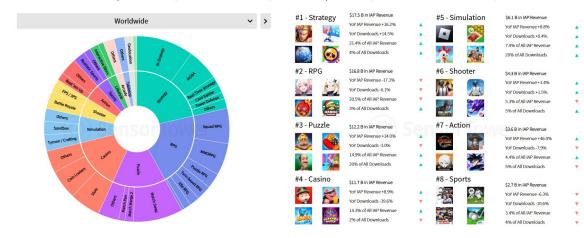


Image credit: Sensor Tower



Top Mobile Games (Top 20 grossing mobile games in 2024 worldwide)

(player spending in million U.S. dollars)

Honor of Kings \$1.9m

2 MONOPOLY GO! \$1.6m

Royal Match \$1.5m

Roblox \$1.2m

PUBG Mobile \$1.2m

Last War: Survival

7 Candy Crush Saga \$1m

> Whiteout Survival \$0.9m

Dungeon Fighter: Origins \$0.8m

Coin Master \$0.7m 1 Brawl Stars \$0.7m

2 Honkai: Star Rail \$0.6m

Pokemon GO! \$0.5m

Genshin Impact \$0.5m

Gardenscapes \$0.5m

7 Monster Strike \$0.4m

Battle of the Golden Shovel \$0.4m

9 Growing Mushrooms \$0.4m

20 Clash of Clans \$0.4m Despite the crushing popularity of Roblox, in the mobile realm, it ranked only fourth in revenue last year. A multiplayer online battle arena Honor of Kings led the way, followed by an online board game Monopoly Go!. Royal Match closes the top three graphically proving the monetization success of the puzzle titles.

Data credit: AppMagic



Top Mobile Games (Top 20 mobile games by downloads 2024)

Roblox

219m

Block Blast 216m

Subway Surfers 177m

Ludo King 171m

Pizza Ready

Free Fire Max 139m

Offline Games 131m

8 Ball Pool 119m

My Talking Tom 2 115m

Royal Match 113m

Candy Crush Saga

Build a Queen 102m

PUBG Mobile 102m

My Talking Tom Friends

Brawl Stars

Wood Nuts & Bolts Puzzle 93m

Wood Screw Puzzle 18

Race Master 3D: Car Racing 89m

EA Sports FC Mobile

Downloads were topped by Roblox, one of today's leaders in the gaming landscape, followed closely by Block Bast, which once again reflects the popularity of puzzle games among mobile players. Top-3 is rounded out by the veteran of mobile gameplay, Subway Surfers.

Data credit: AppMagic



Top Mobile Games (Top 10 Games by MAU in 2024)

Roblox

Subway Surfers

EA Sports FC Mobile



Clash of Clans



Clash Royale



Mobile Legends: Bang Bang



PUBG Mobile



Pokemon GO!

Top-3 according to monthly active users follows a similar trend, except for Free Fire on the second place, which highlights another leader in the mobile industry: battle royales.

Data credit: Sensor Tower



Expert Talks



Anton Slashev, Executive Producer | ex-Playrix | ex-Belka Games | ex-Founder at Unlock Games

The year 2025 will still not be the year of the "Al revolution" for the gaming industry. It will be a year of hybrid monetization, IP collaborations, and web/cross-platform experiences.



Mariusz Gąsiewski CEE Mobile Gaming and Apps Lead, Google

I predict 2025 will be a year of solid growth, likely around 4-6% year-over-year. There will be an increased emphasis on improving customer lifetime value (LTV) through enhanced monetization strategies, exploration of new business models, and increased investment in ROAS-driven user acquisition solutions. This shift is crucial because download growth is expected to moderate compared to previous years. Recent trends show Android downloads outpacing iOS, and I expect this to continue, particularly in Tier 1 and Tier 2 markets.

Furthermore, 2025 will see a heightened focus on creative development. Platforms and traffic sources are increasingly prioritizing strategies that maximize performance through creative excellence. Simultaneously, advancements in AI will enable faster and more cost-effective creation of high-quality creatives tailored to specific platforms and traffic sources.

PC& CONSOLE



PC vs. Console

PC gaming is the next big driver of growth after mobile, now earning the most revenue from non-mobile content. PC and console gaming have gained strength, with consumer spending increasing by \$50 billion since 2011, solidifying their place in the gaming market.

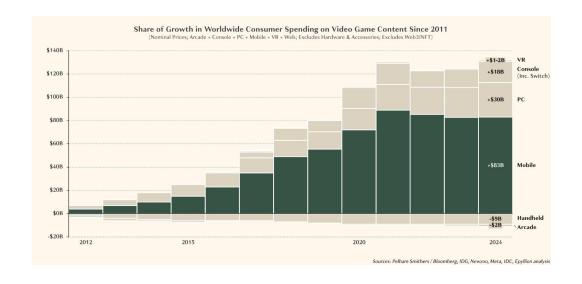


Image credit: Epyllion



PC vs. Console

Twenty years ago, PC made up 29% of non-mobile gaming spend. Since then, PC gaming revenue has grown by 20%, while the console market has stayed flat since 2021.

As pointed out by <u>Matthew Ball's report</u>, the PC gaming ecosystem has major advantages over consoles — and it's only getting stronger.

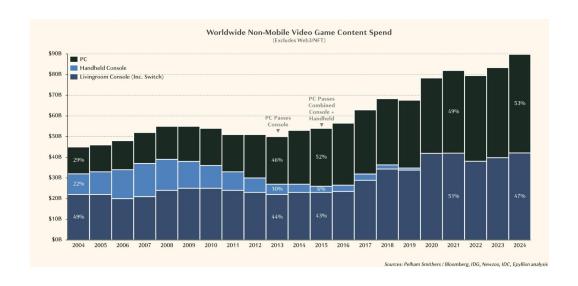


Image credit: Epyllion



PC Advantages as stated by Matthew Ball in Epyllion's Report

Existing

Massive game library: PCs have a larger selection of games than all consoles combined, with near-full backward compatibility.

Wider social network: PC players can connect with more people, often including console users.

Multitasking capabilities: Players can switch to YouTube, read guides, use full Discord, stream with OBS, and even edit videos — all while gaming.

Flexible pricing & performance: PCs offer a lower entry price than consoles while also supporting much higher-end performance.

Competitive edge: The precision of a keyboard and mouse gives an advantage in many games.

Early access to games: PC players can play every early-access title as soon as it's available.

Growing

Library expanding rapidly: More new games are released on PC each year, further increasing its lead.

Console exclusives now on PC: PlayStation now brings its exclusives to PC (even if delayed), and Xbox releases all its titles on both platforms.

Premium Roblox games are PC-only: Some top-tier Roblox experiences are exclusive to PC.

Shifting player habits: Millions of kids growing up on Roblox are unlikely to ask for a \$500 console just to play AAA games.

Rise of portable PC gaming: Handheld Windows gaming devices are becoming more popular, giving players full access to the Steam and PC game libraries.

PC & Console Market Dynamics

Overall, console and PC gaming are both growing, <u>especially in Asia and other global</u> <u>markets</u>. More game developers like Garena, Game Science, and MiHoYo will rise — and they'll start gaining more influence in Western markets too.

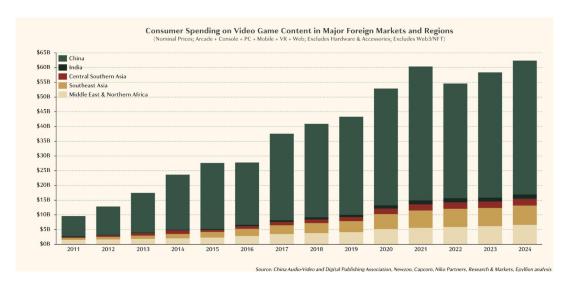
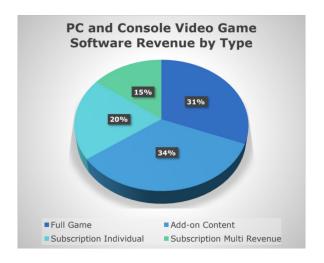


Image credit: Epyllion



PC & Console Market Dynamics

According to <u>DFC</u>, the gaming industry is set for record growth starting in 2025, with PC and console game sales expected to reach \$83 billion by 2028. Big game publishers focus on franchises that <u>generate revenue through add-ons and subscriptions</u>, which opens the door for smaller studios to succeed by selling traditional full games.



- Add-on content has been the main way mobile games make money, and now it's a big part of PC and console gaming too. Revenue from add-ons (34%) has surpassed sales of full games (31%).
- Game subscriptions are also on the rise. Subscriptions to individual
 games like World of Warcraft and Fortnite Crew contribute 20% of
 total software revenue. Another 15% is brought by multi-game
 services, such as Microsoft Game which turned out to be not as
 appealing as expected but still accounts for 15% of revenue.

Image credit: DFC Intelligence



PC & Console Market Dynamics

In 2023, people spent more on gaming hardware and accessories than on PC and console games, and this trend is only growing. By 2028, hardware sales are expected to hit \$120 billion, compared to \$83 billion for game software and services.

An average household has multiple game devices, and even each family member increasingly has several of their own. More and more players can access their game library anytime, anywhere.

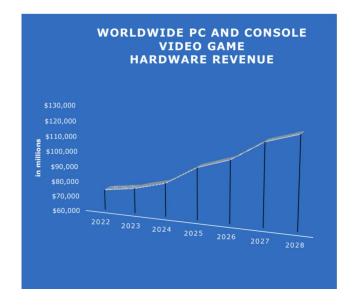


Image credit: DFC Intelligence



Top 20 Console Games in Europe in 2024

1





EA Sports FC 24 (EA)

Grand Theft Auto 5
(Rockstar)

Hogwarts Legacy
(Warner Bros)

Helldivers 2 (Sony)

Red Dead Redemption 2
(Rockstar)

B The Crew 2 (Ubisoft)

It Takes Two (EA)

Call of Duty: Modern Warfare 3
(Activision Blizzard)

1 ELECTRING EL

Elden Ring (Bandai Namco)

Mario Kart 8: Deluxe (Nintendo)*

3 Dragon Ball: Sparking! Zero Bandai Namco

Tom Clancy's Rainbow Six: Siege
Ubisoft

5 Warhammer 40k: Space Marine 2 Focus

Need for Speed: Heat (EA)

Super Mario Bros Wonder (Nintendo)*

Super Mario Party Jamboree (Nintendo)*

9 Fallout 4
Bethesda

Metro Exodus
Plaion

Several 2024 releases made it into the list of best-selling console games in Europe, with EA Sports FC and Call of Duty: Black Ops 6 taking the top two spots. Helldivers 2 ranked as the third best-selling new title, with other notable debuts to follow, including Dragon Ball: Sparking! Zero at #13 and Warhammer 40,000: Space Marine 2 at #15.

Data credit: VGChatz



Top 20 Best-Selling Games in the U.S. in 2024

NBA 2K24

1	COLL-DUTY	Call of Duty: Black Ops 6	11	HOSPITAL	Hogwarts Legacy
2	OHWII 25	EA Sports College Football 25	12		Dragon's Dogma II
3	HELLOIVEPS II	Helldivers 2	13	* 24	WWE 2K24
4		Dragon Ball: Sparking! Zero	14	It SHOWS	MLB: The Show 24
5	(21,2 5	NBA 2K25	15		Grand Theft Auto 5
6	23	Madden NFL 25	16	GIII ASIMA	Minecraft
7	MODERN	Call of Duty: Modern Warfare 3	17		Final Fantasy VII: Rebirth
8	© FRES	EA Sports FC 25	18	a kada	Tekken 8
9	ELDENRING	Elden Ring	19	ZUIT <u>I</u> AIN S	Marvel's Spider-Man 2
	Ones is Great			1/8846	

Call of Duty was the best-selling game franchise in the U.S. for the 16th year in a row. EA Sports College Football 25 was the second best-selling game of 2024, becoming the best-selling sports game in U.S. history. No Nintendo games made it into the top 20 for 2024, though that may be due to Nintendo limiting its sales data.

Data credit: Circana & Mat Piscatella for IGN



EA Sports MVP Bundle

Top 20 Console Games in Japan in 2024

Super Mario Party Jamboree
Sales: 954,261 Total: 954,261

Dragon Quest III HD-2D Remake Sales: 930,505 Total: 930,505

Mario Kart 8: Deluxe
Sales: 536,019 Total: 6,167,617

Super Mario Bros Wonder Sales: 419,854 Total: 1,969,255

Momotaro Dentetsu World
Sales: 411,406 Total: 1,207,087

Animal Crossing: New Horizons
Sales: 377,781 Total: 8,022,435

The Legend of Zelda: Echoes of Wisdom Sales: 372,903 Total: 372,903

Minecraft
Sales: 368,364 Total: 3,762,586

Final Fantasy VII: Rebirth
Sales: 358,353 Total: 358,353

Powerful Pro Baseball 2024-2025
Sales: 341,908 Total: 341,908

Super Smash Bros Ultimate
Sales: 283,744 Total: 5,684,019

Nintendo Switch Sports
Sales: 267,937 Total: 1,514,786

Pokemon Scarlet / Violet
Sales: 244,663 Total: 5,491,026

Dragon Quest III HD-2D Remake (PS5)
Sales: 230,581 Total: 230,581

Paper Mario: The Thousand-Year Door Sales: 222,524 Total: 222,524

Splatoon 3Sales: 213,849 Total: 4,404,975

Princess Peach: Showtime!
Sales: 196,839 Total: 196,839

Luigi's Mansion 2D HD
Sales: 195,327 Total: 195,327

Ring Fit Adventure
Sales: 170,723 Total: 3,678,119

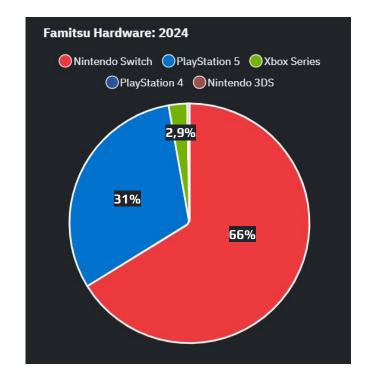
Mario & Luigi: Brothership Sales: 165,060 Total: 165,060 Three Mario games took over the top-5 signalling the swooping success of the franchise in the homeland. Dragon Quest III HD-2D Remake, a classic roleplaying game reimagined, has managed to come second despite having been released in November 2024.

Data credit: Niche Barrier



Top Consoles in Japan in 2024

- Nintendo Switch dominated the console market in Japan, with 18 of the top 20 best-selling games. The PS5 came next, with two top games and a third of total sales.
- Xbox didn't have any games in the top 20 but still made up nearly 3% of sales. The PS4 had little impact, but Like a Dragon: Infinite Wealth helped it rank among the top platforms for best-selling games.
- Meanwhile, the Nintendo 3DS, once a huge hit in Japan, has almost completely lost its popularity after 15 years.



Data credit: Niche Barrier



Top 10 Selling Nintendo Switch Titles in 2024 globally



Mario Kart 8: Deluxe 64.27 million pcs.



Animal Crossing: New Horizons 46.45 million pcs.



Super Smash Bros Ultimate 35.14 million pcs.



The Legend of Zelda: Breath of the Wild 32.29 million pcs.



Super Mario Odyssey 28.50 million pcs.



Pokémon Sword / Shield 26.44 million pcs.



Pokémon Scarlet / Violet 25.69 million pcs.



The Legend of Zelda: Tears of the Kingdom 21.04 million pcs.



Super Mario Party 20.98 million pcs.



New Super Mario Bros. U Deluxe 17.77 million pcs. Mario Kart 8 Deluxe was Nintendo's best-selling game last year by a wide margin, showing just how popular the series still is — and this game in particular, even eight years after its release.

Animal Crossing: New Horizons came in second, followed by Super Smash Bros. Ultimate, both proving the continued success of Nintendo's biggest franchises.

Data credit: Nintendo



Top 10 Selling Xbox Games in 2024 globally

Forza Horizon 4, Sea of Thieves, Forza Horizon 5, and Halo: The Master Chief Collection made up the top 4 of the Xbox titles, proving that community engagement, such as seasonal events and in-game customization is the key to audience's hearts. Moreover, this once again proves the popularity of franchises, like Halo and Forza, which remain strong performers after years of release.



Image credit: Data 40



Top 10 Selling Sony Interactive Games in 2024 globally

Sony Interactive delivered an impressive top 4, dominating by a wide margin. The Last of Us, Horizon Zero Dawn, Marvel's Spider-Man, and God of War stand out with their compelling narratives and cultural resonance, offering huge potential for storytelling-driven marketing. These action-adventure titles are the prime example of how the genre is leading the charge in non-mobile gaming.



Image credit: Data 40



Top 2023-2024 Game Launches by Hours Watched

Streaming has become a crucial tool for organic game promotion, and looking at the hours watched in the first 30 days of a game's release offers a clearer picture of the audience's interest beyond just Day 1 excitement.

Diablo IV shattered expectations with an incredible 168M hours watched in its first 30 days, outpacing Palworld by a whopping 75M hours.



Image credit: StreamHatchet



STEAM



Overview

Launched over 20 years ago, Steam is now one of the most popular digital PC game platforms. By 2024, it had sold <u>over 718 million games</u>. After growing its user base during the COVID-19 pandemic, Steam is on track with <u>33 million peak concurrent users in 2023</u>, up from 27.4 million two years earlier.

Steam's revenue mainly comes from game sales, generating \$10.8 billion in 2024, its highest earnings yet. Over two-thirds come from game sales, while the rest is from in-game purchases.



Before 2012, Steam was mainly a platform for buying, downloading, and playing PC games. However, starting in the mid-2010s, Steam began releasing many more games each year.

In 2018, the number of games released was nearly seven times higher than it had been just four years earlier. In 2024, there was a big jump, with the platform releasing over 25% more games than the year before.

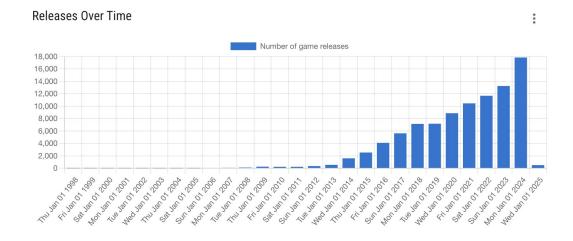
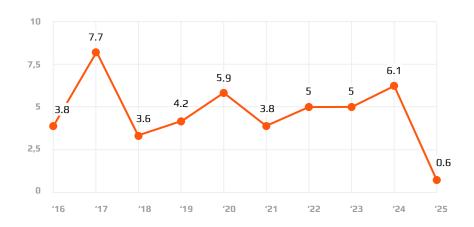


Image credit: Gamalytic



Total Steam revenue 2016 - 2025

(in billion U.S. dollars)



After a notable decline following the pandemic, Steam sales started to bounce back in 2022, though they still didn't reach the peak levels of two years prior. The numbers remained steady throughout 2023, but 2024 marked a strong recovery, with sales hitting their highest-recorded figures.



Steam's dominance in the PC gaming market shows who's driving the overall growth of the industry's segment.

In 2024, the number of monthly active users in the Asia-Pacific countries <u>surpassed</u> <u>Steam's total user base in 2017</u>.

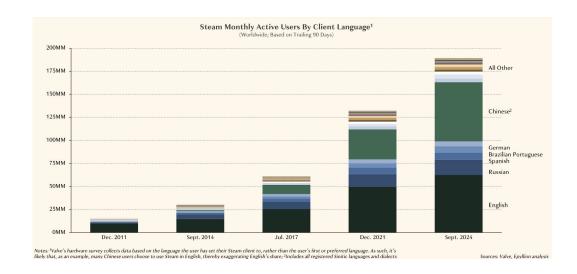


Image credit: Epyllion



Steam users play an average of just 4 games a year, with classics over 8 years old claiming nearly 40% of total playtime, and its all-time leader Counter-Strike another 13%.

New releases make up only 15% — a dip from 2022, but a noticeable increase from the year before.

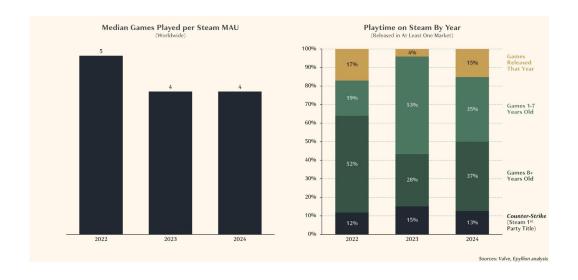


Image credit: Epyllion



All-Time Top Games in Steam

		Copies sold	Revenue	Average playtime
San A	Counter Strike 2	222.8m	\$86	490h
BATTLEGROLHOS	PUBG: Battlegrounds	117.6m	\$4.4b	294h
DOTA 2	Dota 2	211.5m	\$2 b	413h
LIPEX	Apex Legends	65m	\$1.3b	125h
WUKONG	Black Myth: Wukong	21.9m	\$958m	34h
2	Destiny 2	23.7m	\$821.4m	160h
Ballonso Gete	Baldur's Gate 3	14.6m	\$733.7m	85h
WARFRIME	Warframe	29.7m	\$726.5m	170h
ELDETRING	Elden Ring	14m	\$570.6m	101h
	Cyberpunk 2077	14.5m	\$549.4m	67h

The only 2024 release to crack Steam all-time top games list is Black Myth: Wukong, which secured The Game Award for Best Action Game and landed at #5. Aside from that, the chart is dominated by classic shooters, including longtime favorites like Counter-Strike 2 and Dota 2, which have been holding strong for over a decade, each setting records of over 400 hours of average playtime.



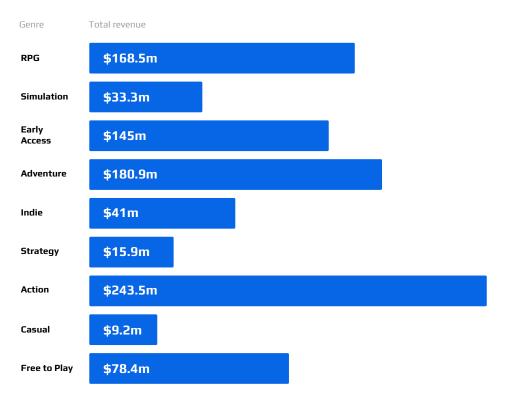
Top Steam Games Released in 2024

		Copies sold	Revenue	Average playtime
WUKONG	Black Myth: Wukong	21.9m	\$958m	34h
PALWORLD	Palworld	18.7m	\$440.3m	45h
HELLOIVERS R	Helldivers 2	12.1m	\$435.8m	52h
SPACE MARINE	Warhammer 40k: Space Marine	2.5m	\$133.5b	28h
ENLEY	Path of Exile 2	4.7m	\$128.3m	45h
DESCENDANT	The First Descendant	4m	\$114.9m	81h
	Dragon's Dogma II	1.9m	\$112.6m	31h
	Throne and Liberty	3.5m	\$101.4m	95h
FRES	EA Sports FC 25	2.1m	\$100.8m	76h
cau-pury	Call of Duty: Black Ops 6	i 1.4m	\$91.7m	N/D

Among the games released in 2024, the award-winning Black Myth: Wukong naturally led the race, but Palworld and Helldivers 2 carved out their own success stories — dominating co-op multiplayer and exploding in popularity thanks to viral social media hype.



Top Steam Genres by Revenue in 2024



Action is the absolute leader in revenue showing the universal appeal of fast-paced gameplay and strong multiplayer elements for the PC gamers. Adventure and RPGs come next, with immersive and story-driven titles attracting massive sales. Yet, revenue in the Action and Adventure genres is highly concentrated among top-performing games, while RPGs stand out with the highest median earnings at \$202, meaning its mid-tier titles perform better than those in other categories.



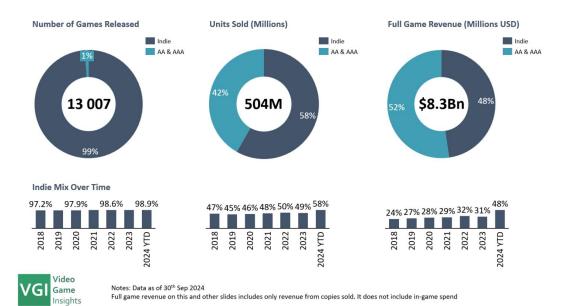
Indie Landscape on Steam

In 2024, indie games <u>made up 99%</u> of all releases on the platform. Discovery remains a challenge but Steam supports indie games through its low-cost open-publishing system Steam Direct, visibility tools like Steam Discovery Queue, regular sales, seasonal events, and a strong community-driven ecosystem. Despite challenges, Steam remains the top platform for indie developers to reach a global audience.



Steam Indie Games Dynamics

Indie Games Performance on Steam in 2024



Indie games on Steam are thriving. In 2024, they hit a major milestone by selling 504 million units, surpassing AA and AAA titles for the first time. Even more impressive, indie games now generate almost as much revenue as big-budget titles, marking a huge breakthrough — their market share grew by 17% compared to last year and doubled since 2018.

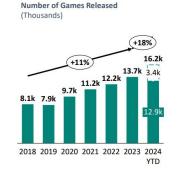
Image credit: VGInsights

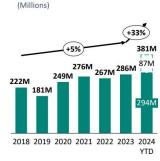


Steam Indie Games Dynamics

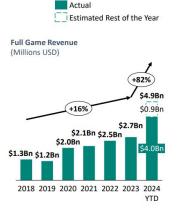
Despite a slowdown in the wider industry, the indie market surged to new heights in 2024, breaking records for the number of games, units sold, and, most notably, revenue. Moreover, more indie developers than ever before are launching their 2nd and 3rd games.

Indie Game Releases, Units Sold and Full Game Revenue by Year, 2018-24





Units Sold



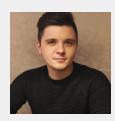


Notes: Data as of 30th Sep 2024. Units sold include free to play downloads

Image credit: VGInsights



Trends Shaping Gaming in 2025



<u>Nikita Zavatski</u>, Business Development Manager, AAA Agency

- Generative AI will greatly help developers speed up project creation, like generating open-world locations or even creating NPC packs. There are already examples, like No Man's Sky, where generative AI helped create an entire universe with billions of planets (Sean, we sincerely admire your work!), or AI Dungeon, built entirely on AI. This trend is only set to grow.
- New gaming devices and hardware advancement will naturally push the boundaries of the gaming experience. Nvidia's
 latest graphics cards along with AI and DLSS breakthroughs will deliver better performance and even more realistic visuals
 by upscaling graphics in real-time. As powerful hardware emerges, gamers will likely upgrade their PCs more often, boosting
 sales of gaming components. There are also talks about Steam Deck 2, which could enhance portable gaming, making
 high-performance gaming on the go more accessible.
- Two biggest products, Switch 2 & GTA 6, are set to reshape the industry, possibly setting new financial standards GTA 6 might even push game prices to \$80-100 at launch and attracting investment in game development, new tech, and marketing. They could shift the entire landscape, influencing platform popularity, trending genres, and developers' priorities.
- The growth of China and Southeast Asia will play a bigger role in expanding the gaming industry. Wukong's success proved
 that Chinese developers can create AAA games that rival big Western titles. A South Korean developer Netmarble is currently
 working on an action-adventure RPG based on Game of Thrones Kingsroad. And more games from this region are on the
 way.
- New app stores & Development of the existing platforms is a possible trend, but one that's still up for debate. Some
 platforms, like Epic, are facing challenges in the competitive race, which could become an issue for the long-term success.
 Many big publishers like Ubisoft and EA are returning to Steam, leaving their own stores behind. So, despite efforts to create
 alternative platforms, developers might prioritize where they can reach the largest audience, making it harder for new stores
 to challenge the status quo in gaming.

STATE OF INFLUENCER MARKETING



Industry's Worth

Influencer marketing is on a meteoric rise, set to soar to \$32.55 billion by 2025, driven by an impressive 35.63% annual growth rate. Due to cutting-edge AI tools and seamless integration into social commerce, this industry isn't just growing — it's outpacing traditional advertising at full speed.

With social media engagement hitting all-time highs, influencer marketing is proving to be the heartbeat of digital advertising future.

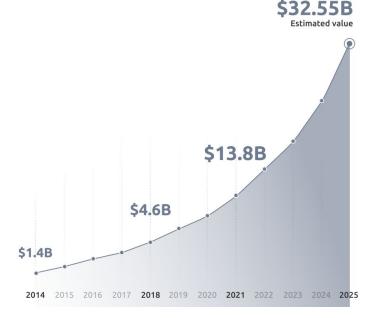


Image credit: Influencer Marketing Hub



Industry's Worth

Taking a different perspective on the industry's economy, <u>Forbes estimated it at around \$250 billion</u> by looking at creators' earnings, follower counts, engagement levels, and business ventures. And the growth isn't slowing down — it's expected to nearly double, reaching close to \$500 billion by 2027.

The growth in this space is largely fueled by top creators who are transforming from entertainers to entrepreneurs. Take MrBeast, who's turned his fame into a thriving business with everything from clothing to Feastable candy bars. Dhar Mann co-founded LiveGlam, a beauty subscription service, while comedian Matt Rife has used his digital popularity to pack physical theaters.



2024 Forbes Top-10 Creators



#1 MrBeastEarnings: \$85M,
Total Followers: 503M



#2 Dhar MannEarnings: \$45M,
Total Followers: 120M



#3 Matt RifeEarnings: \$50M,
Total Followers: 30.4M



#4 Charli D'Amelio Earnings: \$23.50M, Total Followers: 213.5M



#5 Stokes TwinsEarnings: \$20M,
Total Followers: 113.7M



#6 Dixie D'Amelio Earnings: \$14.60M, Total Followers: 87M



#7 Mark RoberEarnings: \$25M,
Total Followers: 61.9M



#8 Alex CooperEarnings: \$22M,
Total Followers: 5.7M



#9 Rhett & LinkEarnings: \$36M,
Total Followers: 14.3M



#10 Khaby LameEarnings: \$20M,
Total Followers: 255M

Image credit: Forbes



Budgets

Around two-thirds of brands (63.8%) plan to partner with influencers, while 26.8% are undecided whether to take this course. In 2025, brands are being more cautious with their influencer marketing budgets. After peaking at 85.8% in 2024, dedicated budgets have dipped to 75.6%. Rising costs and inflation are pushing companies to focus on smaller, more targeted partnerships.

Although 10% fewer brands are planning to increase budgets for influencer marketing in 2025, nearly half (49.2%) still intend to invest more. **Despite economic challenges, influencer marketing remains a priority for many.**

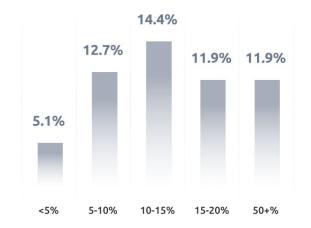


Image credit: Influencer Marketing Hub

Percentage of Budget Allocated to Influencer Marketing in 2025



AI in Influencer Marketing

In 2025, AI is set to revolutionize influencer marketing every step of the way — from finding creators to optimizing campaigns.

With 64% of thought leaders backing its impact, **Al** is on track to reshape the landscape.

Experts point out Al's ability to track campaign performance, predict ROI, and match brands with the perfect influencers. Above all, Al is prized as a tool to save time in campaign management and generate interactive content.

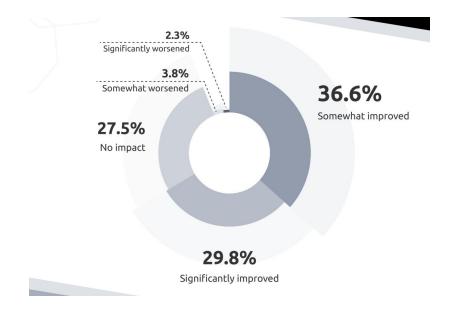


Image credit: Influencer Marketing Hub



Virtual Influencers

Over half of their audience purchased the promoted product, attended the popular event, and followed a sponsor brand endorsed by virtual influencers.

Brands are testing the waters, with the fashion industry leading the way. Take Shudu, the first digital supermodel working with Cosmopolitan and Vogue or Lil Miquela, who partnered with Bella Hadid for Calvin Klein.

New digital personalities like <u>Leya</u>, an environmental advocate, and <u>Kami</u>, the first influencer with Down syndrome, are pushing boundaries in the innovation and inclusivity.







Criteria to Evaluate Influencers

Views and sales remain important, but engagement & clicks, and content type lead the way.

Brands consider both numbers and overall fit when choosing influencers, aiming for a balance between quick wins and long-term, authentic brand growth.

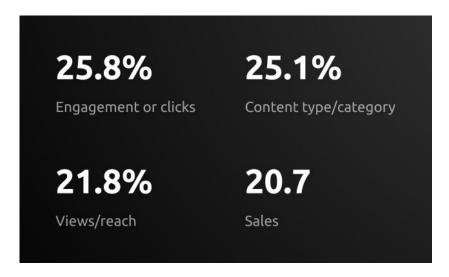


Image credit: Influencer Marketing Hub



Top Platforms for Influencer Campaigns

In 2024, YouTube and Instagram <u>brought the highest ROI to the table</u>. Facebook came second, while outpacing the two <u>in monthly active users</u>. At the same time, YouTube and TikTok have the <u>most attractive CPM rates</u>. However, the most preferred channel is believed to be Instagram, followed by TikTok and, by wide margin, YouTube.

PLATFORM	2025 AVG CPM RATE
Meta (Facebook & Instagram)	\$7.43
TikTok	\$4.38
YouTube	\$4.05
Snapchat	\$8.21
Pinterest	\$7.08

Image credit: Gupta Media

Most preferred platforms

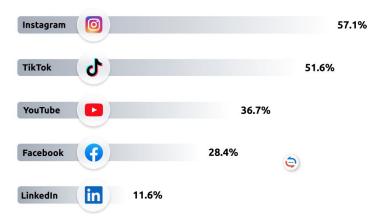


Image credit: Influencer Marketing Hub

Top platforms are neck and neck, each working best for different goals. **To maximize success, it's crucial to analyze metrics** within the broader lens and adopt multi-channel strategies.



YOUTUBE



Overview

YouTube remains a key player in influencer marketing in 2024. It is the second most popular search engine, and with 55% of internet users watching videos before buying, its content is more influential than ever.

YouTube raked in \$34 billion in ad revenue this year, strengthening its grip on long-form video and diverse content.

As the third-most popular platform for influencer campaigns, **75% of marketers see YouTube as essential for influencing consumer behavior and driving sales.**



New YouTube Features for Influencers

AI-Powered Auto-Dubbing

YouTube now lets creators automatically translate their videos into multiple languages, helping them reach global audiences and collaborate with international brands more easily.

• YouTube Hype

To support smaller creators, YouTube launched YouTube Hype that boosts videos from channels with under 500K subscribers. A leaderboard highlights the most-hyped content, increasing visibility.

• Shopping in YouTube Shorts

Shorts now include built-in shopping features, allowing influencers to tag products directly in their videos, so that viewers could make a purchase without leaving the app.

Expanded Monetization with YPP

More creators can now earn through ads, memberships, and merchandise thanks to YouTube's expanded Partner Program. This makes it easier for new influencers to grow and monetize their content while attracting brand deals.

With these updates, YouTube is doubling down on creator success, audience reach, and brand partnerships.



Popular YouTube Content

Video games ranked fourth among the most popular content on YouTube, <u>making up 6% of all videos</u>. The top three categories — Music & Dance, Animation, and Movies — dominate the platform.

While gaming trails behind entertainment-heavy genres that attract a broader audience, it still has a strong presence among the YouTube audience.

Category	%
Music & Dance	16.5
Animation	16.2
Movies	11.8
Video Games	6.1
Humor	5.2
News & Politics	2.7
Health & Self-Help	2.4
Daily Vlogs	2.4
Science & Technology	2.3
Design/Art	2.1

Image credit: HypeAuditor



Influencer Tiers on YouTube

The majority of influencers <u>fall into the Nano and Micro categories</u>, with most channels boasting between 1,000 and 50,000 subscribers.

While Macro and Mega influencers (500K+ subscribers) are fewer in number, they remain key with high engagement and significant influence in the overall content landscape.

	Percentage	ER, %
Nano 1k-10k	69.4%	2.1%
Micro 10k-50k	14.8%	2.7%
Mid-tier 50k-500k	6.4%	3.3%
Macro 500k-1M	0.5%	3.5%
Mega over 1M	0.5%	3.5%

Image credit: HypeAuditor



Top Gaming YouTubers: AAA Agency's Picks

	ER	CPM	Estimated Integration Price		
<u>PewDiePie</u>	5.57%	\$8.55	\$22.2K	PewDiePie and Markiplier, known for their entertaining gameplay, lead the engagement rate charts, making them top picks for advertisers aiming for a strong return on investment. Jacksepticeye, who is also popular for his	
<u>Markiplier</u>	5.39%	\$8.55	\$21K	energetic and humorous videos, shows solid engagement but with a slightly lower rate.	
<u>VanossGaming</u>	4.14%	\$10.99	\$8.7K	VanossGaming, whose content often features fun collaborations and gaming moments, provides a more budget-friendly integration option, allowing brands to balance good engagement with cost-effectiveness.	
<u>Jacksepticeye</u>	3.46%	\$8.55	\$23.7K	Ninja, known for his competitive gaming content and massive reach, has a lower engagement rate, which could suggest he appeals to a wider audience rather than a highly engaged fanbase. This makes him a better option for brands looking for broad exposure rather than targeted engagement.	
<u>Ninja</u>	3.40%	\$18.78	\$3.1K	Data for ER, CPM, Estimated Integration Price is credited to <u>HypeAuditor</u>	



INSTAGRAM



Overview

Instagram is the undisputed leader in influencer marketing. In 2025, <u>90% of brands plan</u> to boost their presence on the platform, thanks to its massive user base and the genuine connections influencers create between brands and consumers.

The power of Instagram is clear: 87% of users take action after seeing product info, whether it's following a brand, visiting a store, or making a purchase. **This makes Instagram a major player in driving consumer behavior and generating leads.**



New Instagram Features for Influencers

Views Take Center Stage

Instagram now prioritizes "Views" over follower count and likes, focusing more on reach and engagement.

Hashtag Following Removed

Influencers can rely more on direct engagement and alternative discovery methods to stay visible.

Inactive Profile Cleanup

Influencers can boost engagement and refine ad targeting by keeping their follower base active.

DM Filters for Easy Collaboration

New messaging filters help creators sort DMs by follower count, verified accounts, and brand inquiries, making it easier to manage brand deals.

AI-Generated Content

Integrated AI generated content features allow influencers to create more innovative posts.

<u>These updates</u> offer influencers new tools to boost visibility, engagement, and collaboration opportunities.



Top Influencer Topics on Instagram

Romance and entertainment dominate the influencer scene on Instagram, capturing the largest share of content. Shopping & Fashion holds a strong third place, reflecting the appeal of style and consumer trends.

Although gaming isn't listed as a standalone category, it thrives within one of Instagram's most popular spheres — the entertainment segment.

Topic	Influencers	% of influencers
Romantic Relationships	5.2M	14.4
Entertainment	3.3M	9.2
Shopping & Fashion	2.9M	8.2
Music	2.7M	7.4
Social Issues	2.7M	7.4
Movies & TV Shows	2.7M	7.4
Beauty	2.6M	4.6
Travel	2M	5.7
Politics	2M	5.7
Kids	1.6M	4.6

Image credit: HypeAuditor



Influencer Tiers on Instagram

Just like on YouTube, <u>nano influencers</u> <u>dominate Instagram</u> — but their presence is even stronger here, making up over three-quarters of all influencers, a full 6% higher than on YouTube.

In contrast, high-profile influencers — celebrities and macro creators — hold a much smaller share, collectively making up just 0.3%. This could point to Instagram's role as a platform where everyday creators thrive, fostering authenticity and relatability.

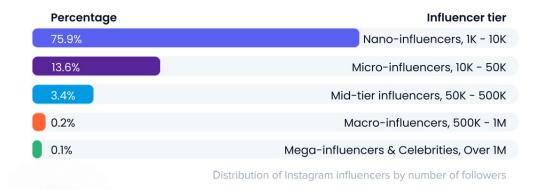


Image credit: HypeAuditor



TIKTOK



Overview

TikTok's explosive growth shows no signs of slowing down. With over 170 million users in the U.S. alone — and projections pushing that number past 200 million by 2027 — the platform has cemented itself as the entertainment powerhouse.

A recent Jungle Scout survey reveals that 68% of adult Gen Z users are open to making purchases on the app, putting it on par with YouTube and just behind Instagram. With its unmatched influence in entertainment and advertising, TikTok is now a key battleground for businesses looking to capture attention and drive sales.



New TikTok Features for Influencers

Surge of TikTok Shop

Since its U.S. debut in late 2023, TikTok Shop has skyrocketed in popularity, pulling in a staggering \$100 million in sales on Black Friday 2024 alone. For brands and influencers that authentic content can now easily translate directly into sales.

AI-Powered Video Creation

TikTok's Symphony Creative Studio is making high-quality content creation easier than ever. This Al-driven tool helps brands and influencers craft trend-aligned videos effortlessly, removing production barriers.

TikTok Minis

TikTok is testing Mini-Apps that offer in-app services like food ordering and ticket booking, opening up new ways for brands to integrate into daily interactions. By partnering with influencers, businesses can make their products and services a natural part of users' TikTok experience.

These updates provide influencers and brands with tools to tap into creativity and monetize their efforts.



Influencer Tiers by ER on TikTok

Although influencer engagement rates on TikTok have dipped slightly compared to 2023, they're still among the highest across all social platforms. Nano-influencers lead the way with an impressive 10%+ engagement rate, however, mid-tier creators and celebrities are not far behind, with over 7% each.

TikTok is designed for effortless content creation and interaction, encouraging users to not just scroll but actively engage — liking, following, and posting frequently.

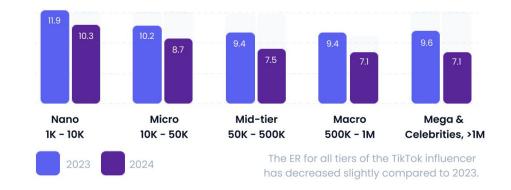


Image credit: HypeAuditor



Top-10 TikTok Gaming Influencers

Data credit: HypeAuditor

		Followers	ER			Followers	ER
N N N N N N N N N N N N N N N N N N N	<u>Devin Caherly</u>	10.2m	7.3%		<u>LSToast</u>	6.5m	4.89%
	Xzit_Thamer	8.4m	4.19%	S	<u>Austin</u>	6.4m	2.96%
	Ely Bell's	7.2m	11.38%		<u>Sypherpk</u>	3.7m	7.3%
	<u>Chica</u>	7m	6.88%	Dylliq E.J	Dwiki CJ	3.3m	2.44%
	Andrik Kingston	6.6m	7.12%	<u>G</u>	<u>GAMINGbible</u>	3.2m	5.93%

From battle royales to esports and VR experiences, TikTok's top gaming influencers span a variety of genres, with top formats being stream highlights and gaming memes. Some carve out their niche in specific games, thriving on titles like Fortnite, Garena Free Fire, and GTA. While most of their content is in English, the Spanish-speaking gaming community is also making waves, proving that great gameplay transcends language barriers.



TWITCH



Twitch Dynamics

In 2023, Twitch racked up an impressive 18.9 billion hours watched, with 2024 following closely behind at 18.5 billion.

Viewership peaked in early 2024, took a summer dip, and rebounded toward the year's end. Despite these ups and downs, Twitch maintained a staggering daily watch time of 55–60 million hours.

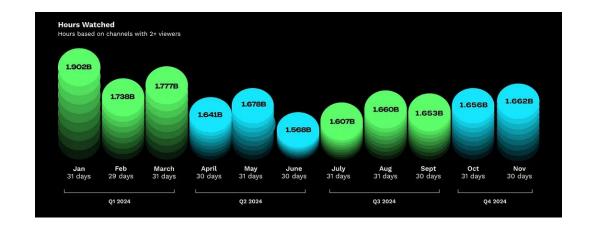


Image credit: StreamElements



Top Games on Twitch

While the top 10 games of the year have shuffled around - for example, Call of Duty: Warzone swapping places with Apex Legends twice - the list of games has remained consistent.

<u>Top genres are</u> battle royales, MOBAs, tactical first-person shooters, sandbox survival games and MMORPGs.

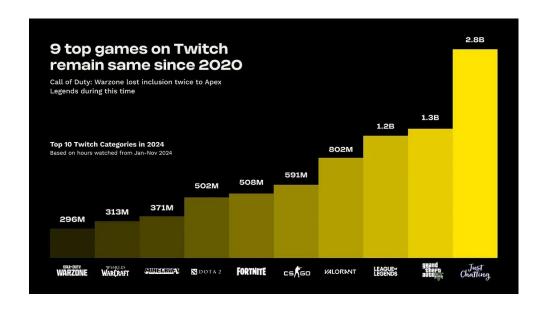


Image credit: StreamElements



Top Twitch Gaming Streamers: AAA Agency's Picks

		Followers	Peak viewers	Hours watched	
	<u>KaiCenat</u>	16m	142 177	1 950 209	Shroud, with 11.1M followers, is a veteran of the gaming scene, known for his high-level gameplay in shooters.
	<u>Shroud</u>	11,1m	22 725	978 229	One of the most well-known female streamers on Twitch Pokimane commands a significant presence on the platform, likely attracting a wide range of viewers with her diverse content, from gaming to talk shows.
	<u>Pokimane</u>	9.3m	11 954	70 306	Sodapoppin has been a consistent figure on Twitch, pulling in solid viewership and hours watched. He mixes gaming with variety streaming, which helps maintain his broad appeal.
278	<u>Sodapoppin</u>	8.9m	69 866	829 557	Nickmercs, known for his expertise in games like Fortnite and Call of Duty is one of the leaders in his niche of competitive gaming.
S.	<u>Nickmercs</u>	6,7m	8 209	175 391	Data for Peak Viewers and Hours Watched is credited to <u>TwitchTracker</u>



Top Twitch Gaming Streamers: Kai Cenat

The undisputed streaming leadership of 2024 goes to Kai Cenat, who racked up <u>185M hours watched last year</u> — that's an over 40% rise from 2023.A big part of his success comes from marathon streams, where he keeps the content flowing non-stop. For example, his Elden Ring marathons last summer gained millions of hours watched and <u>pushed the game far up the charts</u>.



Image credit: StreamHatchet

His biggest draw is "Mafiathons", named in honour of Kai's subscribers, who he dubs the Kai Mafia.

His Mafiathon 2 streamed throughout the whole November featured game streams, including a special Mafiathon edition of Getting Over It, celebrity appearances – Kevin Hart and Snoop Dogg among them — an Al robot that interacted with Cenat and viewers, and many more. As a result, it has pulled in monumental viewership: 82.8M hours watched in a month, with a peak viewership of 623K concurrent viewers.



NEW STREAMING PLATFORMS



Kick Dynamics

In just two years since its launch,
Kick has surged to new heights as an
alternative streaming platform, marking an
incredible year of growth. In 2024, the
platform nearly tripled its viewership, soaring
by 176% to reach 1.7 billion hours watched.

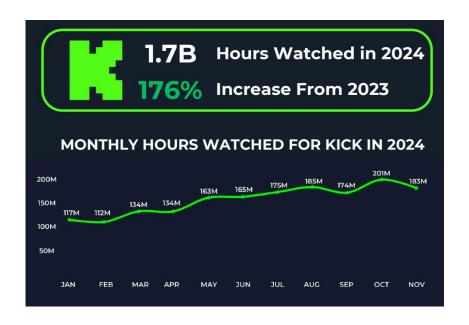


Image credit: StreamHatchet



Top Kick Streamers

Kick's star streamers like WestCOL, Adin Ross, and N3on each pulled in <u>over 50 million hours watched</u>. Adin Ross even made headlines by inviting U.S. president-elect Donald Trump to join him live on stream. However, it was WestCOL who stole the show, attracting a record-breaking 1.4 million concurrent viewers with his Stream Fighters 3 boxing event in Colombia.

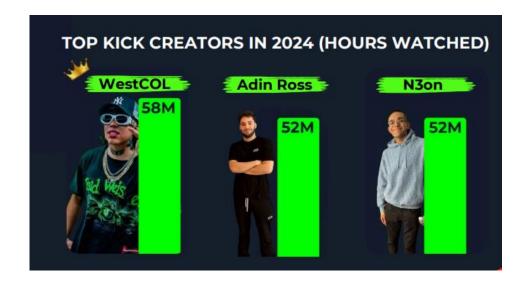


Image credit: StreamHatchet



2024 Breakthroughs



In early 2024, Twitch shut down its operations in Korea due to sky-high network fees that are 10 times more expensive than in most countries. Two months later, **an alternative platform Chzzk burst onto the scene**, soaring <u>to a staggering 84 million hours watched</u> by November. The platform quickly became a hub for popular games like League of Legends, Minecraft, and the MMO Lost Ark.



In response to Twitch's exit from Korea and the rise of Chzzk, **AfreecaTV was rebranded as SOOP**, aiming to empower creators and make content more accessible to global audiences. SOOP introduced a content support center, similar to YouTube's LA Space, and rolled out a real-time translation service.



While not exactly a debut, **BIGO LIVE saw massive growth in Southeast Asia and Latin America**, and by 2024, it established itself among top live-streaming platforms globally. In July 2024, the platform https://doi.org/10.2024/, surpassing both Steam (23.7 million) and Facebook Live (22 million), becoming the 7th most popular live-streaming platform worldwide by 03 2024.



BEST 2024 GAMING CAMPAIGNS



Warhammer 40,000: Space Marine

Space Marine 2 broke records, attracting over 2 million players on its first day and becoming the best-selling Warhammer game.



A standout influencer initiative was the <u>Twitch Drop</u> <u>campaign</u>, where over 30 influencers of all sizes offered exclusive rewards for the hours watched.

Moreover, Warhammer's official Twitch channel <u>hosted a pre-launch stream</u> where they interacted with viewers and played the game, much like typical gaming influencers do.



The promotion <u>was incredibly powerful</u> and included vast offline efforts. Focus Entertainment set up several life-sized statues around the world, organizing <u>contests</u> around them.

They also launched <u>a U.S. and Canada tour</u> for Space Marine fans to try out the game. Influencers played their role here, <u>live-streaming the events</u>, bringing viewers along for the ride.

<u>Clive Standen</u>, who played Captain Titus, became a key ambassador, promoting the game on his and the publisher's social media, speaking at offline events, and hosting <u>the Titus Talks show</u>.



Black Myth Wukong

Over the four years, the team has been unveiling the game's mechanics and story on social media through trailers, such as the 13-minute gameplay teaser, targeted ads and behind-the-scenes glimpses.



Over 10 major companies, including <u>NVIDIA</u>, <u>Lenovo</u>, and <u>Luckin</u> <u>Coffee</u>, came onboard, helping the game reach diverse markets.

A particularly clever move was <u>collaborating with Xuanzang Temple</u>, a key inspiration for the game's setting. This partnership bridged the gap between the game and real-world culture, with promotional events at the temple driving both tourism and pre-orders, further elevating the game's visibility and fan excitement.

<u>Influencer partnerships</u> helped amplify the game's reach, with creators turning the game's mythological elements into compelling stories. A year pre-release <u>xOc</u> unveiled a mysterious Wukong package during a livestream, generating widespread media coverage and boosting the game's international presence.





Call of Duty: Black Ops 6

Activision is pouring blockbuster-level marketing into the game. They came up with <u>graphic trailers</u> expanding on rich character storylines, rolled out a series of <u>funny ads</u>, created <u>an email newsletter</u>, <u>scored influencer collabs</u> in different world regions, provided <u>exclusive gaming bundles</u>, and even introduced <u>a third-party audio tool</u> to offer enhanced in-game hearing to increase the directional accuracy of sounds played in the world.



The game's collaborations blended real-world brands with the virtual world to offer exclusive collectibles and bring in more audiences, with so many brands coming on board: Monster Energy, Dolly Noire, Herman Miller, Corsair, and even Triumph Motorcycles.

Ahead of launch, <u>they've announced two Beta weekends</u>, encouraging pre-orders for early access, exclusive skins, and bragging rights. This not only generated buzz but also allowed them to collect feedback and fix bugs on the go.





Diablo 4: Vessel of Hatred

As part of the expansion, Blizzard ensured exclusive content for Vessel of Hatred owners, with promises of additional in-game rewards beyond Season 6. The team aimed to avoid the feeling of the expansion being a one-off, making sure its value stretched well beyond.



The Vessel of Hatred expansion also brought unique, handcrafted collectibles and gifts to enhance the experience, such as <u>the exclusive</u> package from the Nahantu Tourist Board.

They <u>partnered with MSI</u> for a limited-time promotion around the Vessel of Hatred expansion. For a short period, from November 1 to December 31, 2024, MSI product purchases unlocked both the Diablo IV base game and the Vessel of Hatred expansion, offering a powerful bundle for fans.

The promotion also enjoyed a <u>strong social media presence</u>, keeping players engaged with updates, patches, sneak peeks, and more.





Palworld

Palworld's Early Access launch in January 2024 was an instant success, selling over five million copies in just three days.

While there were no pre-launch collabs, Palworld is now keeping momentum with partnerships, including a crossover with the indie favorite Terraria.

They keep the excitement going with seasonal events, releasing holiday-themed skins and special in-game items for celebrations like Halloween, Lunar New Year, and more.





Its marketing strategy thrived on TikTok, where the game's mix of monster-catching and survival mechanics made for highly shareable content. Both the official account and early-access creators flooded the platform with fast-paced gameplay clips, showcasing Pals and battle mechanics.

Streamers played a crucial role in the game's explosive debut. Popular Twitch and YouTube personalities shared <u>exclusive</u> <u>early-access gameplay</u>, fueling hype.





Silent Hill 2 Remake



To engage the Silent Hill community, Konami teamed up with Takeoff to create <u>exclusive influencer kits</u> that included in-game puzzle coin replicas, a steel case box, digital content codes, and Pyramid Head-themed merchandise.

Select influencers also received a Red Pyramid Thing (RPT) t-shirt, a town map cleaning cloth, and a set of coasters — a sign of developer's appreciation for the fanbase and key voices driving the conversation.

Promotion ramped up with <u>early-access reviews</u> and <u>streams</u> before launch, building anticipation. After release, the game saw a massive surge in attention, <u>amassing nearly 16 million hours</u> watched in its first week, with a peak concurrent viewership of 404K across platforms.

The remake stirred controversy among longtime fans, particularly over James and Maria's redesigns: many felt James looked too old and expressive, while Maria lacked the enigmatic allure of the original. While unintended, this backlash fueled heated discussions on social media, amplifying the game's visibility even further.





Civilization VII



The promotion also featured community updates, with the development team sharing insights through <u>developer diaries</u>.

Another key promotional move is the game's narrator taking on an ambassador role. Fans of the Civilization series know the narrator is central to the experience, offering wisdom about humanity throughout the game. Over the years, notable actors have voiced this iconic role, and for Civilization VII, <u>it's none other than Gwendoline Christie</u>.

Civilization 7 has geared up for the "Civ World Summit", bringing fans together with exclusive content and a live stream. Influencers play a vital role here, both as hosts — a popular Civ YouTuber PotatoMcWhiskey — and as players competing in a thrilling free-for-all.

Fans can get in on the action by purchasing tickets to attend the live studio event, while online viewers can watch the event live and earn a special <u>Twitch Drop reward</u> by tuning into the Firaxis Games channel or partnered streams.





Deadpool & Xbox



Moreover, on the movie's premier day, the first 1,000 buyers of an Xbox Elite Wireless Controller Series 2 – Core from the Microsoft Store got an exclusive Deadpool controller holder. Gamers could also win a custom Deadpool-themed Xbox Series X, complete with foam katanas and two controllers. While Twitch livestream from the Deadpool & Wolverine premiere offered even more prizes to viewers.

In celebration of Marvel Studios' Deadpool & Wolverine, Xbox teamed up with Deadpool for a <u>custom Xbox Wireless Controller</u>. Featuring Deadpool's signature red-and-black suit, it also has a detachable replica of his backside that added both playfulness and practicality. "The appropriately named "Cheeky Controller" channels Deadpool's buns of steel in its firm (yet surprisingly comfortable) grip."

To hype things up, fans had the chance to win this limited-edition controller and other custom Xbox gear through a global sweepstakes, with influencer buzz boosting the excitement.





BUILDING ACAMPAIGN: INSIGHTS FROM AAAAGENCY



Short-term vs. Long-term campaigns

Product updates, such as in-game features, sales, trends, and seasonal events are a great fit for short-term campaigns.

The type of influencer can vary — nano influencers work best for maximum audience engagement, while macro influencers are ideal for broadening awareness.

It's important to keep in mind that even for short-term campaigns, planning ahead is key. Influencer slots can fill up in as little as a month, and to work big-name influencers, you might need to reach out six months in advance.

Brand awareness over time, sustained loyalty, organic customer growth and community development require a long-term campaign that should be based on the client's marketing strategy.

Say the client is launching a new MMORPG in the US, with beta testing and release dates, and KPIs for reach, installs, and purchases.

An agency has to build a marketing plan based on the competitors and audience analysis. It's crucial to understand the audience's expectations, and develop relevant communication guides as part of this.

Moreover, it's advisable to calculate the influencer funnel in accordance with the client's KPIs, and choose the right platform and influencer tier for each step of the funnel.

Steps for Long-term Campaign

- 1. Strategic team begins by **analyzing competitor behavior** over the last year in the market, reviewing their release plans, and audience patterns: who's playing, who's buying, and who's followed. At the same time, they assess **audience sentiment toward competing titles** what they liked, disliked, and what they expect from developers, as well as what community issues need addressing.
- 2. Based on competitor analysis and the client's marketing plan, a one-year promotion strategy for the game is built. At AAA Agency, we often employ an innovation-integration strategy tailored to the product. For gaming, the soft launch phase typically involves beta tests, targeting an engaged community to play the pre-release version and provide valuable feedback, along with positive reviews.
- 3. **The influencer funnel is structured to align with the client's KPIs**, focusing on three stages: Awareness, Consideration, and Conversion. For each stage, the appropriate platform and influencer profile are selected.
- 4. It's key to **create a compelling "hook"** that drives players to take action and to **select influencers who resonate with the target audience**, especially given the highly demanding gaming community. Each genre and title requires a unique influencer strategy to effectively reach the right crowd.
- 5. **Clear communication guidelines are developed,** incorporating key CTAs and addressing the audience's pain points without losing the influencer's authenticity.
- 6. When the influencer funnel is kicked off, stats are collected after each iteration to analyze which tactics performed best.



Tips for Brands from AAA Agency

- **Start your influencer campaign 3-6 months before the release**, since the influencer funnel typically starts to show results after 2 months.
- Share with the agency all the details about the consumer's pain points, developer insights, and even thoughts of your office cleaner about the workspace (just kidding) the more the agency knows, the more accurate the influencer strategy will be.
- Don't expect influencers to deliver immediate traffic. Your audience may come slower, but these will be your people —
 brand advocates who will provide feedback, retention, and word-of-mouth marketing as a bonus.
- **Experiment with approaches**. Don't be afraid to broaden the influencer profile and consider other audiences. Just like the same toy might be just as appealing to dog lovers and art creators, your MMORPG can be of interest to all sorts of audiences. Maybe it's time to tap into a new demographic what if 50-year-old fishing enthusiasts are now interested?



Tips for Brands from AAA Agency

- **Keep the brief flexible**: outline dos and don'ts, but don't write the script for the influencer they're not a teleprompter. Audiences can spot when something feels off, and it'll backfire. Give as much creative freedom as possible.
- Remember that there's no universal platform solution for a specific genre. True, mobile games shine on YouTube and TikTok, PC games thrive on YouTube and Twitch, and console games do well on YouTube, Steam, and Discord. But the key really lies in the player profile. As an agency we work with YouTube, Twitch, TikTok, Instagram, and Kick, and we always analyze the audience's demographics and behavioral habits before making the choice.
- Watch the ER metrics to avoid failed influencer partnerships. If an influencer has a huge follower count but a low engagement rate, it means their audience is either inactive or just not paying attention to their content. If you don't have access to these tools and want to check the stats, take a look at the comments and request story view statistics from the agency. A good conversion rate for story views is usually 7-10% of the influencer's total followers.



INFLUENCER MARKETING TRENDS & CHALLENGES IN 2025



AAA Agency's Vision on 2025 Trends

Marketplace influencers

Marketplaces grows into media empires. In China, social commerce makes up over 35% of all online sales, combining entertainment with shopping through live streams and influencer posts. Douyin, Taobao Live, and Kuaishou have turned streaming into a major sales channel, especially among young people. Taobao even has a separate livestreaming section where users can buy products while watching the streams. Chinese social commerce is marked by connection between content and shopping, with platform algorithms recommending products tailored to viewers' preferences. Now, this trend is expanding beyond China.

Nano influencers

If you're aiming for high engagement rates (ER) and click-through rates (CTR), nano and micro influencers are your best bet. Nano influencers, in particular, can offer ERs ranging from 3 to 6%, which is a great result, along with a higher CTR compared to celebrities and macro influencers. However, if you're launching a new product, it's better to take a more comprehensive approach. By working with a mix of nano, micro, middle, and macro influencers, you can balance reach, awareness, and engagement.



"Earned media value is a new word in campaign metrics, which shows off all potential interactions with content in budget earned by brand. It counts the number of social interactions on content, including social media shares, likes, and comments. The metric helps marketers calculate business impact of the campaign and predict ROI".

<u>Kira Chesalina</u>, Creative Director, AAA Agency

AAA Agency's Vision on 2025 Challenges

New integration formats

One crucial challenge is to come up with new integration formats that capture the audience's attention and prevent them from skipping the content in times when people's attention is so fleeting, and audience demands meaningful yet entertaining information flow. One of the ways is to focus more on interactive and creative content. By blending storytelling with the product and using immersive formats like AR filters or gamified experiences, the integration may feel more like a standout experience than a commercial.

• Make influence great again: from traffic quantity to influence quality campaigns

Some brands may seek impressive numbers, but true success lies in meaningful connections and genuine engagement. To overcome these challenges, brands should shift their perception and focus on partnerships with influencers who create authentic, value-driven content that resonates with their audience, ultimately ensuring higher quality conversions. Metrics should prioritize engagement, sentiment, and conversions, ensuring that campaigns lead to lasting brand loyalty and meaningful results, rather than just a surge of clicks.





<u>Hussam Hammo</u>, Founder & CEO of Tamatem Games

As we look ahead to 2025, influencer marketing in gaming is set to evolve in exciting and dynamic ways. As gaming ecosystems expand, influencers will shift towards creating interactive experiences rather than just promotional content.

Expect live-streaming events, influencer-led tournaments, and exclusive content drops to dominate strategies. Al and data analytics will reshape influencer marketing in 2025. Brands will leverage Al to identify the perfect fit between influencers and audiences, optimizing campaigns for maximum impact.

In-game influencer collaborations will grow significantly. We'll see more influencers lending their voices, avatars, or even personal brands to games, creating immersive connections with their followers.

Sustainability and social responsibility will become major focus areas. Gamers increasingly care about the causes influencers and brands support, so aligning with purpose-driven influencers will enhance credibility and appeal.

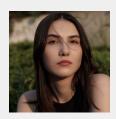


Anastasia Zaiceva, CCO at ZiMAD

In 2025, influencer marketing trends and challenges continue to evolve. Many companies assess the effectiveness of this channel by focusing on high CPIs and comparing it to traditional UA campaigns. However, this is a flawed approach: influencer marketing is not just a user acquisition channel but a tool for building long-term brand engagement.

Key benefits for brands:

- Increased trust and loyalty audiences perceive influencer recommendations as more authentic.
- Brand image enhancement well-chosen collaborations strengthen the brand's values and style.
- UGC creation engaging the audience in creating content around the product.
- Long-term impact unlike UA, influencer campaigns have a lasting effect due to the brand's ongoing presence in content.
- Successful campaigns are those that not only drive traffic but also enhance brand recognition and emotional connection.



<u>Daria Povarova</u>, UGC Team Lead, AdOuantum

Influencer marketing in 2025 will emphasize authenticity, niche communities, and the integration of AI technologies like virtual influencers. Brands will need to navigate challenges such as combating influencer fraud, including fake followers and inauthentic engagement, while also addressing the rising demand for diversity and inclusive representation. As consumers grow more discerning about sponsored content, transparency and balancing ROI will be critical. Additionally, keeping pace with rapidly evolving platforms and trends will require brands to remain agile and adaptive.



Joost van Dreunen, CEO at ALDORA

Following a flurry of layoffs in the games industry that also included many established games journalists and reviewers, influencers have emerged as a critical layer between game publishers and audiences. In a marketplace cluttered with content and rising marketing costs, consumers will come to rely on authentic, knowledgeable voices to help find their next favorite game.



<u>Luiza Girardello</u>, Influencer Marketing Manager & Content Creator

- The Power of Community
 - In my opinion, micro-influencers will dominate the influencer marketing landscape. Their engaged and niche audiences offer authenticity, higher engagement rates, and the ability to build strong brand connections through trusted relationships. Endorsing their events and offering networking opportunities both for brands and for influencers themselves will also play a key role in fostering these communities, offering the chance to create even deeper, in-person connections with respective audiences.
- All About Short-Videos
 - Short-form video content continues to lead the way on platforms like Instagram Reels and YouTube Shorts. The TikTok ban in the U.S. has shifted audiences to alternative platforms, amplifying the importance of adapting content strategies for diverse ecosystems and ensuring agile actions to the constant platform changes. Both for brands and content creators the key is to not rely in one single focus platform for posting content and fostering the followers base.
- o Possible Red Flag of AI Content
 - Al technology is for sure already revolutionizing influencer marketing by enabling faster content creation and personalized strategies. However, over-reliance on Al may risk creating a distance between influencers and their communities, leading to less authentic interactions, lower engagement rates and a "cold" approach that may alienate audiences.

FURTHER READING



Gaming

- Matthew Ball's State of Video Gaming in 2025 report for Epyllion
- Video Game Industry in 2025 by DFC Intelligence
- Global Gaming Deals Report 2024 by InvestGame
- Game Industry Predictions for 2025 by VentureBeat
- DappRadar Games Report: 2024 Overview
- Gaming Report 2024 by Bain&Co
- State of Mobile in 2025 by Sensor Tower
- Predictions for Mobile Games in 2025 by Deconstructor of Fun
- Mobile Non-Gaming Apps 2022-2024 by Mariusz Gąsiewski
- 2024 Game Genre Trends on Live Streaming by StreamHatchet
- Popular Mobile Games on Live Streaming by StreamHatchet
- Most Subscribed Streamers Channels by StreamHatchet
- KaiCenat Breaking Records by StreamHatchet
- Best 2024 Video Games by Polygon
- Play Pendulum Essay by SuperJoost
- Gaming Blog by Wiktoria Wójcik
- Video Game Market Highlights by Mat Piscatella
- How Influencer Marketing Boosted Space Marine 2 by Kira Chesalina for HackerNoon
- Elden Ring Shadow of the Erdtree Marketing Case Study by Kira Chesalina for HackerNoon



Influencer Marketing

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- State of Influencer Marketing 2025 by HypeAuditor
- The 2025 Marketing Benchmark Report by Similarweb
- Creator and Influencer Trends by AdAge
- 2025 Marketing Predictions by Forbes
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- Top 2024 Creators by Forbes
- How to Use Transmedia Storytelling in Influencer Marketing by Kira Chesalina for BetterMarketing
- How to Choose the Most Effective SMM Platform for Your Campaign by Kira Chesalina for Clutch
- When to Hire a Freelance Influencer Marketing Manager vs. Influencer Marketing Agency by Kira Chesalina for Clutch
- Measuring Sentiment in Influencer Marketing by Kira Chesalina for Clutch
- How To Scale Your Marketing Agency Revenue: Insights from AAA Agency by Kira Chesalina for Simplified
- Social Media Benchmarks Report 2025



ABOUT AAAAGENCY



Overview

AAA Agency is an international agency focused on influencer campaigns and creative projects for brands.

Our mission is to shift brands from default advertising to storytelling, the only way to resonate with the audience in today's cluttered market.

We match brands with perfect influencers to create compelling stories and thumb-stopping integrations. We've worked with both startups and giants like Ubisoft, Wargaming, NCSoft, Lilith Games, Long Tale Games, delivering 100+ successful campaigns, and we know how to help brands truly influence their audiences. **Because it is no longer about just selling — it's about making an impact.**



From authentic influencer campaigns to cross-platform special projects, we're with you every step of the way, crafting unique solutions and and making sure no questions are left unanswered.

Reach out to us at <u>sales@aaaqncy.com</u> to get started and follow-our-blog for more insights!

Your ambitions are our adventure. Let's chart a course together.







