

INFLUENCER-LED GAMBLING IN GAMING ON STREAMING CHANNELS OF TWITCH, YOUTUBE AND KICK

Literature Review

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INTRODUCTION

In recent years, there has been a rapidity of gaming and gambling combinations most commonly noticed in Twitch, YouTube and Kick streaming platforms. Influencers, with their considerable and active follower base, play a crucial role in transforming the landscape of gambling-related content in the gaming community. However, this landscape has also witnessed the emergence of a concerning trend of having influential and dishonest actors (individuals and companies) adapt to gambling, which adds to the loopholes within the game. Influencer-driven betting within game content is a tendency that has arisen on the radar of researchers, government and campaign organisations, respectively. With this type of marketing, influencers display casino games or betting content (often on unregulated or overseas gambling sites) and participate in gambling activities in real-time themselves during live streams. What is significant here is that it gains popularity mainly among young or vulnerable people who can be passionate and emulative of others. The ongoing integration of gambling into game content brought up by charismatic influencers and state-of-the-art streaming technologies gets to be a grey area in the world of gaming, drawing parallels between the two as forms of entertainment. This literature review discusses how the features of incentivised gaming in terms of behaviour, environment, and technology are influencer-provided gambling over streaming channels.

Lee Willows has written this report: a final-year MBA student and an authentic and humble social entrepreneur, having established a number of not-for-profit organisations within the gambling space. In addition, he was the first person to work in collaboration directly with the gambling industry over ten years ago following his struggles with gambling. Demonstrating how it was possible to work in partnership without fear of compromising on core principles. The report forms part of a piece of research into this topic, funded by the Gambling Commission in the United Kingdom, via a regulatory settlement.



Lee Willows
Founder & Executive Chair

BEHAVIOURAL CHARACTERISTICS

The promotion of gambling within gaming for real-world money by influencers on streaming platforms can have a detrimental impact on viewers, particularly young and vulnerable individuals who are more susceptible to influence (Andreassen, 2023).

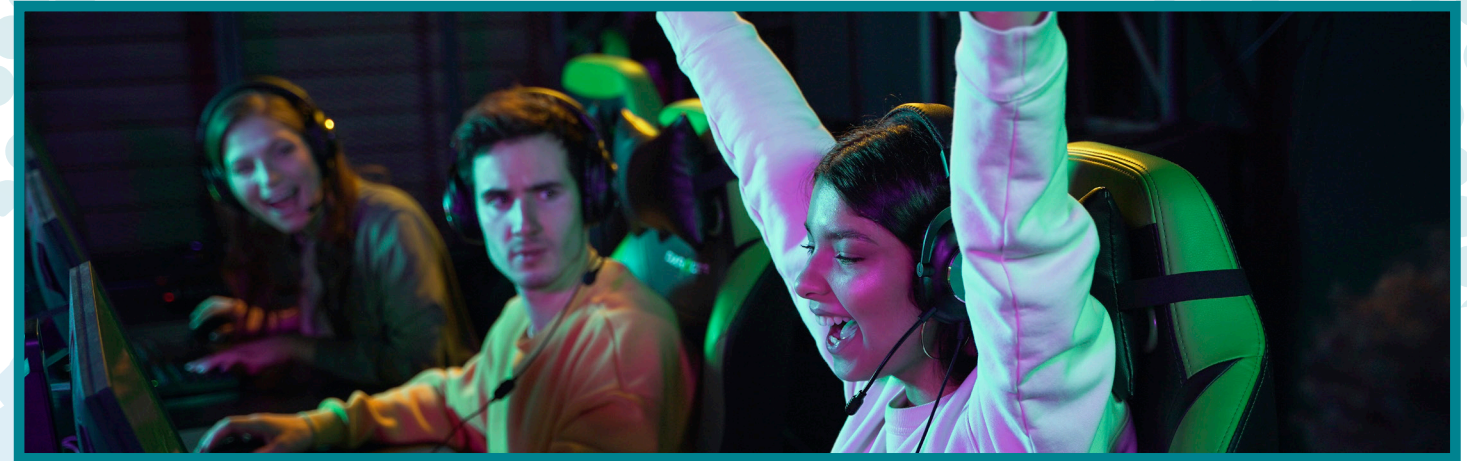
Influencer's Role in Promoting Gambling

On streaming platforms, influencers often serve as a huge source of advertising for gambling-related content to their audiences. This gambling-related content is often from unlicensed gambling operators or those based overseas. The research information reviewed considered the success of an influencer's endorsements or taking part in gambling actions could impact viewers and their behaviour.



Normalisation and Desensitisation

Influencers often engage directly with their audience during live streams, creating an interactive environment that encourages participation in gambling activities (Molde et al., 2019). The study by Andreassen (2023) on 'Healthy Gamers' teaches gamers how to practice good mental health through the internet shows how the role-model behaviour of streamers who gamble, gamble, and win can normalize the activity. Viewers of this content, especially those who do not have earlier experience of gambling, view it as a casual form of entertainment and a harmless pastime. For most people, this is what gambling is. However, for young or vulnerable people, the results of mere gambling could become underestimated, and loss of money over time, inability to cope with life, and the risk of becoming addicted would become (Gainsbury et al., 2015). Social media influencers posting frequent gambling advertisements give their viewers the message that gambling is a fun game that should be played often and without hesitation, increasing the risks players might face (Billieux et al., 2012). Often, such advertisements do not contain any safer gambling messaging, as is the case with traditional advertising. Finally, for the average viewer (if not the majority), many do not know about the gambling sector and the regulations to safeguard them as consumers. Influences may also lack this knowledge.



Cognitive Biases and Misconceptions

Our research found that the messaging from some influencers directed towards unintentional gambling facts utilises their viewers' cognitive biases, such as availability bias and the illusion of control. Availability bias is the ease of remembering some events over others. People tend to emphasise and exaggerate the high probability of events on the memory scale. Such as stream winnings could be why viewers wrongly perceive that winning is as common as they see it on streams, while the reality is different (Bunting & others, 2018). It is possible to create the illusion of control by Influencers who might choose to narrate about "strategies" or "lucky rituals" that their viewers can use. Therefore, viewers start to think they can affect the outcome of gambling activity based on mere luck instead of skill through skill or intentional actions (Chiu et al., 2004).

Increased Salience and Accessibility

The study by Choi et al. (2014) found that the gambling platforms' integration into streams or links on YouTube, Twitch or Kick that viewers can access directly enhances the idea that gambling is becoming increasingly salient for viewers. This means the psychological barrier of gambling is becoming as easy as turning the channel to a favourite TV show. Millions of viewers watch Influences gamble every day and, for many people, it can become impulsive viewing, especially where the probability of winning is artificially increased. According to Gainsbury et al. (2014), these triggers consist of visual, auditory and passionate stimuli that can have an impact on individuals vulnerable to problem gambling—causing cravings and impulsive decision-making.



Social Comparison and Competition

Streamers develop great bonds among themselves by sharing the same gaming virtues and owning common virtual merchandise. This can result in social comparison that can introduce symptoms such as fear of missing out and feeling left behind. This is reflected in people following what they see on the influencers' screen not because they want to but because they feel they don't belong in the online community (Critselis et al., 2013). If your favourite influencer is gambling to win money or win tokens to progress in a game, and you see your friends doing this, too, you are more likely to repeat that behaviour yourself.

Desensitisation to Losses

As a rule, influencers or streamers tend to hide their losses or try not to focus on the topic because permanent attention to losses can cause discomfort and depressive moods. This diminishes the viewer's or gambler's perception of the reality involved in losing, which in turn increases the risk of poor loss stemming from nothing other than their experience with digital gambling (Delfabbro et al., 2020).

The study by Gibson et al. (2022) on the relationship between videogame micro-transactions and problem gaming and gambling found that the impact of watching gambling was amplified as viewer's (particularly young or vulnerable) cognitive skills developed, making them more susceptible to the persuasive tactics of the influencers and the setup of defaulting to the gambling habit as a sense of belonging or loyalty to the Influencer. In addition to this, vulnerable viewers can be unable to gauge the long-term adverse effects of a potential addiction to gambling, along with being unable to recognise the economic stress. The normalisation, framing and high jacking (exploitation) of cognitive biases increased the available gambling opportunities. Finally, social comparison creates conditions for the early formation of problematic gambling habits, which the influencer might have even worsened (perhaps unknowingly). An emphasis on assessing such exposures and implementing the means to control these potential risks would require further investigation and, using this learning, educational resources developed.



Viewer Behaviour and Participation

Streaming platforms of video games can display more gambling-related blogs that cause viewers to consume gambling activities more often, given the frequency that viewers watch content from their favourite influencer for several hours a day in some cases.

Peer Influence

Some of the more complicated decision-making factors relate to environmental factors, such as peer pressure and social media influencers, which can inspire young people to gamble (Costes & Bonnaire, 2022). One of the most salient environmental influences that make gamblers give their all to gambling activities among their peers is peer influence. Socialisation plays a more profound role than we thought, as social interactions and group dynamics become critical factors in influencing the behaviour and mindset of individuals as they engage in gambling. Research by Costes & Bonnaire (2022) indicates that the reason for motivation, which a stronger peer group and social validation from influencers can cause in gamblers, is a critical indicator of risks. The social aspect of streaming gaming channels takes centre stage,



where audiences can form communities (or even cliques) around a particular influencer or gaming niche in a more personalised and meaningful way. The evolution of online betting has led to the emergence of virtual betting communities, which always bring gamblers together, thus creating a feeling of belonging and goodwill that makes gaming-related activities accepted and encouraged among members. Influencers, who are quite charming and can enthrall their followers compellingly, command a great deal of power in the minds of their watchers, and they reshape this personality they desire to follow. When an influencer posts sponsored content or participates in gambling, millions of followers of this person start considering these activities popular, socially acceptable and most importantly without risk.



Motivations and Gratifications

Viewers are pushed by several motivations, such as the need for fun, social contact, and sometimes earning rewards, which can lead to gambling activity (King, Wong-Padoongpatt, 2022). Besides the enjoyment, gamblers are captivated by numerous personal rewards that directly and indirectly satisfy their needs and wants. According to King & Wong-Padoongpatt (2022), some factors influencing viewers' motivation to bet on gambling are excitement and joy through social interaction and the expectation of rewards. The taste of unknown and possible winnings can transform the compulsion into a stimulating, fun-filled, and boredom-negate factor through which gamers can become enveloped. Gaming stream channels allow gamers to converse live with their favourite streamer and their viewers via chat, and hence, they can live both their gaming and social lives. This social activity, by nature, builds a sense of community and inclusion shared by viewers, making a perfect environment for viewers to open up about their gambling involvement and participate in related activities to minimise risk. This type of social activity and awareness was challenging on the platforms we reviewed as part of this study.

Pursuit of Rewards

Virtual and real-world rewards that viewers receive as a result of gambling are a powerful incentive. The mesmerising calling of winning in-game items, receiving cash awards, winning real money or getting social acknowledgement encourages viewers to play and gamble despite the risks and lack of awareness of information. The media effects of betting-related content on esports competitions, for example, are seen by some influences as an impactful way to influence their follower's behaviour and engagement, stimulated by official influence and personal incentives, such as the desire to take risks, engage in social communication, and get rewards. As the boundaries between gaming and gambling keep blurring, it becomes essential to pay attention to these trends to be able to discriminate between effective solutions and influential elements that carry risks of gambling-related harm and how to minimise this. Gamers or those who gamble via influencer marketing do not see themselves as 'traditional' gamblers. Therefore, awareness and education for both this audience and the influencers themselves need to be different from the established methods to be effective with these audiences and bring about behavioural change.

ENVIRONMENTAL CHARACTERISTICS

Social and Group Factors

The environment setting is essential in giving viewers a particular point of view about the influence of pictures and gambling on streaming platforms. The study by Li et al. (2019) on the relationship of loot box purchases to problem video gaming and problem gambling found that the social environment accompanying gambling-related material or Influencer streaming on streaming channels is potentially a powerful influence over the viewer's attitude and conduct.



Peer Group Influence

The involvement and support from influencers in gambling games can affect the viewers and thus make gambling more popular among peer friends (Azevedo, et al., 2023). One of the most critical roles of streaming platforms is their ability to create a feeling of community, with viewers utilising chat platforms to express their opinions and interact. As time passes, these communities' existing norms and language come into play. Suppose a community starts to find engaging in influencer gambling to be a normalised behaviour. In that case, individuals might tend to self-censor and participate in betting to feel accepted within the community or remain in a favourable social light (Wardle et al., 2022).

Parasocial Relationships and the Influencer Effect

Indulging streams personalise their connection with the viewers while heightening parasocial relationships (Lee et al., 2021). Thus, a social interactive pattern, above typical viewer-broadcast interaction, evolves. Audiences frequently find that they crave human contact with the streamers because they connect with a good streamer's personality and trust their recommendations. When these symbols of trust and authority engage in or promote gambling activities, viewers are more likely to regard the activity as non-harmful or life-enhancing and that it is alright to follow the lead of their idols. This "influence factor" is peculiar for young or vulnerable people likelier to be charmed by their peers and look for role models to synchronise.



Echo Chambers and Confirmation Bias

Streaming platforms' recommendation algorithms could create echo chambers with repeat views of content that do not mind mainstream viewers (Sanders, & Williams, 2019). The recommendation system can make a vortex of similar streams by exposing viewers who have watched some gambling-related content that is influencer-produced to these channels. This is again very likely to lead to a situation where gambling as a habit gets more and more entrenched in the environment of online viewers through a process of normalisation. Furthermore, confirmation bias is another issue in this discussion. As a consequence, people with a pre-existing interest in gambling might tend to concentrate on the media, which would probably only verify their claims of the overall positive effects of gambling, thus omitting the necessary precautions or understanding of potential risks.

FOMO (Fear of Missing Out) and Social Identity

The Fear Of Missing Out (FOMO) can be a strong urging overall in streaming services. Viewers feel inclined to carry out influencer-promulgated gambling activities to keep in touch with the online community's discussions, trends and experiences shared within the community members (Reith et al., 2019). This pressure can play a pivotal role for the viewers whose feelings about streamers or the community they follow are powerful. Online Gambling might become an avenue to establish their social identity in the web sphere (Ngetich et al., 2023). This has the risk that many first-time viewers may be experiencing gambling on unregulated or gambling platforms based overseas without the consumer protection tools in place. Consumers like to gamble, and many enjoy gambling, seeing it as a pastime such as a social drink. However, strong awareness and educational content need to be present within these streaming platforms, which seems to be missing now.



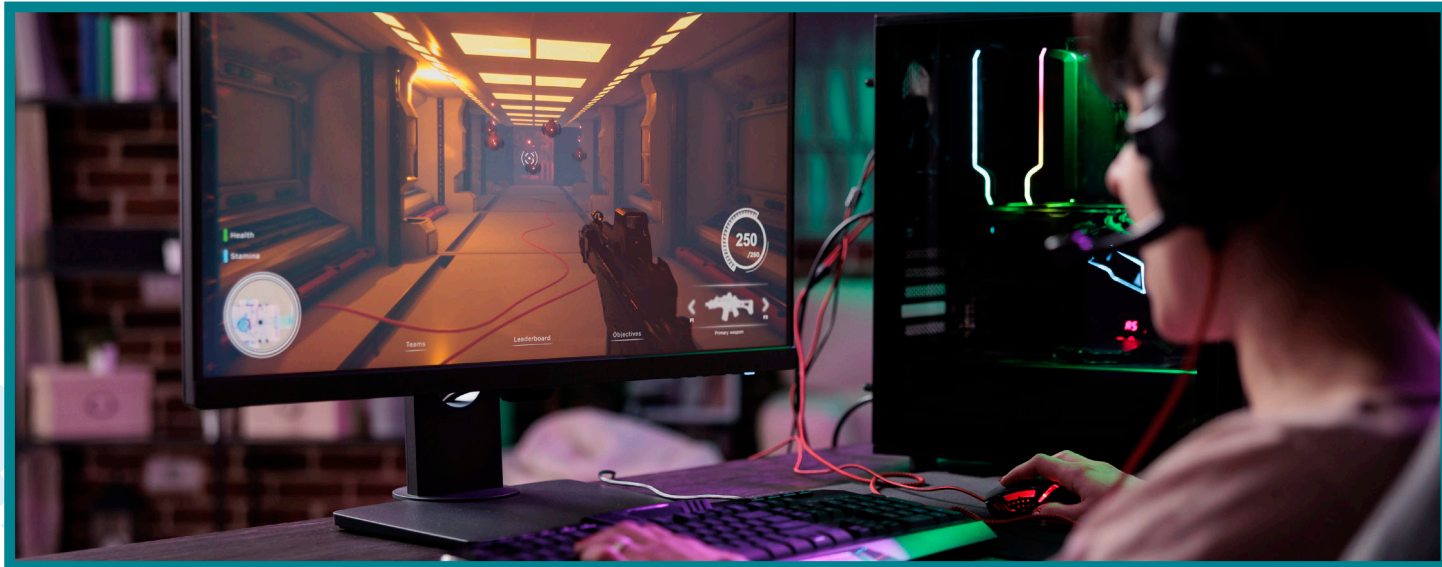


Glamorisation and Lifestyle Portrayal

Some Influencers frequently depict wealthy gamblers with winnings from their gambling. This highlights the glamorous and winning elements of gambling. This might be an even more appealing addition to young or vulnerable viewers, who can be attracted by the prospect of ensured money and an easy way to life, including spending time on fashion items and other luxury stuff. Gambling addiction, the hardships caused by it, and the concept of it are not covered in most platforms, and there is a bias shown in production to exclude this type of information. Relevant information on risks and how to get help should be considered, but it must be done mindful of the audience, who do not see themselves as gamblers.

Lack of Diversity and Representation

Molde et al.'s (2019) study on whether video games are the gateway to gambling noted that diversity, or the lack of it in this case, could make problems even worse. Education content and awareness should be created on the potential risks and controls viewers can take. Still, we should be mindful of making the content appealing to all sections of our community.



Mitigating the Environmental Factors

In the study by Lickert (2019) on Gaming myth and exploration of video gaming, heritage, and identity creation in Cuba, platform providers could introduce more restrictive rules about gambling and labels on sponsored posts related to gambling companies. Furthermore, a wider variety of streamers and representation can provide audiences with different opinions and the chance to limit the effectiveness of promoting betting harm minimisation by one source only. Another means to offset the peer pressure to stay in situations that require a high level of risk (such as gambling) is through promoting the scarcity of irresponsible online behaviour within streaming communities amongst their members.

The interpersonal and group issues observed on the streaming platforms can create an intricate atmosphere in which promoting and requesting gambling by the influencers is routine, but with education around the risks, too. When friends get a taxi ride together, most wear a seat belt – this type of group behaviour keeps the group safe in the event of an accident. It is this type of group behaviour that awareness on platforms where gambling is being offered (or even encouraged by an influencer) should be seeking to achieve. Hard, safer gambling messaging would not be appropriate and risks being a turn-off for the community.

Regulatory and Ethical Considerations

The existing lack of regulation concerning created casino content on streaming platforms does need to be reviewed. This wide range of non-existent regulations potentially creates a warm greenhouse for unethical activities and presents a risk to the populations that are the innocent victims of this careless practice. Another challenge is that through the wide spread of gambling-related content, the influencer (and platform) can influence viewers' behaviours and do nothing to minimise gambling-related harm (knowingly or otherwise) (Li et al., 2019). Specifically related to influencer-fronted betting on streaming platforms, there seems to be a lack of clear rules and principles for safe consumption. Unlike regulated gambling, which is heavily regulated and subject to strict supervision and oversight, influencer-led gambling operates in an 'unregulated parallel world', making it a potential hotbed for possible exploitation and even criminality. The absence of regulation degrades the integrity of the gaming and gambling sectors and, thus, creates the problem of gambling-related contextual promotion, which in turn brings forth substantial ethical challenges of responsible consumption and marketing.

Age Verifying and Programs of Responsible Gambling

A key consideration of influencer gambling in streaming platforms is they might appeal to those who are not of the legal age to participate in gambling, as they will be able to access such information. The study by Li et al. (2019) shows that underage gambling can cause more severe problems later on in life as it increases the likelihood of potential addiction among individuals. The absence of robust age verification mechanisms (or even AML validation) on streaming platforms enables underage viewers to be exposed to, as well as engage with, gambling-related content that can also become appealing or attractive to them.



TECHNOLOGICAL CHARACTERISTICS

Platform Design and Features

The design of some influencer platforms, including interactive applications and games, enables users to view gambling as a norm and an off-the-cuff activity with no consequence. There is a lack of safer gambling messaging, support, tools or signposting.

Algorithmic Recommendation and Confirmation Bias

Streaming platforms' main advantage is their dependence on recommendation algorithms for finding the right content for an individual viewer. Individuals' likeness leads to personalisation, which might shape viewers' thoughts and expose them to content related to their worldview (Gibson et al., 2022). It can be alarming for viewers if they have already seen the influencer's gambling content, which they may have been watching previously but didn't want to see it again. The algorithm can keep suggesting a similar stream, creating an echo chamber confirming gambling as a potentially attractive conduit and all the positiveness. This would be unhelpful. At the same time, people who are relatively more interested in gambling and thus are most likely to see gambling streams suggested may have content coming from unregulated or overseas sites (which can be the source of the influencer gambling content), which might reinforce their own beliefs that gambling could have positive outcomes. Still, viewers do this without knowing the full risks or having support material available. Plus, there is no customer address with the regulator.



Livestream Chat and Gamification

The main advantage of live streaming is that it engages the viewer more and leads to the success of influencer-led gambling. Chat functionalities are a feature that enables instant interaction between other viewers, influencers, and themselves. In such instances, the viewers enjoy community and togetherness (King & Wong-Padoongpatt, 2022). While gambling streams might conjure discussions about gamblers winning and losing, bored onlookers may just pass the time and fuel impulsiveness for involvement in the game. Furthermore, players are rewarded with different added gamification activities such as gambling tips (even though there is no skill to gambling) and virtual prizes. Audio reactions generate this type of interaction as viewers can use them to display their appreciation for the influencer, especially during wins. It is a feedback system with immediate outcomes; viewers feel rewarded as they soon realise that they have been enjoying this completely innovative entertainment.



Monetisation Models and Incentives

The economic model can also impact the influencers-led gambling process. Footprints usually demonstrate money on advertising, subscriptions, and donations from your audience. Broadcasters advertising a bookmaker's websites can be instrumental in becoming sponsors and partners and developing audiences when they view content related to gambling due to the thrill of gambling. Consequently, the prominence of gambling in the content of some streamers may increase to attain better advantages even though it might endanger viewers.

Normalisation Through Integration and Ease of Access

It is expected to note that many streaming platforms have inbuilt integrations with gambling platforms. This comprises pop-up ads, clickable links in the streaming through which you may be able to gamble, and in-stream gambling as well. The process of this smooth integration eliminates psychological obstacles as well as the psychological problem of online betting to online gambling. The research provided by Gainsbury et al. (2014) shows that gambling cues act as triggers that push for cravings in subjects who are prone to problem gambling and also personal decision-making. The platform integration can wrap up the risk of access expediency.



Lack of Content Age-Gating and Parental Controls

Influencers usually have weak or no age-restriction systems and no parental control features. At this point, there is a situation where young people are much more likely to be influenced by the videos of gambling influencers. Thus, the risk is higher at mass exposure of even the most innocent viewers to influence-led gambling content. The online gambling ecosystem is dynamic, and changes as tech devices and ways to access the internet evolve. The rise of virtual reality (VR) and augmented reality (AR) technologies leaves the borderline between leisure and gambling even further. There is a caution that these more immersive platforms may come with riskier experiences in the future. (Kim et al., 2023).

Addressing the Technological Challenge

The effort to reduce the aspects of technology that result in influence-driven gambling necessitates the involvement of governments, charities, gambling businesses, platform developers, and content publishers. Platform providers might consider tighter supervision of influencers' content when they allow it to be posted. Another essential goal alongside education and awareness is implementing underage access restrictions and robust identity verification systems.

The recommendation algorithms of streaming platforms may be involved in exposing viewers to gambling-related content, which, in turn, can boost the volume of those who turn to gambling (Ngetich et al., 2023). One of the technical factors that platform streaming companies have in shaping the gambling phenomenon concerns influencer-led gambling. These start from suggestion algorithms to convenience; these platforms build a surrounding where risky behaviours in activities are expected and sometimes invited.



Platform Policies and Regulations

The rule and regulation sector of the streaming service is where the content and behaviours associated with influencer-led gambling are primarily shaped. These operational policies are the guidelines that wellness influencers adhere to in their work and can, therefore, be macro-impressions on the content and behaviours accompanying gambling. The guidelines and policies allocation task, which is meant to put content moderation into effect, may help eliminate risks related to gambling-related content and keep vulnerable viewers protected (Ngetich et al., 2023). Effective content moderation policies should encompass several vital elements, such as transparency, as platforms must be open and present their policies and content moderation, making clear statements for influencers defining the actual deeds considered acceptable to them. These Platforms should be held accountable for the influencers that they allow to be on their platform and take action when they break these rules laid down for moderation of contents, and circling back unethical, black market or irresponsible gambling-related activities. Also, these platforms should consider adding functionality that enables users to make reports on misleading or harmful content so people themselves can join and help with the technical part of moderation.

Focus on Specific Streaming Platforms

Twitch, being a top gaming content site, has become a target of many critics of the way the influencers of the site have been using gambling as a mode of content creation. Whether the platform is a month or a game-based revenue stream from supporters/viewers, for many streamers, the financial benefit is of great motivation (Greenfield, 2022). Despite heavy criticism, Twitch has either been limited in its capabilities to fully control the vast spread of influencer-led gambling on its streaming platform or has been incapable of stopping this social practice. Through the platform, some restrictions or deletion of gambling-related posts have been made, but critics claim that they aren't enough and can't sufficiently protect younger or vulnerable viewers.

Although YouTube has developed stricter rules regarding unlawful casino content than Twitch, the challenges raised are regarding the promotion of 'loot box' mechanics in games, which, according to others, is merely restricting gaming on facing real-money gambling (Yang, 2020). Even with these efforts, questions remain about the appropriateness and effectiveness of YouTube Gaming's policies to deal with the deeper issues associated with influencer-driven problem gambling. The platform can proceed with robust enforcement mechanisms to ensure compliance with its policies and guidelines. This includes automated content detection technologies for fast and consistent identification of inappropriate content and proactive monitoring of high-risk channels to reduce the chances of offensive content being spread.

Meta and Facebook Gaming, just like Twitch, offer similar services, with an edge over the broader spectrum of users outreaching gambling content, due to the more extensive user base (Molde, 2019). With stricter policies in place, with better content moderation and funding of educational programs, the cooperation between the influencers, regulators and advocacy groups to neutralise the risks associated with influencer-led gambling and to foster responsible games among those who are vulnerable can be achieved by the streaming platforms.

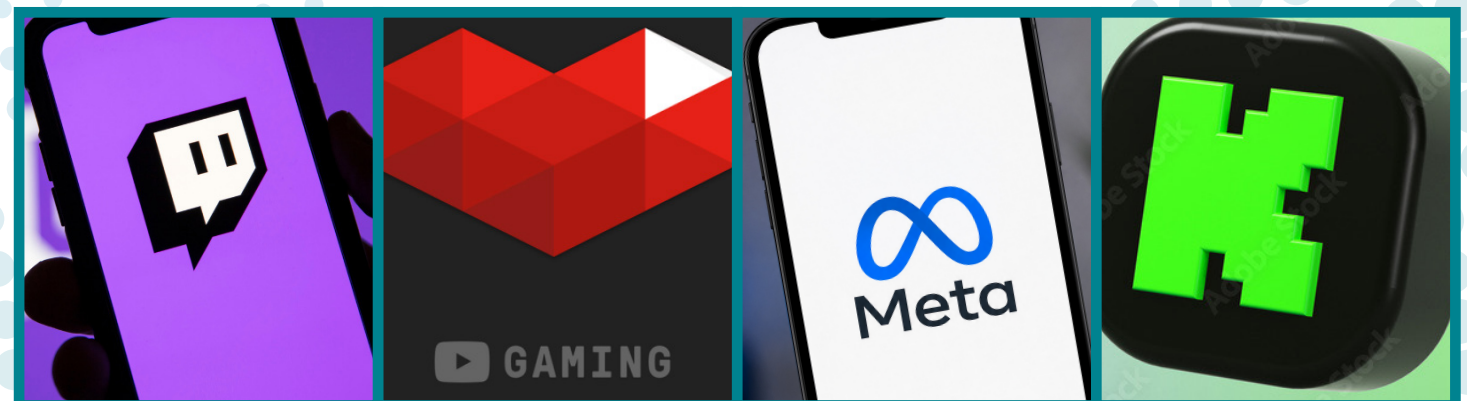
Kick, the relative new kid on the block when it comes to streaming platforms, is owned by the co-founders of betting platform Stake. Previously Stake was a prolific sponsor of a number of streamers on Twitch but was banned in October 2022, along with a number of others, of which only three were named; Rollbet, Roobet and Duelbits.

One of the Kick co founders is a streamer known as Trainwreckz previously a Twitch streamer. See this excerpt about him here from Wiki;

'When Stake.com was banned by Twitch, Niknam switched to Kick.com, a new streaming platform with financial ties to Stake.'

In October 2022, Niknam claimed to have been paid US\$360 million by sponsors to gamble on stream over a 16-month period'

Naturally the ties between Kick and Stake can be seen as problematic from a consumer protection and safer gambling POV. Stake was built with looser moderation and to be 'creatorfirst', offering a more generous revenue split v competitors. A number of large name creators have moved to Kick, some sponsored, some not, and Stake Kick haven't shied away from spending on sponsorships and promotional activities; see F1 team.



THE DATA



Influencer-Led Gambling in Gaming on Streaming Channels of Twitch, YouTube, and Kick
Monthly viewership on different platforms (Twitch and YouTube), where people are watching influencers gambling.

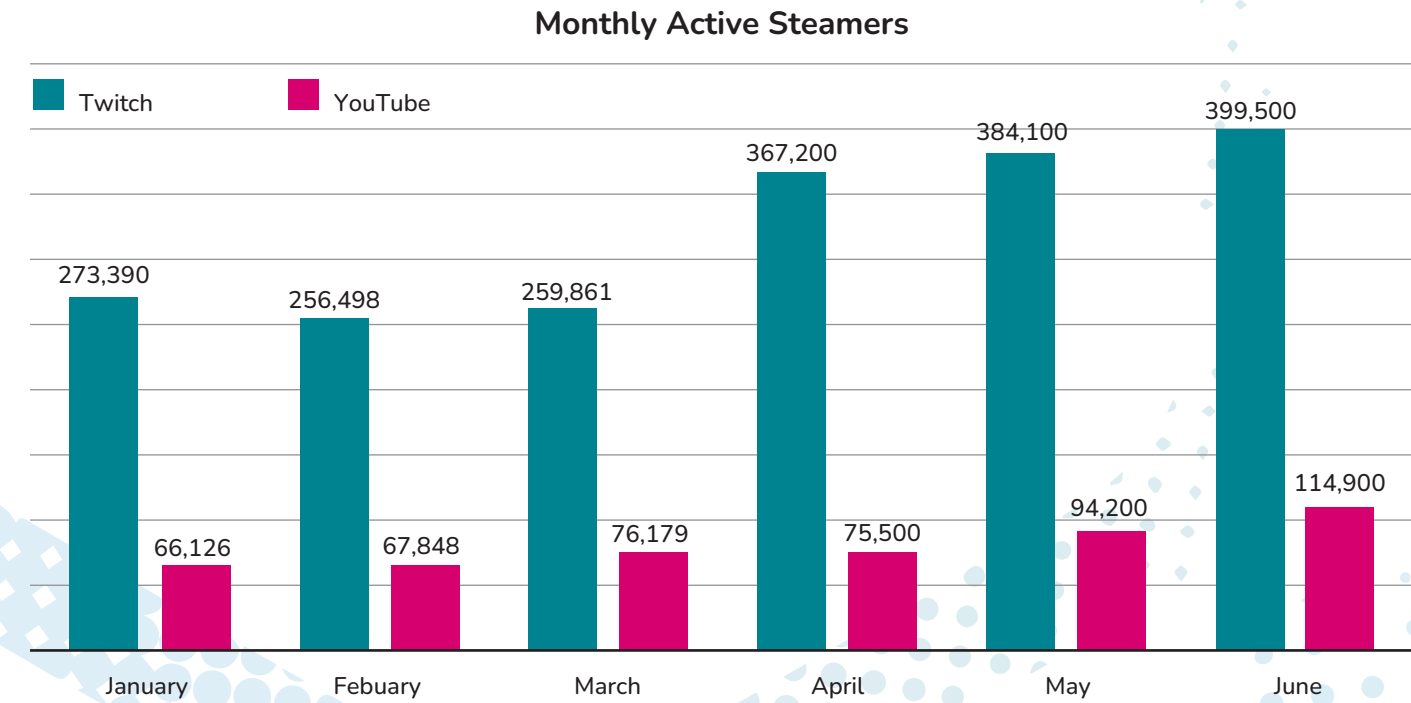


Figure 1: Monthly viewership on different platforms (Twitch, YouTube)

Streaming, a phenomenon that emerged in the early 2010s, has been on a steady rise, with Twitch leading the way in terms of users. Currently, Twitch boasts about 15 million active users daily, with about 106 minutes of streaming watched per person daily. Twitch reports that 65% of their users are male, with 73% between the ages of 18 and 49. This demographic is a key target for many brands, explaining the popularity and growth of influencer-led activity on these platforms (Abarbanel & Johnson, 2020).

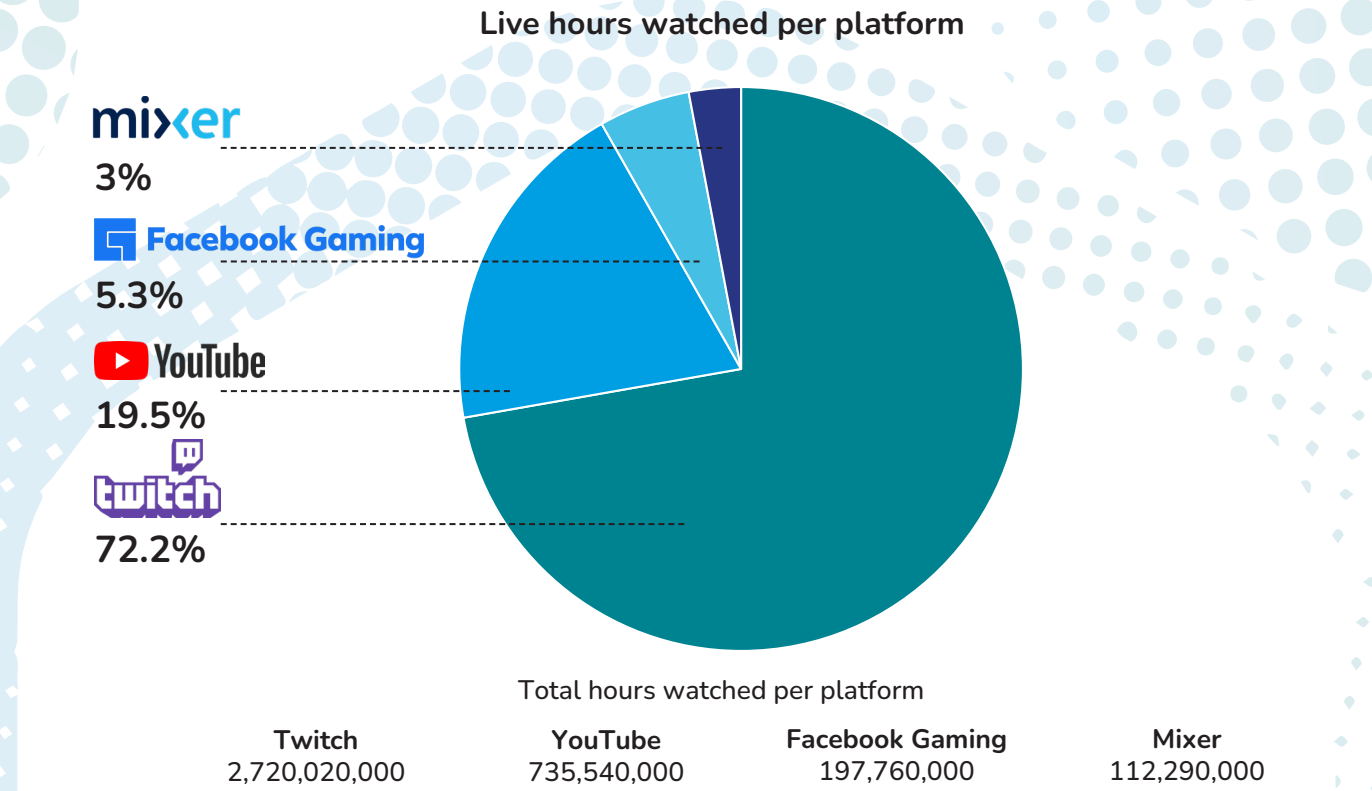


Figure 2: Live Hours watched per platform

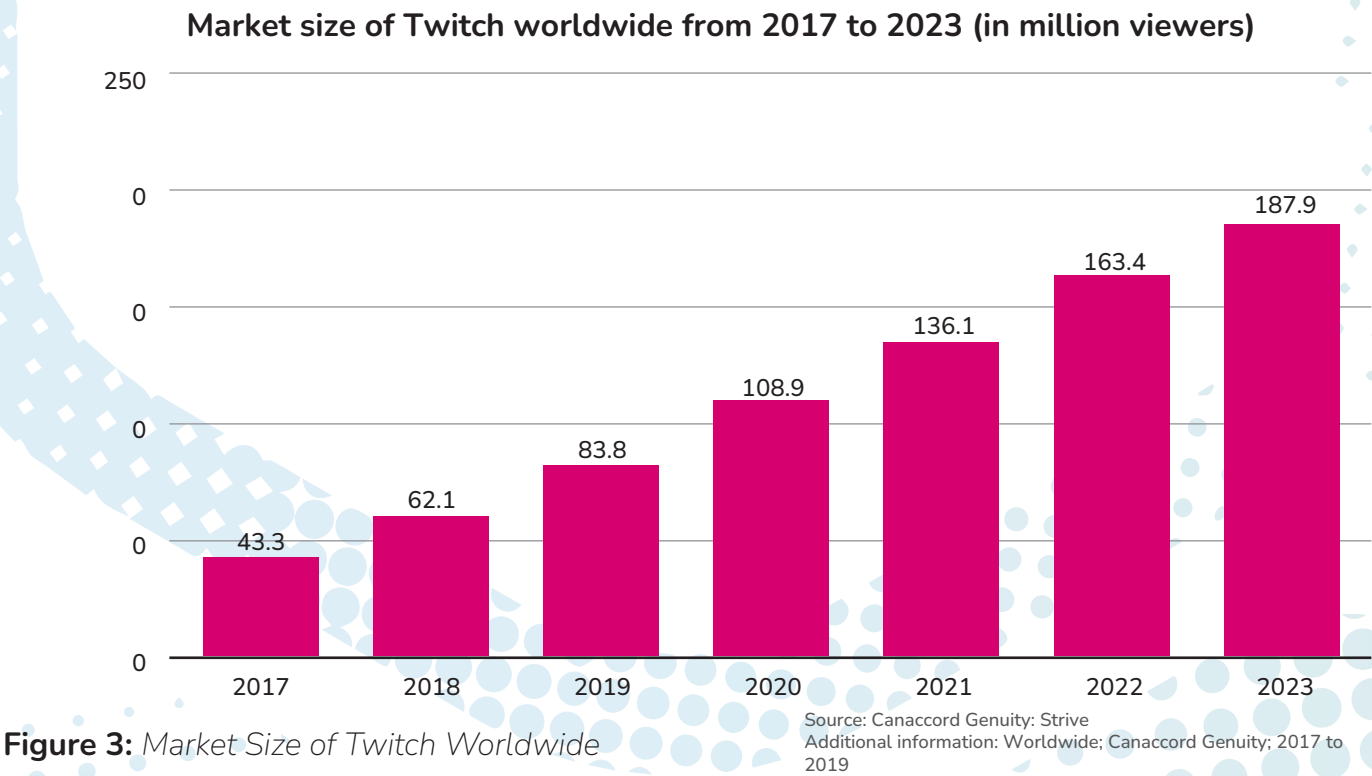


Figure 3: Market Size of Twitch Worldwide

76% of Twitch gambling channels are suspected of view botting

Streams of gambling games have long been a feature of Twitch. The Casino Jackpot / Slots / Virtual Casino categories, and others alike, can now be considered some of the most viewed content. Technically, streams of gambling games are not prohibited, but these categories are subject to several serious restrictions on advertising, viewer age etc. The platform has also witnessed several high-profile scandals where popular streamers borrowed vast sums of money and then fell into debt or even addiction, becoming too engrossed in streaming online casinos, (Shah, 2017). In other cases, the viewers became victims, entrusting their data or money to bed on games that are unregulated or unlicensed and with no customer protection processes in place.

Suspicious Activity Has Been Growing on Gambling Channels

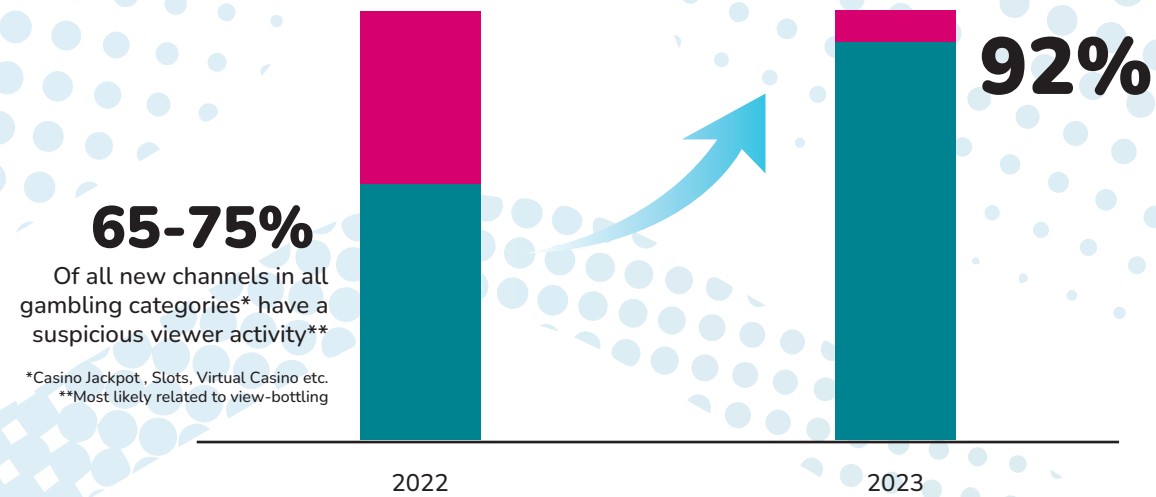
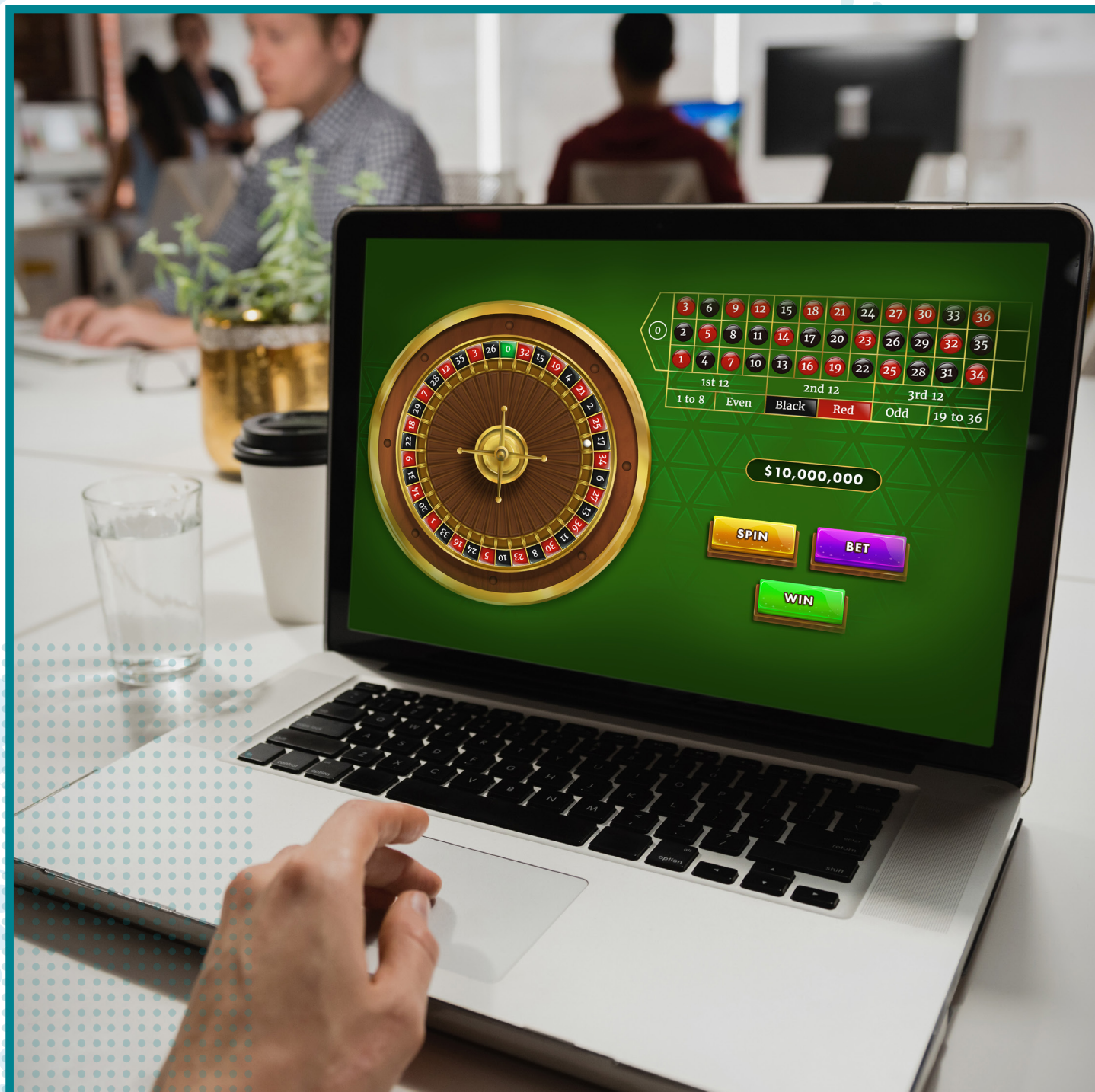


Figure 4: Gambling Channels activities



Number influences on web gaming, their location in the world and other interesting demographics

Share of Female-Skewing Games Among Top 1,000 Games by Consumer Spend iOS & Google Play Combined

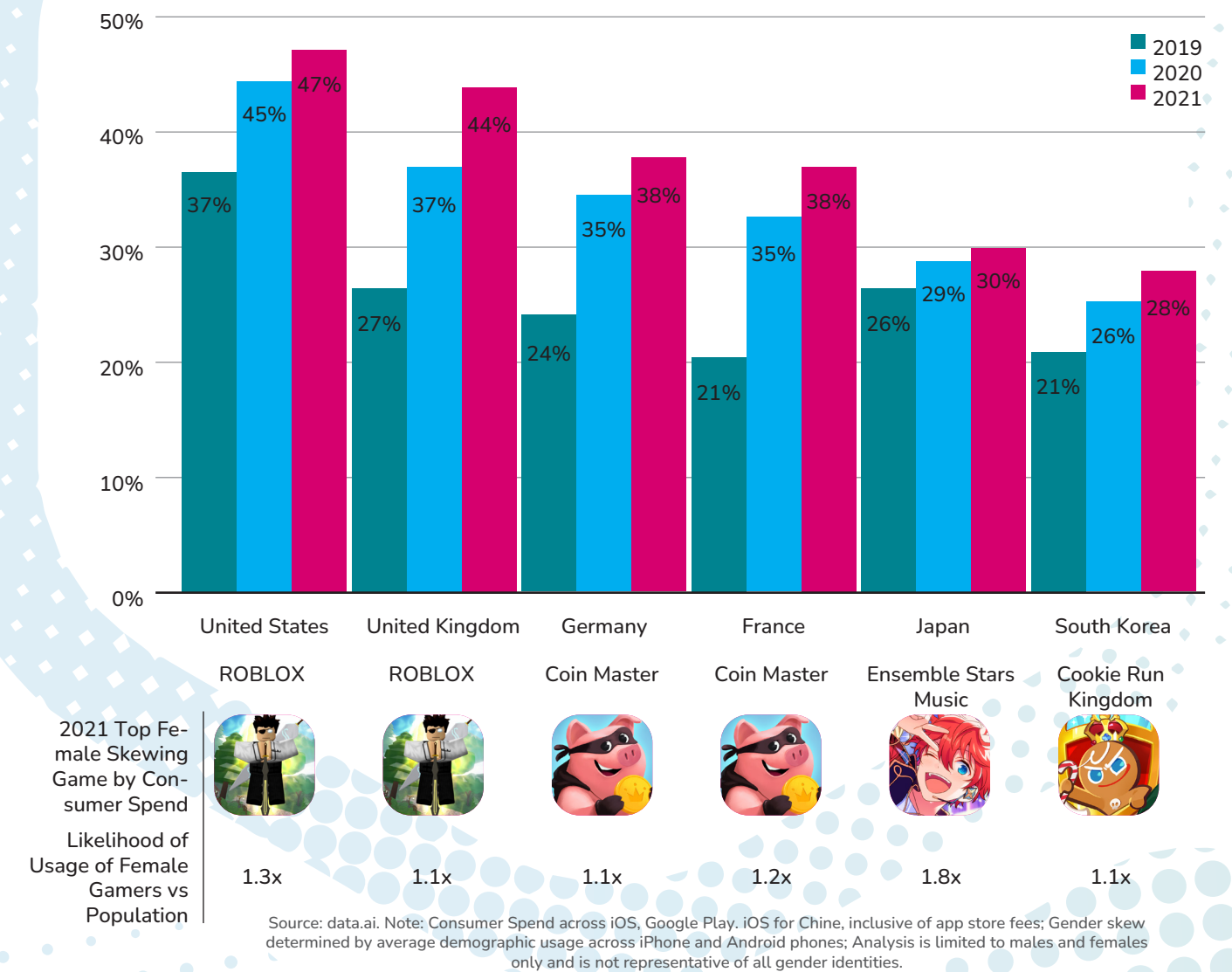


Figure 5: Consumer Spending

The mobile gaming industry has grown at a rapid pace and has now outstripped specific traditional gaming formats in terms of overall revenue. The International Data Corporation, in collaboration with DataAI, has just released a report that revealed that mobile games now bring in 60% of the total industry income. With all of that having been said and now out of the way, it is important to note that mobile games are predicted to bring in around \$136 billion in 2022, which is almost two-thirds of the \$222 billion that the entire gaming industry is expected to earn, (Mäyrä, & Alha, 2020). That indicates that the mobile gaming industry has grown over 4.5 times since 2014, when its total value was around \$30 billion, with all things having been considered and taken into account.

The Rising Stars of Kick: Analyzing the Growth of Top Live Streamers

The new live-streaming service, Kick, has made a name for itself in the gaming space, quickly attracting some of the biggest names in the industry. The site was created in collaboration with Stake.com, a gambling website, and live streaming creator Trainwreckstv, who is most known for his slots and gambling live streams.

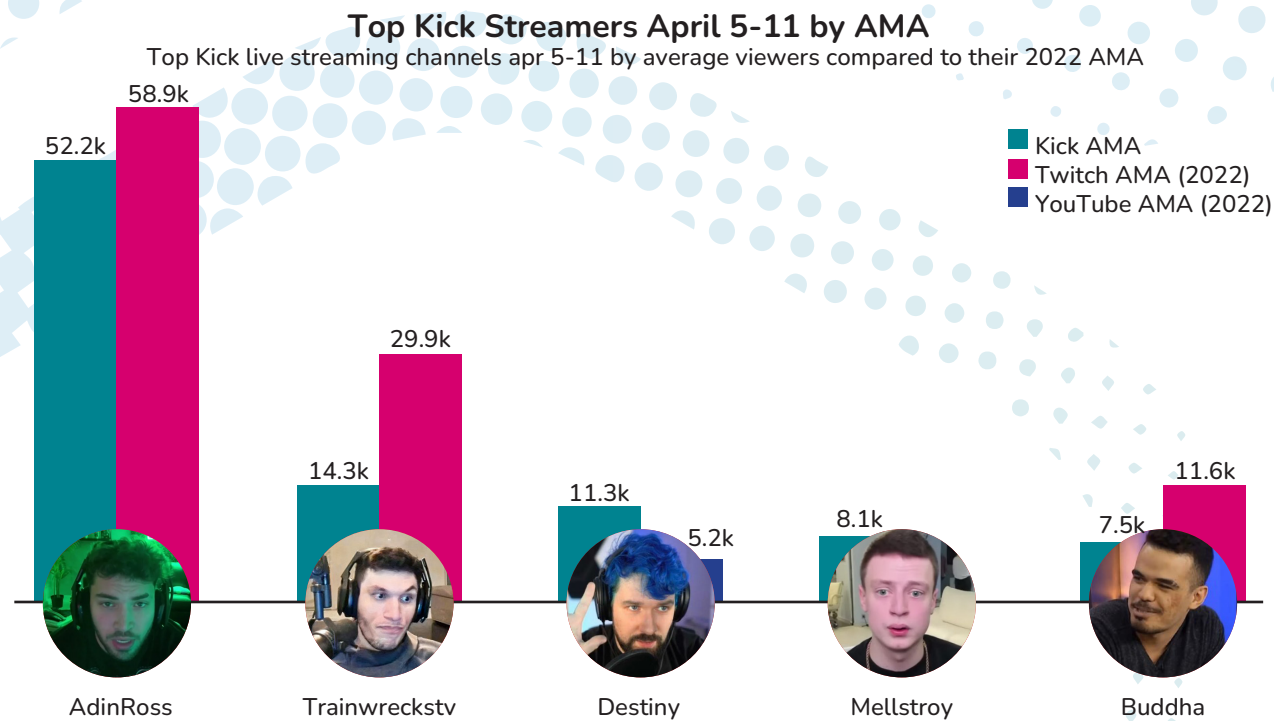


Figure 6: Streamers abd viewership on different platforms



Market Share

In 2021, Twitch dominated more than 70% of the game streaming market, with 5.79 billion total hours watched. The platform currently has 30 million active daily users and 140 million unique monthly users. It also has 9.2 million active streamers, with more than 7 million going live each month. The same year, Facebook Gaming took up almost 16% of the market. With 1.29 billion total hours watched, the platform overtook YouTube Gaming's stats for the first time. 2021 also saw 400,000 unique channels and over 11,000 broadcasted games on the platform. Moreover, 230 million users are active monthly in over 600,000 Facebook Gaming groups.

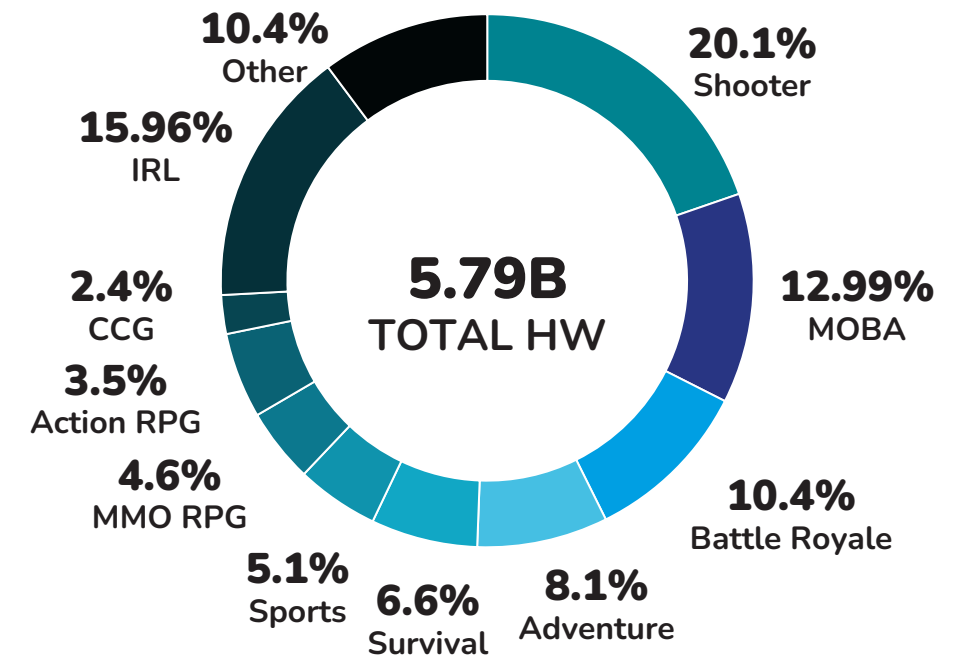


Figure 7: Top genres viewership on Twitch

YouTube Gaming streamers and channels viewership in August 2023

With three-fourths of the year gone, YouTube Gaming has maintained its stature as one of the premium destinations for great content across genres. What has helped is the quality of its streamer line-up, with names like Ludwig, Valkyrie, TimTheTatman, and Sykkuno continuing to change the game and attract millions of viewers. With Twitch facing many issues and Kick/Rumble still in the early stages of their runs, the red platform has done a splendid job of taking advantage of the uncertainty among audiences by churning out newsworthy content, (Abarbanel, & Johnson, 2020). This helped it reach almost 497M Hours Watched, an impressive number that played a part in achieving an overall platform record of 3.2B HW last month, while the number of average concurrent viewers is also at an all-time high.

Most Watched Organization YouTube Gaming Channels

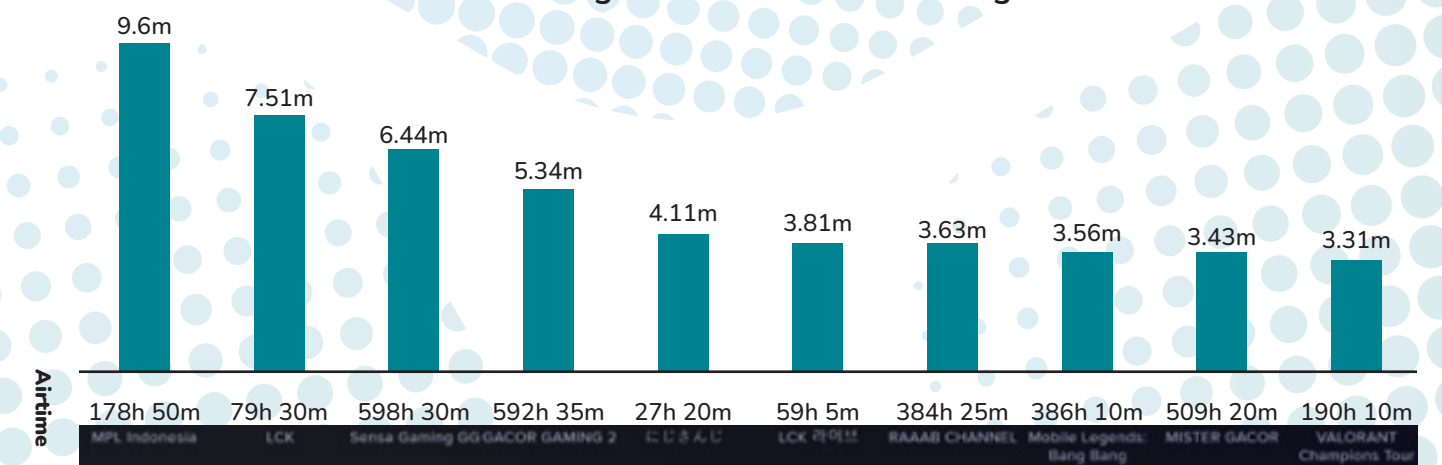


Figure 8: Most viewership on YouTube

2023 Global Livestreaming Landscape

In the first quarter of 2023, Twitch and YouTube garnered the most Hours Watched among all other live-streaming platforms. However, none of the leaders demonstrated significant dynamics in this indicator, as the figures remained at the same level as in the fourth quarter of 2022. When considering the YouTube Gaming segment separately from non-gaming YouTube broadcasts, its total Hours Watched grew by almost 13% for the same period. Twitch and YouTube Live watch time remained at the same level as in the last quarter of 2022. YouTube Gaming grew by 13%, with gaming streams now accounting for 17% of the total Hours Watched on YouTube Live. Valorant and Minecraft significantly increased their audience reach on Twitch (Ioannou et al., 2023). Nonolive showed the best dynamics in terms of Hours Watched among all platforms (+1.35%) and Trovo's Hours Watched dropped to the level of early 2021.

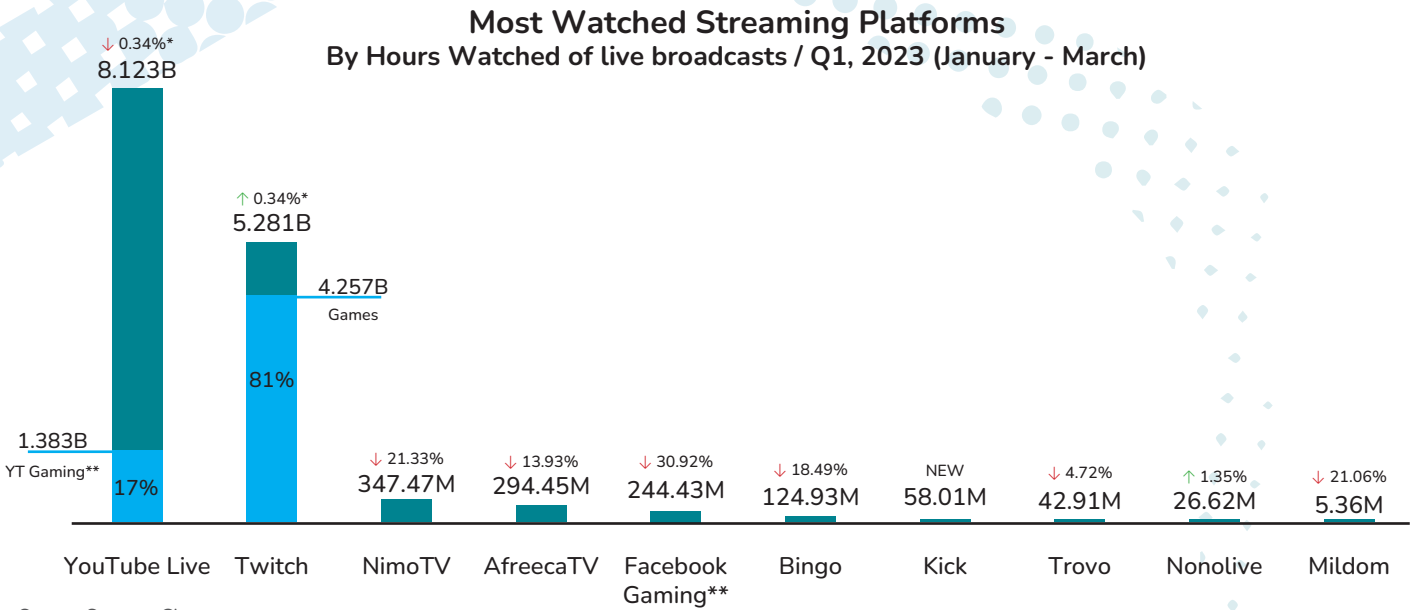
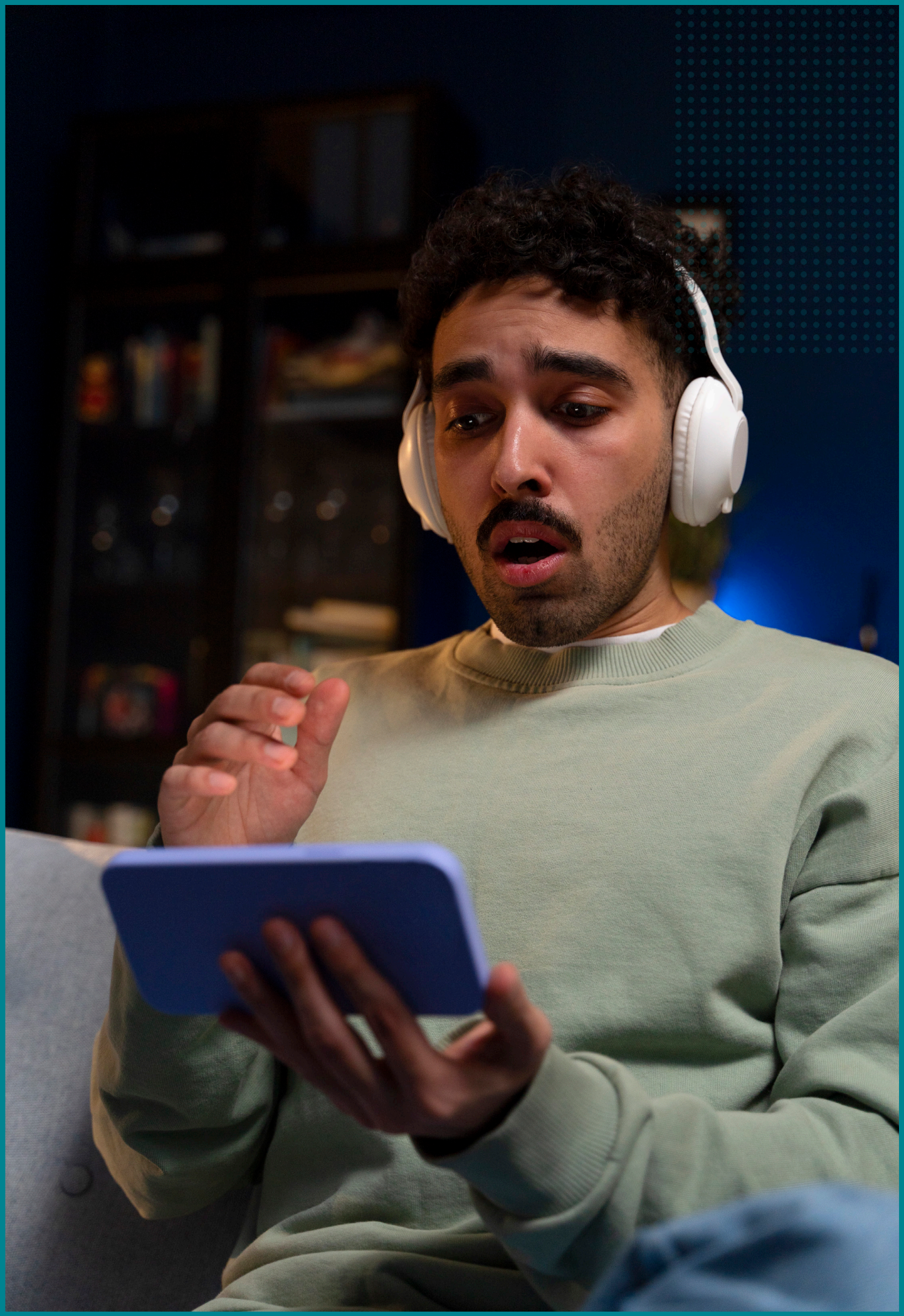


Figure 9: Monthly Watched streaming platforms



CONCLUSION

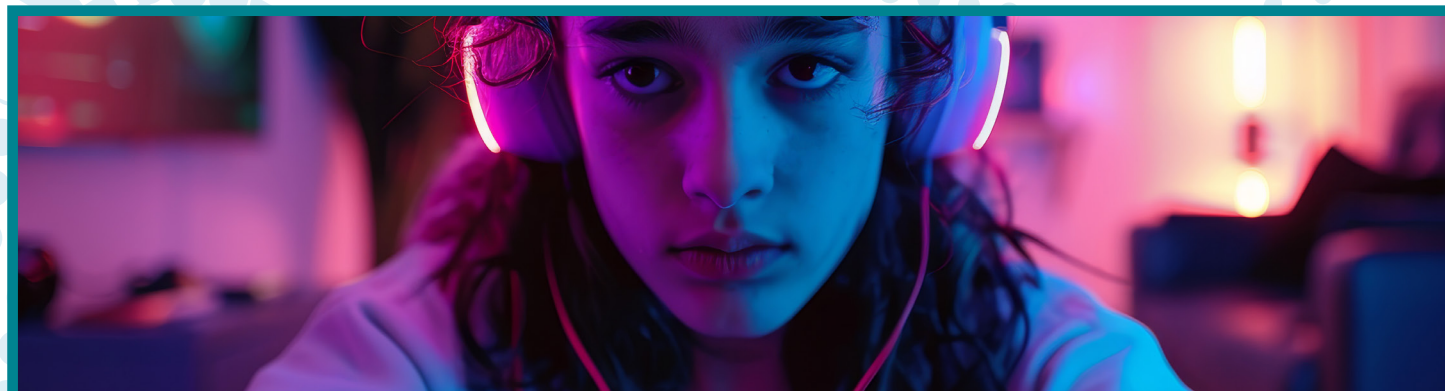
Influencer-endorsed gambling advertising on streaming platforms is growing in huge numbers; however, the absence of clear regulations and ethical considerations can have a significant impact on both the gambling and gaming sectors and society as a whole. With no or very limited information or tools on safer gambling, there is the probability that viewers, primarily young or vulnerable people, could experience gambling-related harm and be in a vacuum where there is no support or information available. This is because the gambling being promoted may be from unregulated or overseas markets.

In order to mitigate these concerns, there is a need for the implementation of evidence-led co-created and externally evaluated educational awareness for viewers, influencers and platform providers. Academic and awareness information should be purposeful and co-created with consumers who watch influencers and streaming platforms. Our research suggests viewers who gamble do not see themselves as traditional gamblers, and there is a lack of knowledge among influencers about regulated and unregulated gambling. Safer gambling information, age verification, and advertising transparency should also be considered.

Research avenues such as longitudinal studies, platform-specific analysis and educational interventions are recommended to build upon the insights gained from this literature review and inform future initiatives aimed at addressing the challenges posed by influencer-led gambling should also be considered. The challenge of influencer-led betting in games on streaming channels is complex as technology and consumer behaviours evolve, but at the very heart of any work in this space, viewers, influencers and platform providers must be involved to bring the sector and key stakeholders on the journey.

This report highlights several themes of work. However taking a consumer risk-based approach and to achieve measurable and timely social impact, Community Care Gaming commits explicitly to the following activities during 2024/25, and we invite others to work alongside us:

1. Conduct research involving key stakeholders to discuss, shape, scope, and co-create educational and awareness content for streaming platforms and the esports sector. To be completed by December 2024.
2. Pilot with up to 10,000 beneficences and academically evaluate educational content and audience fit. To be completed by April 2025.
3. Undertake substantive research on Black Market Gambling to understand exactly what it is and how it operates. To be completed by May 2025
4. Undertake substantive research and a literature review on Choice Architecture on Websites to understand the relationship between consumer choice and behaviour. To be completed by May 2025
5. Lead an education symposium to share findings from (i) the two new research projects and (ii) findings from the educational content and external evaluation. To be completed by July 2025.



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