Sensor Tower



How Starfield achieved 10M players

Starfield’s astronomical launch: Bethesda’s largest release into an intensively competitive market

Pathmatics
BY SENSOR TOWER

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About this data:
Methodology

Sensor Tower's Qualitative Insights team created the revenue and download forecasts featured in this report using the Sensor Tower Store Intelligence platform.

- Figures cited in this report reflect App Store and Google Play consumer spending and download estimates for January 1, 2018 through May 31, 2023.
- The market forecast for 2023 to 2027 is based on past spending and download trends, macroeconomic projections, and additional factors.
- All revenue figures in this report capture consumer spending (gross revenue). This includes the revenue earned by the app developer as well as the portion earned by Apple or Google.
- Android estimates represent revenue and downloads from the Google Play Store only. Sensor Tower does not provide spending or download estimates for third-party Android stores.
- Since Google Play paused its billing for users in Russia on March 10th, 2022, Google Play consumer spending in Russia for the remainder of 2022 and beyond has been excluded from the forecast.



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Starfield timeline

Genre: RPG

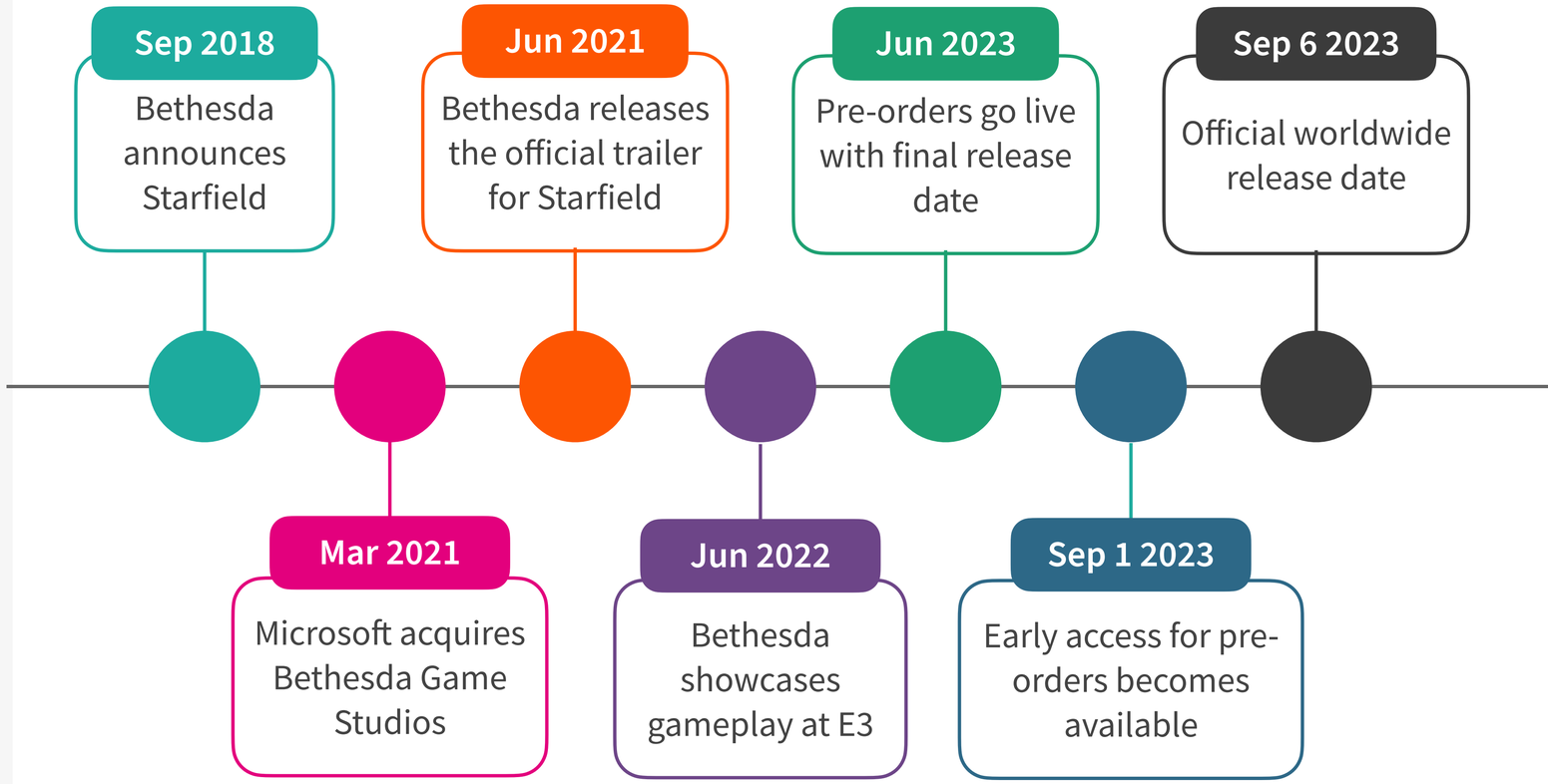
Developer: Bethesda Game Studios

Publisher: Bethesda Softworks

Platforms Available: Windows, Xbox Series X/S

IP: First new IP from Bethesda in over 25 years

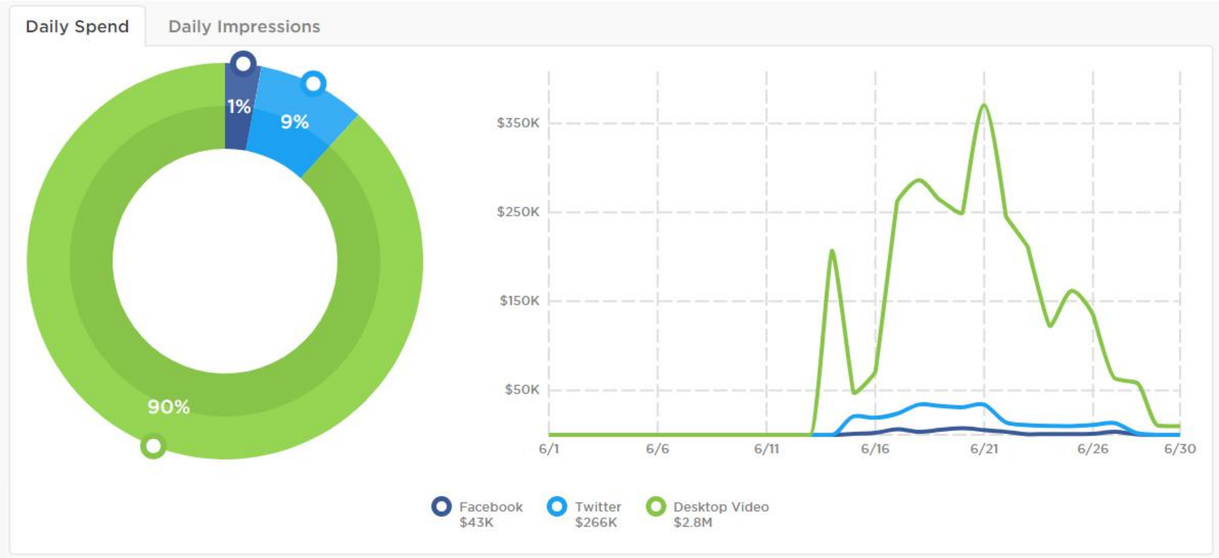


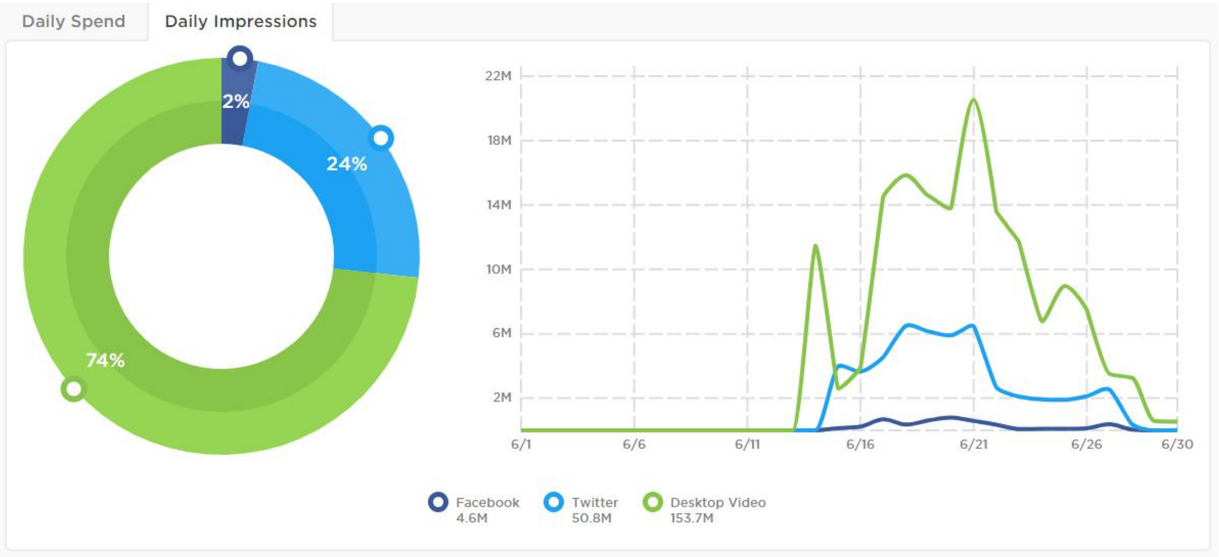


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Trailer strategy

- After a long period of waiting from the initial announcement in 2018, Bethesda released their **official trailer for Starfield in June 2021**
- Starfield's strategy focused primarily on promoting their official teaser trailer on **YouTube**, along with a small amount of Twitter and Facebook posts
- When looking at impressions rather than spend, you will notice a **high volume on Twitter** during this period
- As this data was collected before the launch of our YouTube in-app channel release, all of the YouTube spend will be in Desktop Video

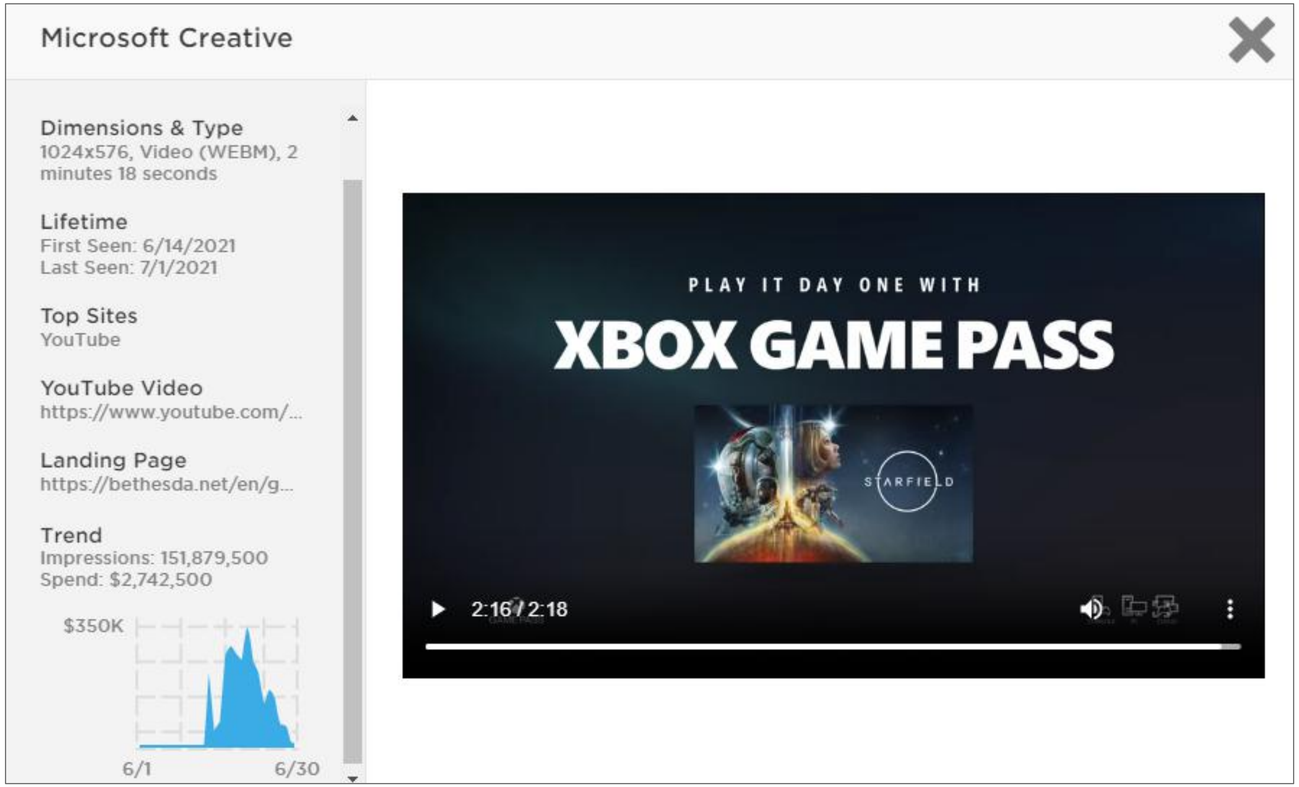




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Trailer creative strategy

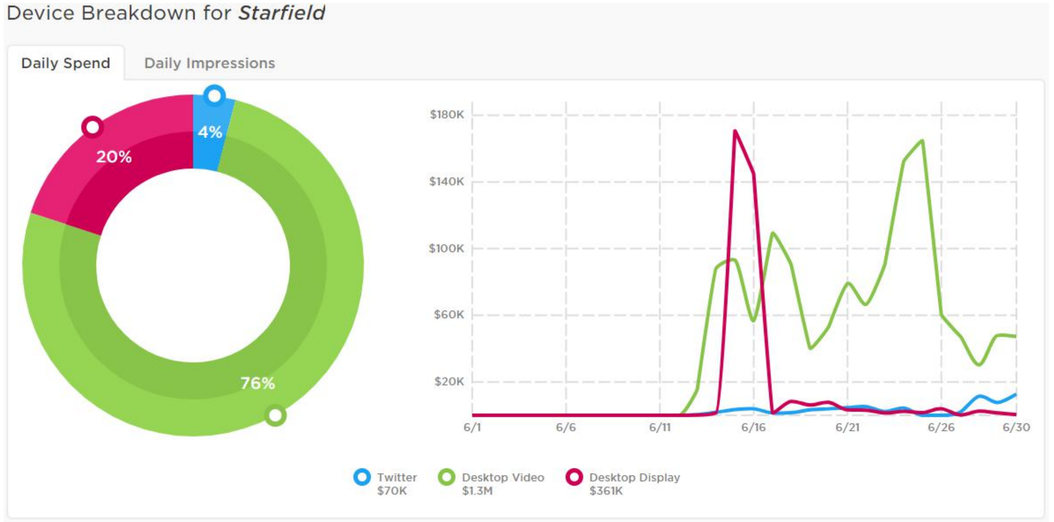
- In March 2021, **Bethesda** joined Microsoft's **Xbox Game Studios**
- Bethesda released their 2-min trailer on YouTube after E3 in June 2021, which touted a **brand new universe** from the award-winning creators of Skyrim and Fallout 4
- After showcasing **alpha footage** of Starfield, the final CTA is to **"Play It Day One with Xbox Game Pass"** (showing one of the first collaborative efforts between Microsoft and Bethesda)
- The landing page for this creative directing viewers directly to the Starfield page on Bethesda's website

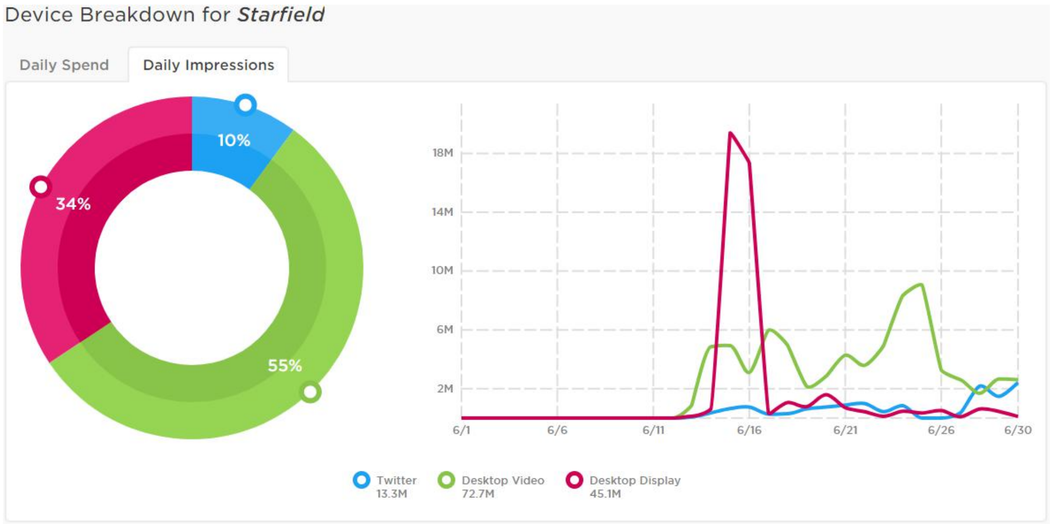


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Gameplay reveal strategy

- Almost one year after Bethesda released their official teaser-trailer, they released a had a **full gameplay reveal at E3 2022**
- Bethesda's creative strategy featured **YouTube** heavily, along with popular websites for gamers like **Reddit, Twitch, and GameSpot**
- There was also a smaller **Twitter** presence at 4% of estimated ad spend and 10% of estimated impressions
- As this data was collected before the launch of our YouTube in-app channel release, all of the YouTube spend will be in Desktop Video

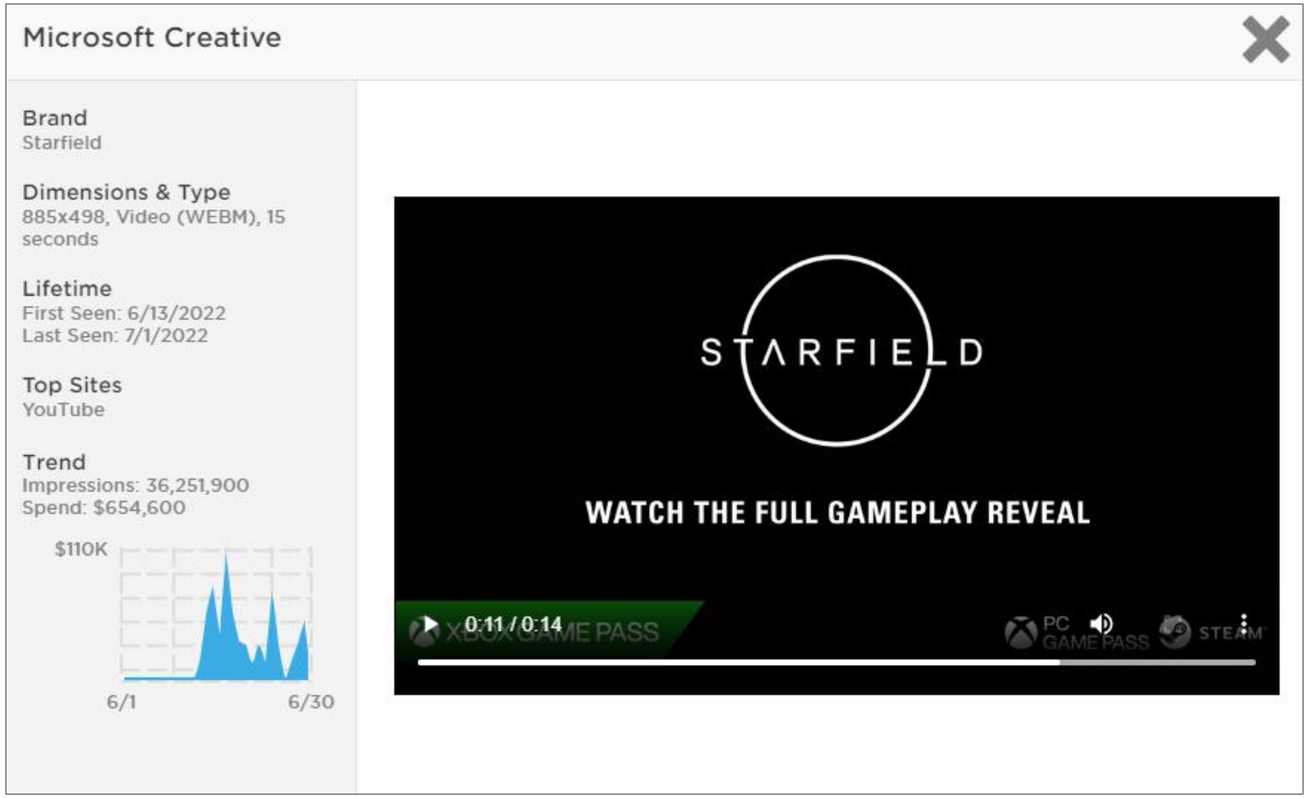




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Gameplay reveal creative strategy

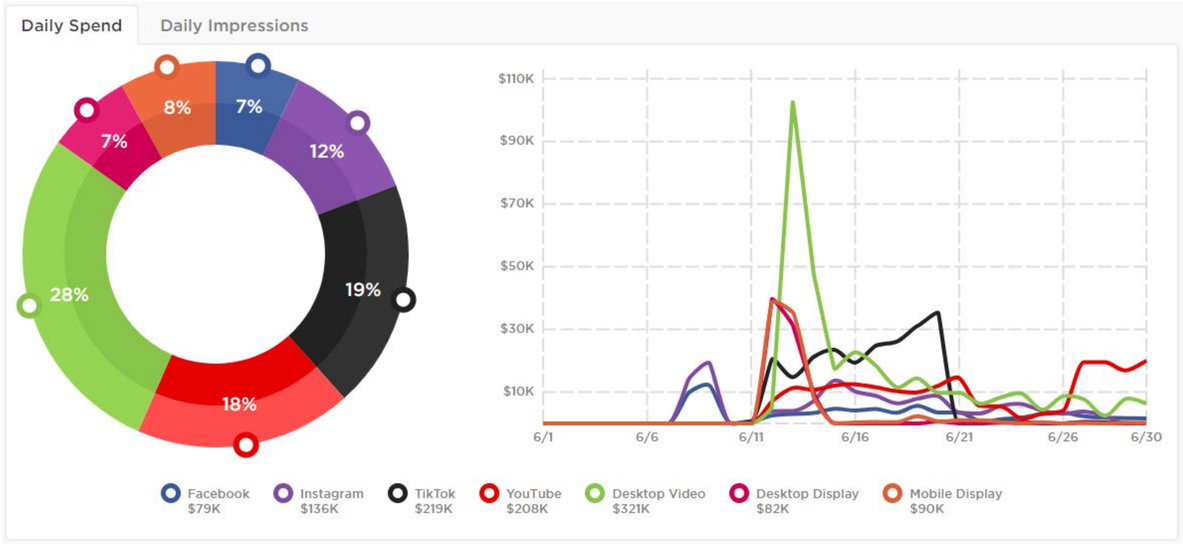
- Bethesda focused on **two similar shorter creatives** for the Gameplay Reveal (15s and 30s)
- These creatives both have voice-overs to welcome the viewers to “Constellation” and **feature gameplay footage**
- The CTA at the end of each creative encourages viewers to **“Watch the Full Gameplay Reveal”** and continues to promote **Xbox Game Pass**
- The third most viewed creative during this timeframe was a static image promoted on **Reddit** that also prompted users to watch the Gameplay Reveal

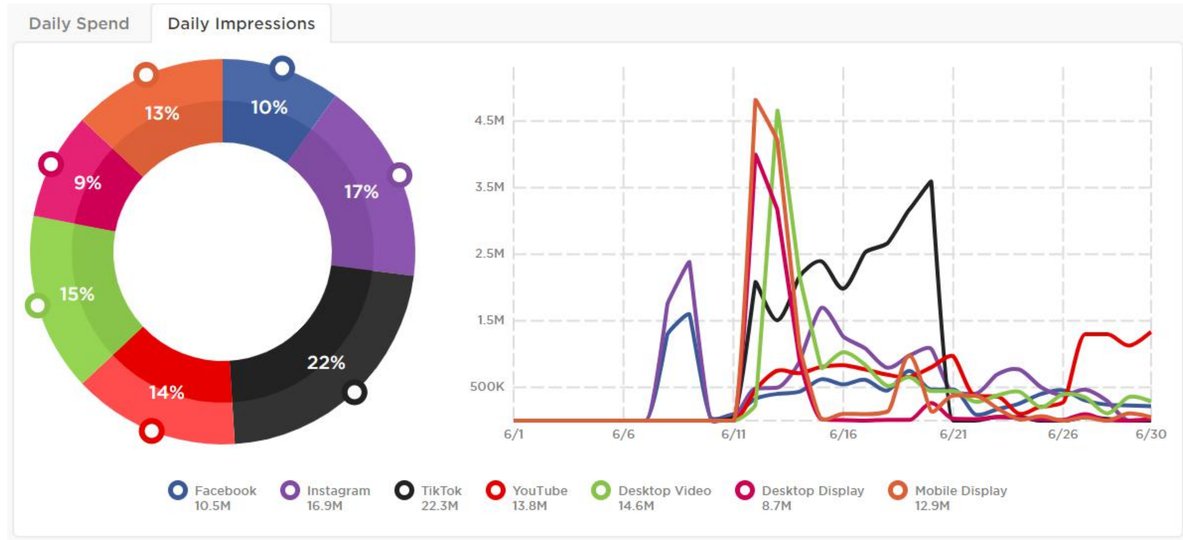


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Pre-order announcement strategy

- Starfield became available for **pre-order in June 2023**
- The creative strategy for the pre-order announcement took a bit different approach from previous campaigns
- **Programmatic spend focused on Twitch** for Starfield during the pre-order announcement phase
- **Social spend was primarily TikTok** then **Instagram**, and socials played a larger role during this timeframe
- **YouTube fell behind programmatic and socials** during this timeframe

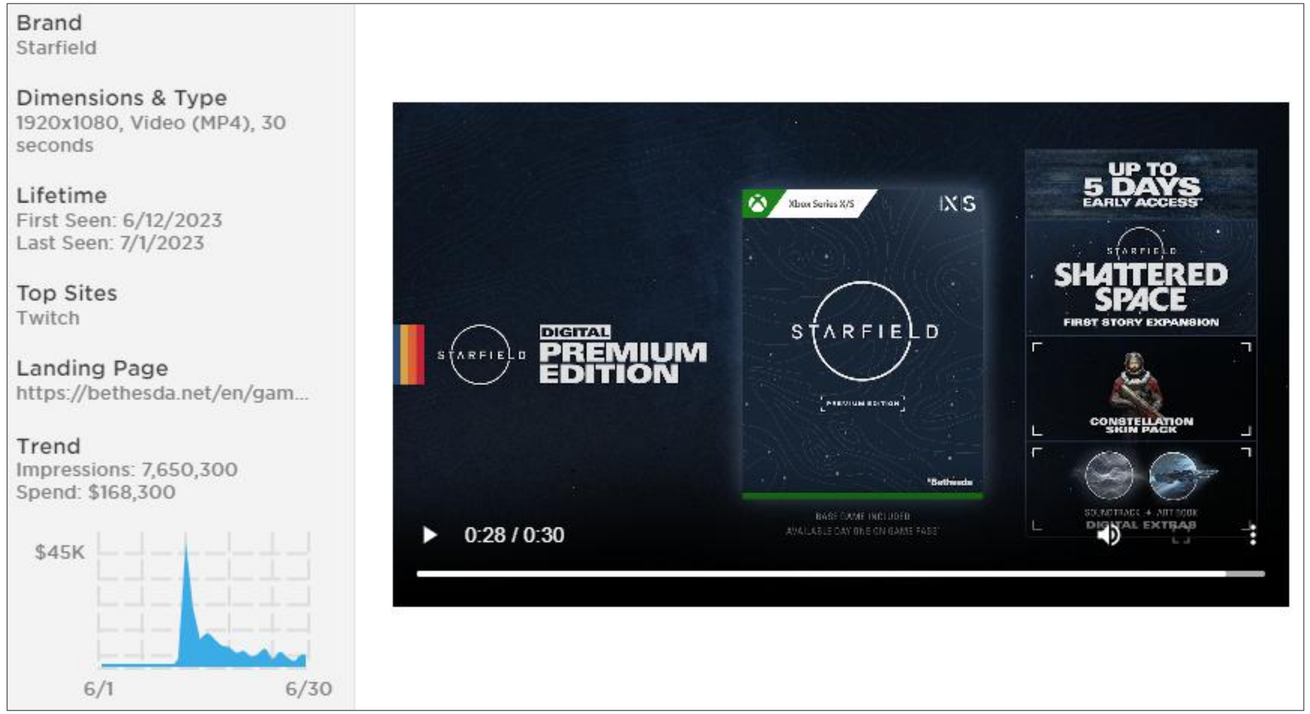




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Pre-order programmatic creative strategy

- Starfield's programmatic strategy continued to **focus on shorter form videos** for their pre-order campaign (30s, 15s)
- The CTA shifted slightly from focusing only on Game Pass, to **showcasing the Premium Editions** that were available for pre-order
- The **benefits of the Premium Edition** are also touted; 5 days of early access, the first expansion, skins, and other digital extras
- The creatives also **linked to a pre-order landing page** on Bethesda's site, which provides comparisons of the various editions available for purchase
-



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Pre-order socials creative strategy

- The strategy on socials was primarily **quick videos and video posts** (6s)
- Socials creatives focused less on Premium Editions and more on the **pre-order date** specifically
- The creatives **did not explain the benefits of the Premium Edition**; however, they did **link to a pre-order landing page** on Bethesda's site, which provides comparisons of the various editions available for purchase





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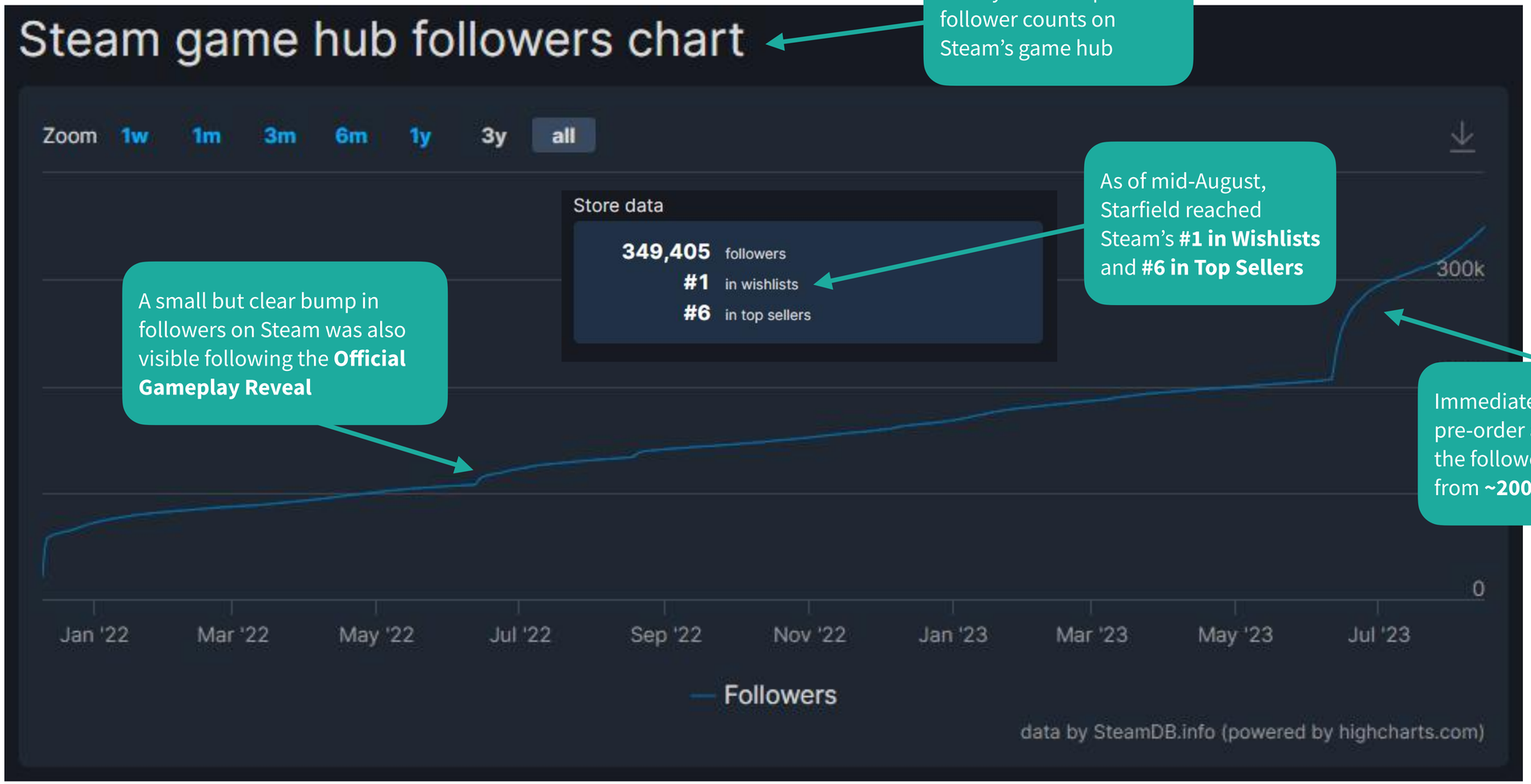
Pre-order word cloud

- Using **Pathmatics Creative Text Search**, we can evaluate which keywords played the largest roles in Starfield's pre-order strategy
- There was a **heavy brand focus** on Starfield, but also on Elder Scrolls & Skyrim, and Fallout 4
- **Game Pass, Xbox, and Steam** were also mentioned quite frequently
- Less frequently mentioned were gameplay specific mechanics



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Validating lift with external resources



Using **Steam DB** you can clearly see the upticks in follower counts on Steam's game hub

As of mid-August, Starfield reached Steam's **#1 in Wishlists** and **#6 in Top Sellers**

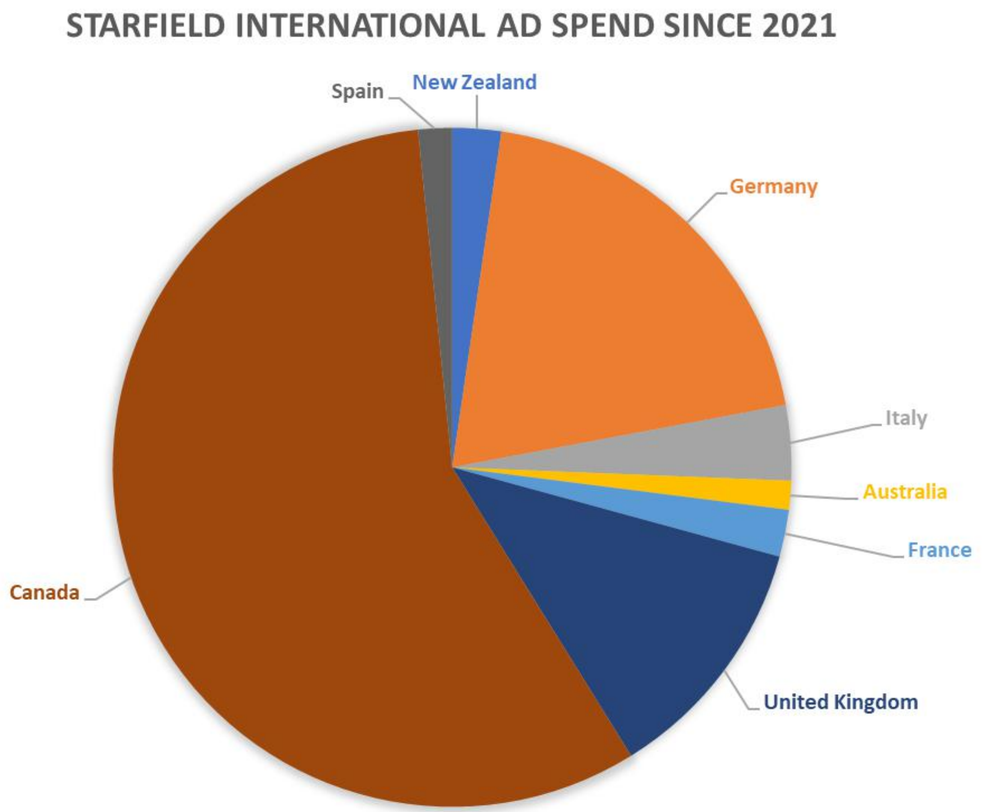
A small but clear bump in followers on Steam was also visible following the **Official Gameplay Reveal**

Immediately following the pre-order announcement, the followers on Steam spiked from **~200K to above 300K**

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International strategies

- Since 2021, the **US accounted for 70% of total estimated ad spend** for Starfield on Pathmatics
- In **2021**, for the trailer, Starfield ad spend was primarily in the **US**, with some investment in **Canada** as well
- In **2022**, for the gameplay reveal, Starfield ad spend **expanded to include Germany**
- In **2023**, for the pre-order, Starfield **added UK and Italy** to their marketing mix as well
- For the pre-order strategy, Starfield tested **only YouTube for the UK**, and **only TikTok for Canada**

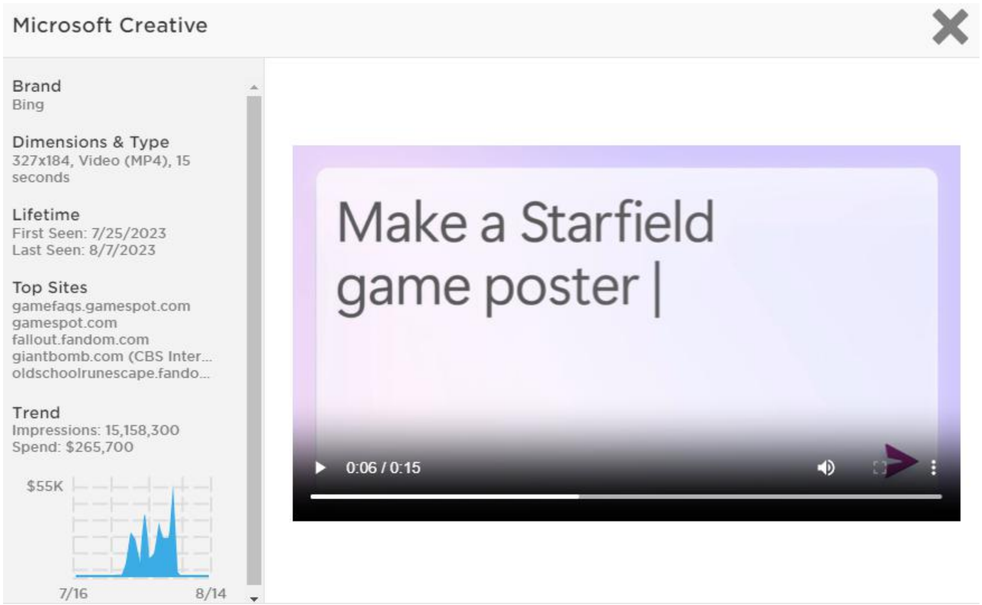


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Microsoft collaboration

- **Microsof**t acquired Bethesda in March 2021 and shortly after announced that Starfield would be **included as part of Game Pass**
- Their creatives heavily featured Game Pass and **frequently showed Starfield as a Day One release on Game Pass**
- Microsoft has been **cross-promoting Starfield on Bing creatives** recently leading up to release
- These creatives show a Bing user asking Bing's AI-powered search to **"Make a Starfield game poster"**

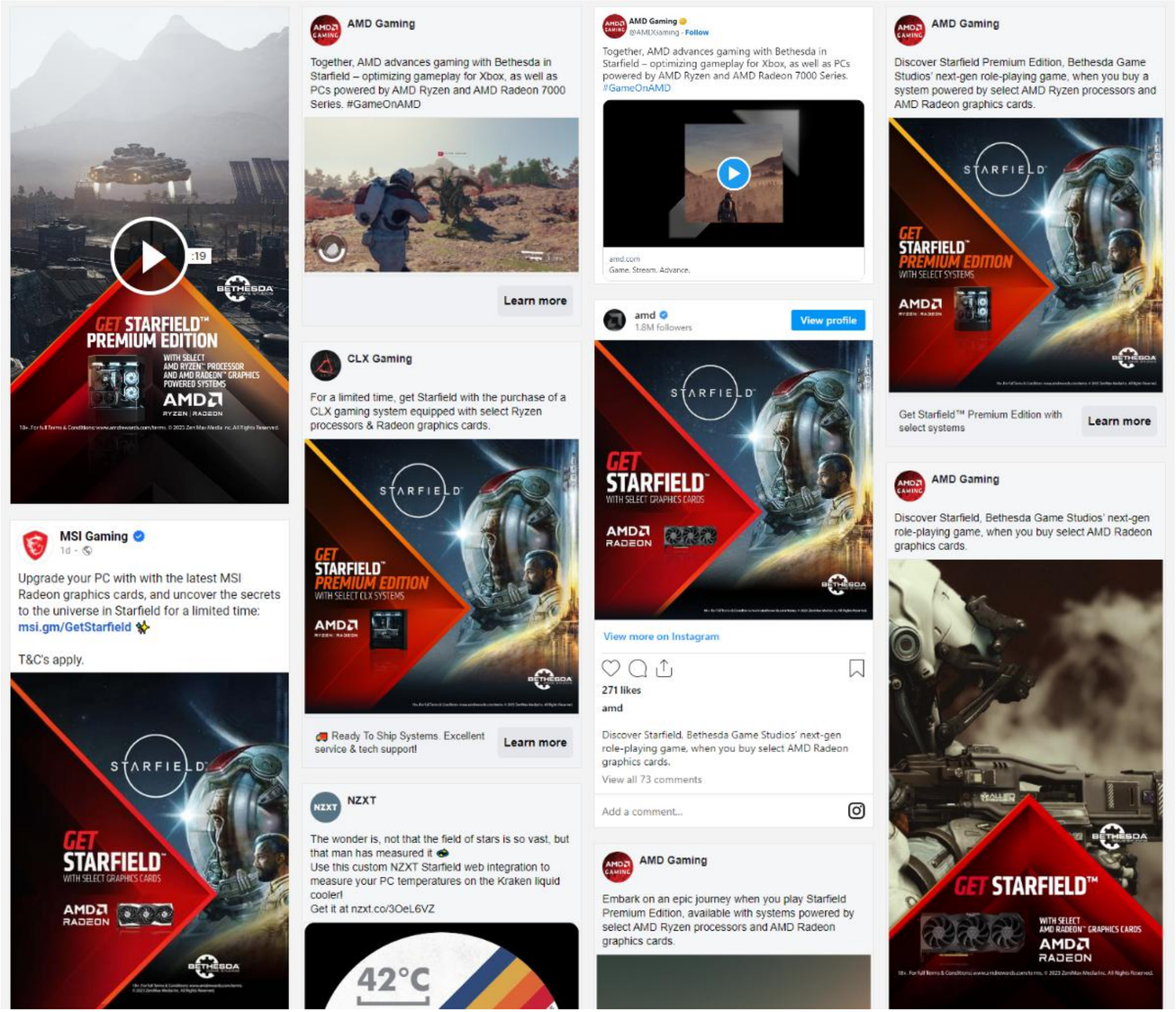




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External advertisers

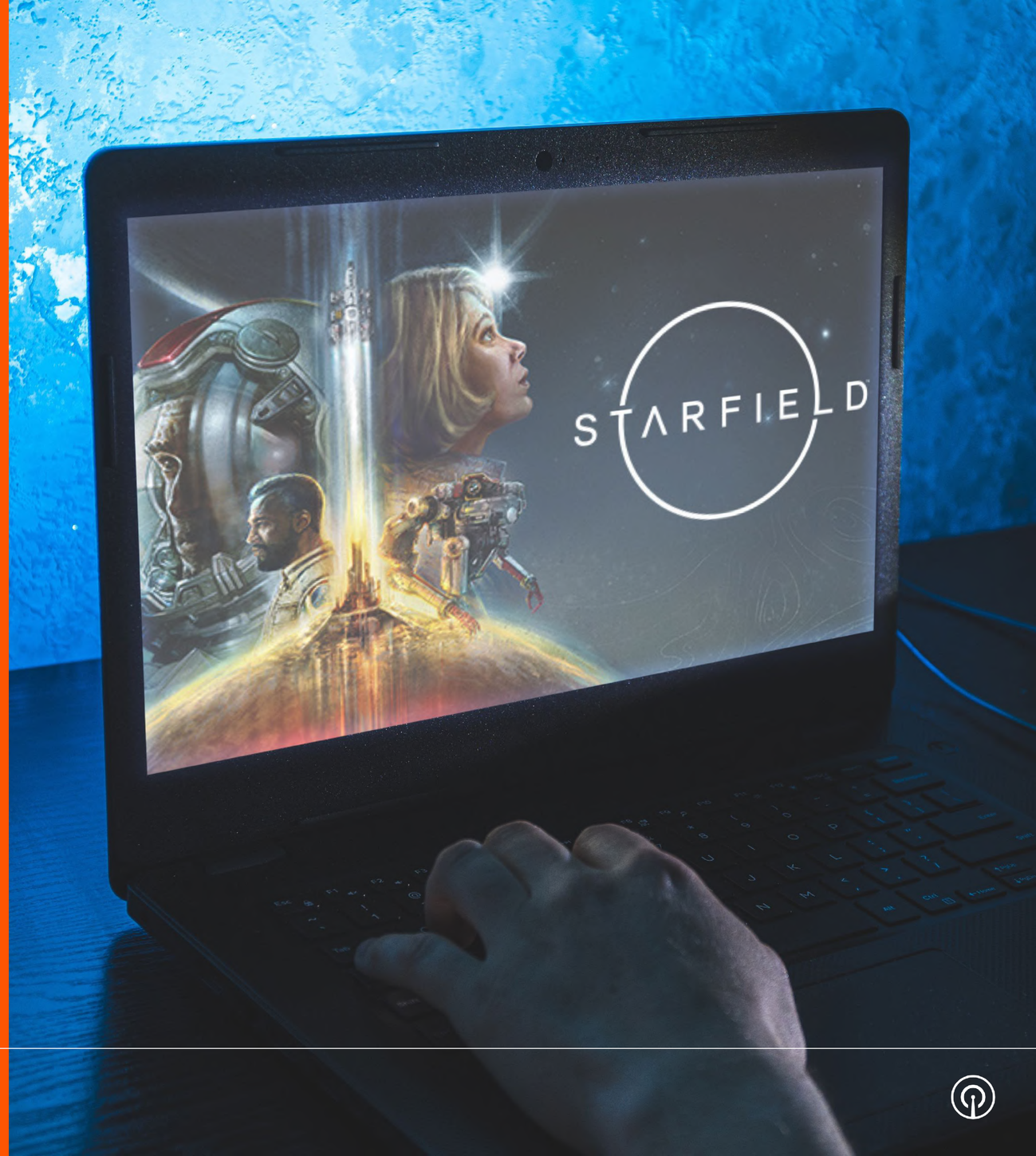
- **Consumer electronics companie**s are also jumping on the Starfield hype-train as we near launch
- **AMD Gaming, MSI Gaming, CLX Gaming, and NZXT** were some of the biggest spenders with co-branding between their hardware and Starfield
- Most of the CTAs are to upgrade the viewers hardware in order to prep for the Starfield release
- Some brands, like AMD, are offering **Starfield Premium Edition with the purchase of specific products**



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Starfield pre-launch: Key takeaways

- Starfield marks **Bethesda's first new IP in 25 years** and has been building marketing hype since it was announced in 2018
- This huge upcoming release marks the **first major game between Microsoft and Bethesda** after their acquisition
- During the first major marketing waves, Bethesda focused primarily on **YouTube, Reddit, and Twitch** and recently starting incorporating major socials like **TikTok and Instagram during the pre-order phase**
- Creatives emphasized Starfield being a **Day-1 Game Pass** game and pushed various **premium editions available for pre-order** via landing page links
- Starfield has a massive amount of hype, and is currently **#1 on Steam Wishlist**. External advertisers (including Bing) have been featuring Starfield and running promotions giving out copies with purchases



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Starfield
Post-launch analysis

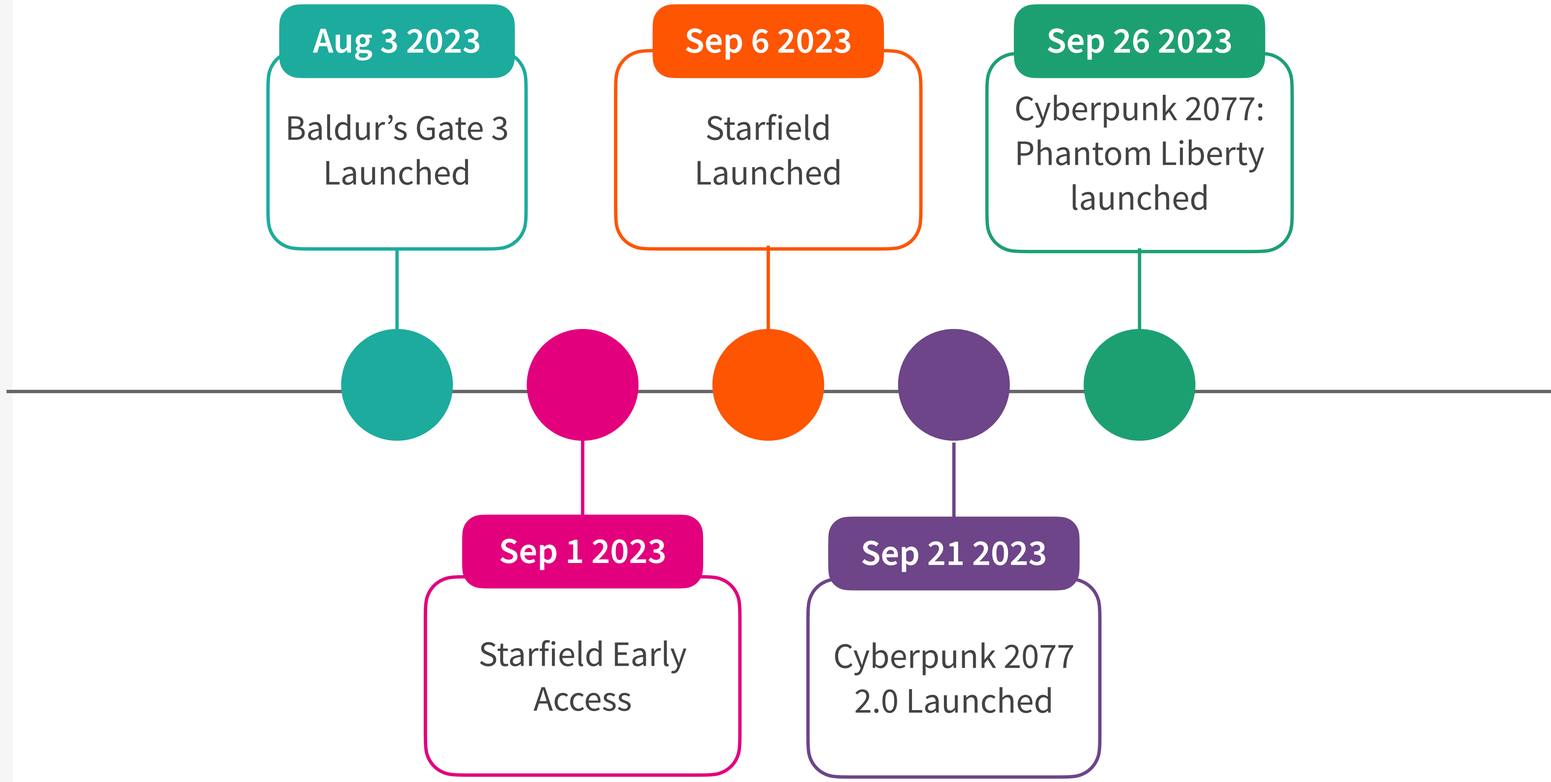
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Launch timeline

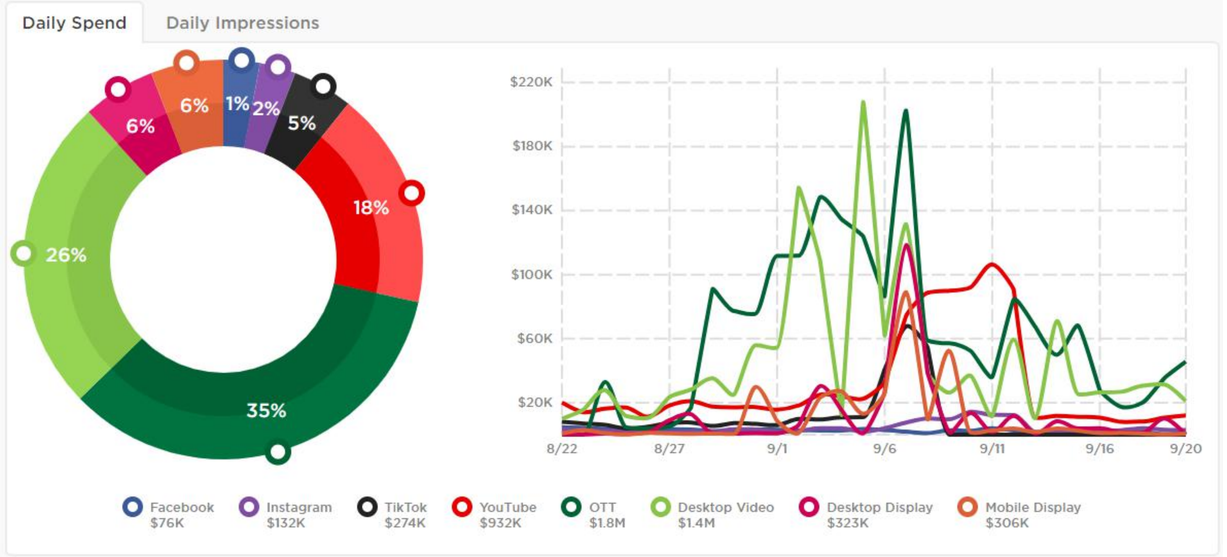
- **Starfield had intense competition** on both sides of its launch date with Baldur's Gate 3 and Cyberpunk 2077
- Larian Studios originally planned to launch Baldur's Gate 3's at the end of August, but moved it up to August 3rd due to the proximity of Starfield and Cyberpunk 2077: Phantom Liberty
- **Starfield launched in early access on Sept 1st** for players who pre-ordered the Premium or Collectors Editions
- Players who pre-ordered the **Standard Edition and Game Pass subscribers had to wait until Sept 6th** to play

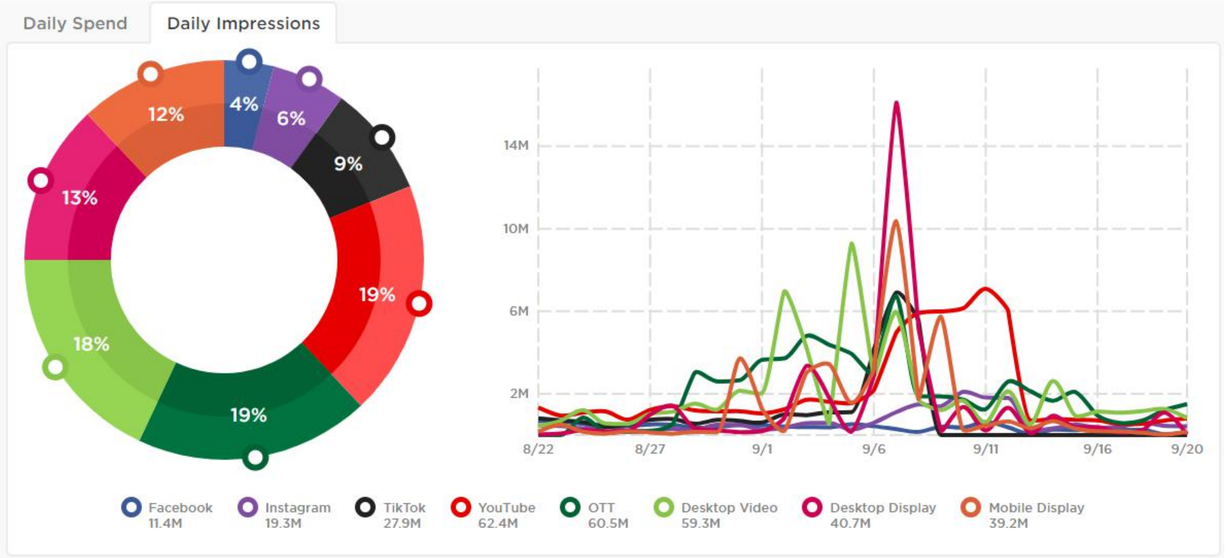


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Launch strategy - spend & impressions

- Starfield's launch window had a dramatic shift in **strategy leaning heavily on OTT**
- During pre-launch, Starfield did not utilize OTT at all, while at launch **OTT accounted for over 1/3rd of estimated ad spend**
- Outside of OTT, **Desktop Display and YouTube remained large portions** of Starfield's ad spend
- **TikTok remained the #1 social channel for Starfield** during the launch window

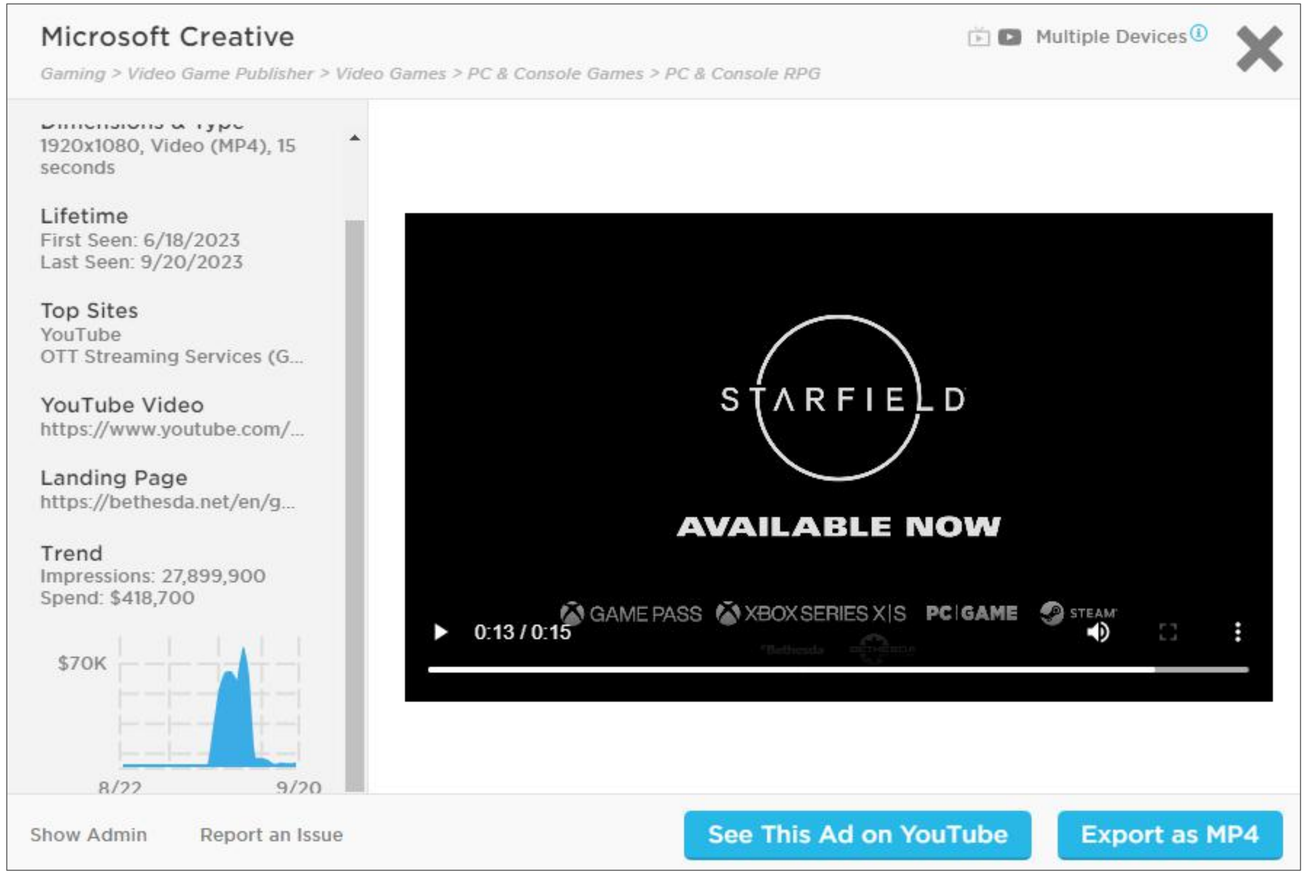




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Launch creative strategy

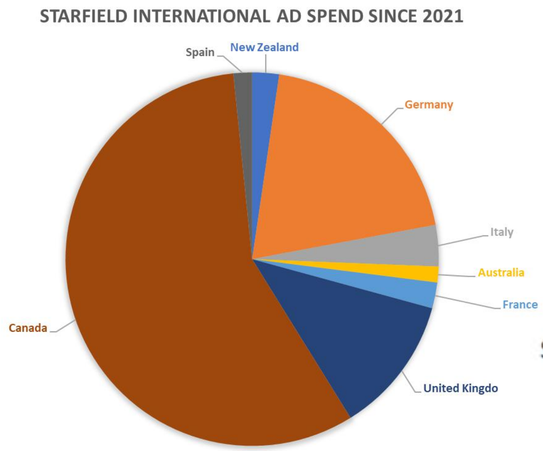
- Starfield's strategy continued to **focus on 15s-30s videos** for their launch window
- The contents of the creatives remained the same as the pre-launch videos, however they end with an **"Available Now" CTA**
- The **benefits of the Premium Edition** are still touted; but no longer state 5 days of early access and focus on other perks (the first expansion, skins, and other digital extras)
- The creatives **link to a landing page for purchasing Starfield** on Bethesda's site, which provides comparisons of the various editions available for purchase

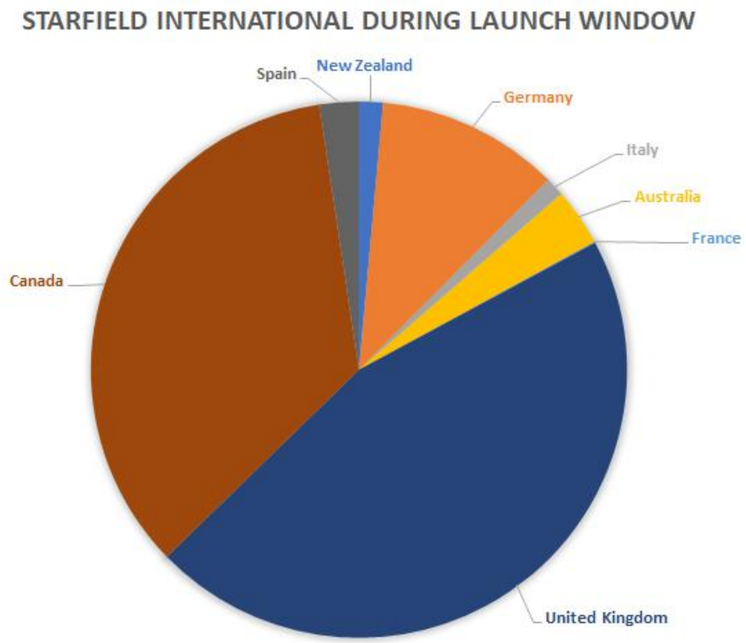


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International strategies

- **During the pre-launch time frame, the US accounted for 70%** of estimated ad spend on Pathmatics
- During the launch window, **US share accounted grew to 77%** of estimated ad spend
- **The United Kingdom overtook Canada as Starfield's #2 country** at 10.7%, followed by Canada at 8.2%
- Starfield's ad spend in the UK and CA was **primarily attributed to YouTube, Desktop Video, and TikTok**, followed by Desktop & Mobile Display

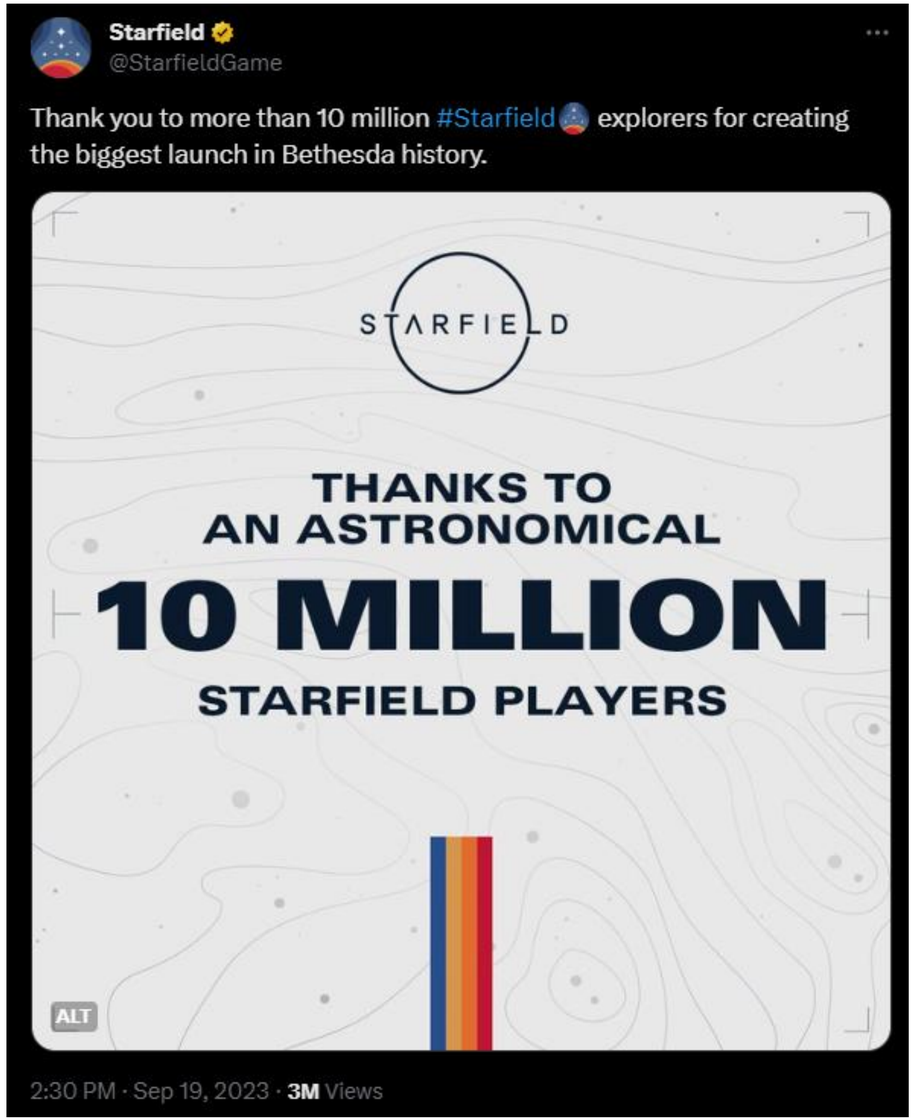




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Launch success

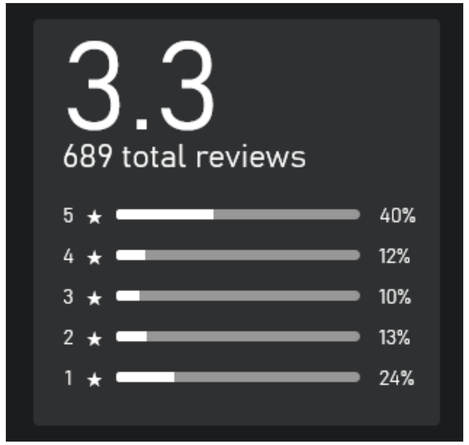
- According to the announcement from Starfield's "X" account, **Starfield has surpassed 10M players since launch**
- This denotes **Bethesda's biggest launch in the company's history**
- Starfield's launch is quite unique for Bethesda, as it was also **available day one on Game Pass**

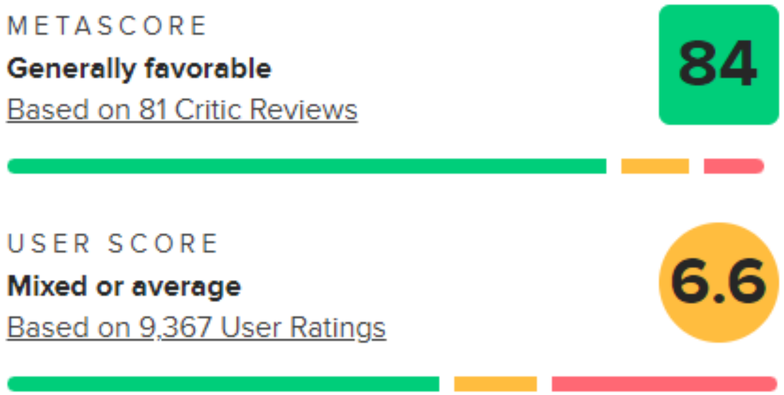


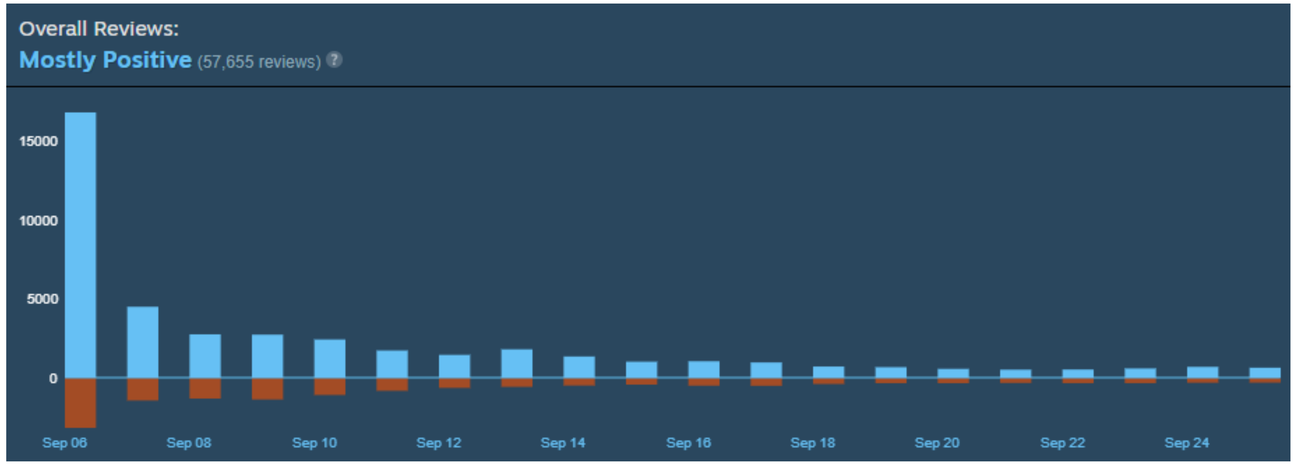
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Reviews & reception

- Starfield's **reviews on Game Pass were mixed**, averaging 3.3 out of 5.0
- **Starfield launched to mostly positive reviews**, with a 72.09% positive rating on Steam
- **Critics had a more favorable reception** of Starfields launch and the aggregated critic score reached 84 on Metacritic
- **User Scores on Metacritic were significantly lower** at a 6.6 average rating out of 10 on Metacritic, which echoes the reviews on Game Pass







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Ad spend
- competitive comparison

- **Starfield (Microsoft) ranked #2 in PC & Console RPGs** in estimated ad spend for 2023 YTD
- **Hogwarts Legacy (WB) held the #1 rank** and Diablo IV (Activision Blizzard) held #3
- **Cyberpunk 2077 (CD Projekt) and Baldur's Gate 3 (Larian)** launched much closer to Starfield and were ranked #11 and #16 respectively, **with dramatically smaller ad spend**

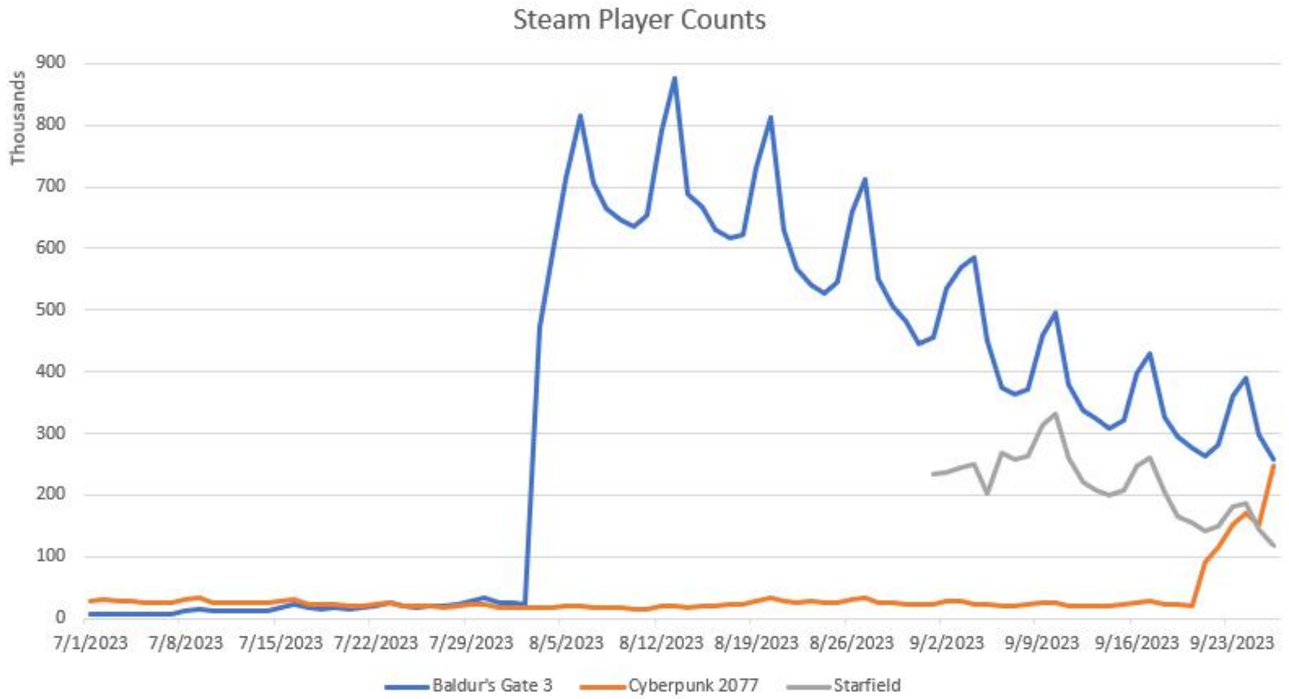
PC & Console RPGs
Pathmatics Estimated Ad Spend & Impressions
Region: United States / Timeframe: 1/1/2023 - 9/23/2023

Advertiser	Rank	Spend	Impressions
Warner Bros. Interactive Entertainment	1	US$32,974,800	3,543,403,700
Microsoft	2	US$21,199,100	2,171,520,000
Activision Blizzard, Inc.	3	US$19,937,000	1,964,360,400
Square Enix Holdings Co., Ltd.	4	US$17,612,100	1,826,583,900
miHoYo Co., Ltd.	5	US$11,093,600	1,651,050,300
CD Projekt S.A.	11	US$1,859,400	237,449,700
Larian	16	US$1,095,000	140,187,900

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Steam launch - competitive comparison

- Starfield's **Steam playerbase is considerably lower** due to it being available on Game Pass and Xbox
- Despite this, **Starfield did reach #27 for All-Time Peak Players on Steam** during its peak the weekend after release
- In comparison, **Cyberpunk 2077's All-Time Peak player count ranks #5** (during the original launch), and **Baldur's Gate 3 comes in at #9**
- **Cyberpunk 2077 player count surpassed Starfield** during their 2.0 version launch, and continued to spike at the launch of their first DLC Phantom Liberty

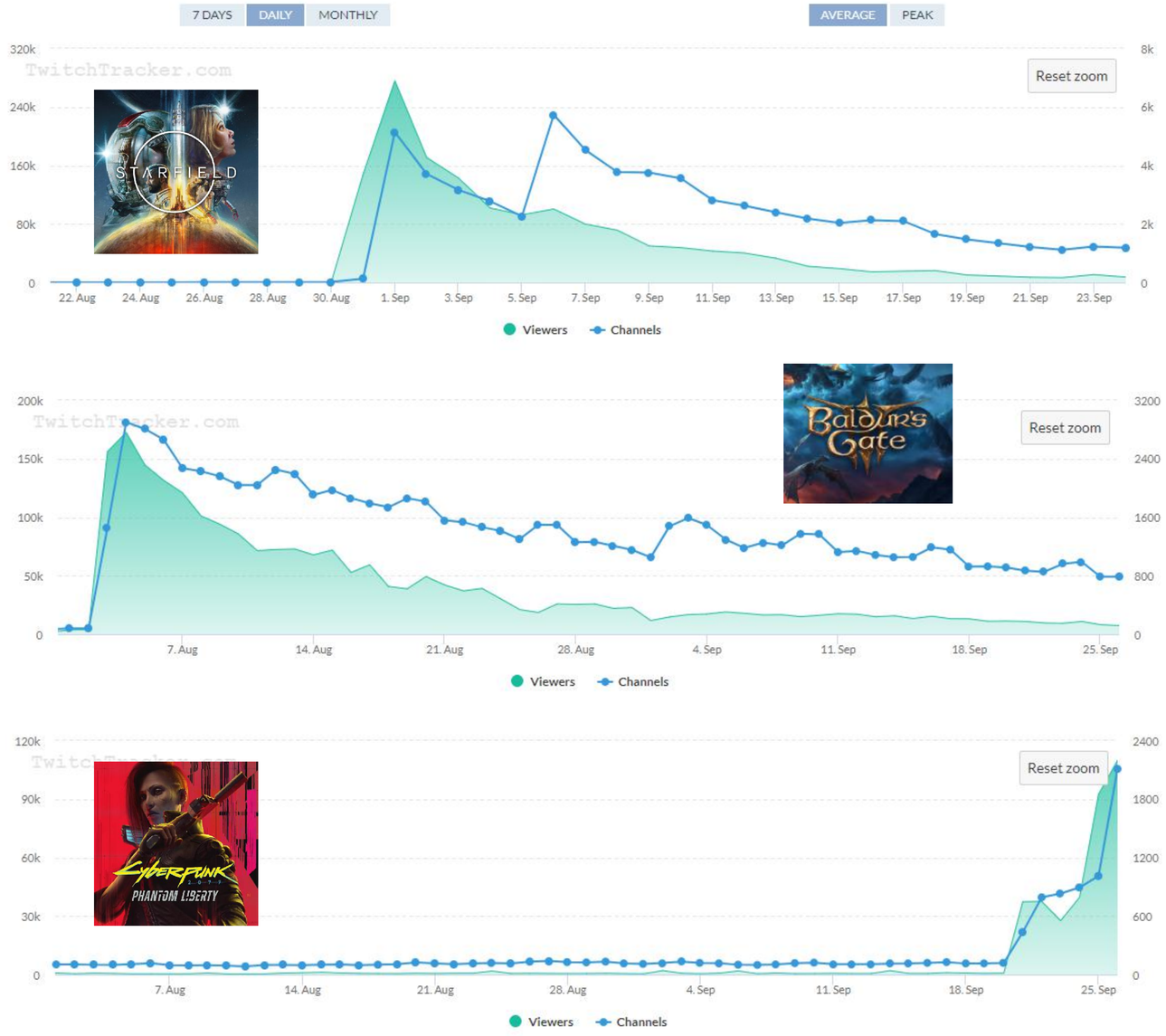


Title	All-Time Rank	All-Time Peak	2023 Peak
Starfield	27	330,723	330,723
Cyberpunk 2077	5	1,054,388	246,754
Baldur's Gate 3	9	875,343	875,343

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Twitch viewership - competitive comparison

- **Twitch viewership peaked at early access for Starfield** followed by a huge spike in channels at the official launch
- The increase in channels broadcasting Starfield at launch **did not lead to a dramatic increase in viewership**
- **Starfield viewership continued to decrease** steadily post launch and now averages about 14k viewers per day for September
- Cyberpunk 2077 and Baldur's Gate 3 currently hold **higher daily peak viewers than Starfield**



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Starfield launch: Key takeaways

- **Starfield was Bethesda's biggest launch in company history,** with a brand new IP/Universe garnering over 10M players worldwide on PC and Xbox which includes **pre-orders, purchases, and Game Pass subscribers**
- **Up against heavy competition** in the PC & Console RPG market, Starfield's launch was sandwiched between the critically acclaimed Baldur's Gate 3 and Cyberpunk 2077's version 2.0 release and their first DLC Cyberpunk 2077: Phantom Liberty
- Starfield's launch marketing strategy shifted significantly from their pre-launch campaigns and **focused primarily on OTT**, which they had not used in prior campaigns
- With years of marketing and hype building up among the playerbase, **user reviews came back fairly mixed:** 3.3/5 on Game Pass, 6.6/10 on Metacritic, and a 72% positive reviews on Steam



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—

See who's taking mindshare with download and revenue data for nearly all mobile apps.

Sensor Tower **App Intelligence**

—

Leverage ASO data to differentiate your app and drive organic growth.

Sensor Tower **Ad Intelligence**

—

Develop winning user acquisition campaigns with insight into creatives achieving majority SOV.

Sensor Tower **Usage Intelligence**

—

Benchmark app usage and engagement and understand demographics of your users.

Sensor Tower **App Teardown**

—

Evaluate which SDKs apps are using and measure SDK adoption across market segments.

Sensor Tower **Consumer Intelligence**

—

See how mobile users are engaging with the most popular apps. Measure user churn and retention.

Pathmatics **Explorer**

—

See who's taking mindshare with download and revenue data for nearly all mobile apps.

Pathmatics **Connect**

—

Leverage ASO data to differentiate your app and drive organic growth.

Pathmatics **Custom**

—

Develop winning user acquisition campaigns with insight into creatives achieving majority SOV.

Pathmatics **RMI**

—

Benchmark app usage and engagement and understand demographics of your users.

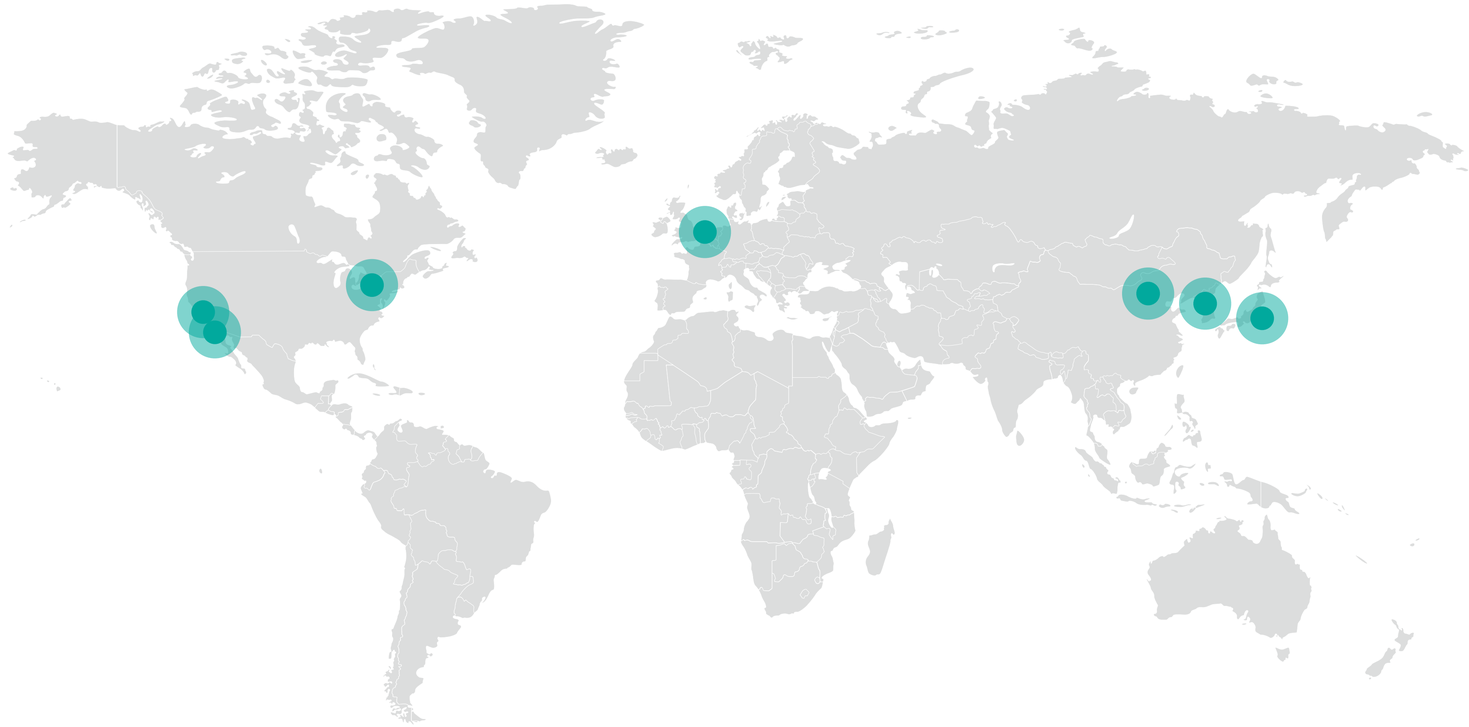
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Sensor Tower is the leading solution for mobile marketers, app developers, and industry analysts who demand competitive insights on the mobile economy. Sensor Tower's product suite includes: Top Charts, App Intelligence, Store Intelligence, Ad Intelligence, and Usage Intelligence.

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About Sensor Tower

Sensor Tower is the leading provider of market intelligence for the global digital economy. We provide quality data to better inform your most important business decisions. Our product Pathmatics empowers brands with the digital marketing intelligence needed to seize new digital opportunities and drive business growth. With the broadest coverage in the industry including Facebook, Instagram, YouTube, Snapchat, TikTok, OTT, display, video, and more.

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Our solution
Sensor Tower

Target areas for improvement using Sensor Tower

- Know how competitors are spending, where they're targeting, and which campaigns stand the test of time
- Understand how competitors reach other regions and how much they're willing to spend to reach them
- Make data-driven decisions on your schedule with scoped, tailored, reports delivered when your team needs them
- Expand your creative output and better connect with your audiences by having a central place to view competitor creative messaging, imagery, and CTA
- Create data-driven competitor mood boards and tailor messages to resonate with your audience
- Optimize campaigns equipped with visibility into the activities of your partners. Review relationship and make confident and informed adjustments

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Pathmatics

Target areas for improvement using Pathmatics

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