

2017

Next Level: How Gaming Brands Can Win Across Social Video



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Level One: Overview

Modern gamers are no longer simply playing video games, they're looking to watch and engage with video content from their favorite games — in fact, nearly 50% of YouTube game enthusiasts spend more time watching video game content than playing games.* As a result, gaming dominates social video platforms like YouTube, Facebook, Instagram, Twitch, and Twitter. 64% of the U.S. population age 13+ plays video games,* and these gaming fans have formed a massive — and passionate — community online, using social video platforms to share game clips, find reviews, research new games and consoles, and ultimately make purchase decisions.

On YouTube, the gaming category clocks in at 1.5 trillion views — but the top 10 gaming brands capture merely 1% of that audience.† Brand marketers can still stand out in this massive space through sophisticated cross-platform video strategies, and an aggressive investment in paid media to reach the right gamers at the right time to drive awareness and consideration of games and consoles.

* Think with Google, "4 Reasons People Watch Gaming Content on YouTube." June 2017.

† Source: Pixability Software, July 2017.

50%

of YouTube game enthusiasts spend more time watching video game content than playing games

64%

of the U.S. population age 13+ plays video games

1%

of the 1.5T views in the gaming category on YouTube are captured by the top 10 gaming brands

Gaming is a unique category in the video space, with more than 665M people around the world watching video game content online.* This vast gaming community has built a vibrant video ecosystem across social video platforms, with its own unique set of video types and styles. It even contains its own specialized video platforms: Twitch and YouTube Gaming. Live gaming content also attracts a particularly large audience, with gamers viewing livestreams more than 10B times on YouTube in 2016,[†] while Twitch attracts more than 10M viewers each day.[‡] It's imperative that brand marketers understand this space, and the specific nuances of each video platform, to reach and engage the right gaming viewers at scale.

Pixability's report uncovers insights on the gaming space across YouTube, Facebook, Instagram, Twitch, and Twitter, and analyzes the performance of top gaming brands and creators. Backed by these data and insights, gaming marketers can develop more effective video advertising content and strategies, all while maximizing the impact of their cross-platform media spend to ensure next-level video performance.

* Source: SuperData, "Gaming Video Content." 2017.

† Source: Pixability Software, July 2017.

‡ Source: Bloomberg, "Amazon's Twitch Wants More Game-Streamers to Make Money on Site." April 2017.

Scoreboard:

Top 10 Gaming Brands Across Social Video



32M Total Subscribers
11K Total Videos



151M Page Likes
4K Videos



37M Followers
7K Posts



38M Followers
1.1M Tweets

It's imperative that brand marketers understand this space, and the specific nuances of each video platform, to reach and engage the right gaming viewers at scale.

100M



Total followers amassed by the top 20 gaming brands on Twitter

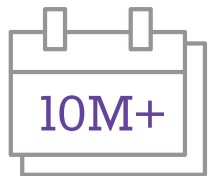


64M

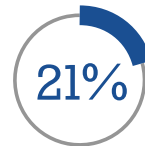
Total followers amassed by the top 20 gaming brands on Instagram

106 minutes

average time a Twitch viewer spends watching video on the platform each day



viewers per day on Twitch



of all gaming-related interactions on Facebook are from women

10B

views of live gaming content on YouTube in 2016



3

of the top 5 gaming brands on Twitter are major console manufacturers



Mobile gaming comprises only **4.3%** of the total gaming space on YouTube

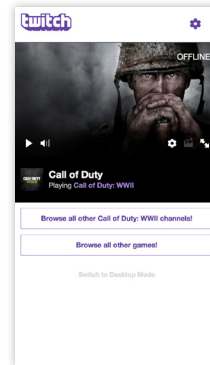
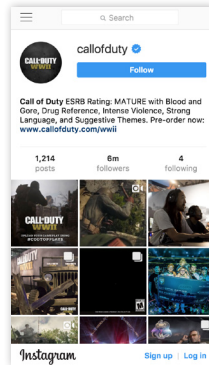
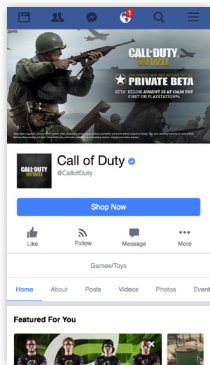
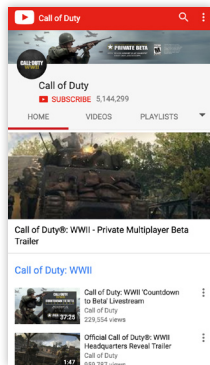


... but this space still accounts for **60B** total views

Section 01

Understanding the Platform-hopping Gaming Audience

Gaming audiences are turning to each social video platform with different expectations about the content they'll find, engage with, and share. Through a nuanced understanding of each platform's specific ad products, targeting parameters, and user behavior, marketers can extend and optimize their campaigns across platforms, and maximize the impact of their media investment.





Gamers look to brands on **YouTube** to watch trailers pre-launch, and turn to creators after launches for reviews, walkthroughs, and comedy videos. Ideal for inviting engaged gamers to lean in, the platform offers robust contextual targeting capabilities that can help shape brand preferences, and ultimately purchase decisions.



Facebook provides powerful audience targeting options that can help marketers increase product and brand awareness among the platform's huge gaming community, and even offers a variety of apps and games within its platform.



Instagram's visual-first design makes it well-adapted to share in-game footage, concept artwork, and behind-the-scenes or bonus footage, helping brands build equity and product awareness around new and legacy titles.



Twitter's specialized ad products allow advertisers to target against events, communities, and followers, making it a compelling platform to build product awareness — particularly around tentpole industry events such as E3.



One of the largest platforms for live content, **Twitch** is tailor-made for gaming. With Twitch, marketers can build consideration among an engaged audience, and establish partnerships with leading creators.

Section 02

Gaming Content Types

Gaming has evolved into a rich ecosystem across social video, complete with its own set of specific content types. From let's play videos to game music, these unique content types are essential for marketers to understand when developing video content and ad strategies that resonate with gamers.



TV ad

A traditional video ad repurposed as a digital ad.



Trailer

A short teaser or full trailer promoting an upcoming game, console, expansion, or new in-game content.



Cinematic

CGI or cutscene footage used to expand on a game's storyline or a character's narrative.



Reaction

A video documenting the reactions of people playing a game.



Let's Play

A personality-driven video pairing gameplay and commentary, typically with picture-in-picture footage of the player.



Gameplay Footage

A video featuring in-game content.



Game Music

A video featuring a game's music or a musician covering a gaming song or soundtrack.



Walkthrough /Tutorial

A video that teaches viewers through in-game footage.



Parody

A video made for entertainment, using gaming content and characters to spoof a game, genre, current event, or another subject.



Sketch

A live-action video, made for entertainment, that's focused on a video game, genre, or gaming culture.



Prank

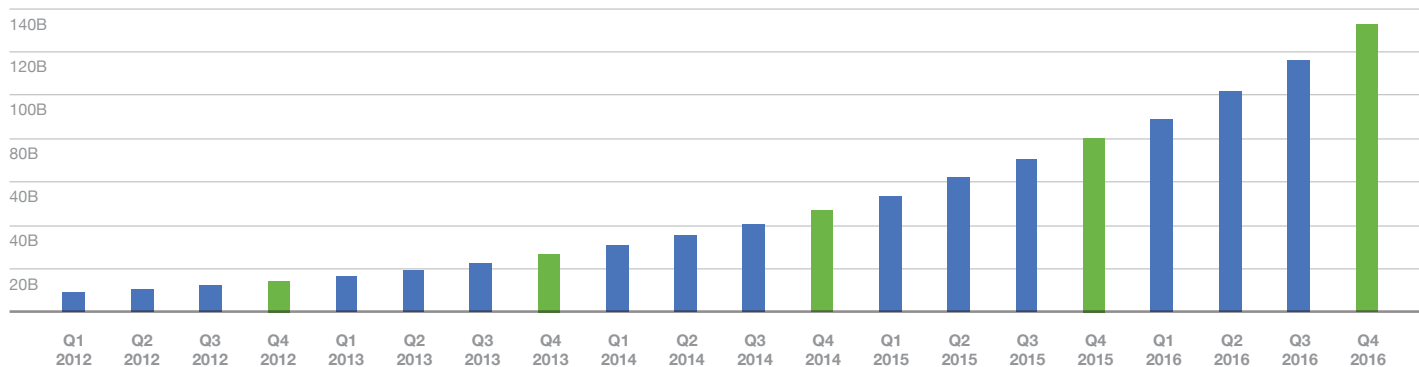
A video of someone performing a gaming-related prank.

Section 03

Gaming is Exploding on YouTube

On YouTube, views of gaming content have grown steadily each quarter over the past five years. This sustained growth indicates that gaming audiences are hungry for video content, and an always-on paid media strategy will help advertisers stay visible and top-of-mind within the massive space.

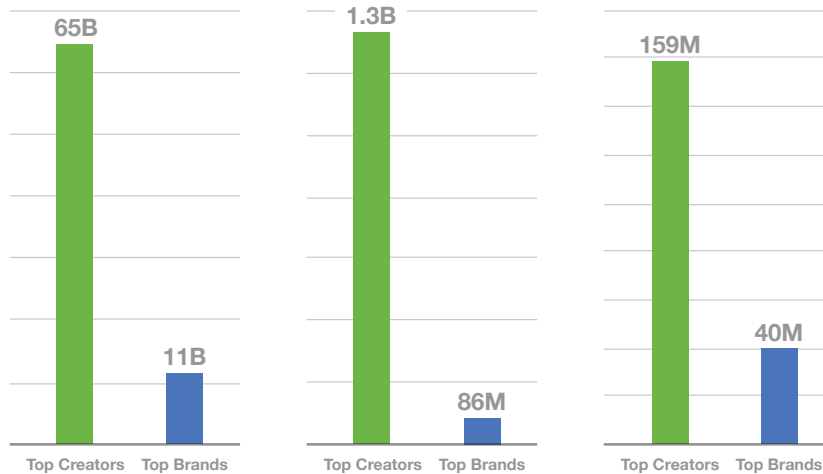
Figure 1: Views of Gaming Content on YouTube by Quarter



Source: Pixability Software, July 2017

The top ten creators attract 8X more views and 15X more engagements than the top ten gaming brands. However, brand advertisers can still make an impact on the gaming audience by adopting creators' video strategies, such as publishing long-form, made-for-digital comedy content. Marketers can also reach gamers by partnering with top and rising creators, and advertising against creator channels to leverage their passionate fanbases.

Figure 2: Video and Channel Performance on YouTube
by Views



Source: Pixability Software, July 2017

Figure 3: Top Ten Gaming Channels on YouTube

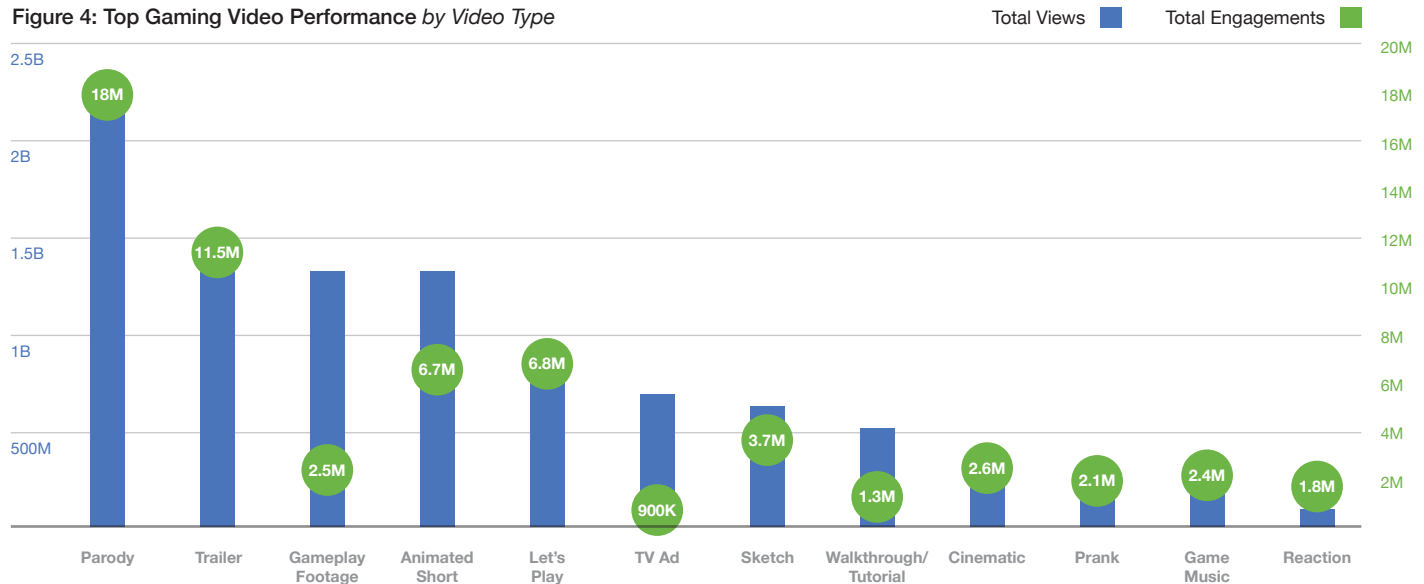
Rank	Channel	Views
1	DanTDM	10.8B
2	PopularMMOs	9.3B
3	Markiplier	8.0B
4	VanossGaming	7.8B
5	jacksepticeye	7.8B
6	VEGETTA777	7.4B
7	IGN	6.7B
8	stampylonghead	6.3B
9	EIRubiusOMG	5.7B
10	Machinima	5.7B

Source: Pixability Software, July 2017

Parody and Let's Play Videos Steal the Show on YouTube

Overall, parody and let's play videos attract the lion's share of views and engagements on YouTube. Trailers also garner a high volume of views and engagements before a launch, but viewership typically drops off post-launch.

Figure 4: Top Gaming Video Performance by Video Type



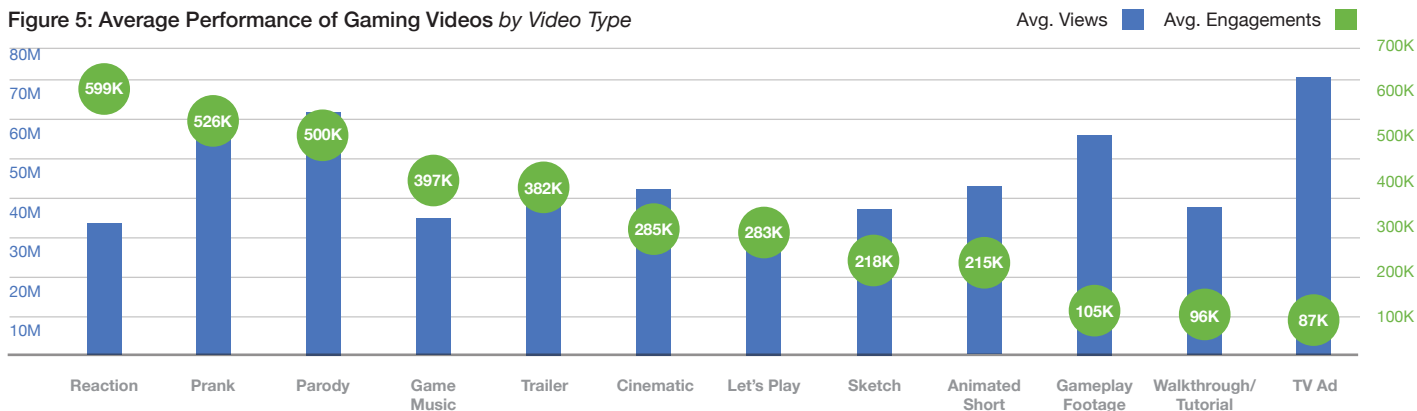
Source: Pixability Software, July 2017

Comedy Represents a Critical Opportunity for Crossover Content

On YouTube, TV ads generate the most views on average across gaming content types — likely due to heavy paid media investment by gaming brands — but received the fewest engagements on average. Reaction and game music videos attract a lower viewership on average, but dominate the average engagements rankings — indicating that brands have an opportunity to boost their audience engagement through these content types.

Overall, however, comedy content like parody and prank videos achieved the best video performance on average, highlighting an important area of crossover. Gaming-adjacent comedy creators like PewDiePie and VanossGaming have built massive audiences, attracting 16B and 8B total views of their respective channels. There's clear demand among gamers for comedy content, and brand marketers can meet this demand by producing entertaining videos, and backing their comedic content with paid media.

Figure 5: Average Performance of Gaming Videos by Video Type

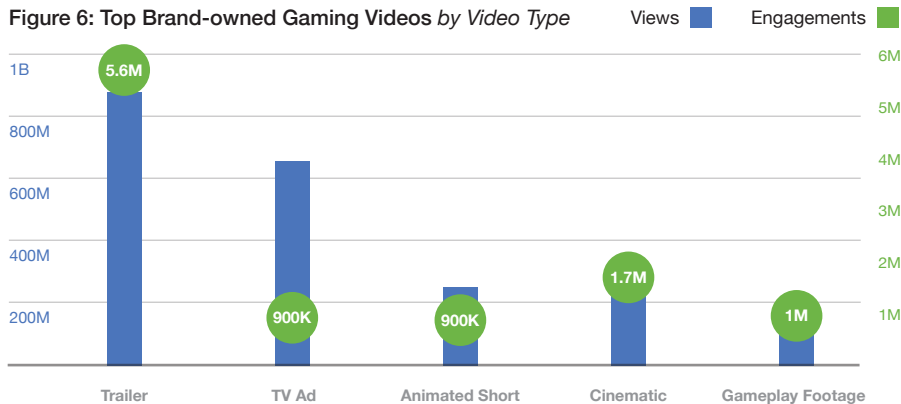


Source: Pixability Software, July 2017

The Viewing Behavior of the YouTube Gaming Audience

The gaming audience overwhelmingly looks to brand channels on YouTube for trailers prior to a launch — resulting in trailers being the top-performing content type for brands. After a launch, gamers turn to creator channels on YouTube, hungry for more video content around their favorite games. Marketers can raise their visibility post-launch by creating additional video content, such as entertaining parody and comedy videos, or walkthroughs and tutorials. Simultaneously, marketers can tap creators to extend the reach of their advertising through partnerships, and follow their audience across platforms, engaging gamers on Facebook, Instagram, Twitter, and Twitch.

After a launch, gamers turn to creator channels on YouTube, hungry for more video content around their favorite games.

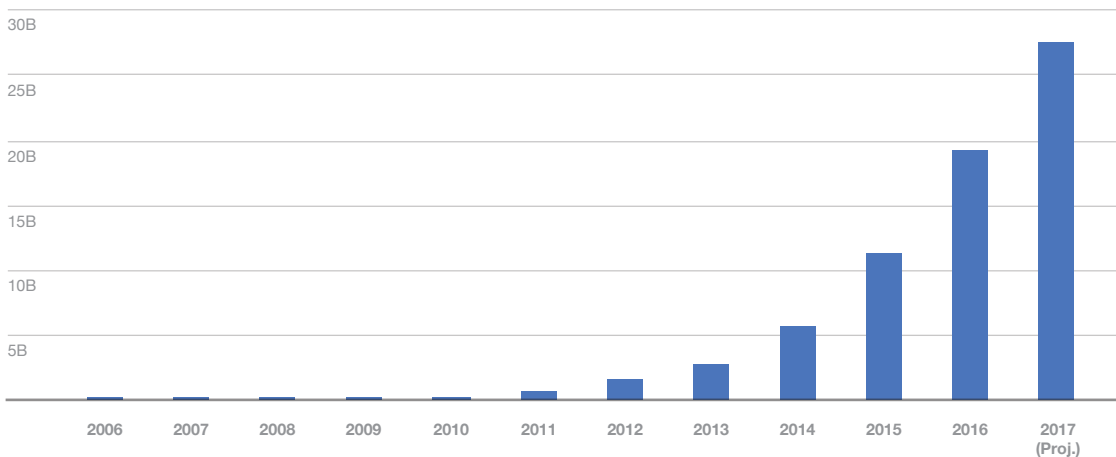


Source: Pixability Software, July 2017

Mobile Gaming Can Help Marketers Reach Young and/or Female Gamers

Mobile gaming videos on YouTube attract a dramatic 60B views, despite the sub-category comprising only 4.3% of the total gaming space. Historically, views of mobile gaming videos grew rapidly year-over-year, but that growth rate has slowed since 2015. However, the space is still projected to surpass 25B total views in 2017 on YouTube, and the space attracts the largest share of the young and female audience on Facebook — indicating an opportunity for marketers looking to reach young and/or female gamers.

Figure 7: Annual Views of Mobile Gaming Content on YouTube by Year



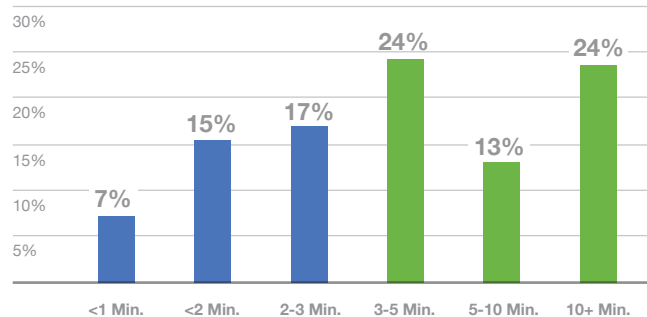
Source: Pixability Software, July 2017

Winning Gaming Video Strategies

Brand marketers have an opportunity to increase the relevance of their videos strategies by investing in diverse content types that gaming audiences are proven to engage with. Brands should also invest in long-form content, as viewers overwhelmingly choose to view longer videos. Videos longer than 3 minutes in length attracted 61% of views across top gaming videos — however, only 38% of top brand content was longer than 3 minutes.

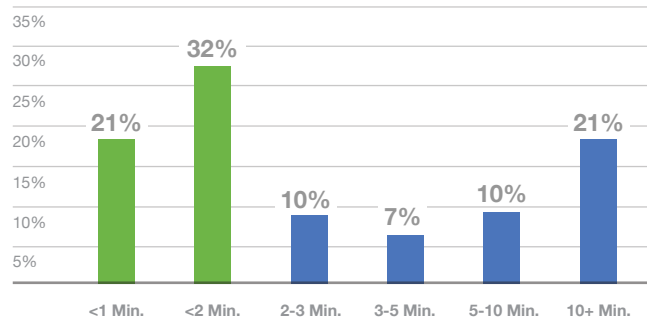
When publishing longer (10+ minute) videos, marketers should highlight the most important segments in video descriptions to help users navigate to the moments that matter most to them. In addition, brands should link their social video pages to help users connect with them across platforms. Finally, Pixability advises marketers to utilize the rich channel and playlist capabilities across social video platforms to encourage longer viewing sessions, organizing their channel to boost the user experience.

Figure 8: Best-performing Gaming Videos by Length



Source: Pixability Software, July 2017

Figure 9: Top Gaming Brand Videos by Length



Source: Pixability Software, July 2017

Section 04

The Demographics of the Gaming Audience

While the gaming audience skews toward young men, there's still a considerable audience of female gamers — in fact, women account for 21% of all gaming-related interactions on Facebook. Likewise, 79% of people discussing gaming on Facebook are age 18-34, but considering the scale of the gaming audience, there remains a significant audience of 34+ gamers.

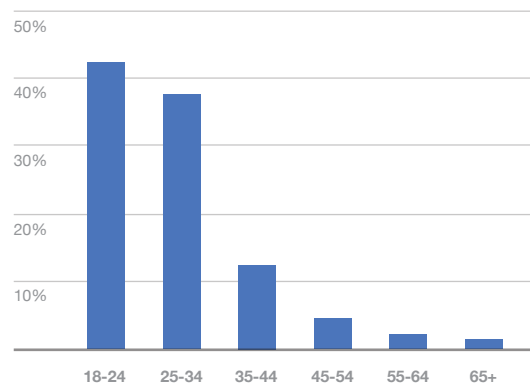
21%

of people discussing gaming on Facebook are women

79%

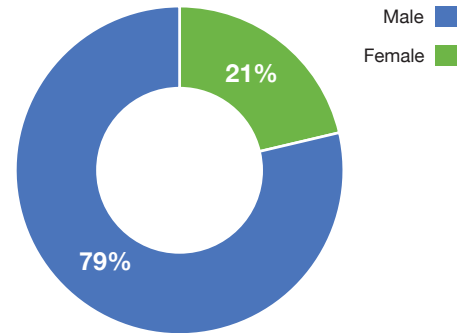
of people discussing gaming on Facebook are age 18-34

Figure 10: Facebook Gaming Audience Age Distribution



Source: Pixability Software, July 2017

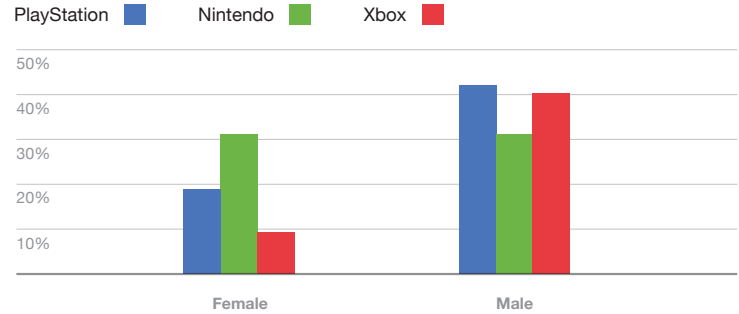
Figure 11: Facebook Gaming Audience Gender Analysis



Source: Pixability Software, July 2017

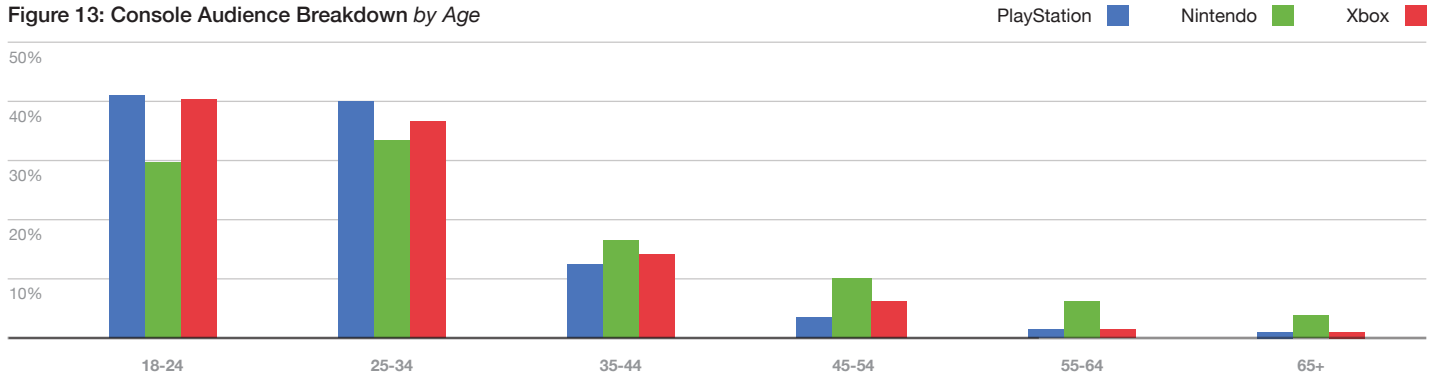
Nintendo receives more interactions from women than other major console manufacturers, but men still make up the majority of its audience. Nintendo's audience also skews slightly older than groups discussing the Sony PlayStation and Microsoft Xbox, likely due to its strong connection with fans of its legacy products.

Figure 12: Console Audience Breakdown by Gender



Source: Pixability Software, July 2017

Figure 13: Console Audience Breakdown by Age



Source: Pixability Software, July 2017

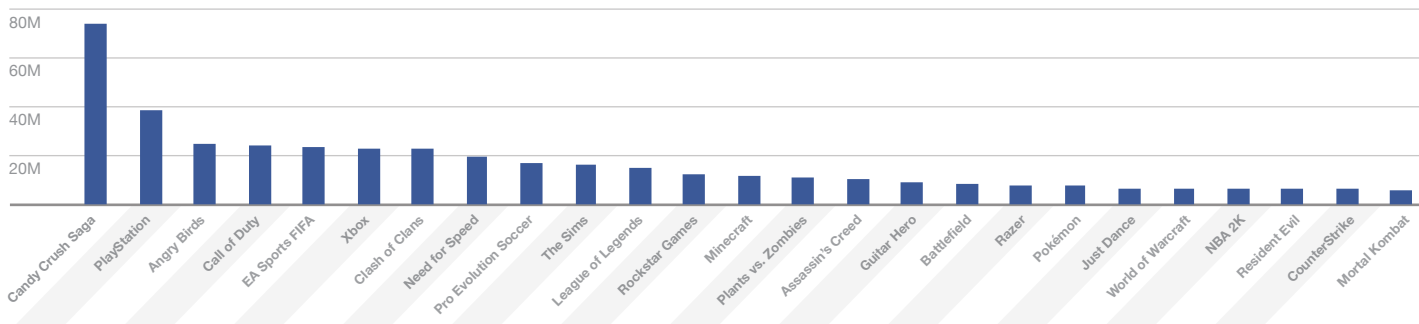
Section
05

Gaming Brands Across Facebook, Instagram, and Twitter

Mobile Gaming Crushes the Competition on Facebook

Mobile sensation Candy Crush dominates the gaming audience on Facebook, with nearly 2X as many Page Likes as PlayStation. Gaming brands, particularly mobile-focused brands that offer in-app games, have invested substantial resources in building large communities on Facebook. As a result, there are 16 gaming brands with more than 8M Page Likes on the platform — far more than the subscribership earned by gaming brands on YouTube.

Figure 14: Leading Gaming Brands on Facebook by Facebook Page Likes



Source: Pixability Software, July 2017



UBISOFT®

Challenger Spotlight

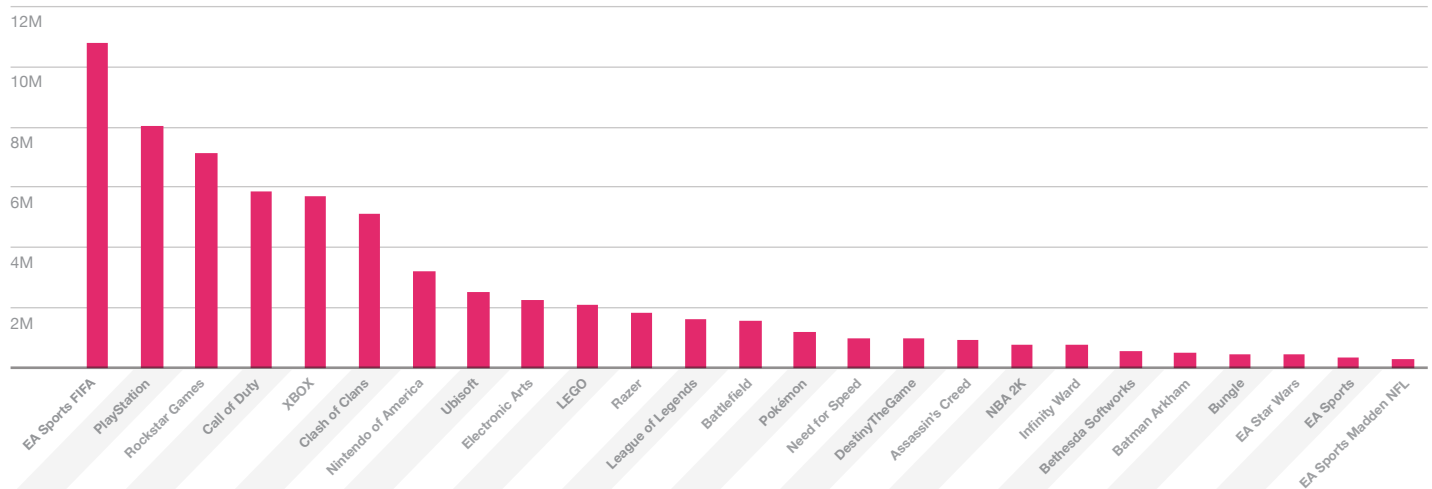
Ubisoft Maximizes Facebook Playlists

On Facebook, Ubisoft takes full advantage of playlists to organize content by franchise, maxing out with 10 individual playlists for popular titles like Assassin's Creed and Far Cry. This helps users navigate to find videos relevant to their exact gaming interests, extending viewing sessions and increasing product awareness.

FIFA Brings Home the Gold with the Most Instagram Followers

FIFA is winning on Instagram with more followers than any other gaming brand, and fully 34% more than PlayStation. While there are 14 gaming brands with 10M or more Page Likes on Facebook, only FIFA has amassed more than 10M followers on Instagram. FIFA's photorealistic gameplay lends itself to compelling visual platforms like Instagram, and the brand invests heavily in Instagram video content. Marketers from across the gaming industry, however, can borrow a page from FIFA's playbook and take advantage of Instagram's visual appeal to reach an engaged gaming community.

Figure 15: Leading Gaming Brands on Instagram by Instagram Followers



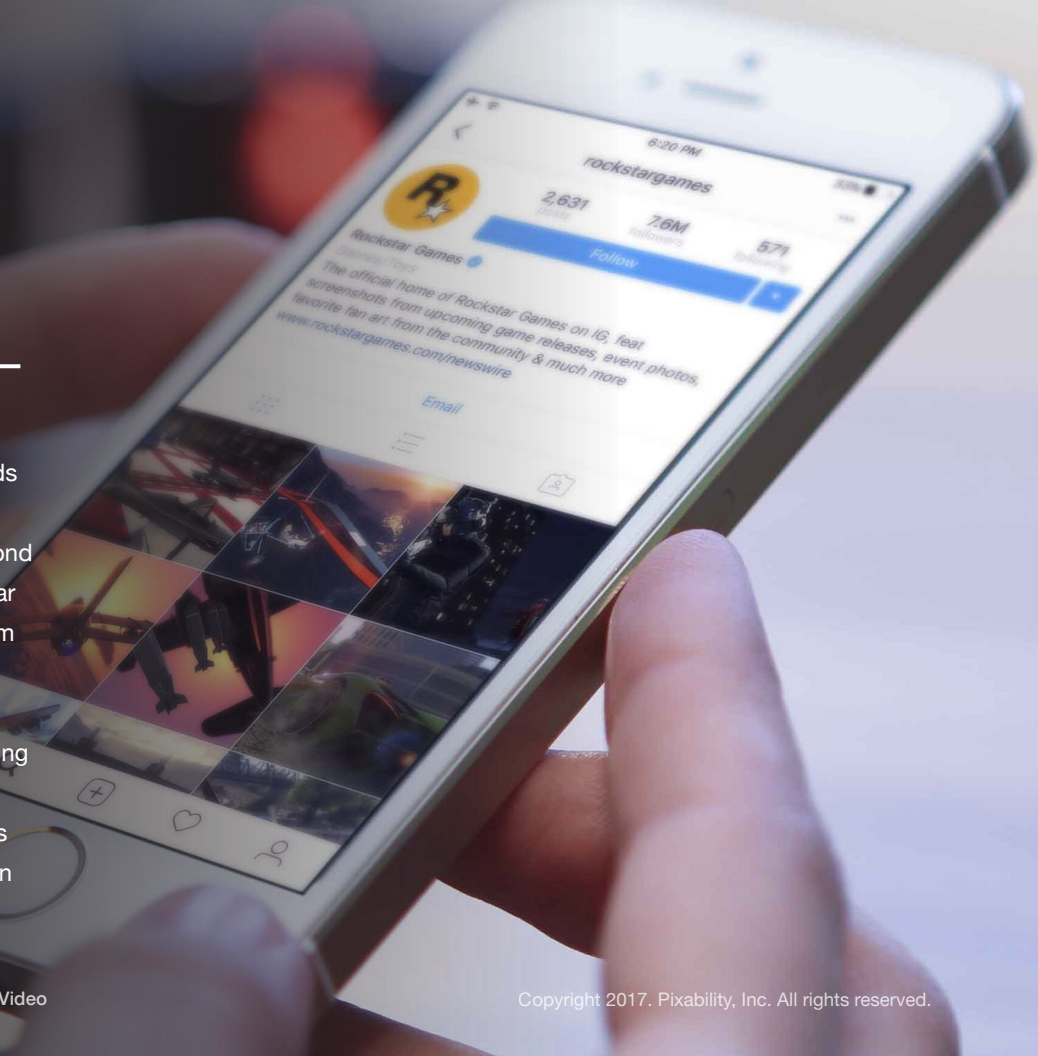
Source: Pixability Software, July 2017



Challenger Spotlight

Rockstar Games Rocks Instagram

Clocking in at 3rd on the most-followed brands list, Rockstar Games has posted more on Instagram than any other gaming brand. Beyond showcasing gameplay footage from its popular Grand Theft Auto series, the brand's Instagram strategy includes publicizing livestreams (broadcasting live on Twitch, YouTube, and Facebook), promoting updates, and announcing giveaways. The brand also recognizes the importance of partnering with leading creators and influencers, such as a recent collaboration with the musical group A\$AP MOB.

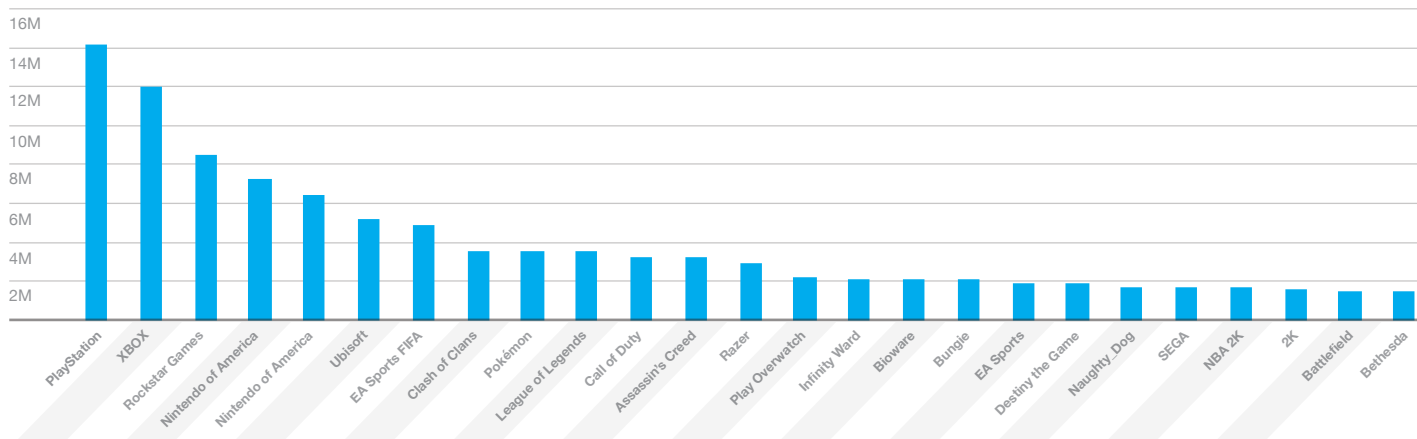


PlayStation Steals the Title for Most-Followed on Twitter

PlayStation leads gaming brands in followers on Twitter, counting 14M fans of its profile. The console's aggressive Twitter strategy includes sharing and promoting gameplay footage, updates, and new releases. Competitors Xbox and Nintendo are among the top five most-followed brands on the platform. Similar to Instagram, Clash of Clans is the only mobile gaming app on the top followers list for Twitter.

PlayStation leads gaming brands in followers on Twitter, counting 14M fans of its profile.

Figure 16: Leading Gaming Brands on Twitter by *Twitter Followers*



Source: Pixability Software, July 2017



BATTLEFIELD

Challenger Spotlight

Battlefield is Leading the Charge on Twitter

Battlefield has made Twitter its battleground, engaging the target audience by firing off over 500K tweets in total. Battlefield uses Twitter to promote giveaways, and update its followers on livestreams that it broadcasts on Twitch.

Section 06

1%

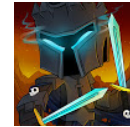
of the gaming conversation on YouTube is controlled by the top 10 brands

Gaming Creators Dominate **on YouTube**

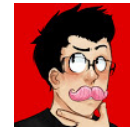
In 2017, the top 10 gaming brands on YouTube controlled just 1% of the gaming conversation on the platform, as popular gaming creators have built impressive followings through engaging video content. Additionally, the number of gaming-related channels on YouTube grew by 149% in 2017 over the previous year. But brand marketers have an opportunity to learn from creator's video expertise and cross-platform reach. As the space becomes more crowded, it's critical that brands invest in sophisticated, cross-platform video strategies — and paid media — to stand out in the crowd.



DanTDM
16M subscribers
10.8B views



PopularMMOs
12.5M subscribers
9.3B views



MarkiplierGame
18M subscribers
8B views



VannossGaming
21M subscribers
7.8B views



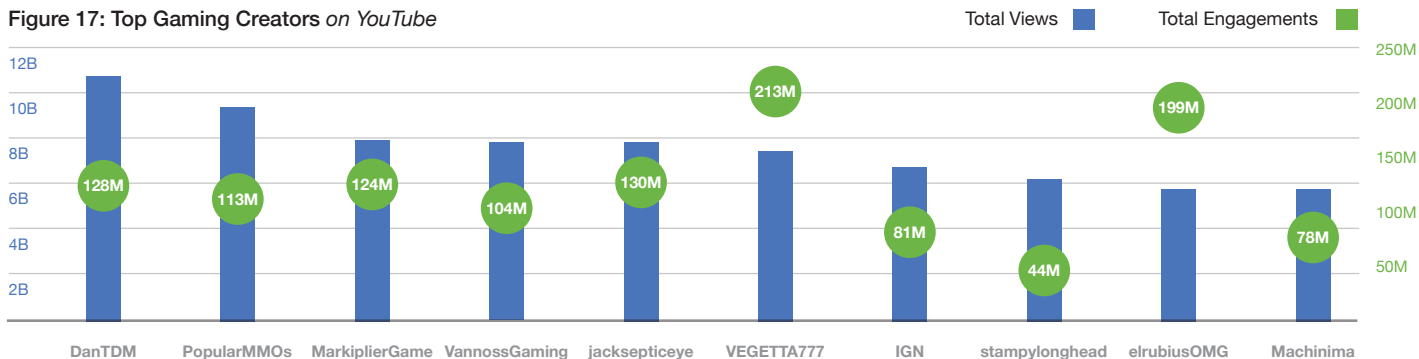
jacksepticeye
16M subscribers
7.8B views

Top creators command a massive audience on social video, but reaching those passionate fans often comes at a premium price. Marketers looking for efficient reach should consider partnering with mid-tier — but fast-rising — creators, and evaluate creator channels in emerging game spaces.

The majority of top gaming channels focus almost exclusively on Minecraft content. While many of the top creator gaming channels focus exclusively on gameplay content, several branch out into comedy and parody videos.

Marketers looking for efficient reach should consider partnering with mid-tier — but fast-rising — creators, and evaluate creator channels in emerging game spaces.

Figure 17: Top Gaming Creators on YouTube



Source: Pixability Software, July 2017

Creator Spotlight: DanTDM

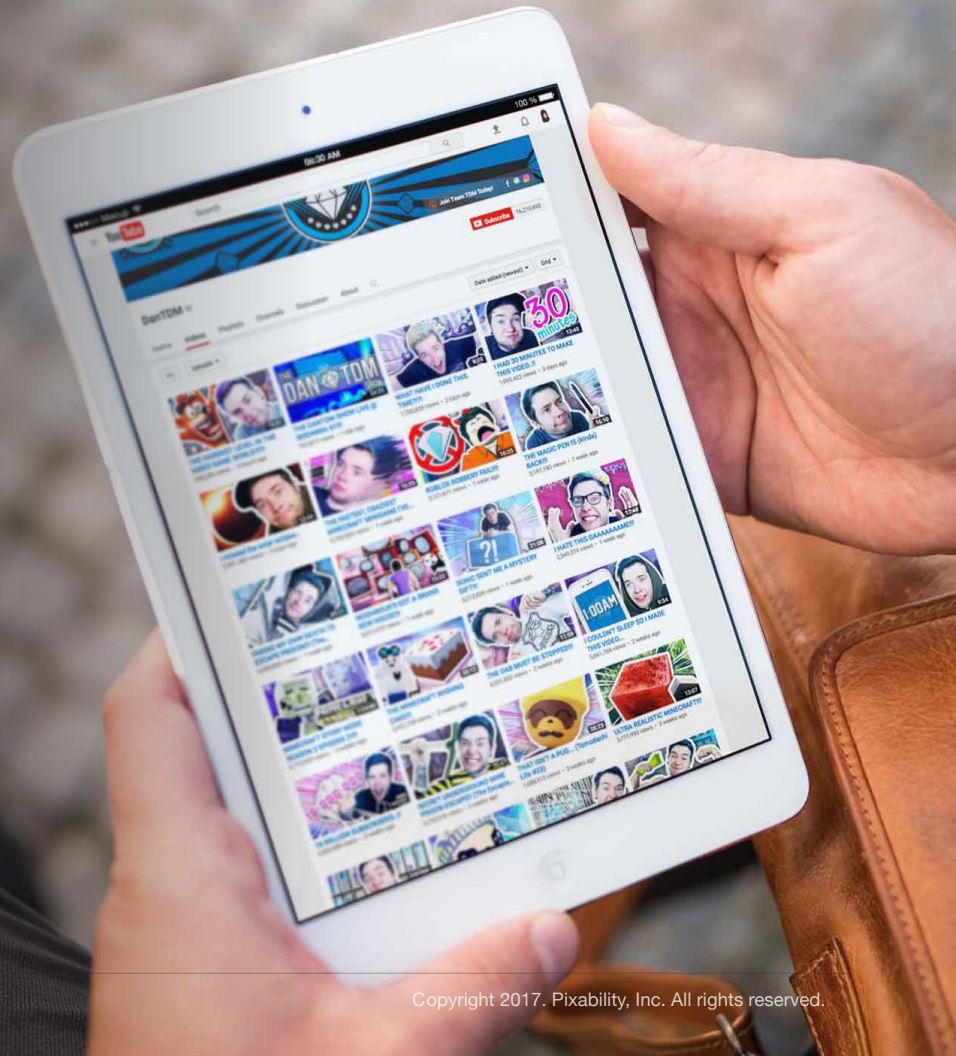
DanTDM of TheDiamondMinecart features a mix of gaming, modifications, and comedy content, the vast majority of which is Minecraft content. While DanTDM doesn't lead the gaming space in subscribers, he attracts the largest viewership in gaming through aggressive cross-platform marketing and daily video releases.

Views: 10.8B

Subscribers: 16M

Likes: 102M

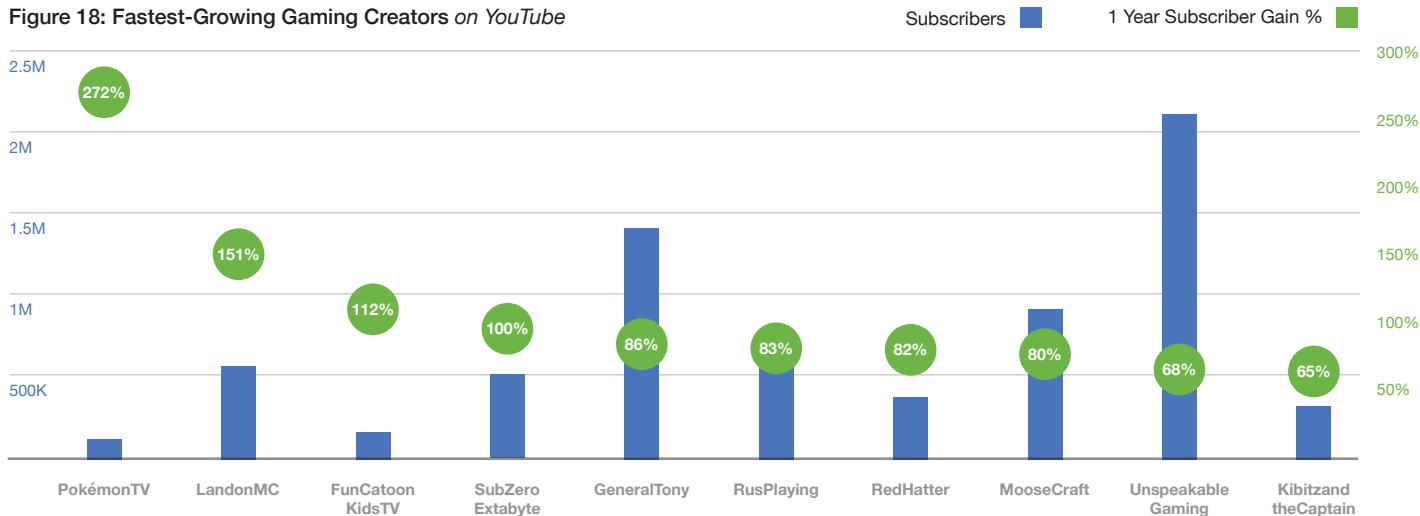
Social Shares: 869K



By keeping a close eye on emerging trends, brand marketers can rapidly gain visibility among an engaged gaming audience. For example, the massive popularity of Pokémon Go pushed augmented reality and mobile gaming to the forefront of the gaming space on YouTube. As a result, a significant number of the fastest-growing gaming creators are focused on Pokémon Go content.

By keeping a close eye on emerging trends, brand marketers can rapidly gain visibility among an engaged gaming audience.

Figure 18: Fastest-Growing Gaming Creators on YouTube



Source: Pixability Software, July 2017

Section 07

Power up your advertising: Opportunities for brands to stand out

360° Video Content

360° video technology allows viewers to completely immerse themselves in videos, and represents an unprecedented opportunity for brand marketers to engage with gaming fans. The higher cost of 360° video production has slowed creator adoption, especially compared to other recent video innovations like drones. The top ten most-viewed 360° videos on YouTube have attracted 12% of all 360° video views, and none are owned by creators. Viewers are hungry for this innovative new content; total views of 360° YouTube content rose by 382% from 2015-2016 — and Pixability projects that in 2017 alone we'll see more than 1.5B views of 360° YouTube videos. In addition, 360° video ads on YouTube generated 41% more views, shares, and subscribes than traditional in-stream video ads.*

Brands should capitalize on their access to 360° video technology to rise above popular creators, and create 360° videos that engage their audience more deeply than traditional video content.

1.5B

360° video views
projected for 2017

41%

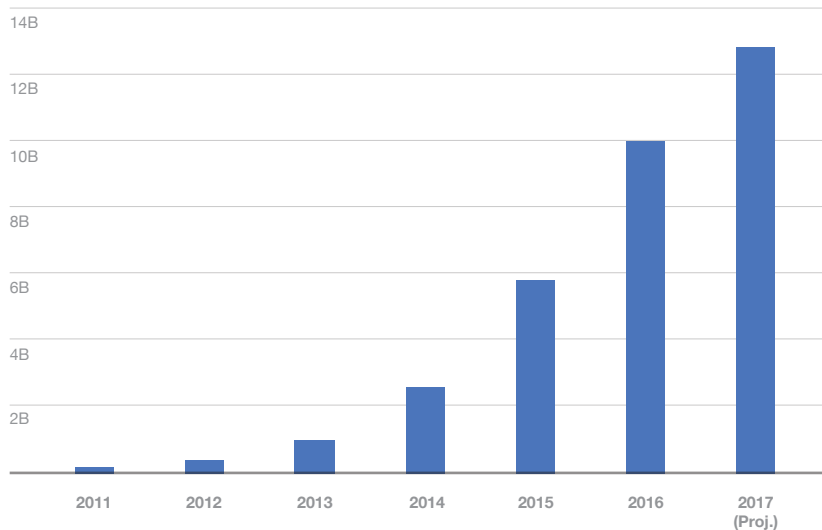
more views, shares,
and subscribes of
360° video ads

* Source: Jim Habig, Think with Google, "Is 360 Video Worth It?" July 2016.

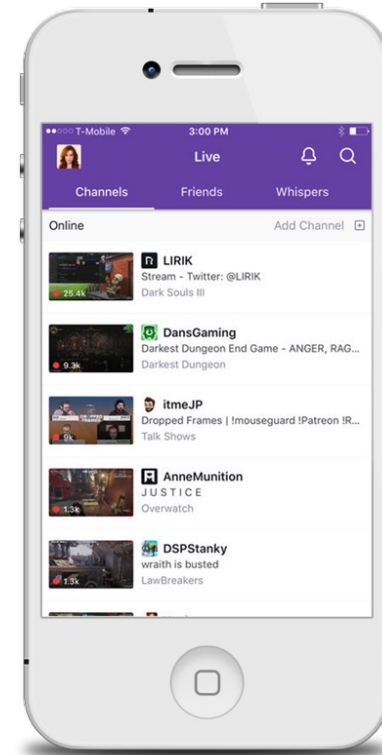
Going Live: Twitch & YouTube

YouTube launched livestreaming in 2011, and since then, live gaming content has garnered more than 28B views. In 2016 alone, gamers watched more than 10B livestreaming videos, and Pixability projects that live gaming content will attract 12.8B views in 2017.

Figure 19: Views of YouTube Gaming Livestreams *by Year*



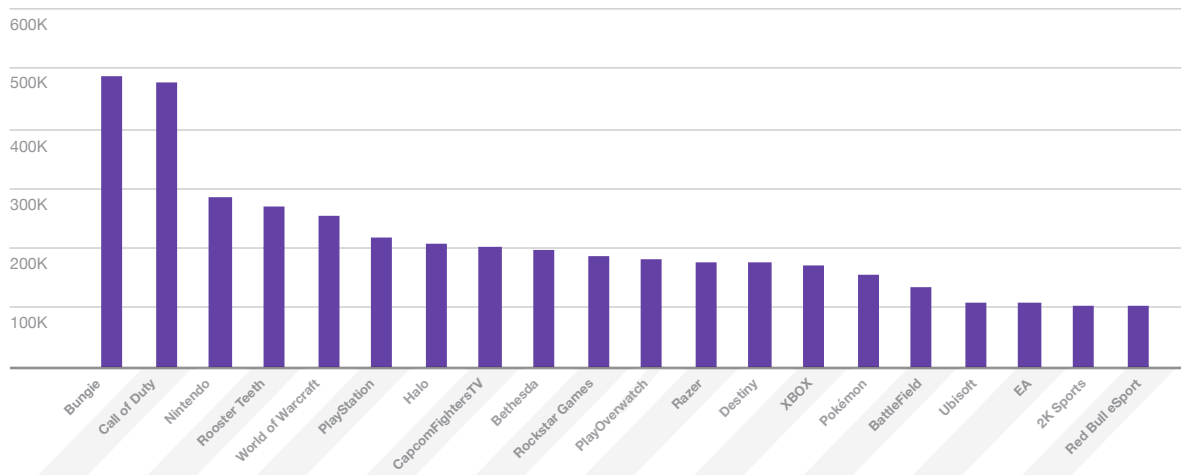
Source: Pixability Software, July 2017



Meanwhile, on gaming-focused Twitch, Bungie and Call of Duty each have made Twitch streams a core part of their video strategy, and as a result, dominate in channel followers. Bungie's frequent livestreams give viewers a glimpse of upcoming updates and launches, drumming up product awareness and increasing engagement.

Brands can use the urgency of livestreaming content to stand out in the crowded gaming space across social video, particularly around E3 and other major game or console launches. Even if viewers missed a livestream, they can tune in after the broadcast, further increasing the impact of the brand's live video investment. Pixability recommends that gaming brands cut down hours-long livestreams into digestible segments, or flag the most important sections of the livestream in the video description.

Figure 20: Leading Gaming Brands on Twitch by Twitch Followers



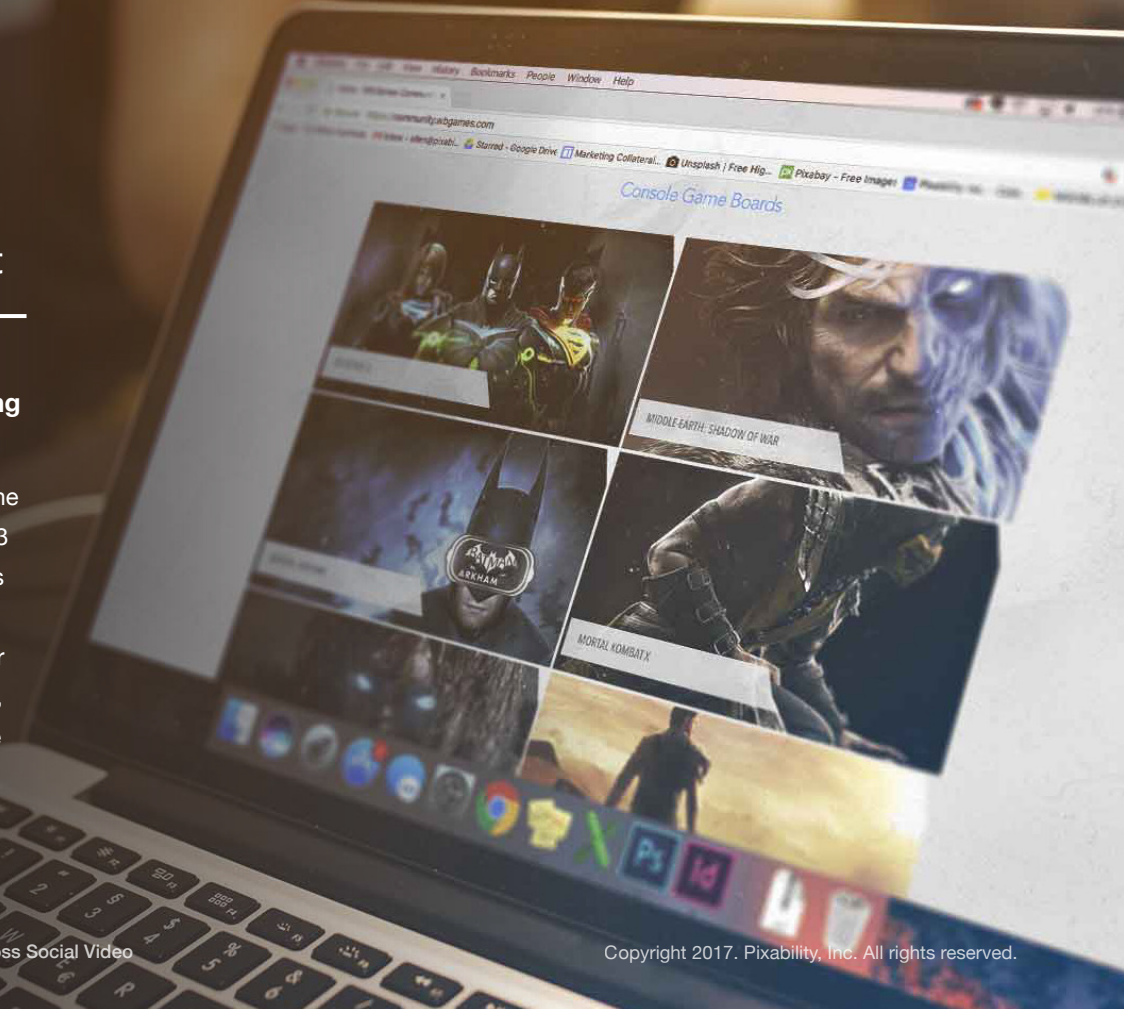
Source: Pixability Software, July 2017



Challenger Spotlight

WB Games Levels Up Its Marketing through Livestreaming

It's never too late to upgrade your content strategy. WB Games joined the streaming trend on YouTube during E3 2017, and generated over 150K views through three livestreams. The brand has also created a series of videos for each game introducing its characters, and these videos helped reinforce the original game trailer.



Who
are
we?

About Pixability

Pixability is a video advertising technology company that helps media professionals deliver outstanding campaign performance across YouTube, Facebook, Instagram, Twitter, Snapchat and Spotify. Advertisers use Pixability's software to activate video at every stage in the consumer journey. Pixability provides sophisticated targeting, automated media execution, and verifiable viewability and placements across premium video platforms. Pixability is headquartered in Boston with offices in New York, San Francisco, Chicago, and London.

Get in touch.

To find out how your gaming brand stacks up across social video platforms, contact us (info@pixability.com) to set up a meeting.

Report Appendix

Methodology

Over the past several years, Pixability has worked on in-depth analyses of various industries using our internal proprietary software. Pixability's proprietary software harvests data from the YouTube, Twitter, Facebook, and Instagram APIs. The YouTube-certified data science and analysis teams at Pixability study this data and use it to generate insights into the viewership, sharing activity, trends, etc. in any given space – in this case, the gaming space across social video. Videos are analyzed based on a number of features, including metadata process (title, description, and tags), comment analysis, etc.

Appx.

Top Ten Gaming Brands Channels *on YouTube*

Rank	Channel	Views	Description
1	Angry Birds	3.096B	Official Channel for Angry Birds
2	League of Legends	1.573B	Official Channel for League of Legends
3	PlayStation	1.532B	Official Channel for PlayStation
4	Clash of Clans	1.428B	Official Channel for Clash of Clans
5	Call of Duty	1.032B	Official Channel for Call of Duty
6	Nintendo	889M	Official Channel for Nintendo
7	Mobile Strike	616M	Official Channel for Mobile Strike
8	Xbox	537M	Official Channel for Xbox
9	Clash Royale	475M	Official Channel for Clash Royale
10	Battlefield	361M	Official Channel for Battlefield

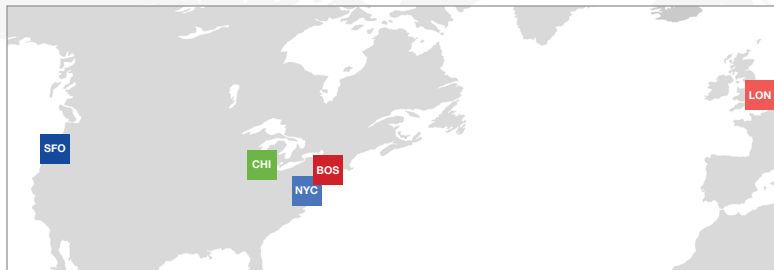
Source: Pixability Software, July 2017

Appx.

Top Ten Gaming Creator Channels on YouTube

Rank	Channel	Views	Description
1	DanTDM	10.8B	Gaming channel dedicated to Minecraft
2	PopularMMOs	9.3B	Gaming channel dedicated to Minecraft
3	Markiplier	8.0B	Creator focused on gaming and comedy content
4	VanossGaming	7.8B	Creator focused on gaming and comedy content
5	jacksepticeye	7.8B	Creator focused on a variety of Let's Play content
6	VEGETTA777	7.4B	Spanish creator focused on Minecraft
7	IGN	6.7B	Leading source of gaming news, reviews, and trailers
8	stampylonghead	6.3B	Creator focused on a variety of Let's Play content
9	EIRubiusOMG	5.7B	Spanish creator focused on Minecraft and general gameplays
10	Machinima	5.7B	Professional studio featuring various content

Source: Pixability Software, July 2017

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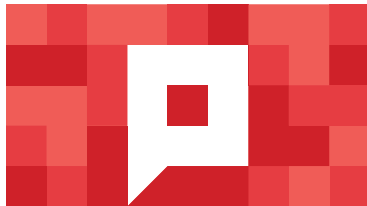
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