

# The State of AAA Game Advertising

A look back on the biggest launches and trends of the past year



# AAA Gaming Advertising Overview

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### What's inside?

This report dives into the biggest PC/console game launch for each quarter in 2023, drilling down into timing, channels, positioning, and spend. After, we take a look at some key insights into the biggest trends of 2023 in PC/console game marketing.

### Where does this data come from?

Unless otherwise noted, the data in this report comes from Pathmatics, a digital ad intel platform and part of Sensor Tower that tracks advertisers and publishers, showing ad spend, creative, share of voice, and more.



# Pathmatics and its value.



## Planning

**Insights:**

Compare digital marketing & channel strategies of competitors

**Actions:**

Predict and adapt to competitors' media mix and buying behavior to maximize advertising efficiency and effectiveness

**Result:**

Increase share of voice & reach



## Strategy

**Insights:**

Understand competitor go-to-market, commercial & partnership strategies

**Actions:**

Spot trends and drive better strategic planning and data driven decision-making

**Result:**

Increase first mover advantages and market share against competitors



## Creative

**Insights:**

Compare creative styles, focus language, product positioning & call to action with competitors

**Actions:**

Tune your creatives using data & insights to outperform competitors

**Result:**

Optimize digital share of wallet & conversion rates

# 2023 was a huge year for AAA PC/console game launches.

50% of the top PC/console games by ad spend in 2023 were launches, compared to 20% in 2022.

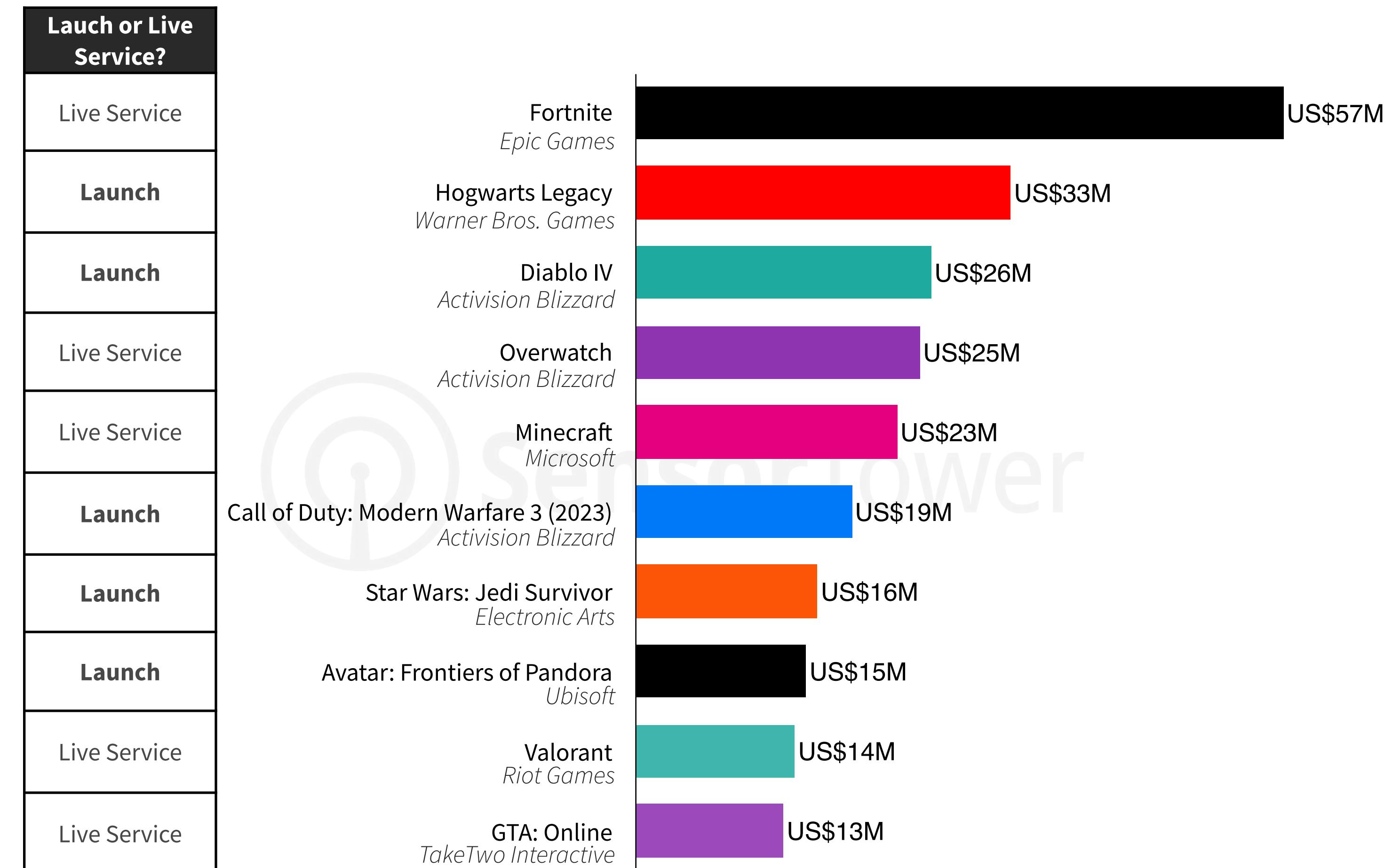
The four 2023 launches with the most ad spend behind them included Hogwarts Legacy, Diablo IV, Call of Duty: Modern Warfare III (2023) and Star Wars: Jedi Survivor. Hogwarts Legacy and Star Wars: Jedi Survivor bring new angles to S-tier intellectual properties, and likely needed a significant budget to show players why they should buy another game in IPs that already have many dedicated games.

Call of Duty: Modern Warfare III is a remake of the original 2011 hit, and Diablo IV is a sequel to Diablo III, released in 2012. However, while Diablo IV needed to re-engage an audience hasn't seen a new launch in several years, Modern Warfare III needed to differentiate itself from Modern Warfare II (2022) and Modern Warfare 3 (2011).

The top PC/console spender was a live service game: Fortnite had a huge year, with the OG Fortnite season driving record active players.

Other live services games like Minecraft, Valorant, and GTA: Online competed with the biggest launches of the year to land on this list. Interestingly, Riot vastly scaled back on Valorant and League of Legends US spend this year. Valorant was the top PC/console game by ad spend in 2022.

Top ten PC/console games by ad spend 2023



# 2023 PC/console launches took advantage of huge existing audiences.

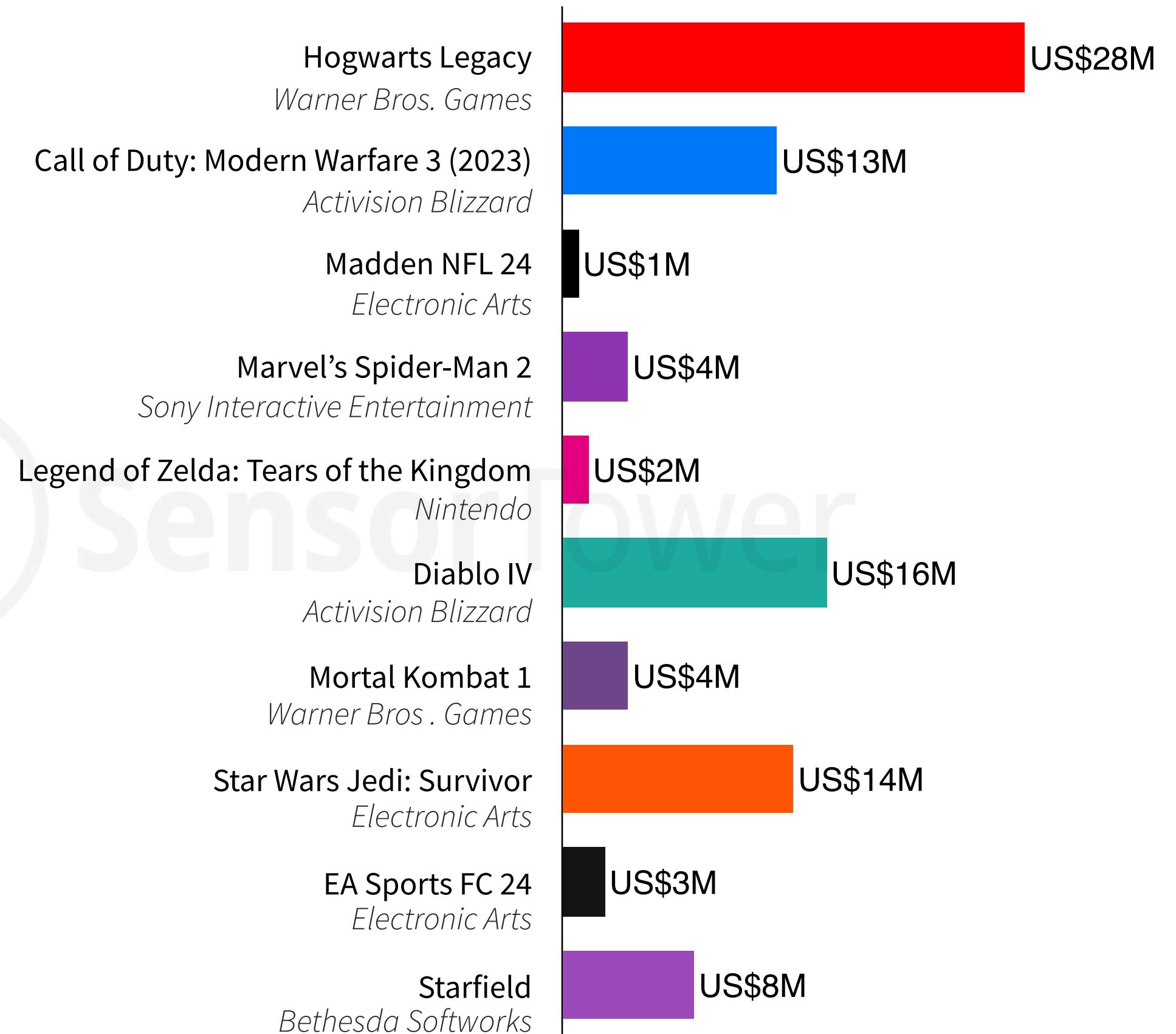
Some of these top launches were able to take advantage of an existing, highly engaged audience to avoid needing a huge ad campaign to drive sales. The Legend of Zelda series, for example, has an almost sacred position in the gaming community and doesn't seem to need to do much to ensure its fans will buy the newest installment.

Other launches ran fully loaded launch campaigns. Some games introduced a new angle to an existing IP (Hogwarts Legacy, Star Wars Jedi: Survivor) while others needed to re-engage the audience of an older series (Diablo IV, Call of Duty: Modern Warfare III).

*Ad spend of top 10 selling PC/console games 2023  
30 days pre-launch to 30 days post-launch*

Note: Top selling PC/console games according to Circana.

IP	Top Ad Channel
Harry Potter	Facebook
Call of Duty	YouTube
NFL	Facebook
Marvel	Video
Legend of Zelda	OTT
Diablo	Facebook
Mortal Kombat	YouTube
Star Wars	YouTube
FIFPro	TikTok
Original	OTT



# YouTube is the primary ad channel for PC/Console games in the US.

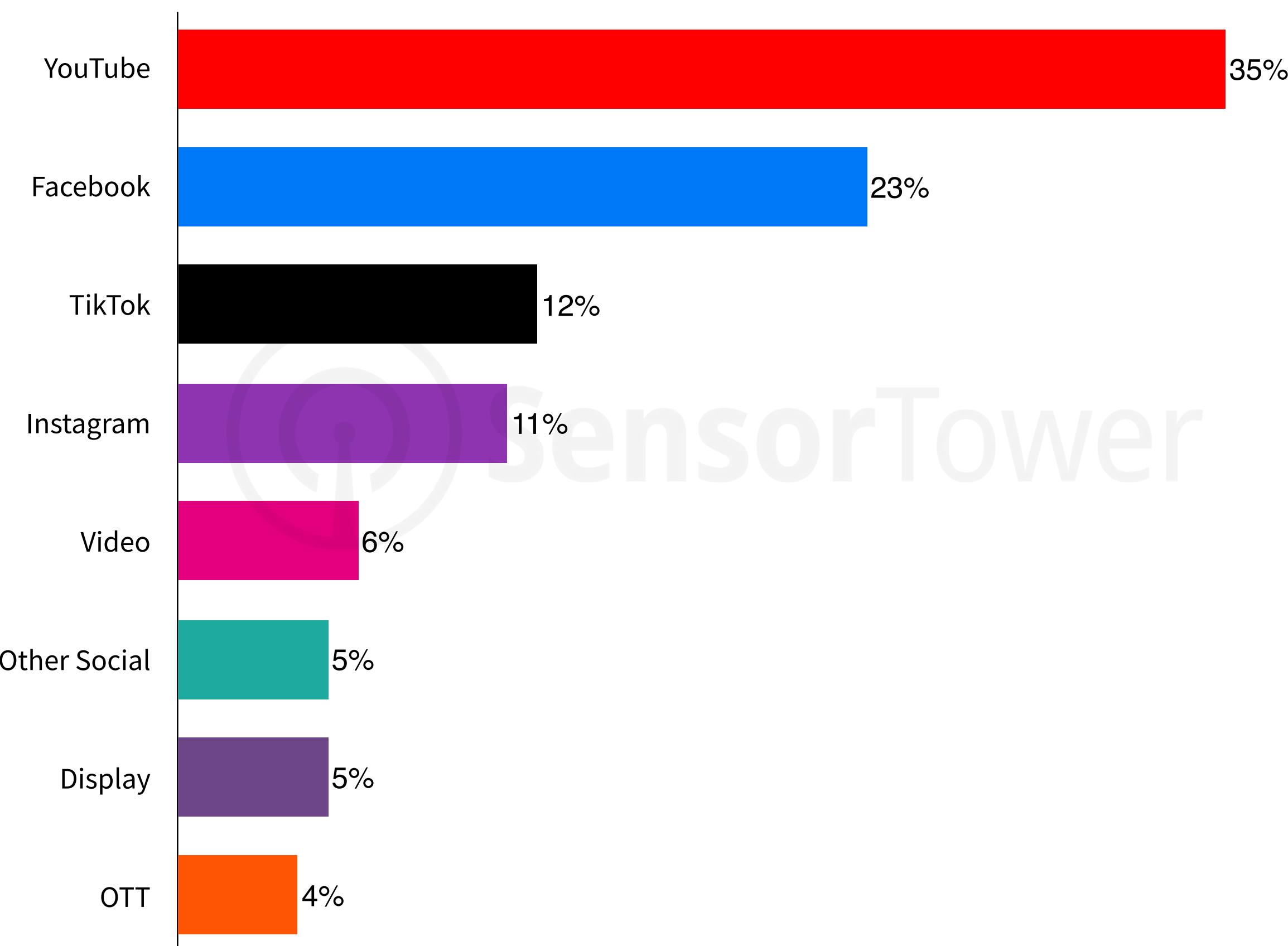
As the home of gamers across the board and the premiere video platform, it is no surprise that YouTube is the #1 ad channel for PC/Console games. Facebook remains an advertising titan despite not being the first social network to come to mind for PC/Console gamers. TikTok and Instagram are also quite significant, representing a valuable younger, highly engaged audience.

Comparing to 2022, the media mix is becoming more diverse, with Facebook, TikTok, and Instagram taking share from YouTube. Gaming streaming leader Twitch also saw huge growth.

Video drove 6% of spend, with Twitch being the largest video channel by far. Other social channels like Snapchat, Pinterest, and X take up 5%. Display ads take another 5%, while OTT ads shown on channels like Netflix, Hulu, and Peacock drove 4%.



PC/console gaming ad spend by channel 2023

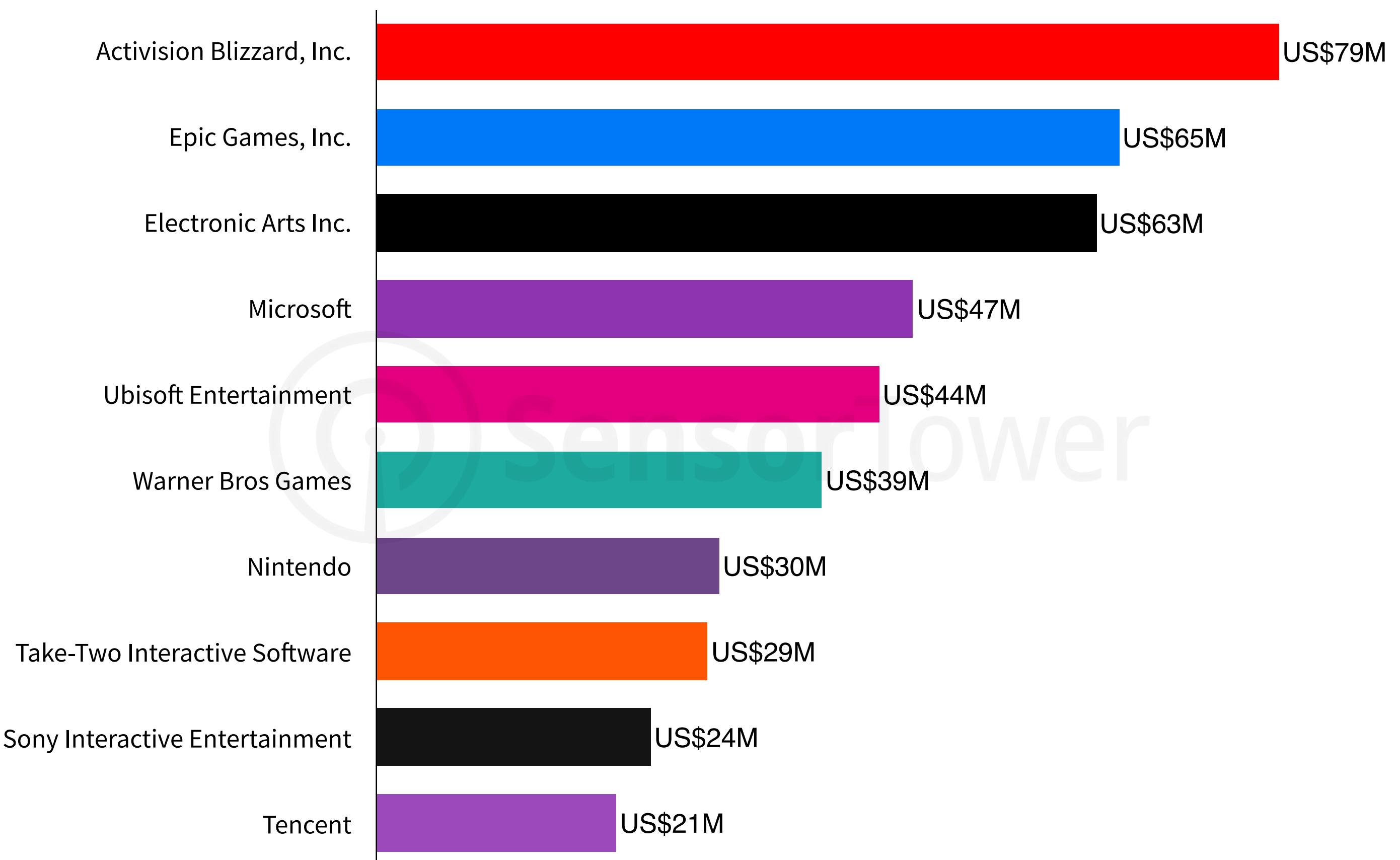


# Activision Blizzard is the top publisher by ad spend in US PC/console gaming for 2023.

With the launches of Diablo IV and Call of Duty: Modern Warfare 3, not to mention being acquired by Microsoft, 2023 was a big year for Activision Blizzard. If Activision Blizzard ad spend and Microsoft ad spend are added together, Microsoft's footprint in US PC/console ad spend is more than twice the #2 publisher on this list. Interestingly, Microsoft spent the most on advertising for Minecraft, not Starfield.

Epic Games' Fortnite saw more ad spend than any other game. Electronic Arts saw multiple successful launches in Madden 24, EA Sports FC 2023 (which performed admirably despite the lack of the FIFA name), and Star Wars: Jedi.

*Top PC/console games by US ad spend in 2023*



# Top Launches 2023 Review



# 1Q2023: Hogwarts Legacy



# Hogwarts Legacy was the definitive launch of 2023.

It's not easy to name an IP bigger worldwide than Harry Potter. There have been several games made out of the IP: 17 to be exact. Hogwarts Legacy had an established audience to appeal to, but needed to show this audience why they should care about this 18th Harry Potter game.

Needless to say, Warner Bros. Games delivered with Hogwarts Legacy. What really made Hogwarts Legacy stand out was its execution on the core fantasy of the IP. The previous games mostly focused on Harry and his friends, but what Harry Potter fans really want is to attend Hogwarts themselves. Hogwarts Legacy gave them that chance, and this core value proposition was messaged throughout from preorder all throughout launch.



<b>Release Date</b>	February 10, 2023
<b>Publisher</b>	Warner Bros. Games
<b>Developer</b>	Avalanche Studios
<b>Genre</b>	Action RPG
<b>Metacritic</b> (Metascore/User Score)	84 / 8.4

Sources for sales numbers: Warner Bros.

## Hogwarts Legacy positions itself as the fantasy fulfillment of the Harry Potter IP.

Hogwarts Legacy's cinematic trailer focused on the beginning of the Harry Potter fantasy, receiving an invitation via owl to Hogwarts. This trailer was released at the beginning of the launch campaign (about a month before launch), and footage from this trailer was used extensively leading up to launch.

*Screenshots from Hogwarts Legacy official cinematic trailer at prelaunch period*



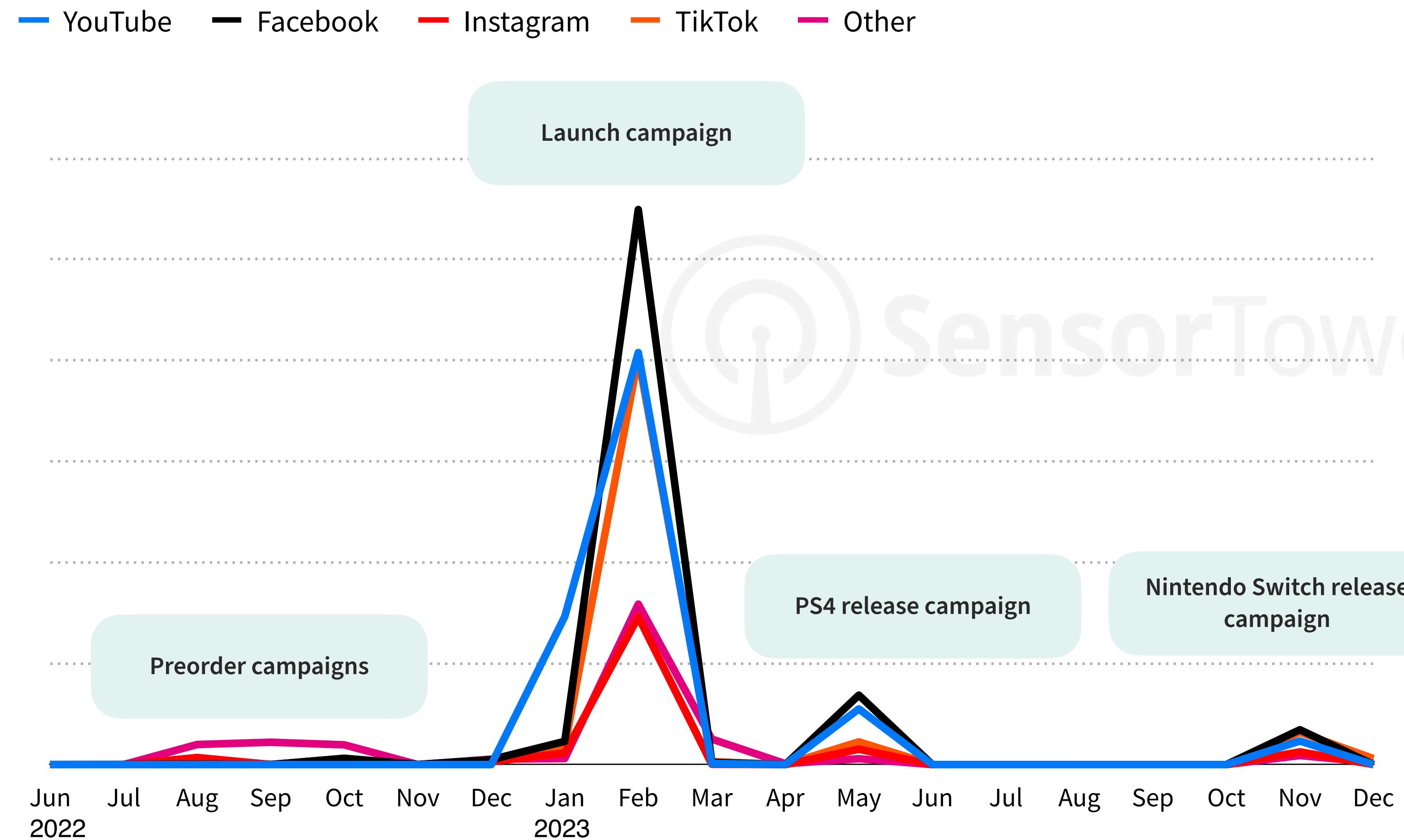
Hogwarts Legacy's launch trailer continues on the IP fantasy, focusing on the beginning of the school year for the player character. This trailer was also used significantly post launch, though a variety of other creative were also used.

*Screenshots from Hogwarts Legacy official launch trailer at postlaunch period*

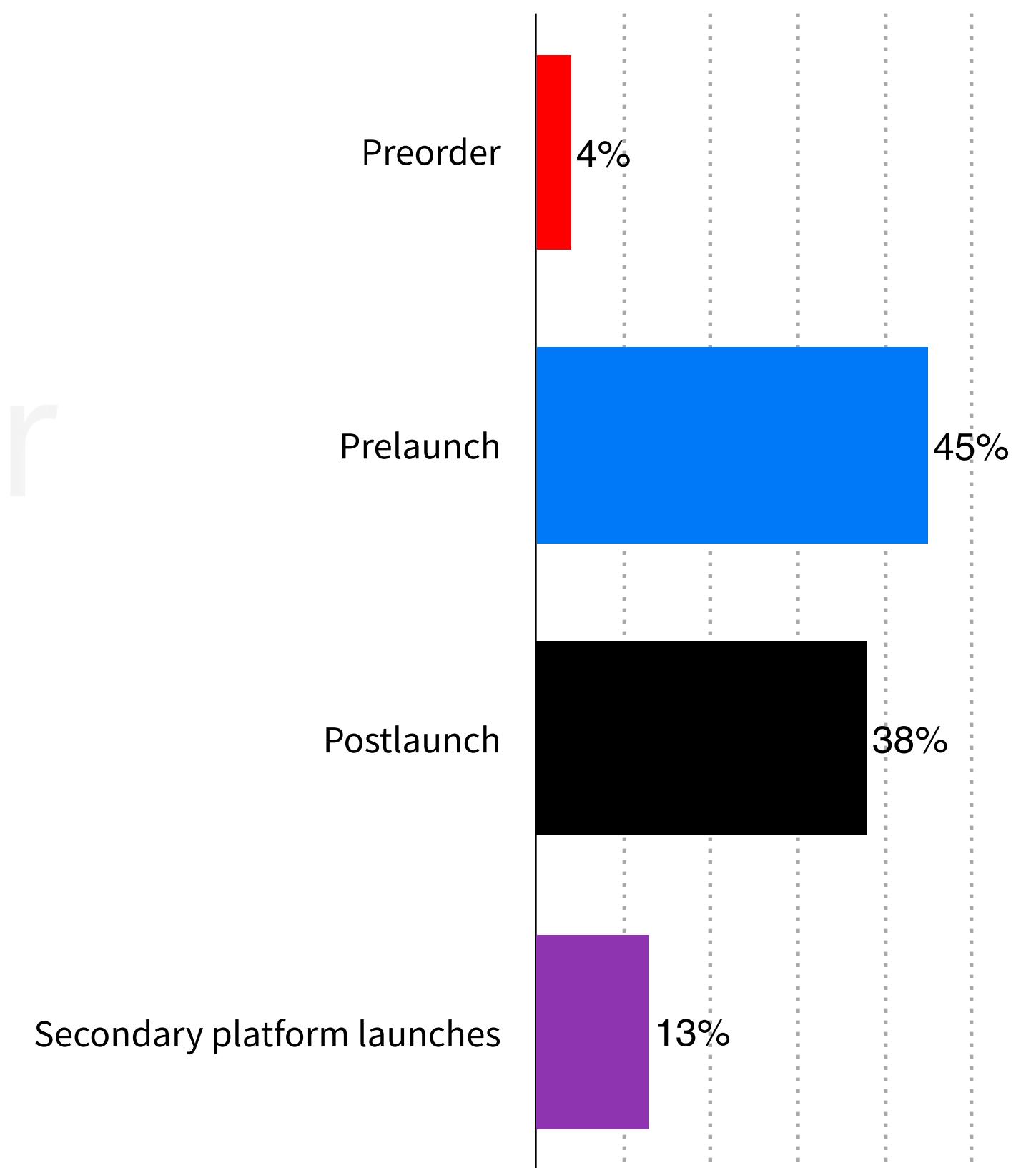


# Hogwarts Legacy focused on a massive launch campaign, with the largest portion of budget spent building hype just before launch.

*Hogwarts Legacy creative spend over time by network*

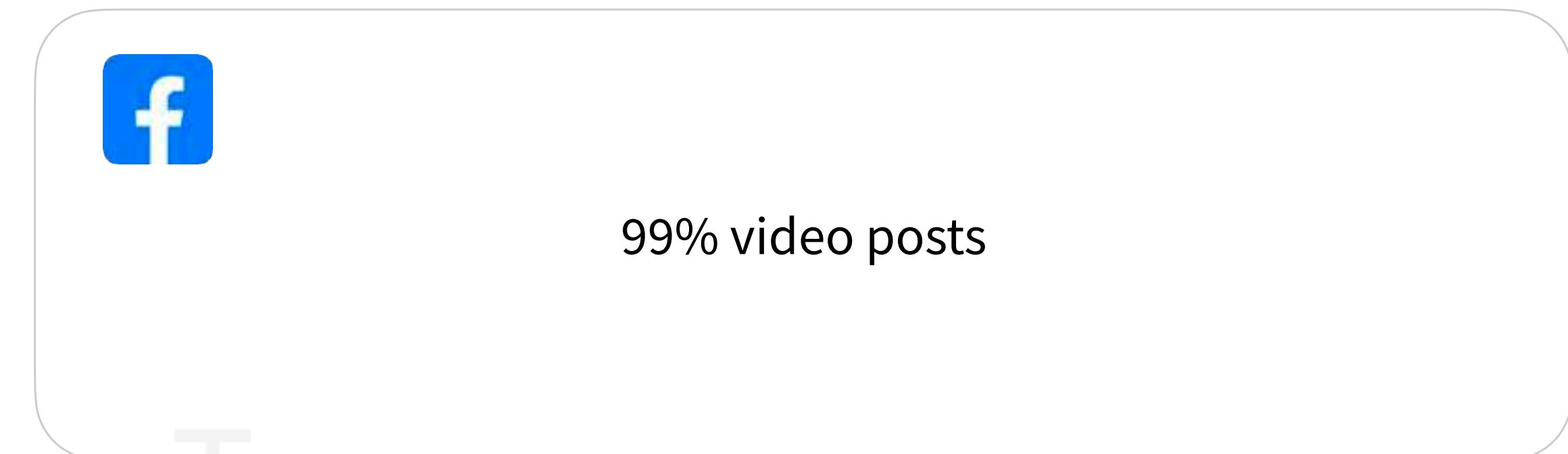
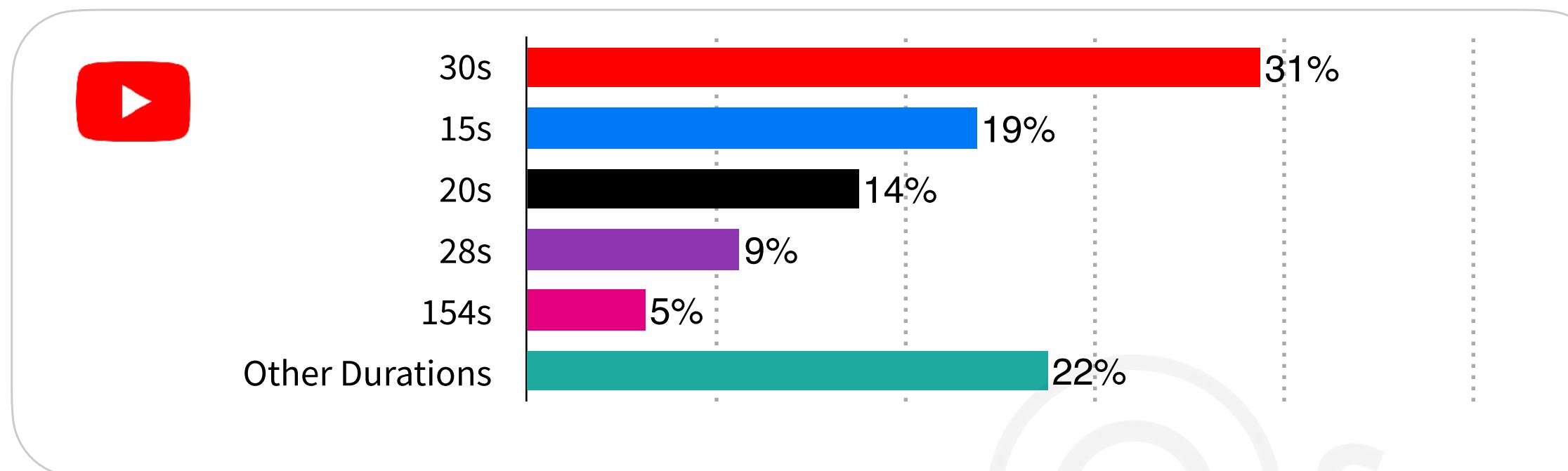


*Hogwarts Legacy spend breakdown by campaign period*

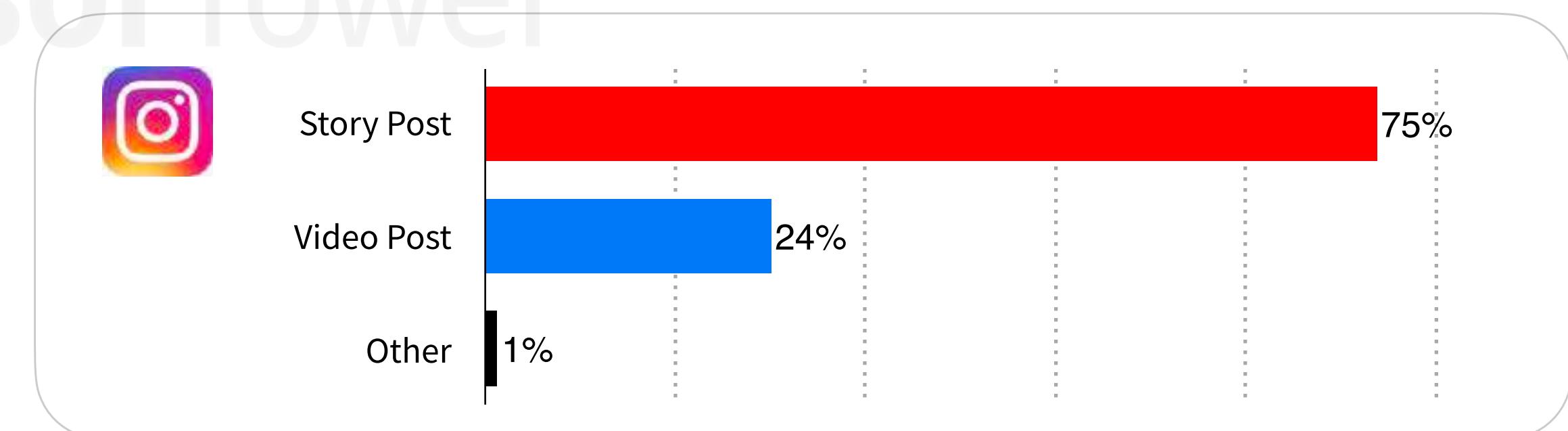
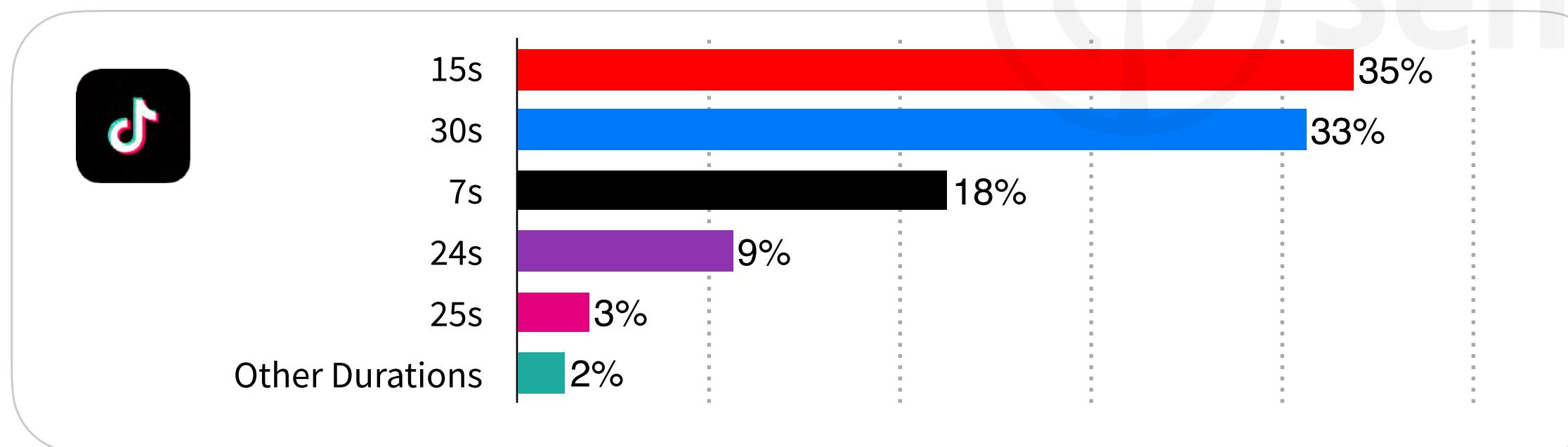


# Hogwarts Legacy's creative formats were tuned for each channel.

*Breakdown of Hogwarts Legacy creative spend by format and network 30 days pre-launch to 30 days post-launch*



99% video posts



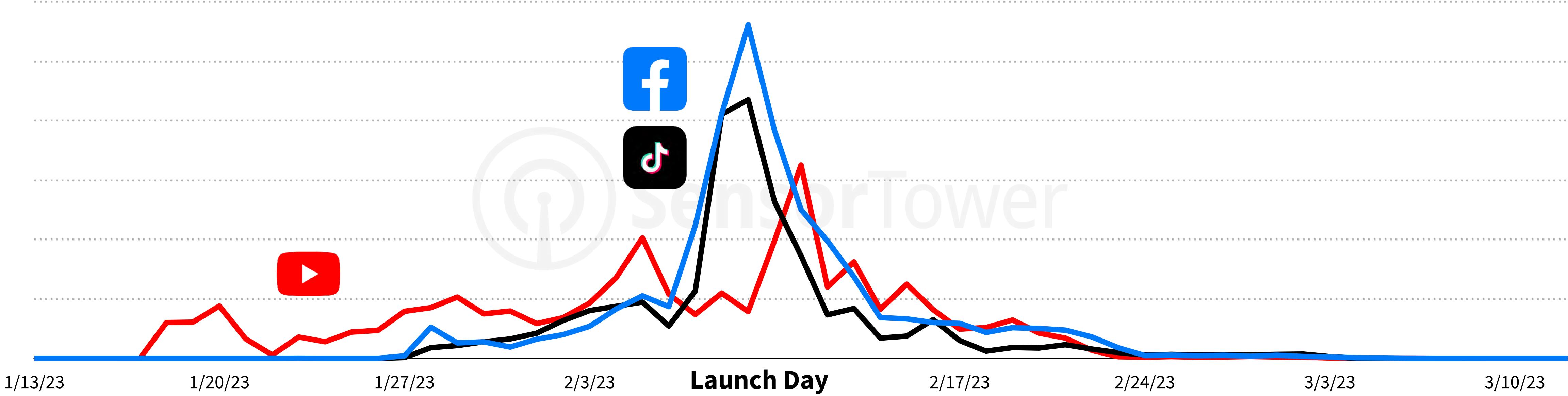
75%

TikTok ads were decidedly shorter than YouTube ads overall, as befitting the short form video channel. 30s ads highly utilized on both networks. It seems a longer ad suited Hogwarts Legacy's narrative focused messaging.

While Facebook ads were virtually all video posts, Hogwarts Legacy used primarily Story Posts on Instagram, somewhat surprising given the focus on video in other platforms.

# Hogwarts Legacy's YouTube spend was steady, while Facebook and TikTok spend spiked sharply at launch.

*Hogwarts Legacy creative spend over time by network  
30 days pre-launch to 30 days post-launch, top three networks by Hogwarts Legacy ad spend*



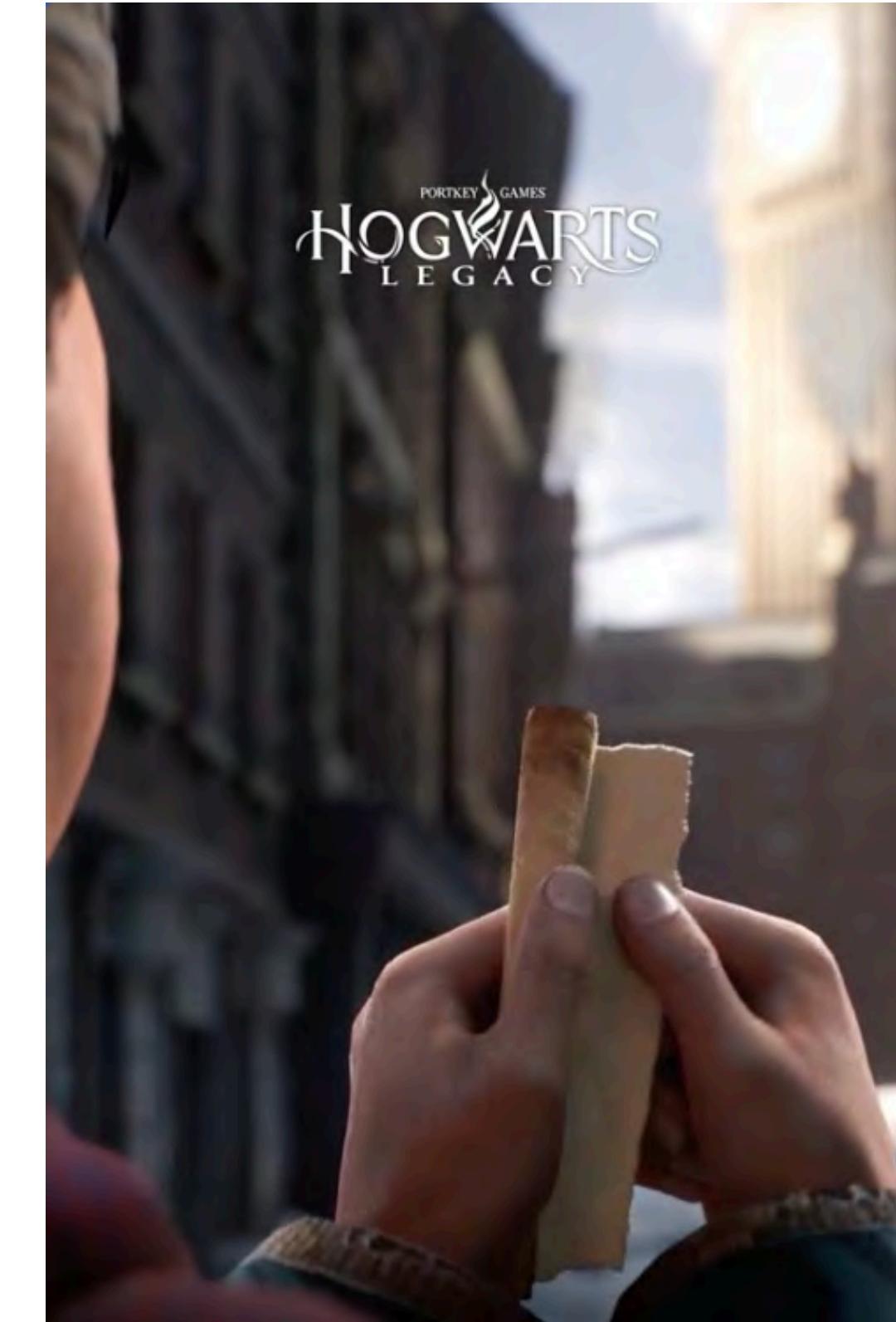
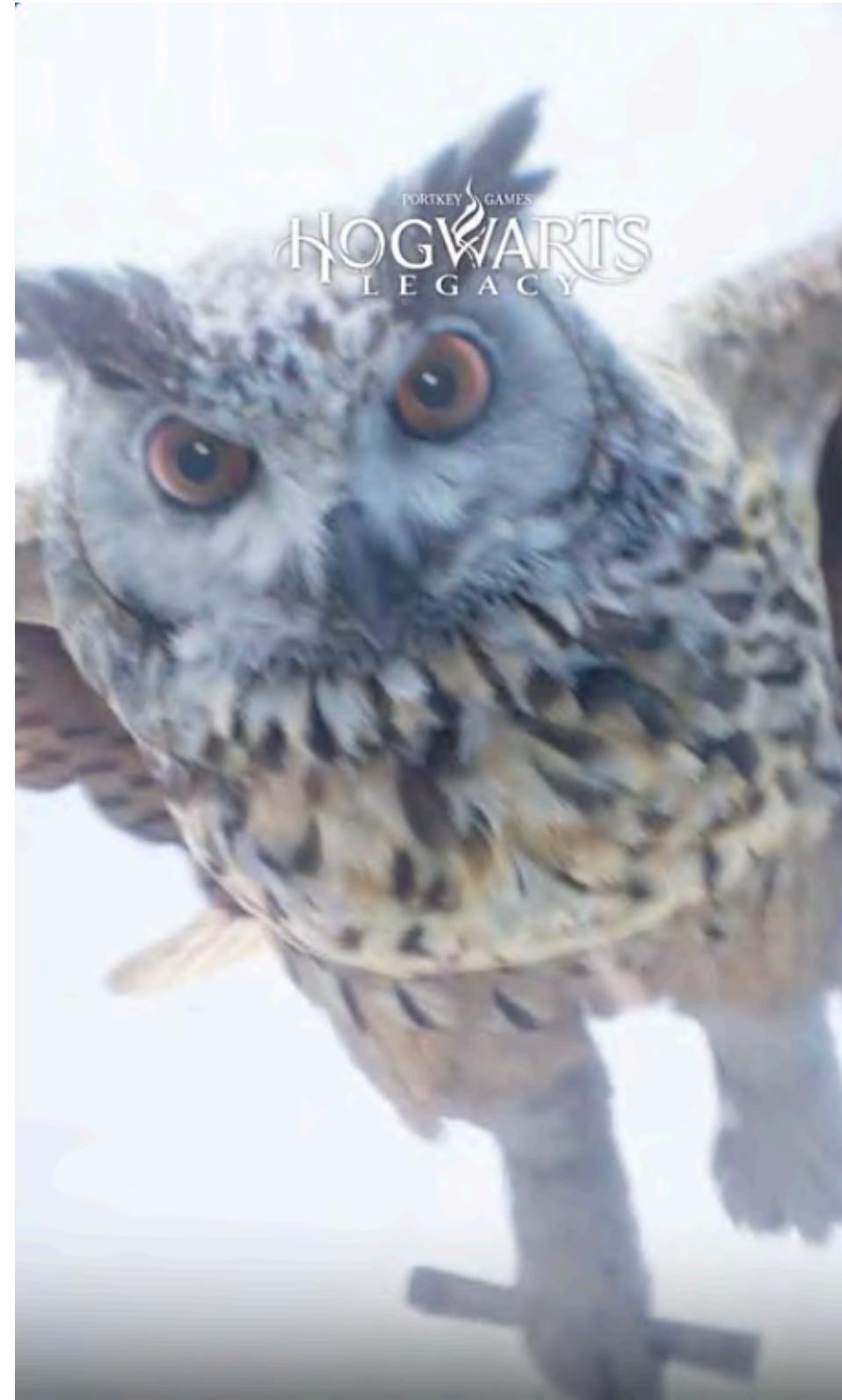
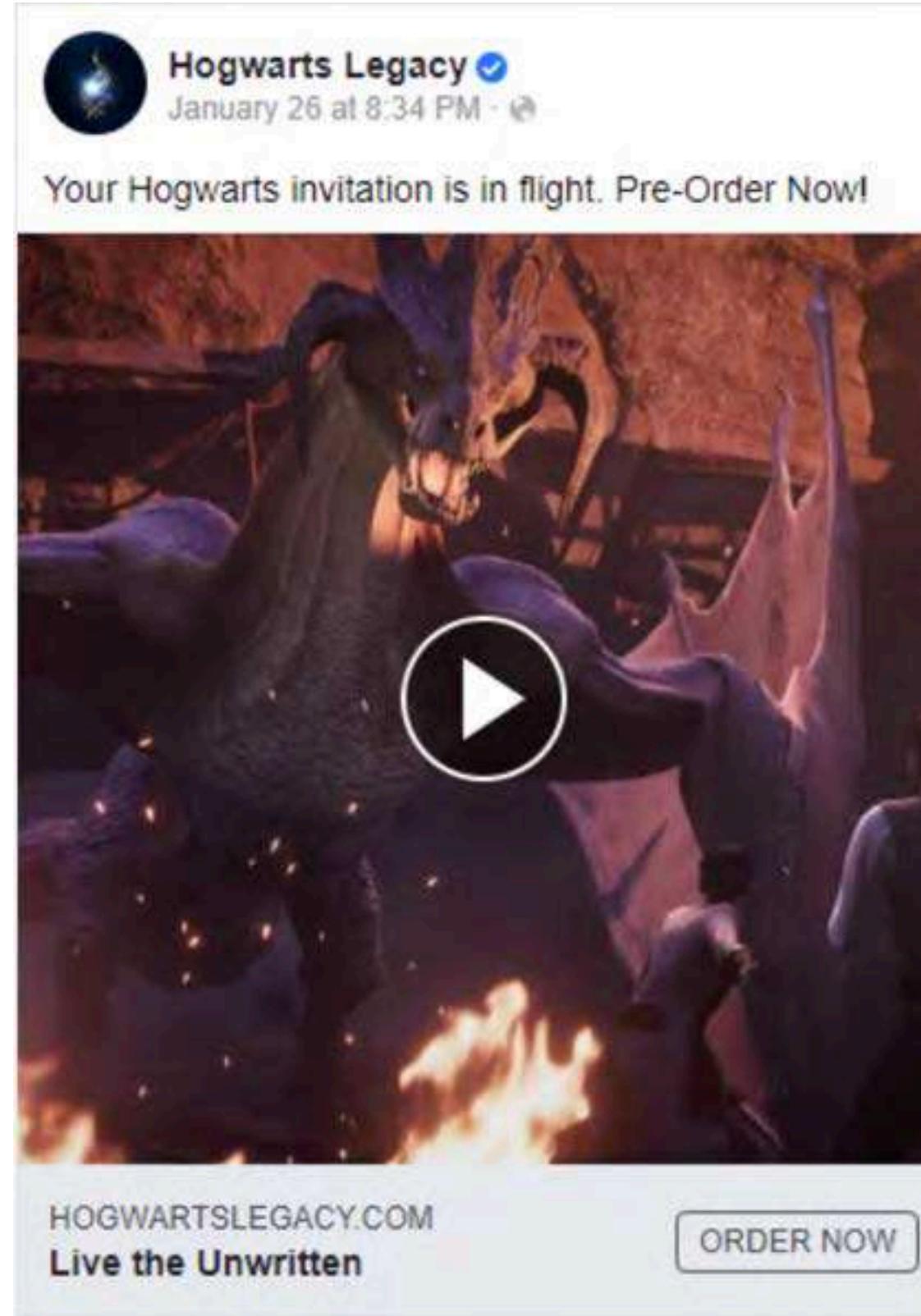
YouTube is a platform where longer form content can find sustained engagement, supporting a slower but steadier spend strategy. Comparatively, Facebook and Tiktok reward fresh, time-sensitive content, which incentivizes advertisers to spend in a shorter time period around launch.

The launch campaign was kicked off with the release of a cinematic trailer that was also used as ad creative on YouTube.



# Pre-launch, Hogwarts Legacy used footage from the cinematic trailer to message the IP's fantasy fulfillment on all top channels.

*Screenshots of top creative for YouTube, Facebook, and TikTok in 30 days before launch*



Leading up to launch, Hogwarts Legacy leaned heavily into the beginning of any Harry Potter's fan fantasy: getting an invitation to Hogwarts via owl. The same creative was used across top channels, including YouTube, Facebook, and TikTok.

# Post-launch, Hogwarts Legacy creative strategy diverged by channel.

Post-launch, the owl delivery creative present across every channel disappeared, and the top creatives by channel were completely different.



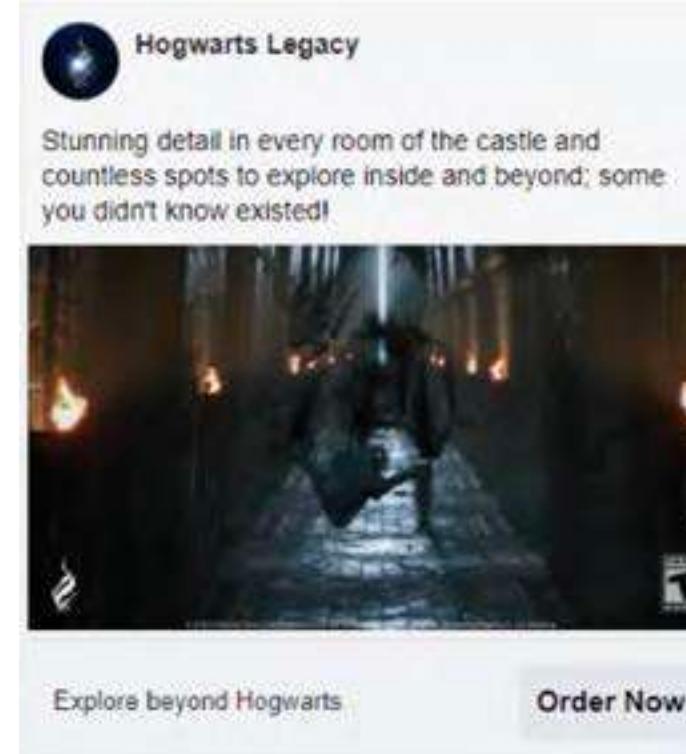
Post-launch, the top Tik-Tok creative was an organic inspired “how it started vs how it’s going” ad.



*Screenshots of top TikTok creative post-launch.*



Post-launch, the top Facebook creative focused on game quality and themes of exploration and discovery.



*Top Facebook creative post-launch.*



Post-launch, the top YouTube ad looks like a mobile game ad, with a “challenge” theme.



*Screenshot of top YouTube creative post-launch.*

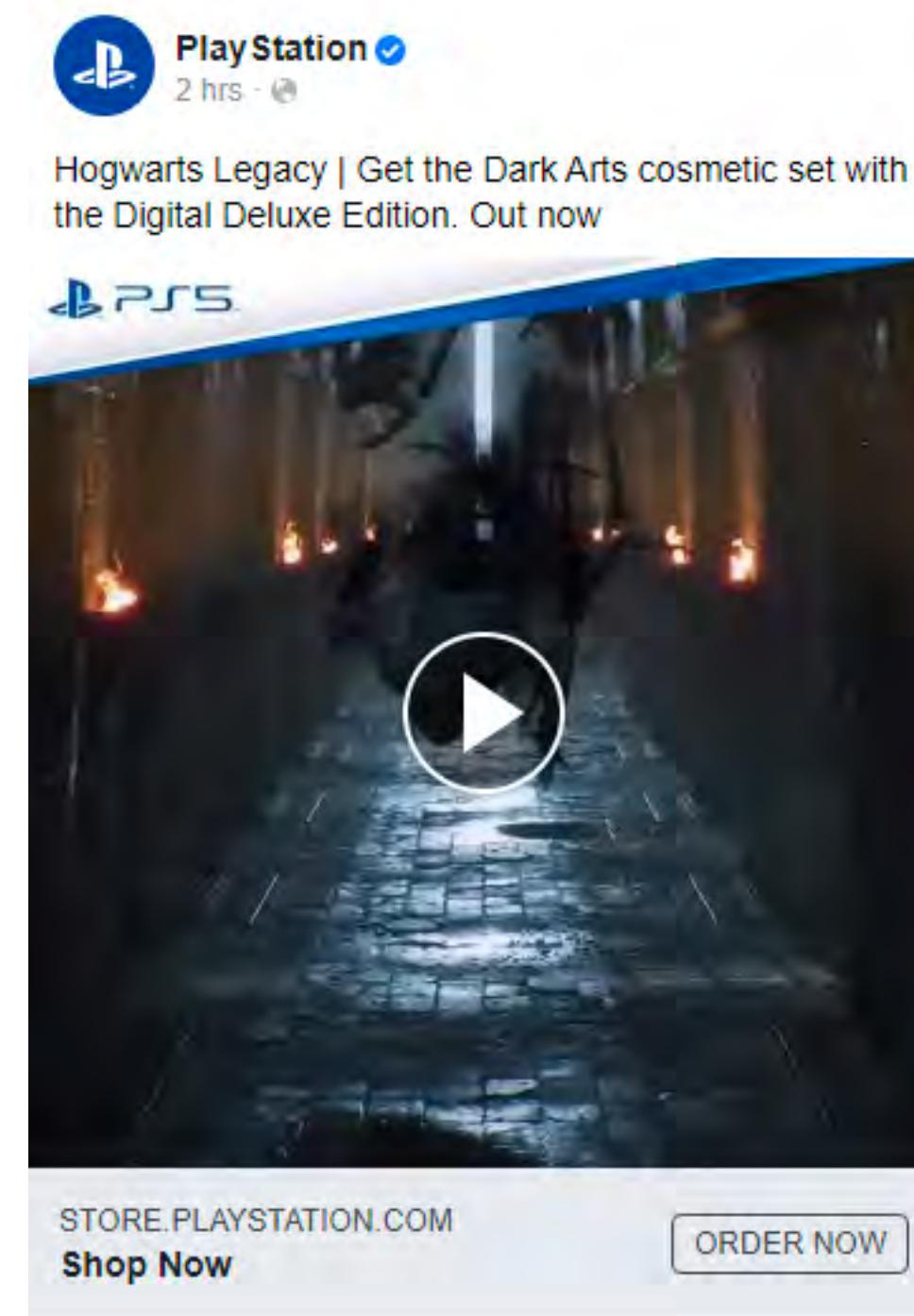
# PlayStation partnership was prominent in every Hogwarts Legacy campaign.

PlayStation branding was included in most creative intro and outros.



*CTA from top pre-launch TikTok creative.*

Hogwarts Legacy was also promoted by PlayStation.



*Top Facebook creative post-launch.*

Even during the Nintendo Switch launch campaign, PlayStation was more prominent in creative.



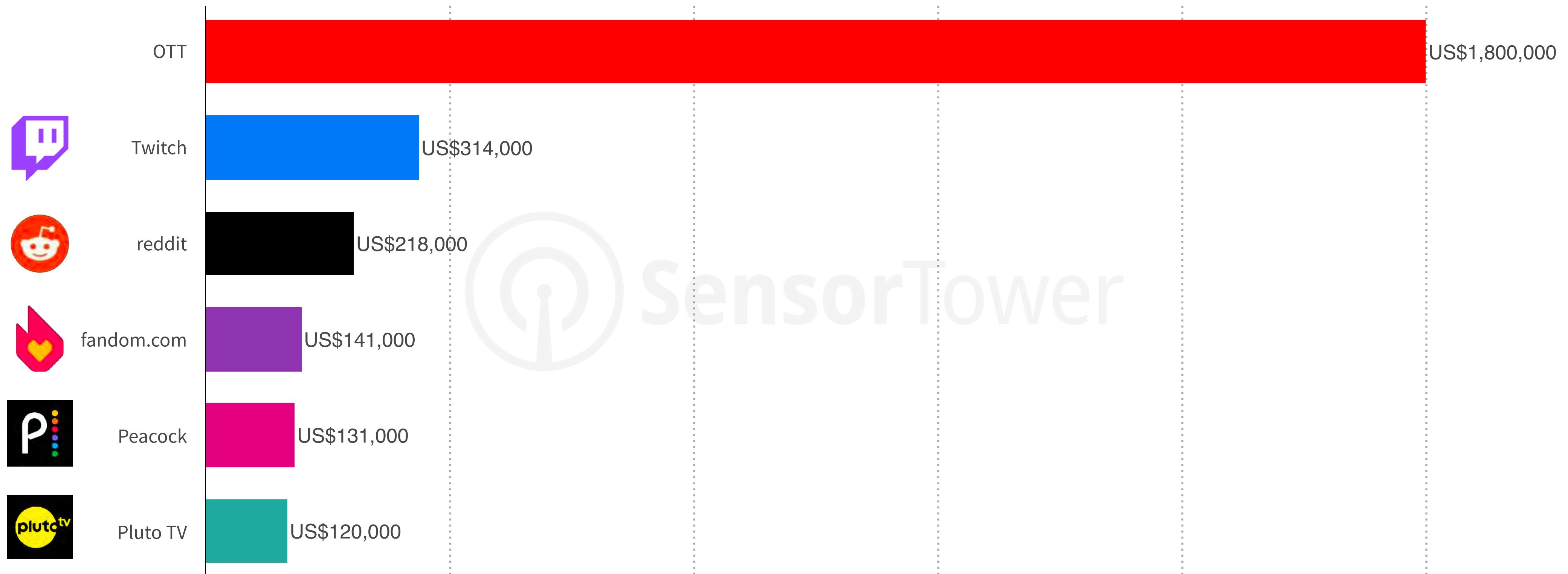
*CTA from top Nintendo Switch launch campaign TikTok creative.*

In this and other Nintendo Switch launch campaign creatives, although "AVAILABLE NOW on Nintendo Switch" is fairly prominent, the PlayStation cases are stacked on top of the Switch case, and "Out now on PlayStation..." is higher than the Switch call out.



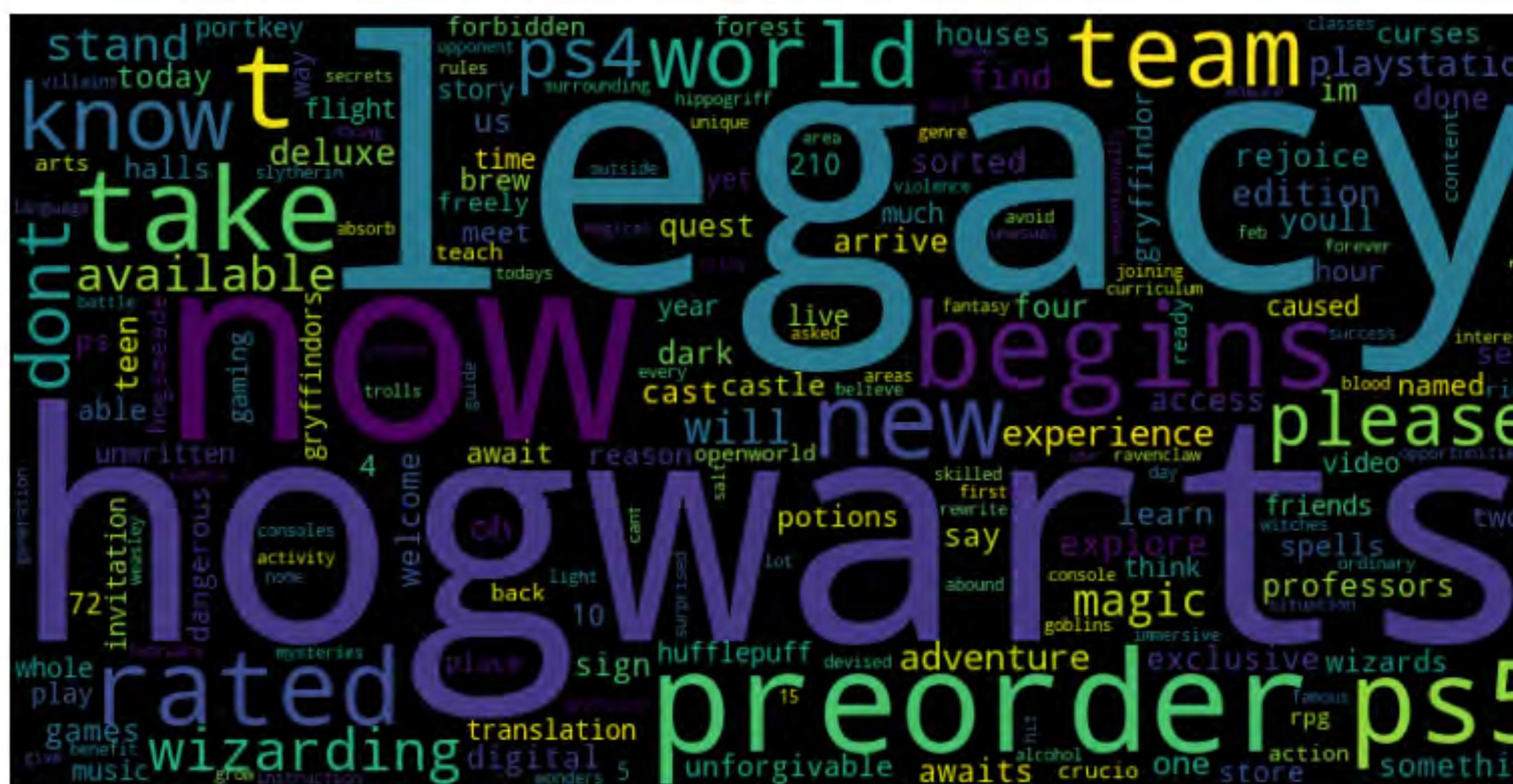
# OTT was the most used channel outside of top social ad networks.

*Ad spend breakdown by channel  
Tertiary ad networks*

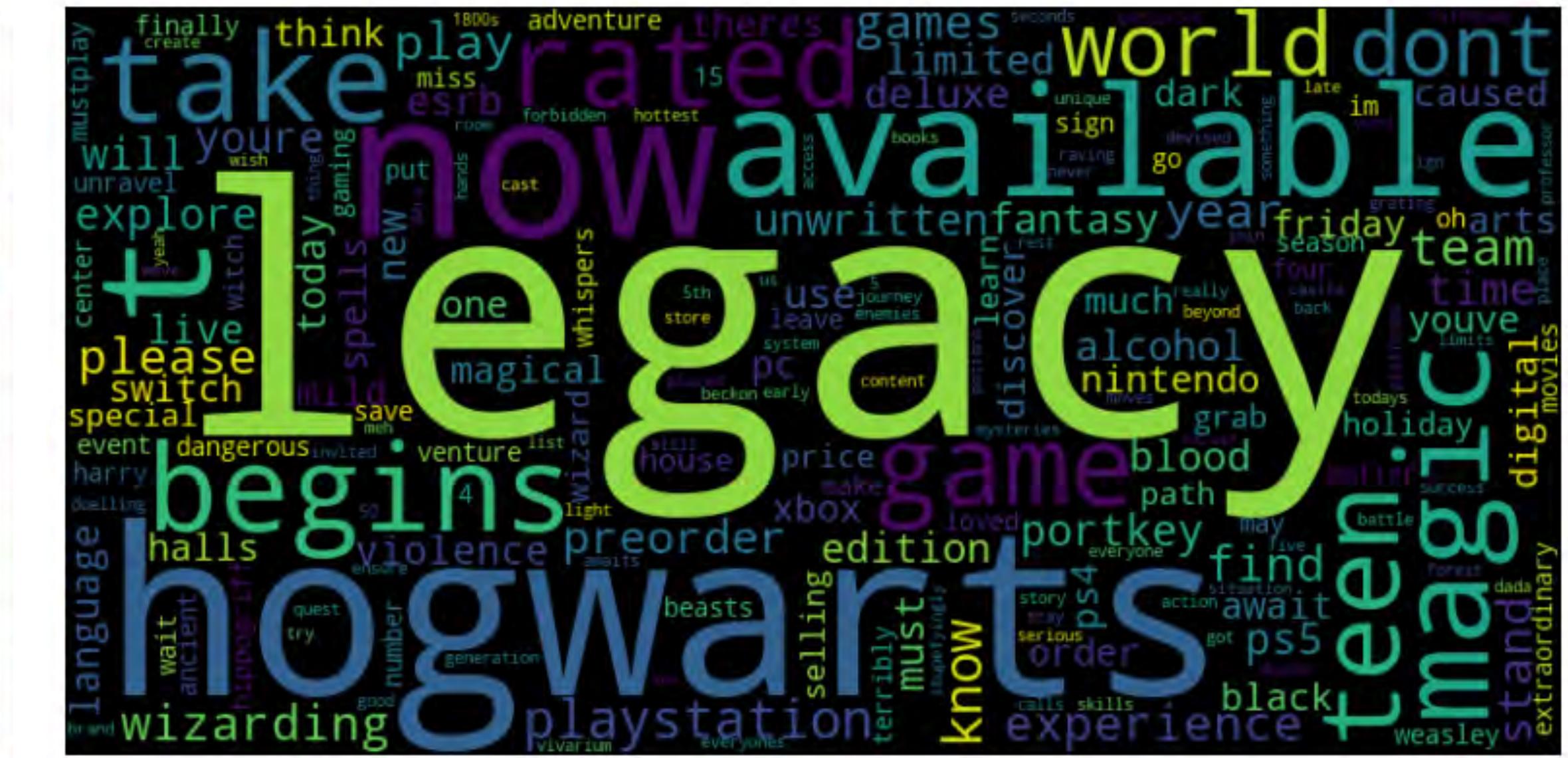


**Hogwarts Legacy messaged its tagline, “Your legacy begins now”, throughout launch. “PS5” was more common as text in pre-launch creative.**

## *Word cloud of Hogwarts Legacy creative text pre-launch*



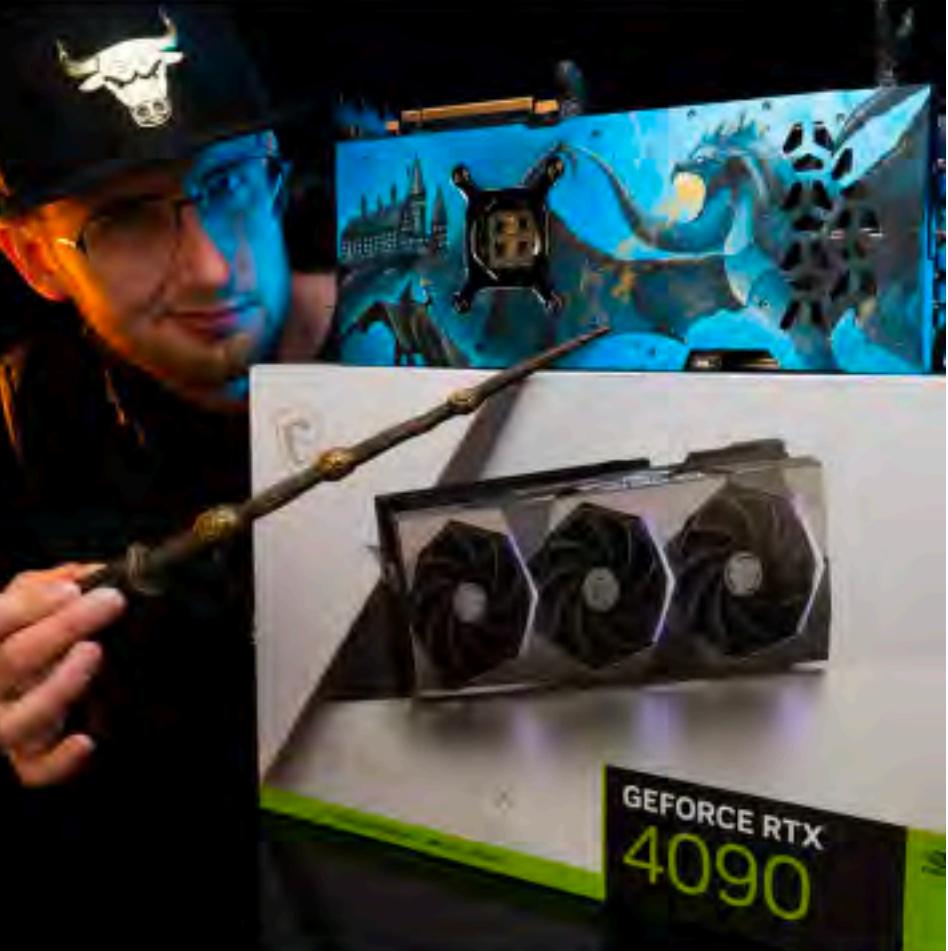
## *Word cloud of Hogwarts Legacy creative text post-launch*

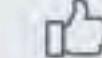


## Hogwarts Legacy had relatively fewer brand collaborations compared to other top 2023 AAA launches.

 **MSI Gaming**   
April 27 at 9:34 AM - 

Are you lost in the enchanting world of Hogwarts Legacy? Check out what CzugA has done to our RTX 4090 SUPRIM X!!! 😍 Would this graphics card be the key to unlocking even more magic in your magical world experience?  
#HogwartsLegacy #MSIGraphicsCard #SUPRIM #RTX4090



**MSI Gaming**  
Get the latest information about MSI's award-winnin... 

 **DesignByHumans**   
@DesignByHumans

Explore Hogwarts™, Hogsmeade™, and the Forbidden Forest™ in style with officially licensed Hogwarts Legacy™ tees today!

Store: dbh.la/hogwarts2023  
Store: dbh.la/harrypotter2023

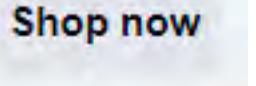


• 29.7K Views

 **Reviewed**

QVC has exclusive 'Hogwarts Legacy' game bundles for PlayStation 5 and Xbox Series X. Be sure to shop fast before these magical bundles vanish!



Hogwarts Legacy Package Deal Only at QVC 

# 2Q2023: Diablo IV



# Diablo IV might have driven the most revenue of any PC/console game in 2023.

Diablo IV is the long awaited sequel to Diablo III. Diablo II, released in 2000, was a legendary title that helped define the action RPG genre. Diablo III, released in 2012, received a somewhat more mixed reception due to technical issues, the controversial real-money auction house, and an overall shift in tone and gameplay compared to Diablo II. While Diablo III received numerous live service updates allowing it to achieve significant sustained success, the Diablo IV launch needed to overcome the specter of these past challenges.

Given Blizzard had nearly a decade of experience running live services for Diablo III to leverage in creating Diablo IV, it's no surprise that the game launched with a full complement of live services. While gamers pay to play the game, there are additional optional micro-transactions reminiscent of mobile games. This means that it should have a much longer tail of revenue compared to more traditional pay once and play boxed single player games like Hogwarts Legacy. While there is a vocal population of gamers who see this business model as "greedy", (and have made their opinions known through reviews on Steam and Metacritic, hence the 2.3 Metacritic User Score), it seems entirely possible that this choice allowed Diablo IV's total revenue to exceed Hogwarts Legacy's in 2023.

**\$666 million**

in sales within five days of launch

**Fastest**

selling Blizzard game of all time

**#2 2023**

PC/console game launch by ad spend



<b>Release Date</b>	June 5, 2023
<b>Publisher</b>	Blizzard Entertainment
<b>Developer</b>	Blizzard Entertainment
<b>Genre</b>	Action RPG
<b>Metacritic</b> (Metascore/User Score)	86 / 2.3

Sources for sales statistics: Activision Blizzard

## Diablo IV positions itself as a return to the dark atmosphere of Diablo II, the classic 2000 RPG.

Diablo IV's trailers are full of darkness and disturbing imagery, positioning the game as more horror and less fantasy action RPG than its predecessor, Diablo III. The fact that many of its YouTube trailers contain a warning that must be clicked through reinforces this, as does one of its earlier taglines: "Return to darkness."

*Screenshots of Diablo IV's announcement trailer on YouTube*



*Screenshot from Diablo IV's announcement trailer*

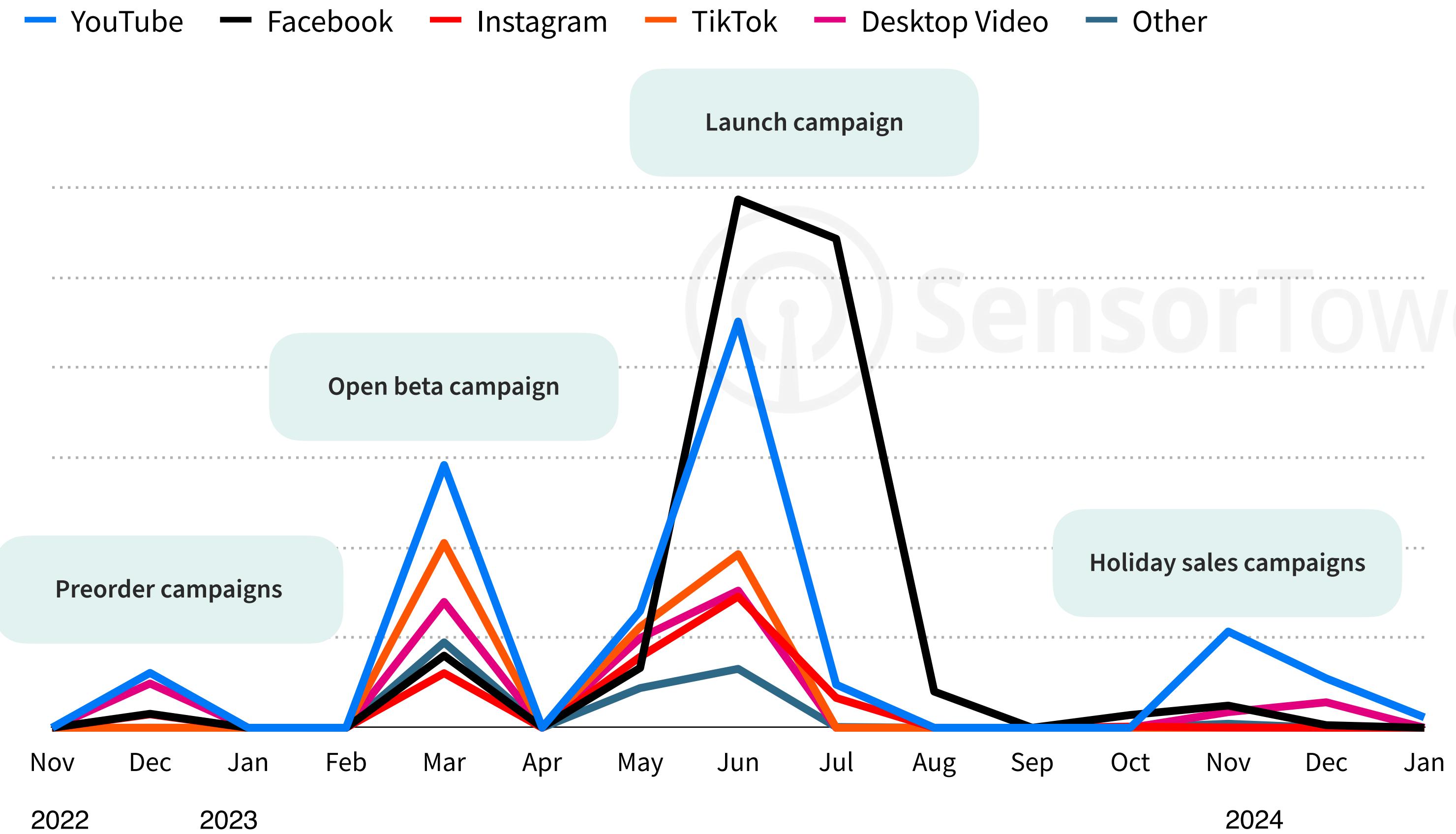


*Diablo IV ad creative*

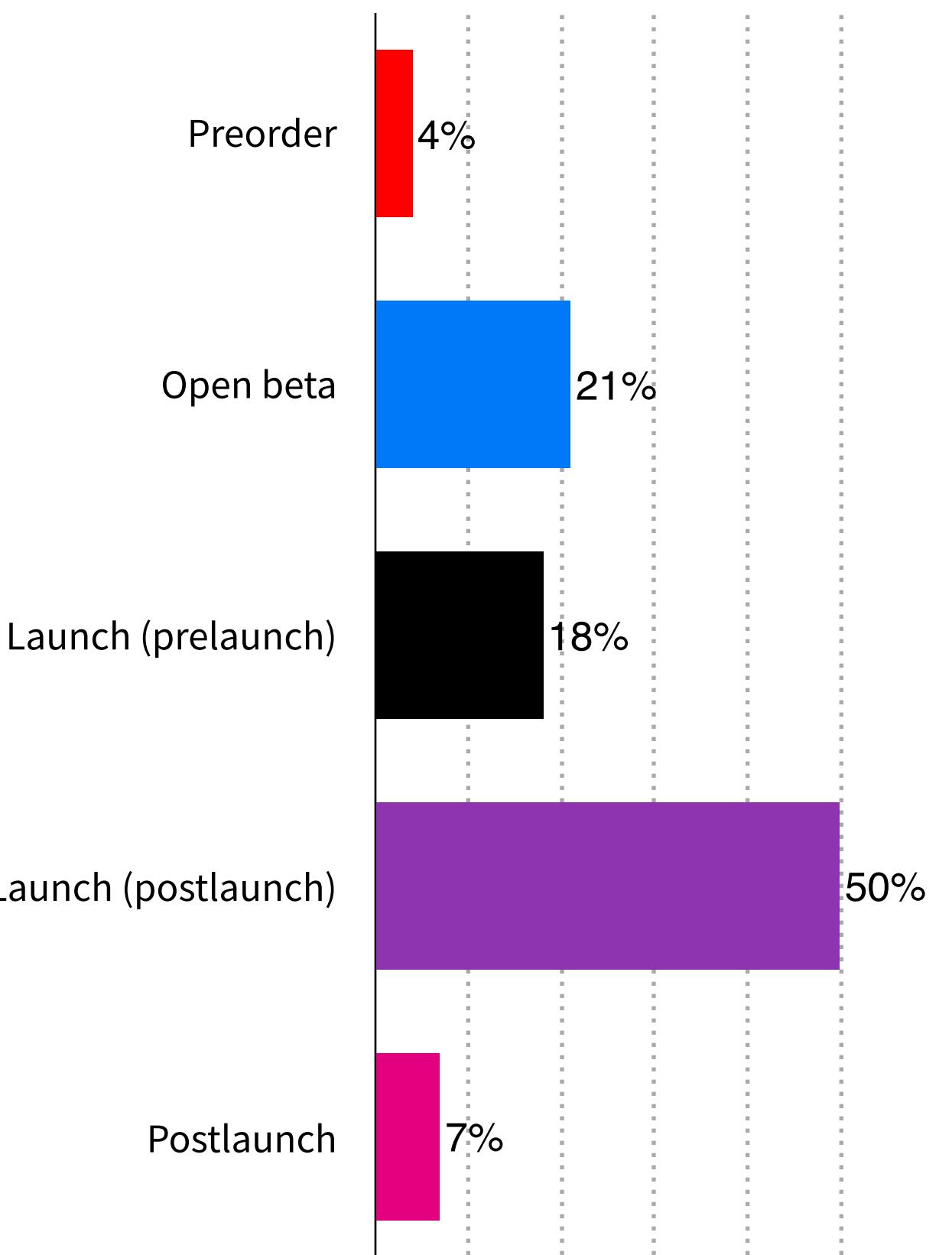


# Diablo IV combined a significant open beta campaign with significant post launch spend, including a huge accolades campaign.

Diablo IV spend over time by network



Diablo IV spend breakdown by campaign period



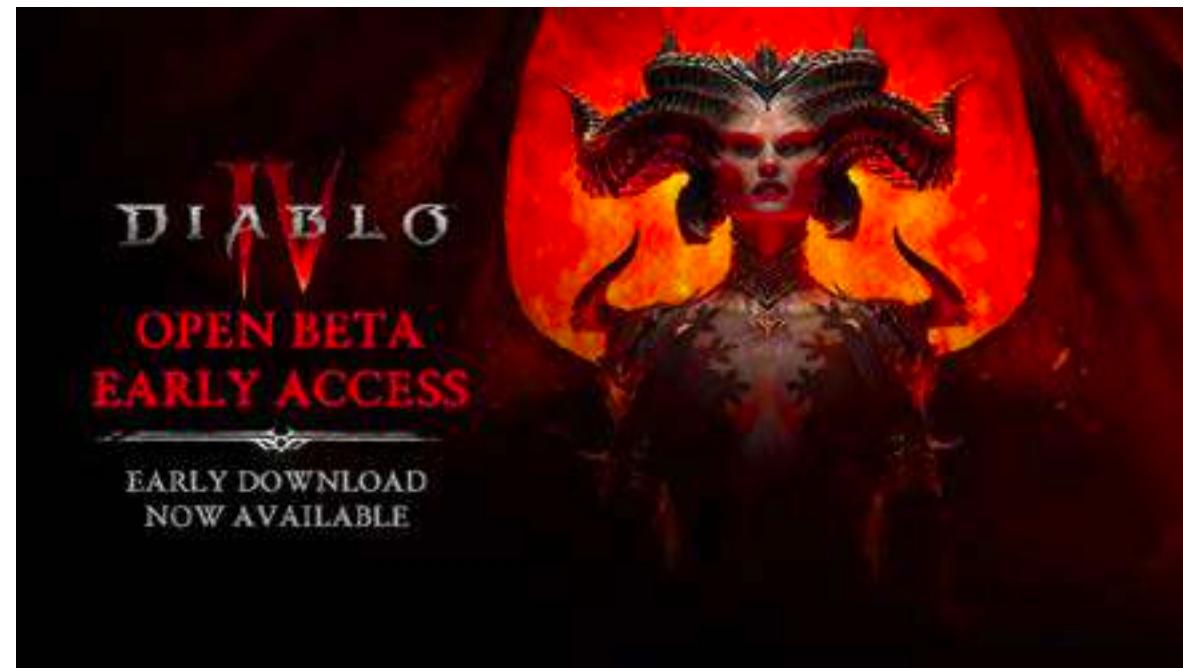
# Diablo IV's launch directly addressed challenges that the release of Diablo III faced.

## Diablo III launch issue:

Server errors, including the infamous “Error 37”, that preventing players from logging in.

## Diablo IV solution:

Diablo IV held a huge open beta months before launch, ensuring that technical issues wouldn't appear, at least on the same scale, and indirectly assuring players of the same.



Diablo IV creative

Real-life money auction house sparks controversy.

No auction house at all, which is confirmed on X rather than through any official announcement.

Some fans were dissatisfied by what they saw as Diablo III moving away from the dark, gritty atmosphere of Diablo II to target a more mainstream audience.

Diablo IV returned to a dark atmosphere reminiscent of Diablo II. The announcement trailer featured disturbing imagery and brutal violence, and one tagline used was “Return to Darkness.”



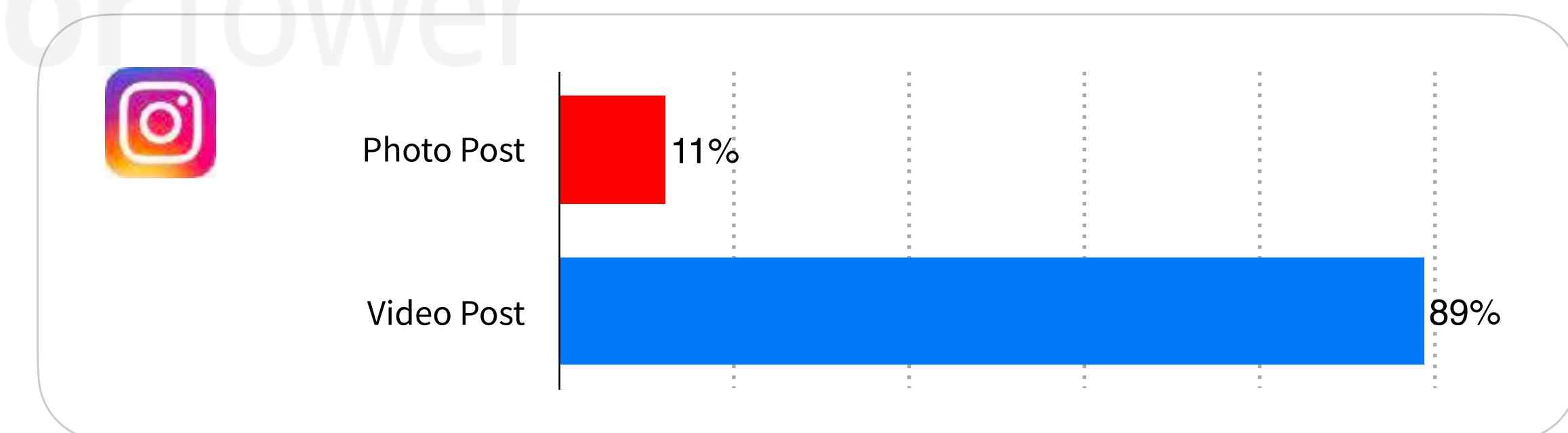
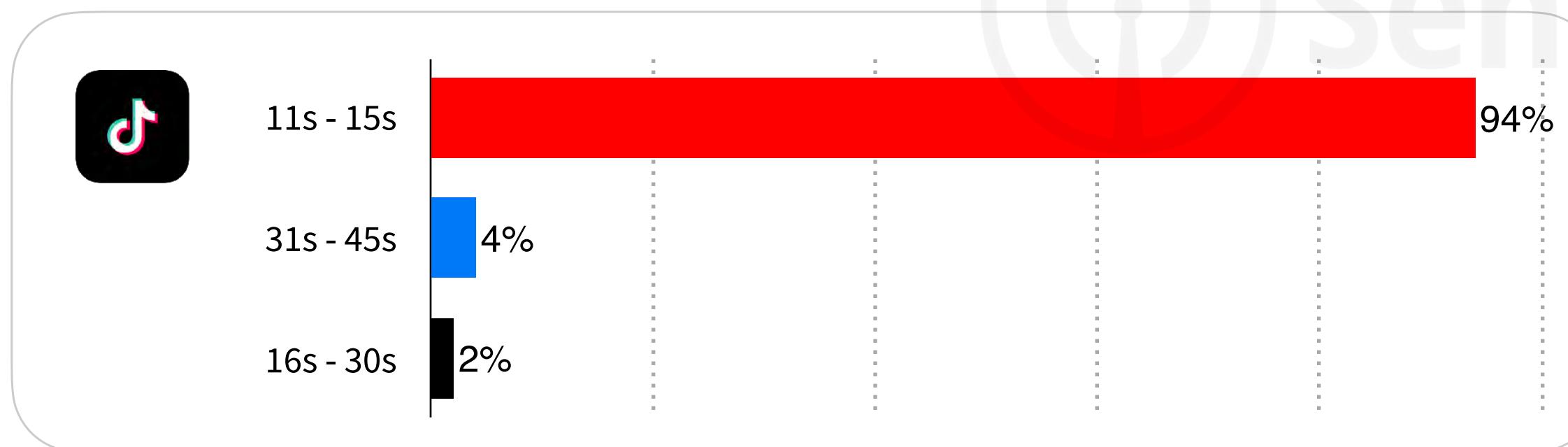
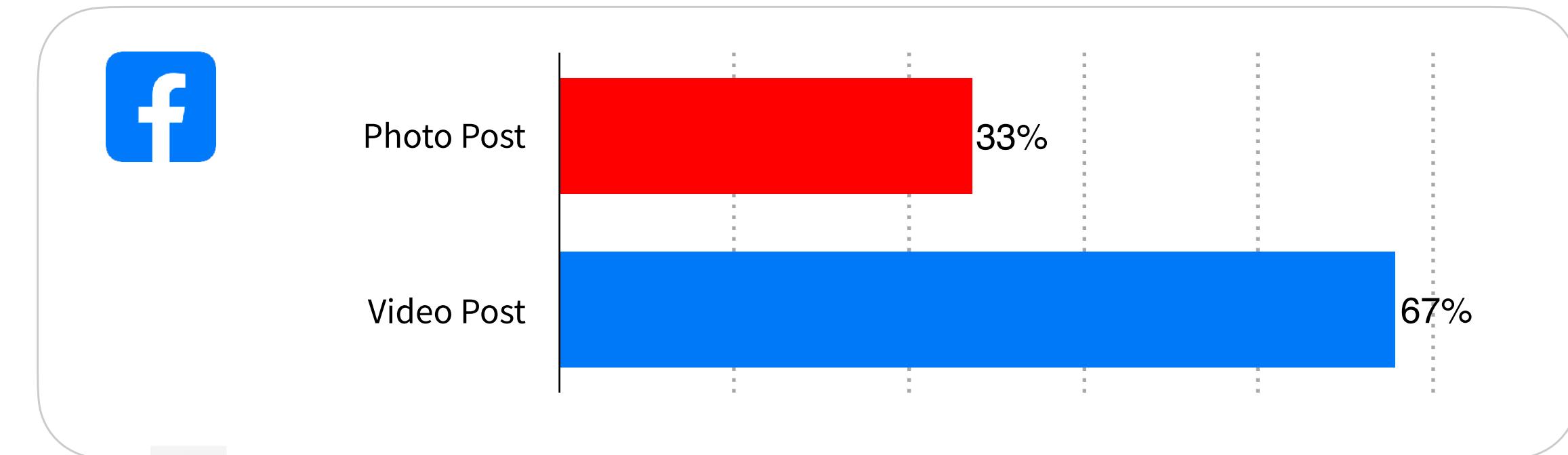
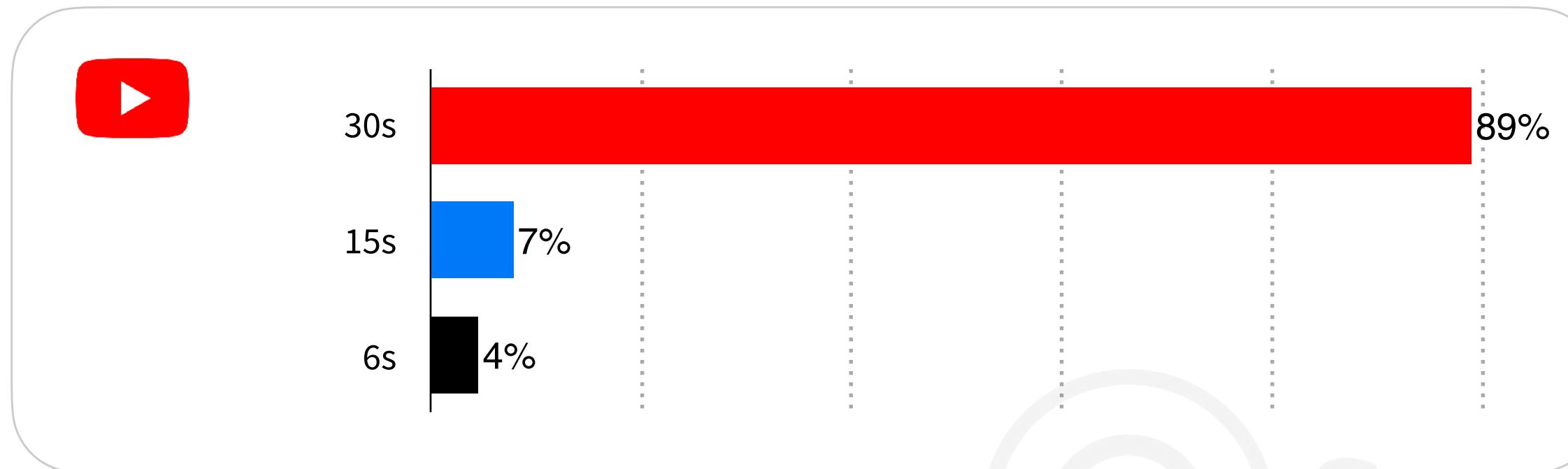
Screenshot of an X reply posted by Rod Fergusson, Diablo producer



Screenshot from Diablo IV announcement trailer

## Diablo IV favored 15 - 30s video ads.

Breakdown of Diablo IV creative spend by format and network 30 days pre-launch to 30 days post-launch



Diablo IV clearly favored 30s ads on YouTube and 11s - 15s ads on TikTok at launch.

Video posts were favored on both Facebook and Instagram, with photo posts seeing more use on Facebook.



# Pre-launch, Diablo IV adopted different creative strategies by channel

Post-launch, the owl delivery creative present across every channel disappeared, and the top creatives by channel were completely different.



Pre-launch, the top TikTok creative featured gameplay and Billie Eilish's "You Should See Me in a Crown". Cinematics were also used.



Screenshots of top TikTok creative pre-launch.



Pre-launch, cinematics creative were on top for Twitch, though gameplay + Billie Eilish creative was also seen.



Screenshots of top Twitch creative pre-launch.



Pre-launch, YouTube focused on live-action ads, with cinematics creative also being used.



Screenshots of top YouTube creative pre-launch.

# One week post launch, Diablo IV pivoted into accolades campaigns.

Across all top channels, one week post launch, Diablo IV creative focused on reviews and quotes from reviews and critics. This campaign was much more Facebook heavy than the initial launch campaign.



Screenshots of top Facebook creative post-launch.



Screenshots of top Twitch creative post-launch.



Screenshot of top YouTube creative post-launch.

# Diablo IV had several sales post launch.

Diablo IV may be more willing to discount given that live ops allow them to monetize current players. Also, Diablo IV became available on Xbox's Game Pass March 28, three days before their mini Online Game of the Year campaign (which only saw around \$10k in spend). Having Diablo be available for \$10/month (with a free trial) makes it paying full price almost a year after release even less appetizing.

## Halloween sale

10/16/23 - 11/1/23



## Black Friday sale

11/17/23 - 12/1/23



## Christmas sale

12/15/23 - 12/31/23

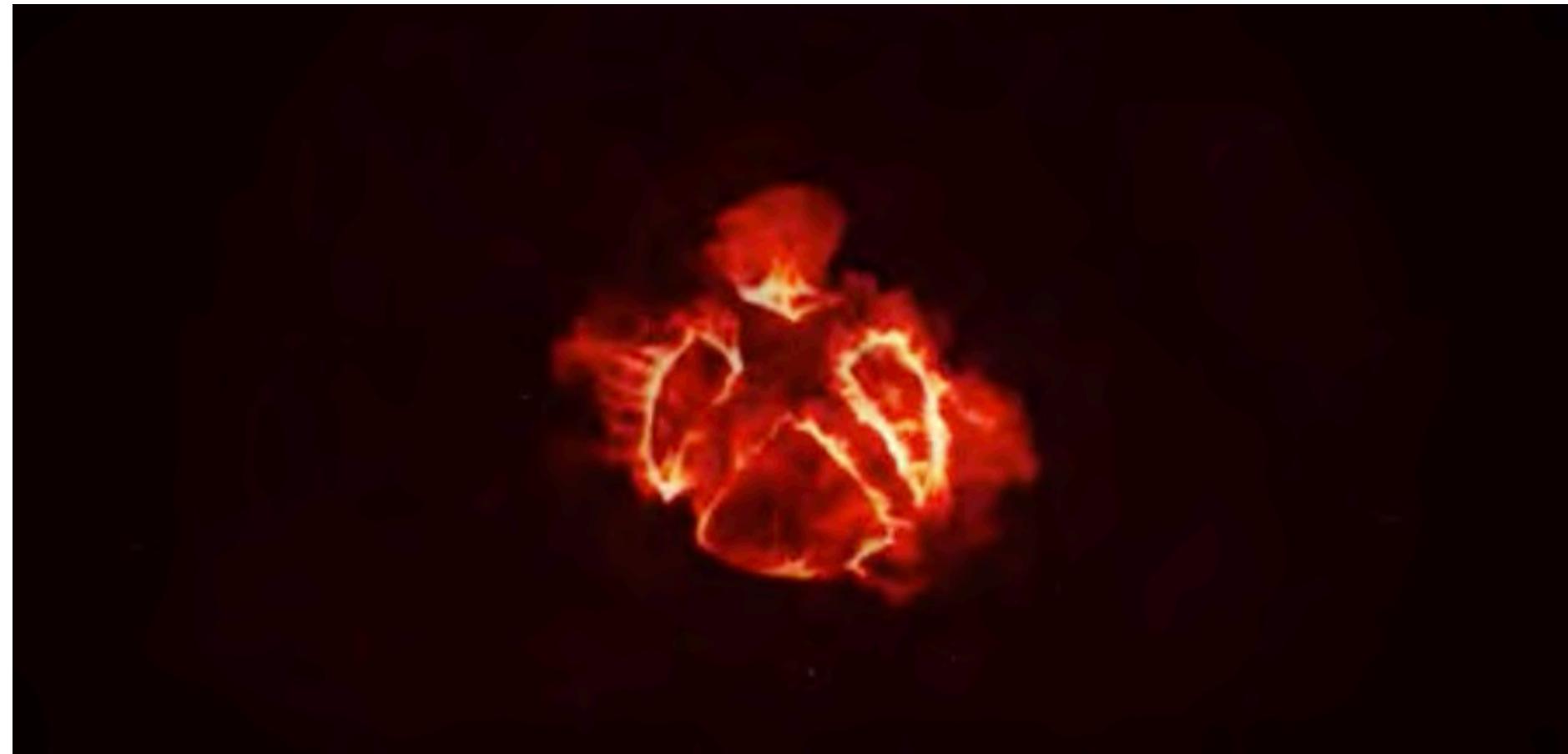
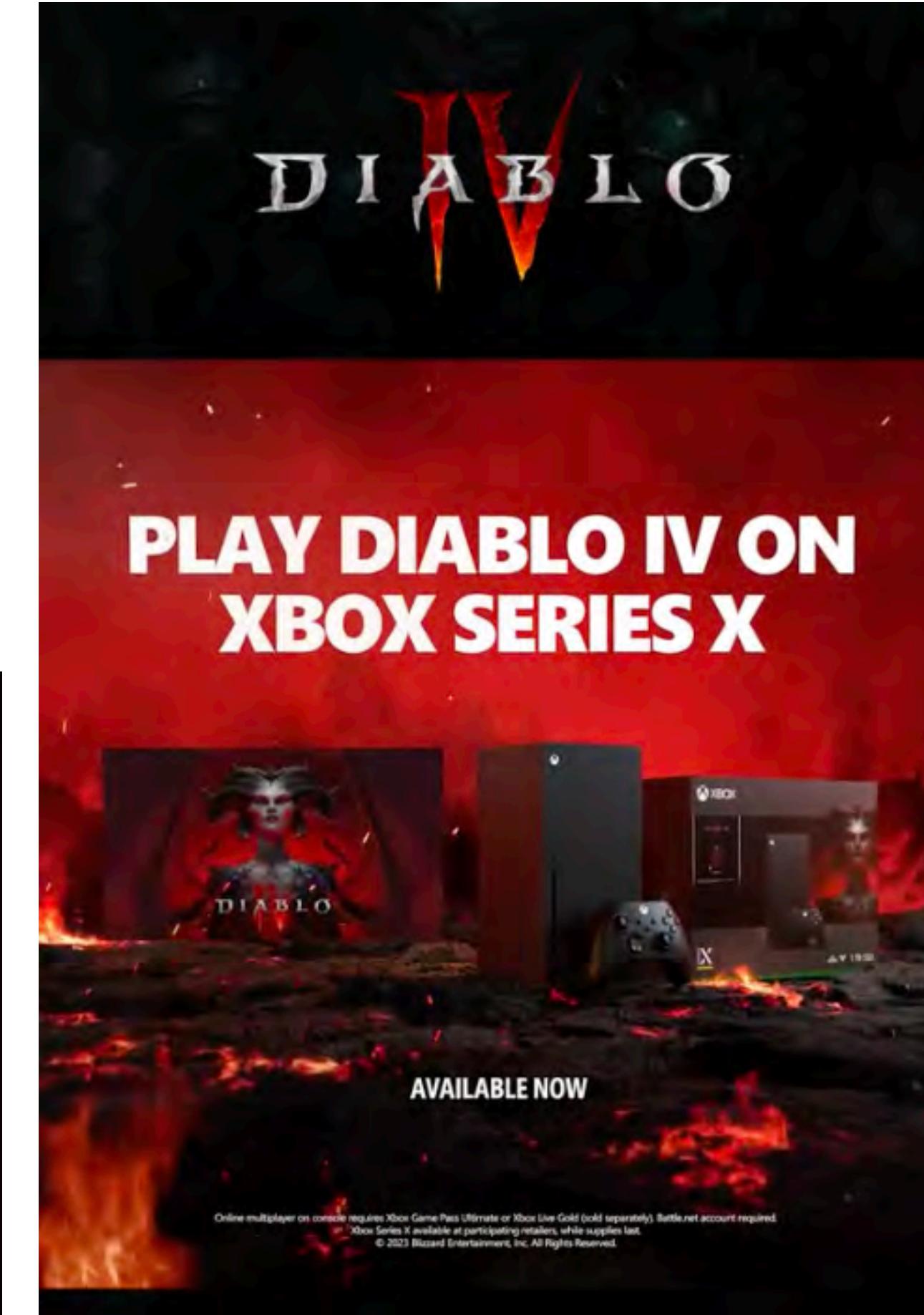


## Online game of the year sale

3/31/24 - 4/8/23



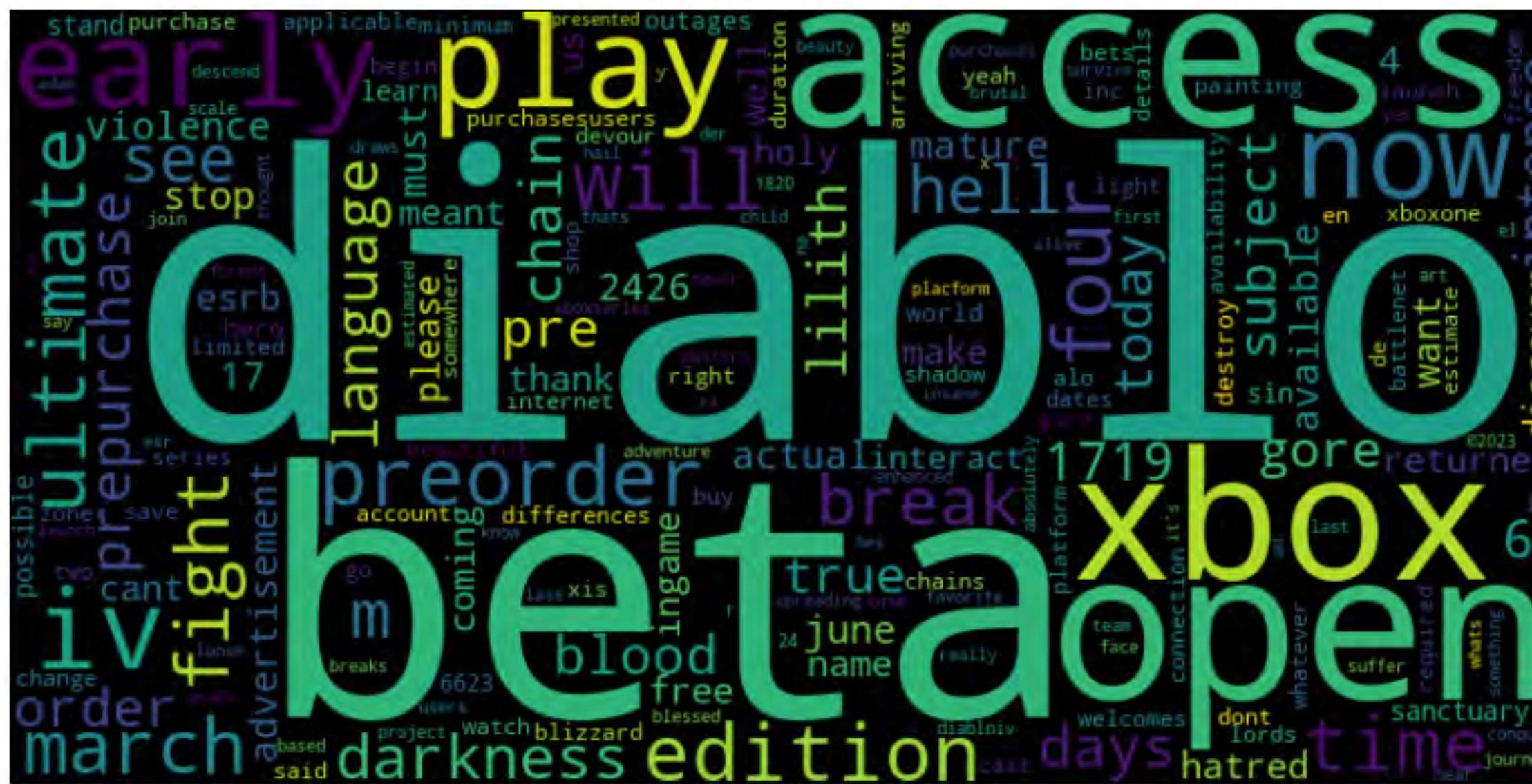
## Xbox branding is prevalent in Diablo IV ad creative.



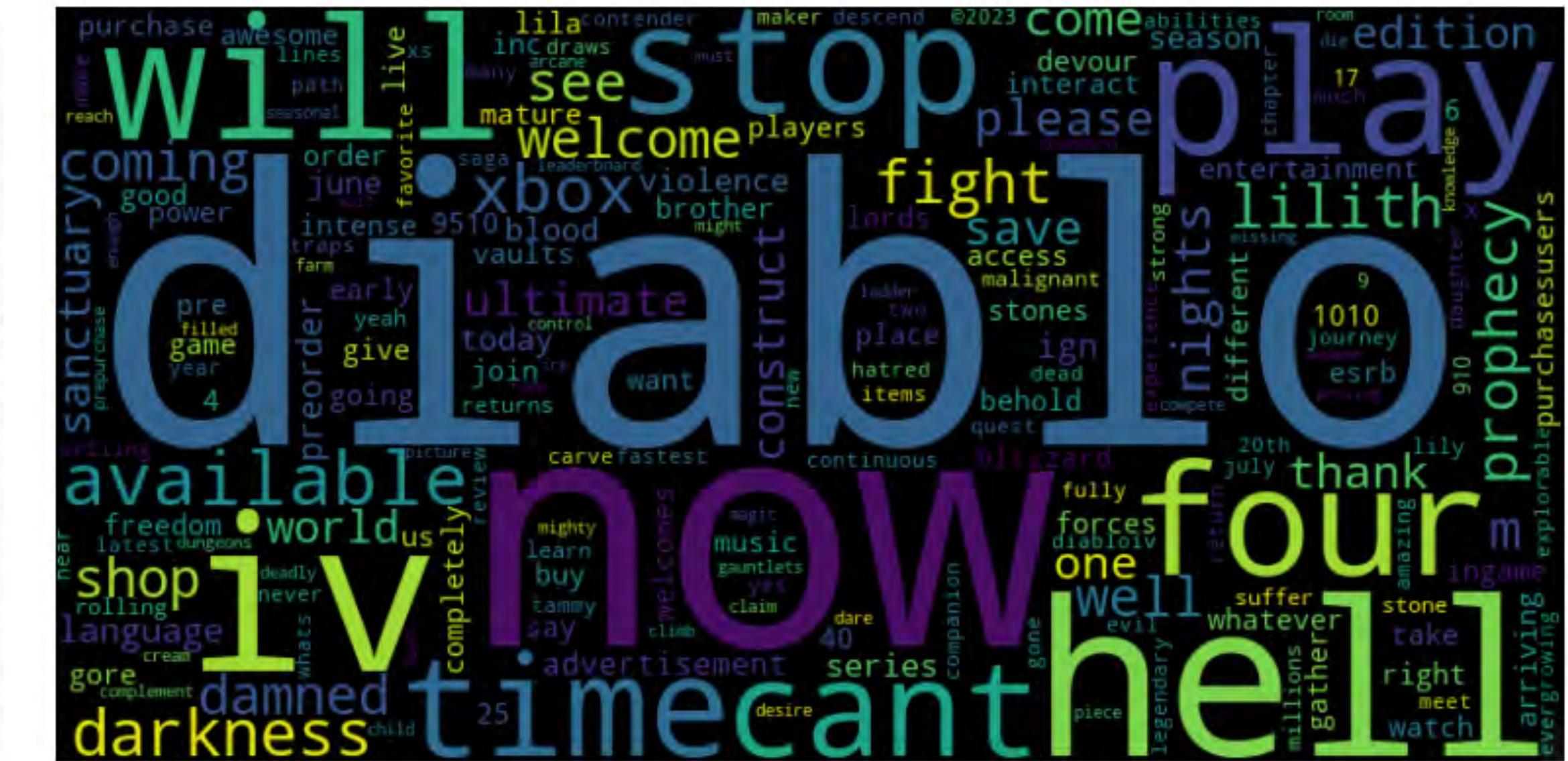
Xbox + Diablo IV branding seems very similar to PlayStation + Hogwarts Legacy branding.

**Diablo IV promoted its beta heavily pre launch.  
“Hellish” fantasy words were used frequently pre and post launch.**

## *Word cloud of Diablo IV creative text pre-launch*



## *Word cloud of Diablo IV creative text post-launch*

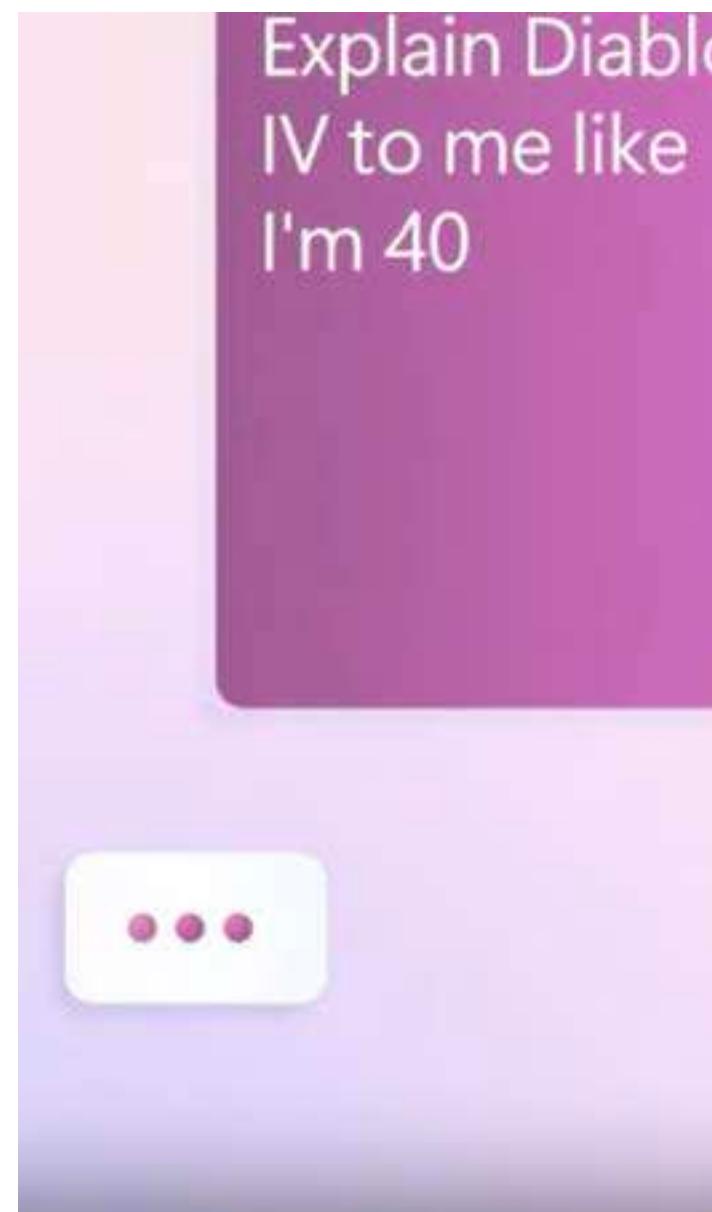


# Diablo IV partnered with a diverse set of brands at launch.

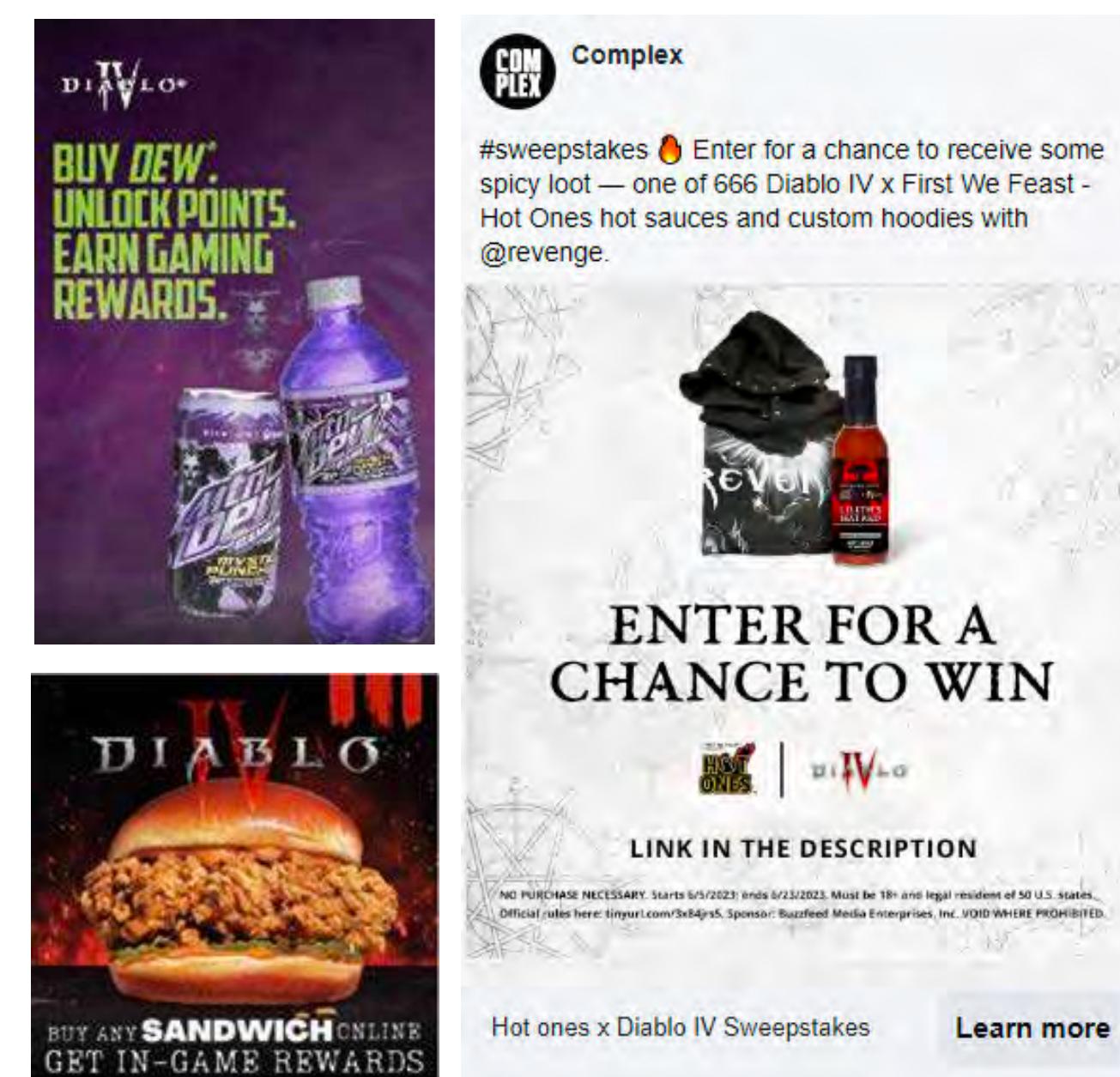
Diablo IV gaming hardware and accessory collabs included SteelSeries and SecretLab.



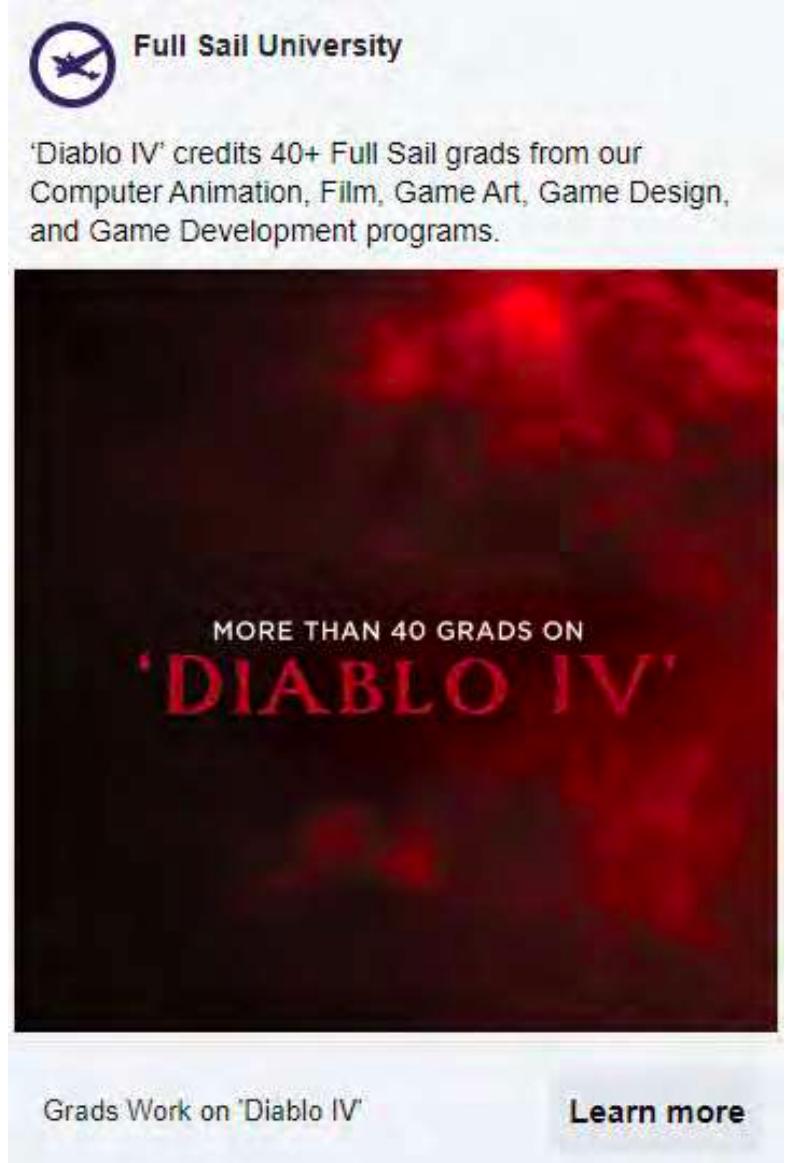
Diablo IV was mentioned in Microsoft Bing creative.



Mountain Dew is a common gaming partner, but Diablo IV also had some "fiery" collaborations, in keeping with the hellish nature of the game.



Full Sail University mentioned Diablo IV in creative to promote itself as a viable path into the gaming industry.



# 3Q2023: Starfield



# Starfield was highly anticipated for years.

There may not be a game more beloved than Bethesda's The Elder Scrolls V: Skyrim. Bethesda's Fallout series is also universally acclaimed. Starfield is Bethesda's first new franchise in over 25 years. To say that the gaming community was eagerly awaiting the studio's next epic adventure would be an understatement.

Starfield's launch was unique in that the game was available via Xbox Game Pass from release. That means that players could pay the full \$70 at launch to own the game, or sign up for a free trial, after which they would pay only \$10 per month to play. Even if you only wanted to play Starfield and planned to finish playing and cancel your subscription within six months, that would be a better deal than buying the game outright from a consumer perspective, assuming you didn't plan to play it again.

Despite this compelling competition and Starfield's status as a PC and Xbox exclusive, Starfield managed to become the 10th best selling game of 2023.

**12 million**

players within three months

**Top 10**

most played game in Microsoft Gaming

**10th**

best selling game of 2023, not including Xbox Game Pass players

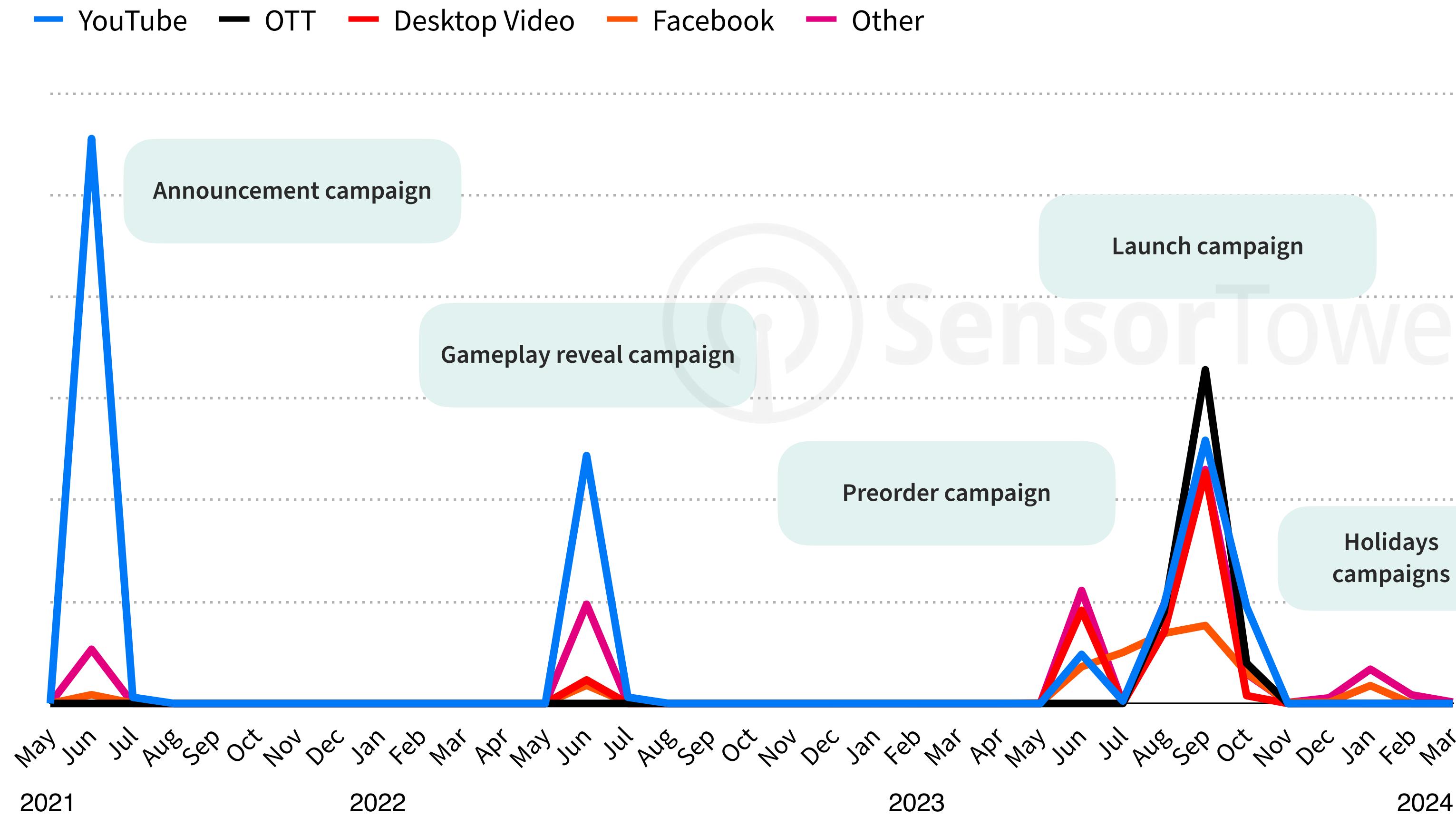


<b>Release Date</b>	September 6, 2023
<b>Publisher</b>	Bethesda Softworks
<b>Developer</b>	Bethesda Game Studios
<b>Genre</b>	RPG
<b>Metacritic</b> (Metascore/User Score)	83 / 6.9

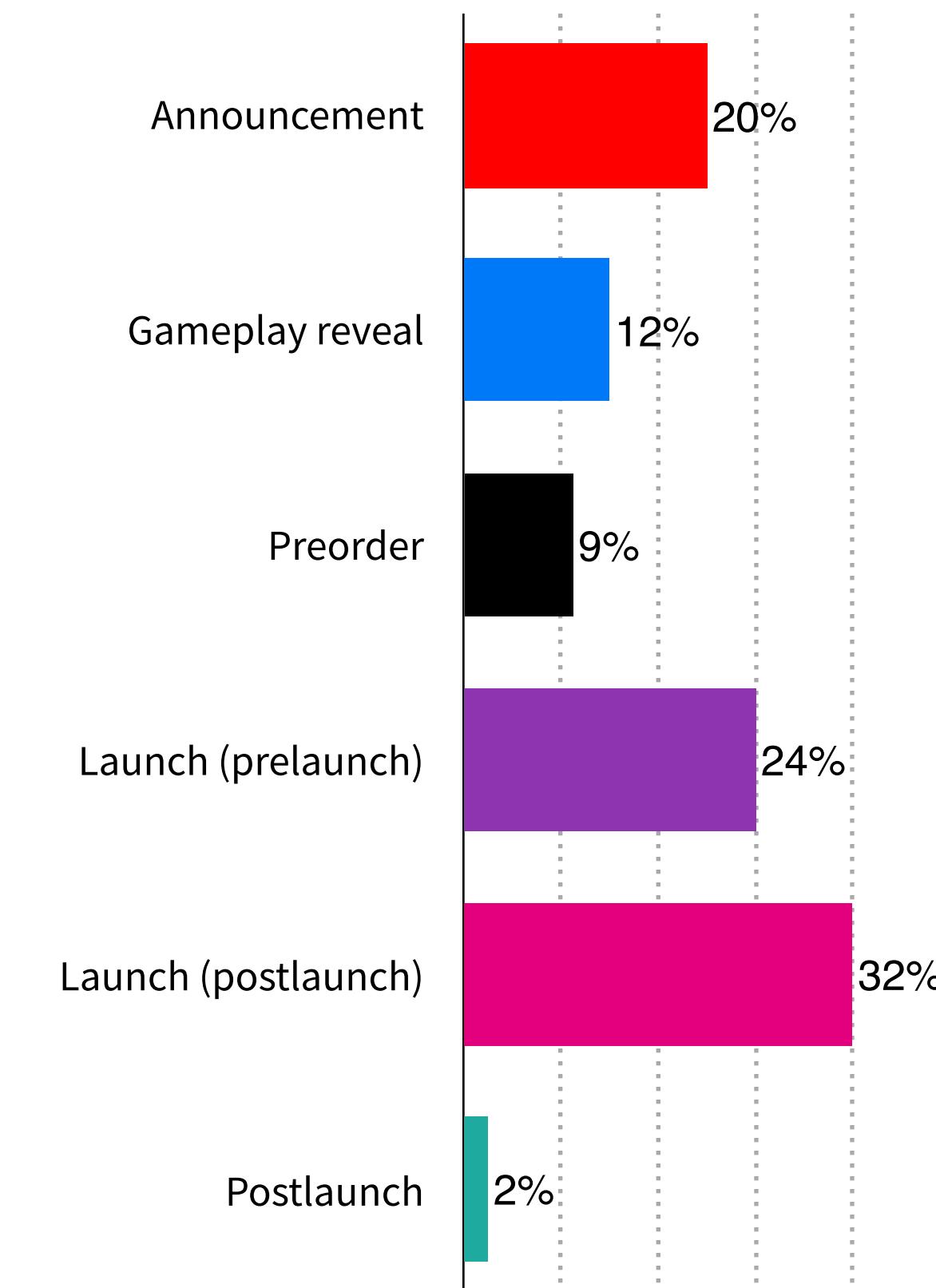
Sources for sales statistics: Microsoft/Xbox

# Starfield's announcement and gameplay reveal campaigns saw huge spend, a year and two years before release, during the Xbox Games Showcases 2021 and 2022.

Starfield spend over time by network



Starfield spend breakdown by campaign period



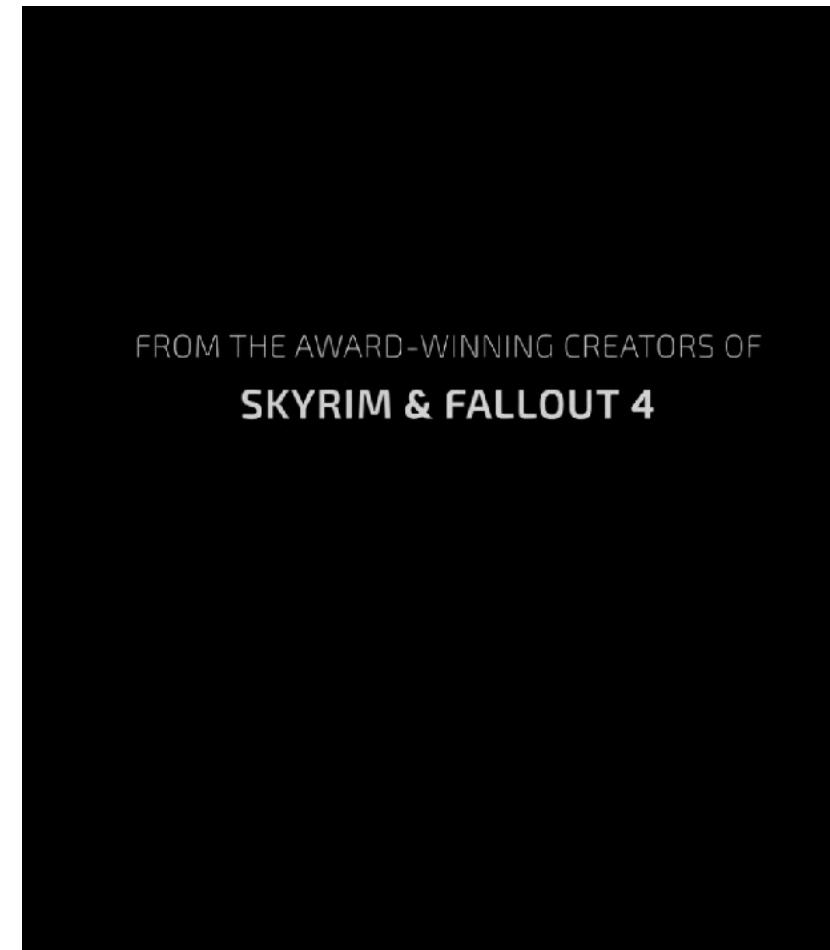
**Starfield positions itself as ultra high quality, from both technical and artistic standpoints.**

Starfield mentions Bethesda's earth shattering hits Skyrim and Fallout in trailers and creative and showcases cinematic space landscapes in 4k, positioning the game as ultra high quality in every sense. This positioning was reinforced in the accolades campaign following launch.

*Screenshot from Starfield's official gameplay trailer.*



*Screenshot from Starfield's  
teaser trailer.*

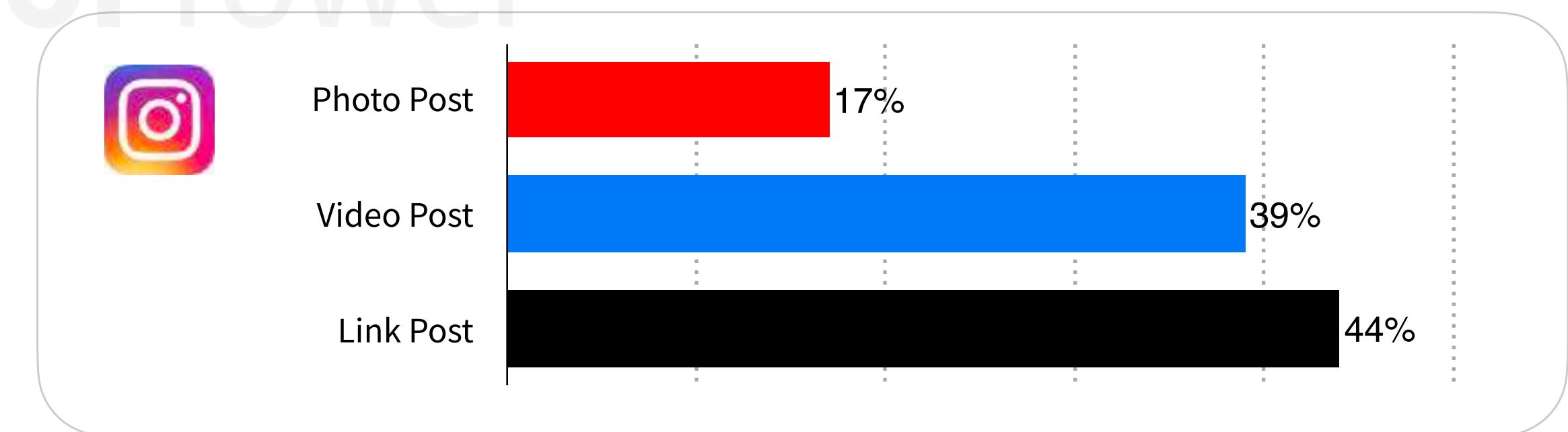
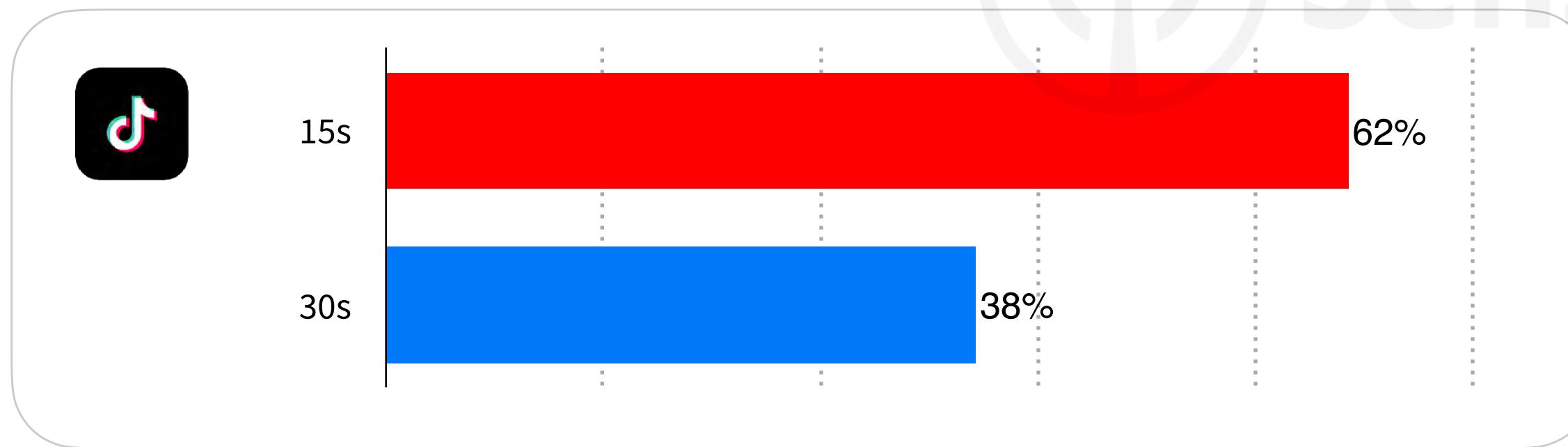
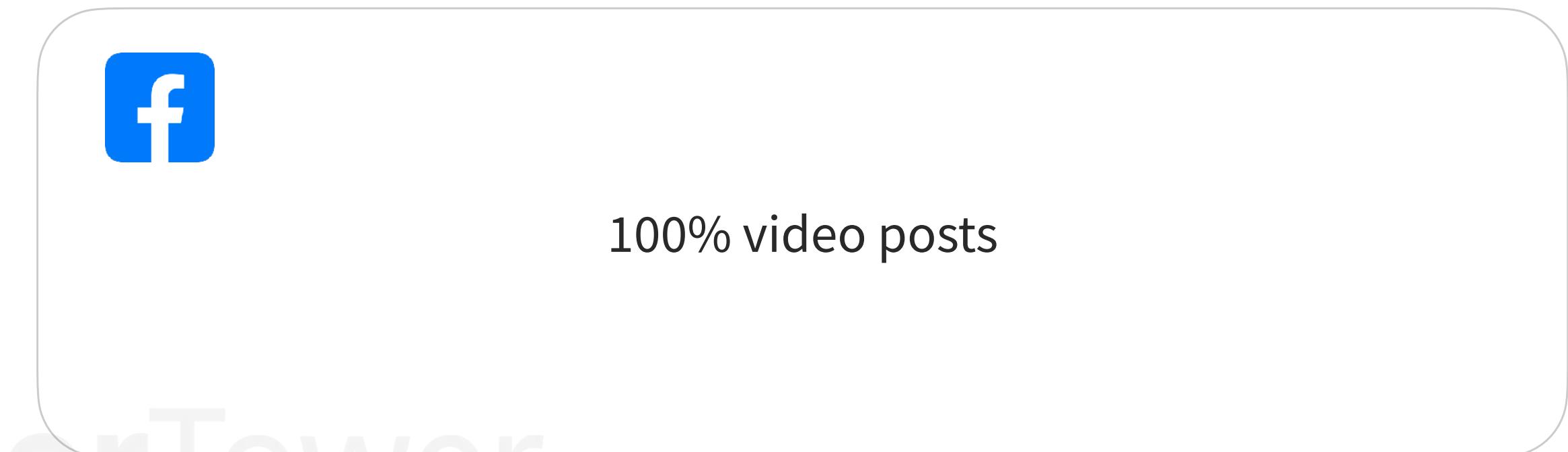
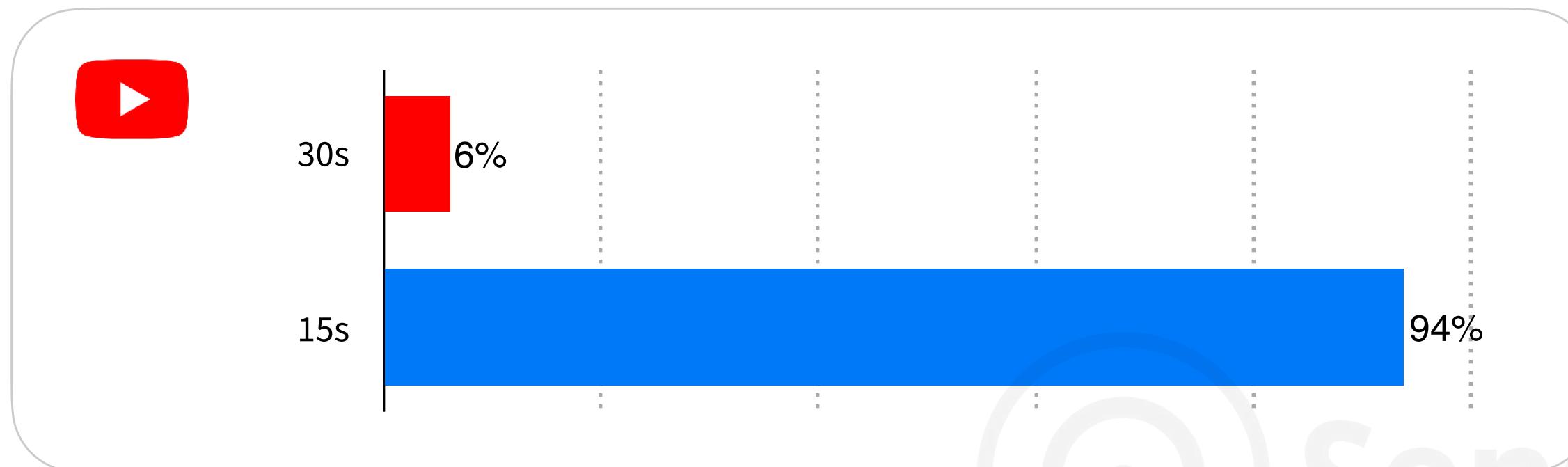


## *Screenshots from Starfield accolades creative*



# Starfield favored 15s video ads.

*Breakdown of Starfield creative spend by format and network  
30 days pre-launch to 30 days post-launch*



Starfield favored 15s ads on both YouTube and TikTok. Surprisingly, TikTok saw a higher proportion of 30s Starfield ads than YouTube.

Video posts were used liberally on Facebook and Instagram, but Link posts were the #1 used format used on Instagram.



# Starfield primarily used a combination of gameplay and live action creative.

*Screenshots of top gameplay creative pre-launch.*



*Screenshots of live action creative pre-launch.*



Both styles of creative were seen across top used channels, including Hulu, YouTube, and Twitch. The top creative on Hulu and YouTube were gameplay creative, while the top creative on Twitch was live action.

# Starfield creative strategy heavily leveraged Xbox's brand.



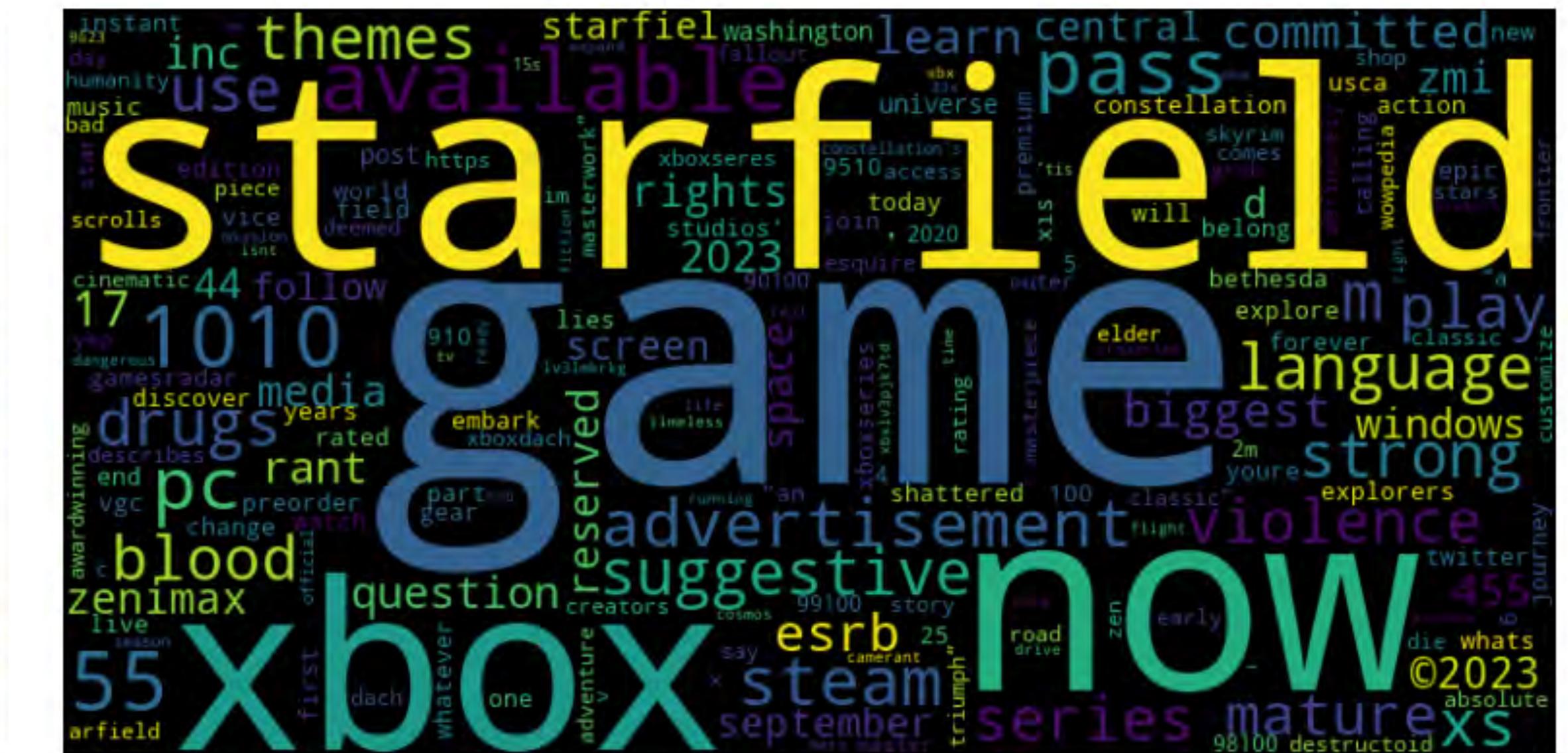
Xbox Game Pass, which Starfield was part of from day one, was not mentioned as much as Xbox itself. Xbox's intro animation is customized for each game (compare to Diablo IV Xbox intro on slide 30).

## Xbox game pass was promoted heavily in Starfield creative text.

Word cloud of Starfield creative text pre-launch



Word cloud of Starfield creative text post-launch



# Starfield's brand partnerships were uniquely diversified.

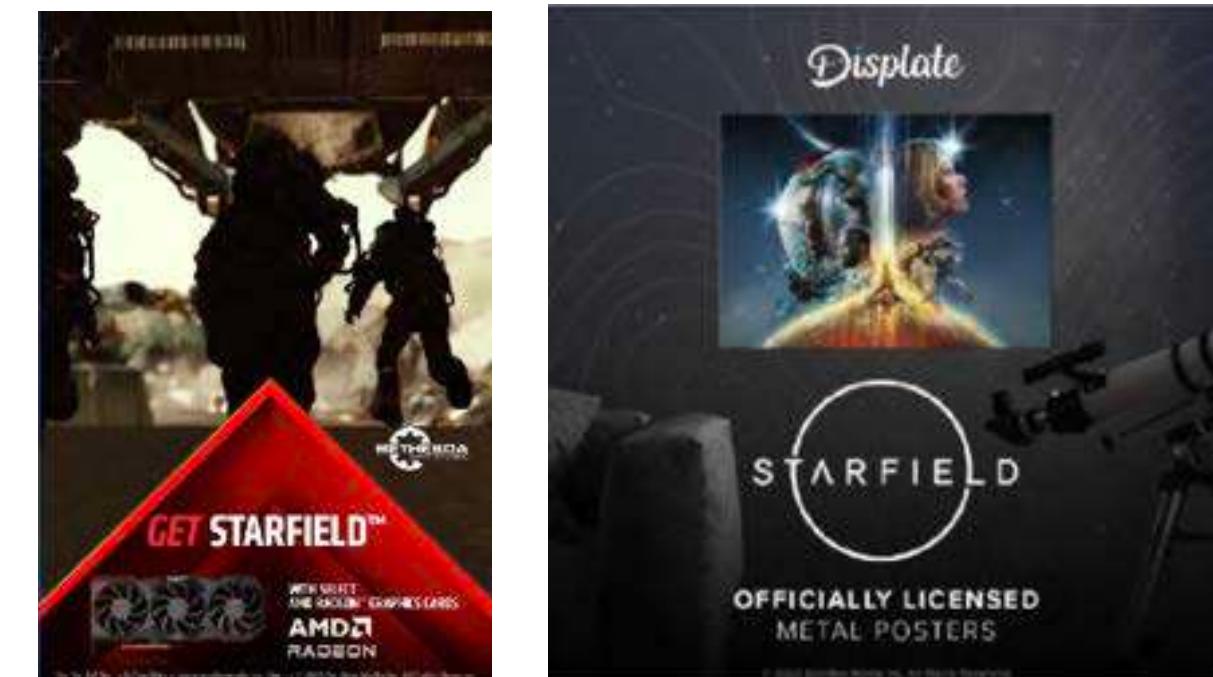
Retailer Target promoted Starfield on their socials.



Rockstar is another common gaming partner, but Starfield also partnered with German smart food maker yfood.



Starfield collabed with gaming hardware and accessories.



Xbox Game Pass' partnership with Verizon made a Starfield x Verizon partnership make sense.





# 4Q2023: Call of Duty: Modern Warfare III



# Call of Duty: Modern Warfare III (2023), a remake, is the second best-selling PC/console game of 2023, but faces challenges.

Every Call of Duty title is formidable contender for best-selling game of the year despite releasing in Q4. Modern Warfare III, the 2023 remake of the 2011 title, was no exception despite releasing in a year jam packed with groundbreaking launches.

This remake comes a year after the Modern Warfare II remake, which topped \$1 billion in sales in 10 days and beat out Elden Ring to become the best selling game of 2022. While Modern Warfare III (2023) faced the challenge of distinguishing itself from the original Modern Warfare 3 or the previous year's Modern Warfare II, this is a familiar and entirely doable challenge for Infinity Ward or Activision in the past, considering historic Call of Duty sales numbers.

Modern Warfare III seems to have run into this challenge more than other years' releases, however. Some fans consider the game more of an expansion to Modern Warfare II than a sequel in its own right. Others highlight perceived balance and matchmaking issues. These issues contributed to Modern Warfare III receiving lower Metascores than Modern Warfare II (which received a Metascore of 75 and a User Score of 5.2, both significantly higher than Modern Warfare III), and initial sales numbers 38% lower than Modern Warfare II (2022)'s in the UK.

**#1**  
selling game of November 2023

**More hours**  
played per player than MW (2019) and MW2 (2022)

**#3**  
top PC/console game by ad spend 2023



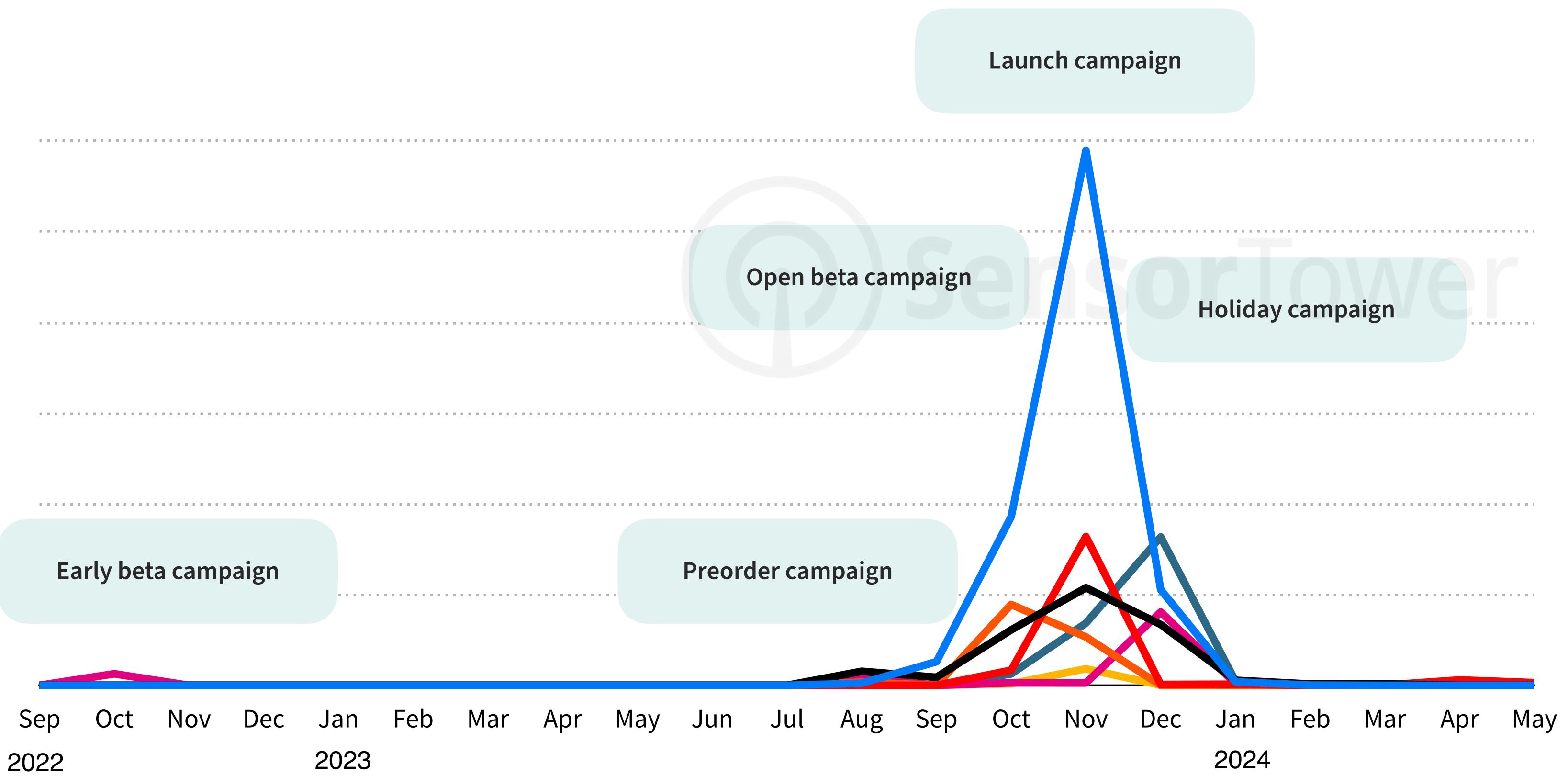
<b>Release Date</b>	November 10, 2023
<b>Publisher</b>	Activision
<b>Developer</b>	Infinity Ward, Sledgehammer Games
<b>Genre</b>	Shooter
<b>Metacritic</b> (Metascore/User Score)	56 / 2.0

Sources for sales statistics: Activision

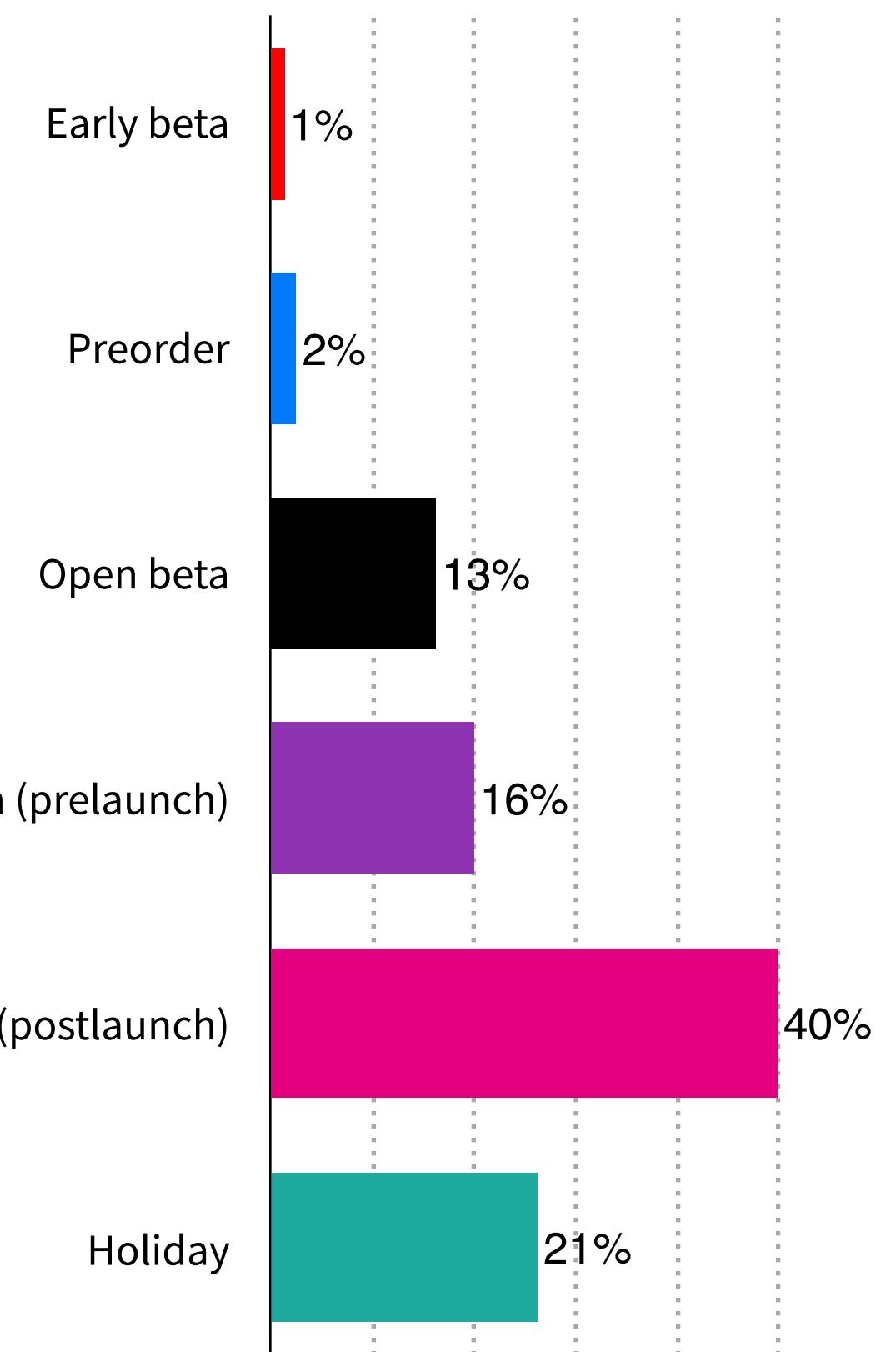
# Call of Duty: Modern Warfare 3 (2023) blended preorder, open beta, launch, and holiday sales into one huge campaign.

*Call of Duty: Modern Warfare 3 (2023) spend over time by network*

— YouTube — Facebook — OTT — Video — Instagram — TikTok — Other



*Call of Duty: Modern Warfare 3 (2023) spend breakdown by campaign period*



## Call of Duty: Modern Warfare III positions itself as a remake with a twist.

Call of Duty: Modern Warfare III (2023) highlights characters from the original, including villain Vladimir Makarov. However, its red branding contrasts sharply with the standard Call of Duty military green branding.

*Call of Duty Modern Warfare III (2023)'s launch trailer YouTube thumbnail*



*Call of Duty: Modern Warfare II (2022) Creative screenshots*



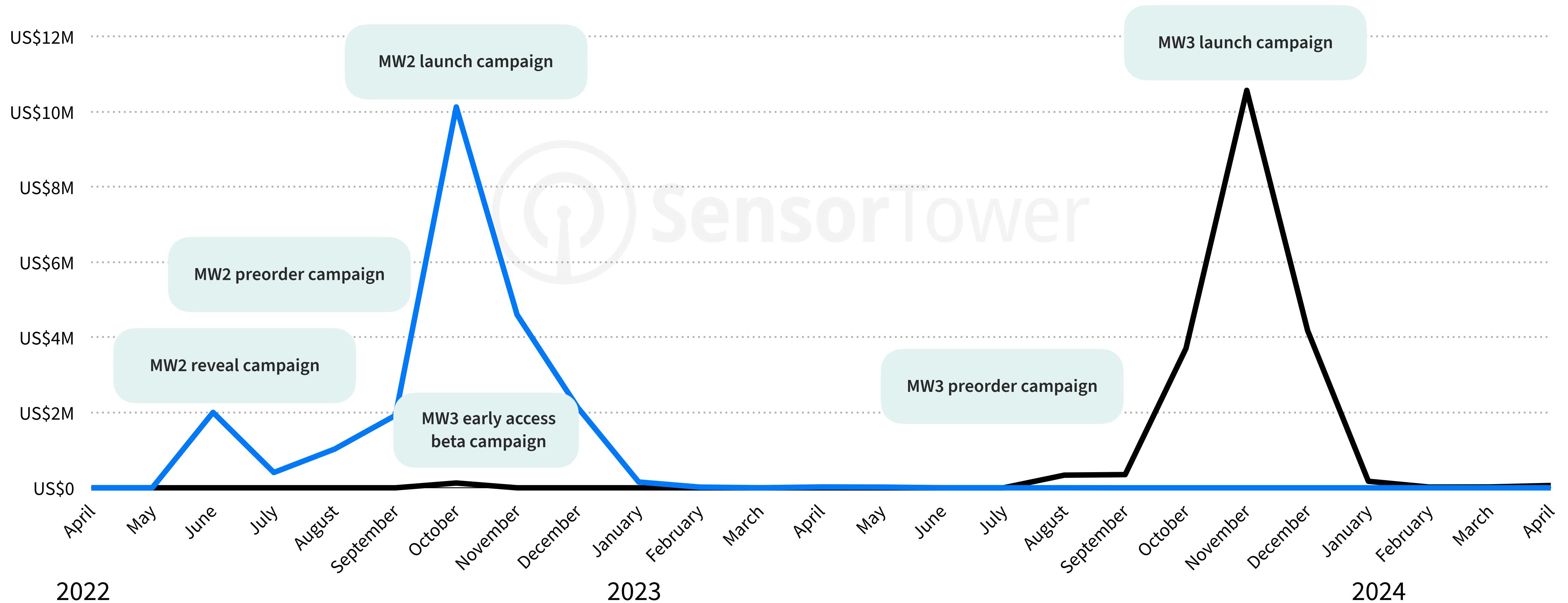
*Call of Duty: Modern Warfare III (2023) Creative screenshots*



# Modern Warfare III did not have a reveal campaign.

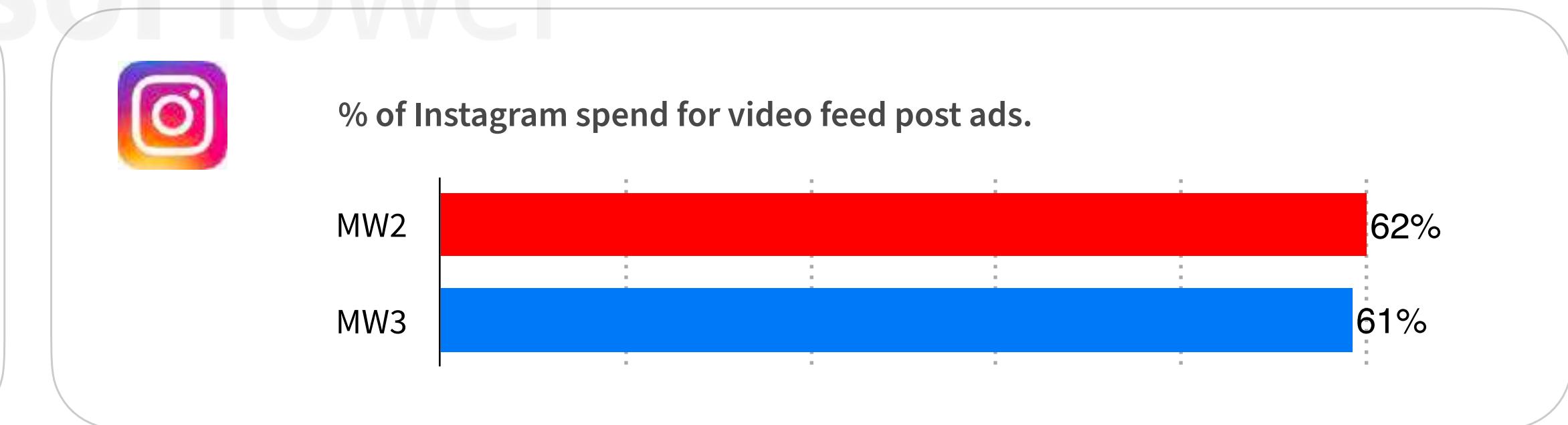
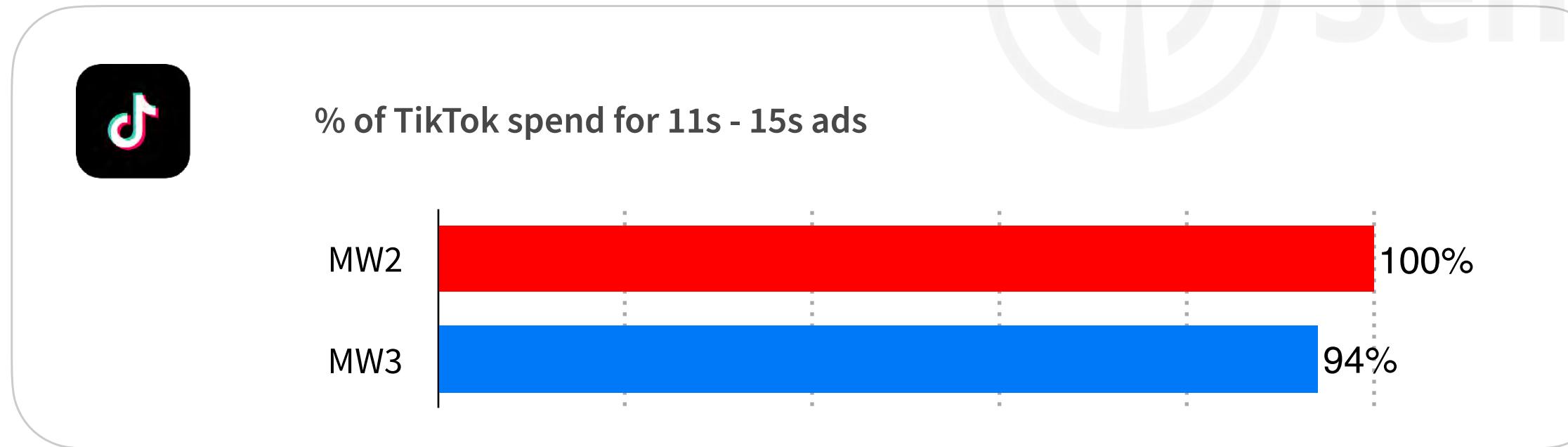
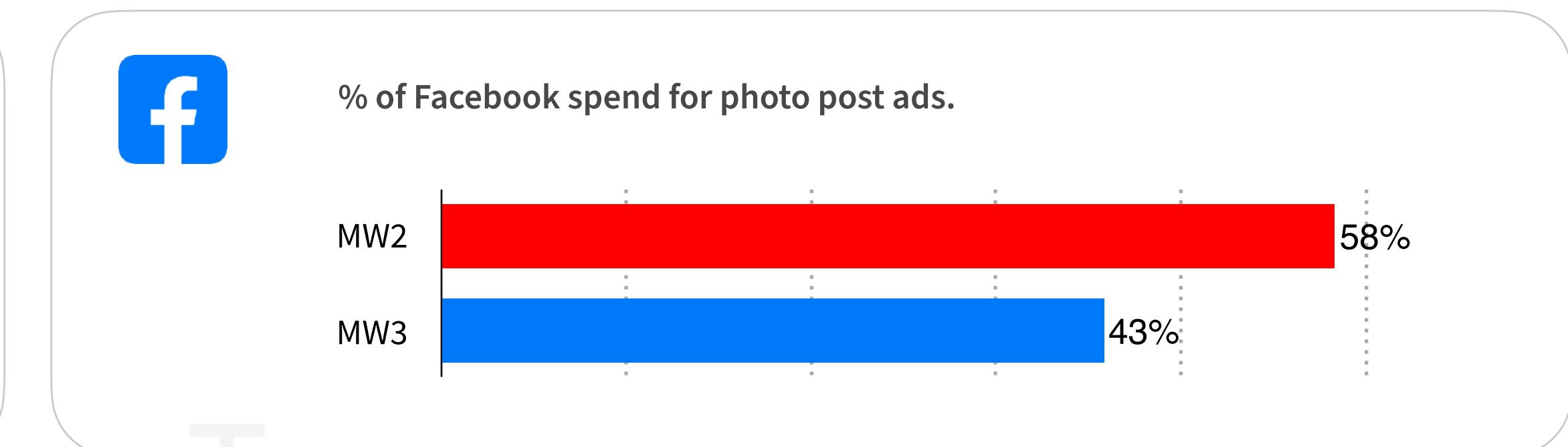
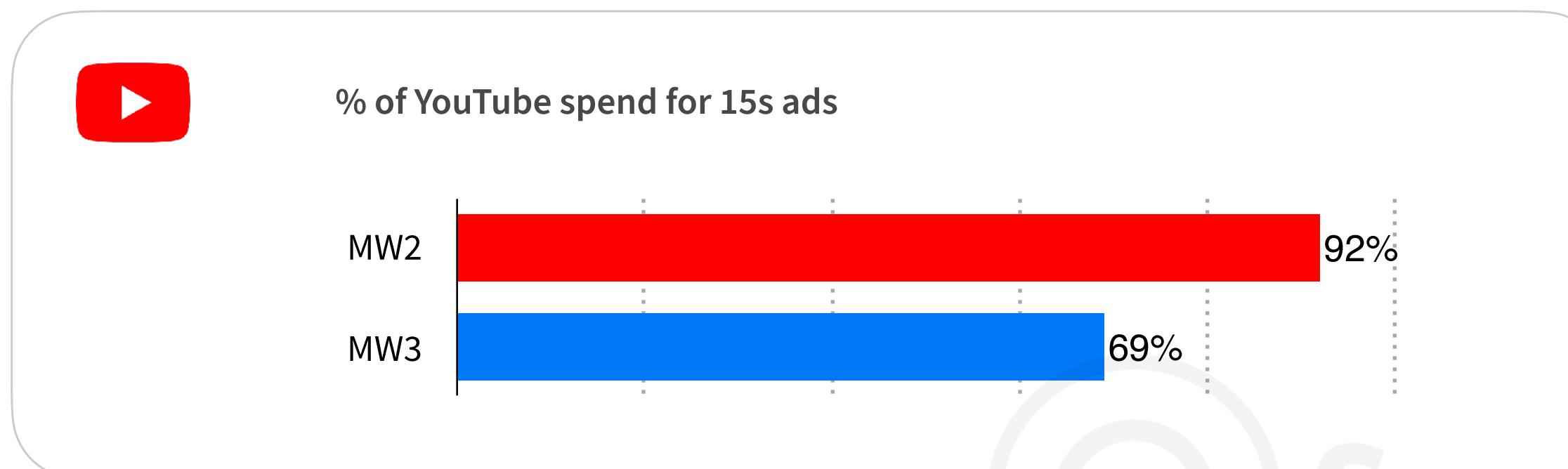
Modern Warfare II (2022) ran a reveal trailer campaign in June before release; Modern Warfare III did not. Modern Warfare III did run a small campaign to get early access beta players during the MW2 launch.

— Modern Warfare 2  
— Modern Warfare 3



# Modern Warfare III diversified its ad formats compared to Modern Warfare II.

*Breakdown of Call of Duty: MWIII and Call of Duty: MWII creative spend by format and network  
30 days pre-launch to 30 days post-launch*



Both Call of Duty games favored video ads around 15 seconds long, though Modern Warfare III leaned more into other ad formats.

For both launches Facebook ad spend was focused more on photo post ads; Instagram was focused on video post ads.

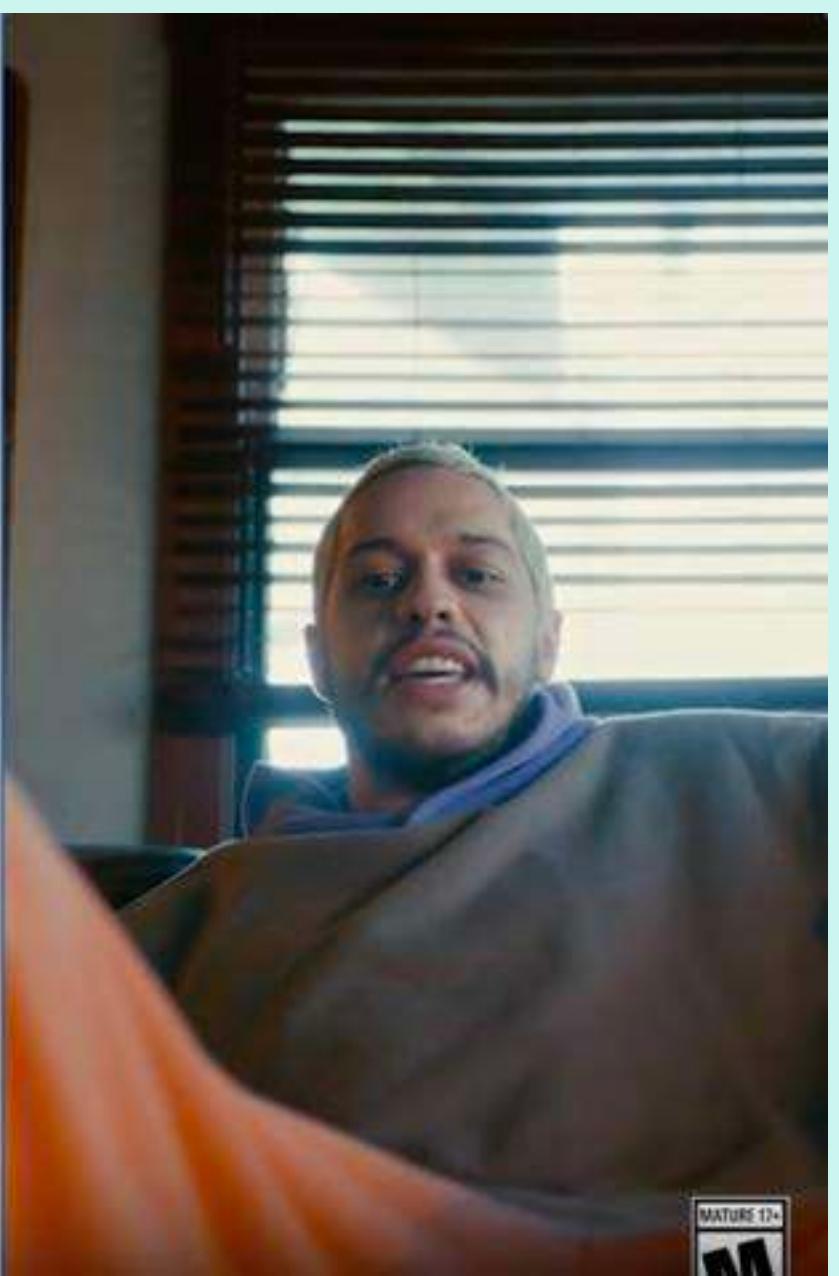


## **Modern Warfare II creative focused on celebrities and media quotes; Modern Warfare III focused on esports influencers.**

Modern Warfare II had Pete Davidson casually singing a song with friends in a commonly used creative. Post-launch, accolades creative can be seen quoting media outlets like Forbes and CNET.

### **Call of Duty: Modern Warfare II (2022)**

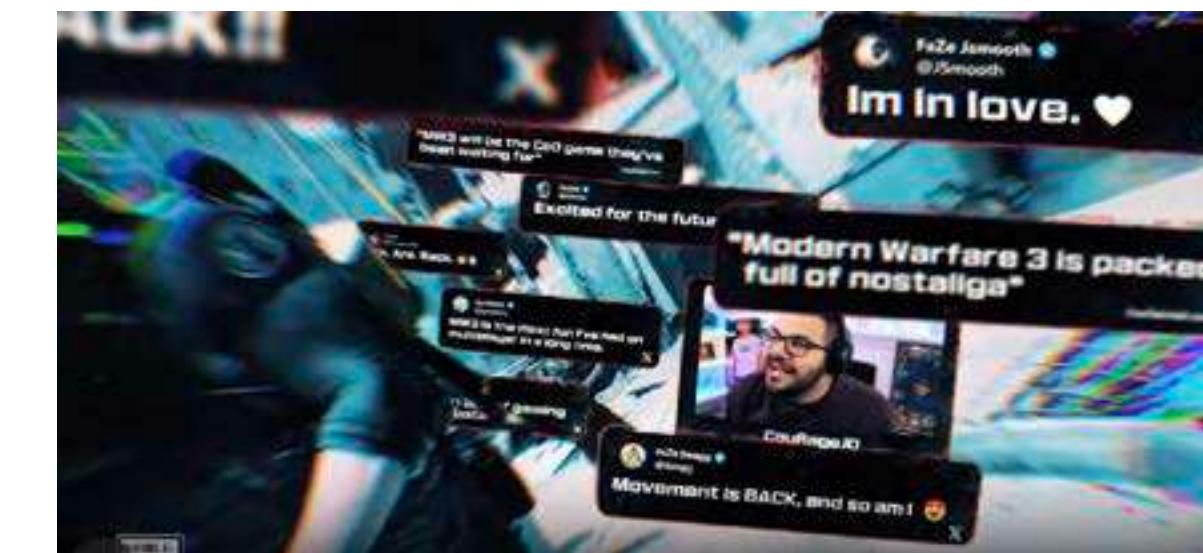
*Creative screenshots*



Modern Warfare III used quotes and clips of esports players and influencers post launch in its accolades campaign.

### **Call of Duty: Modern Warfare III (2023)**

*Creative screenshots*



# PlayStation co-branding were prevalent in both MWII and MWIII creative.

Call of Duty: Modern Warfare II (2022)  
*Creative screenshots*



Call of Duty: Modern Warfare III (2023)  
*Creative screenshots*



**Call of Duty: Modern Warfare III (2023) pre and post launch creative didn't show a significant change in positioning, though "warfare" was more prominent post-launch.**

## *Word cloud of Call of Duty: Modern Warfare III (2023) creative text pre-launch*

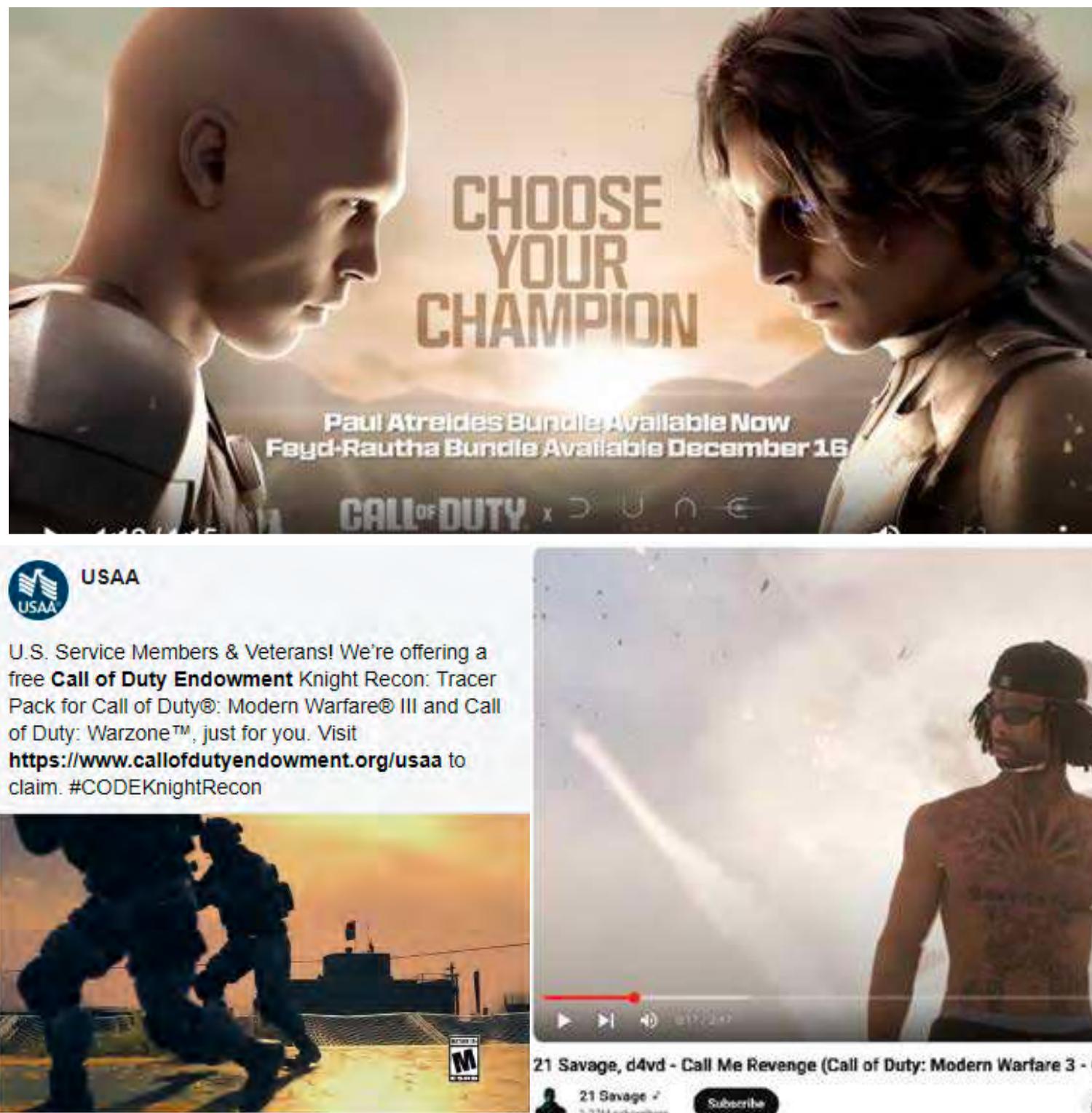


## *Word cloud of Call of Duty: Modern Warfare III (2023) creative text post-launch*



# Call of Duty had some of the most innovative collaborations of 2023 launches.

Some of Modern Warfare III's most unique collaborations include Dune: Part Two, financial services company United Services Automobile Association, and an official song by 21 Savage.



Modern Warfare III branched out of gaming accessories to partner with premium watch brand MVMT.



Modern Warfare III also collabed with more standard gaming partners like Monster.

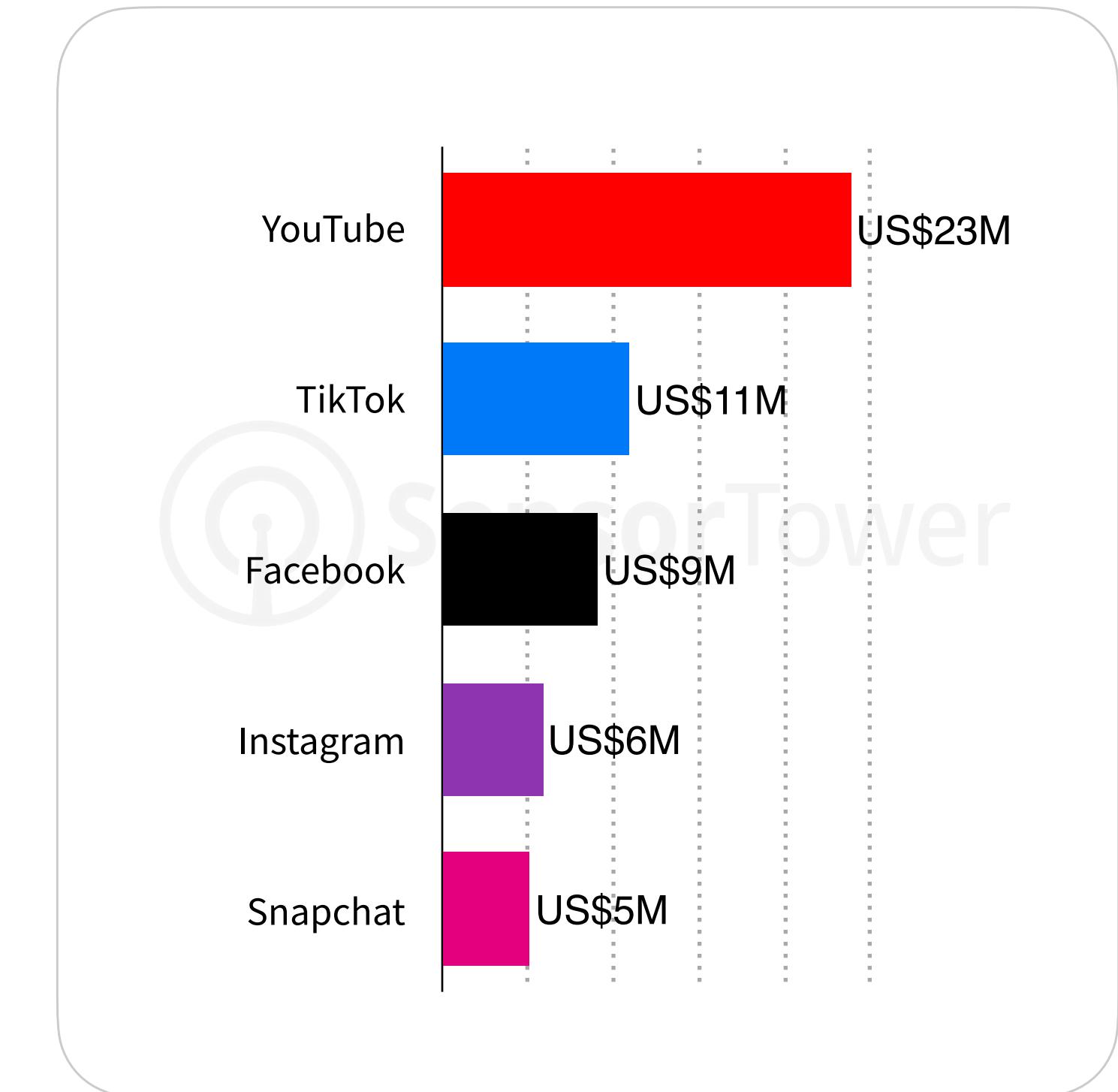
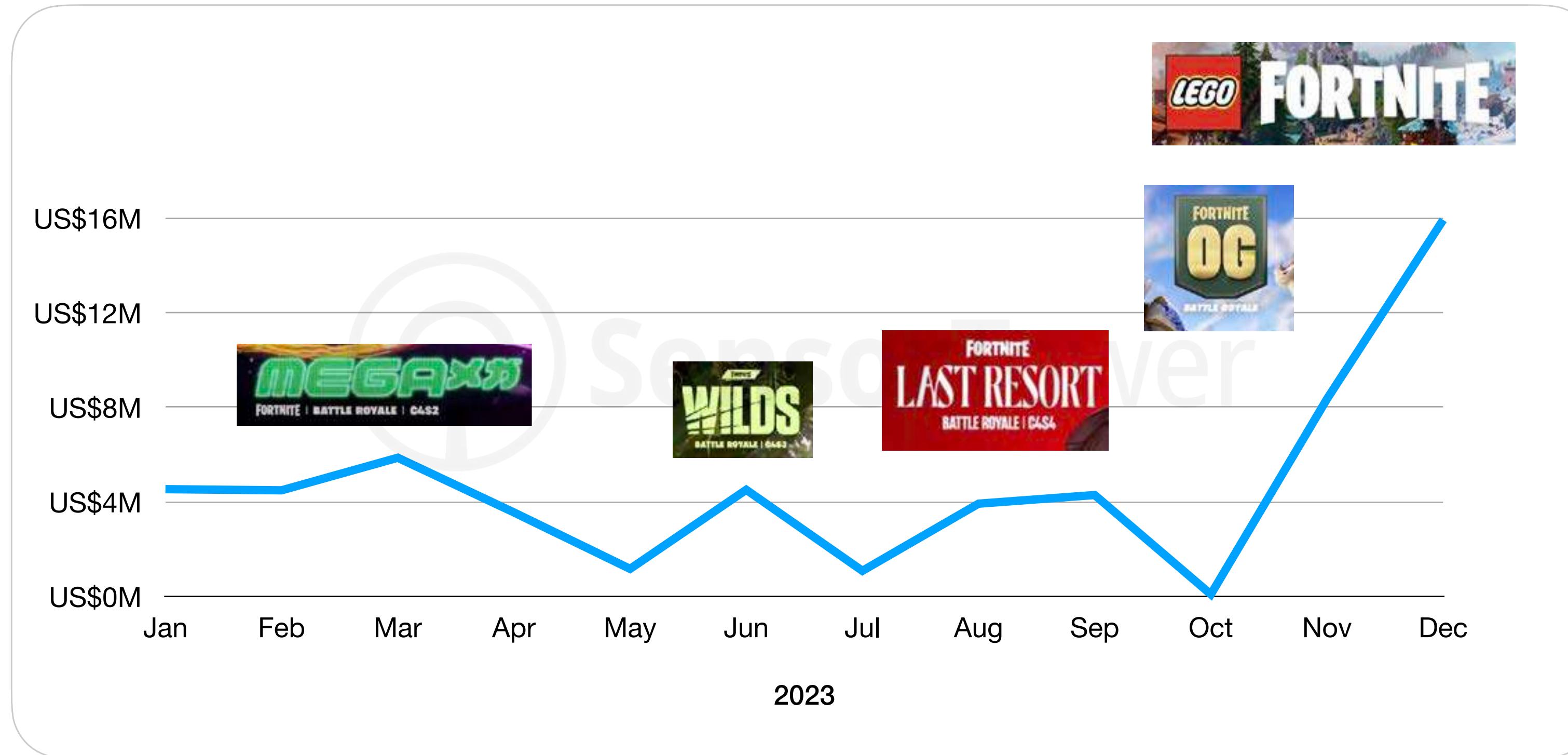


# Live Services Cross-platform Transmedia Sports IP



# Fortnite led live service PC/console games with an explosive 4Q2023 powered by OG Fortnite and LEGO Fortnite.

Fortnite US monthly ad spend



Fortnite was #1 in ad spend among PC/console games in 2023, spending more on a single season of its live services than most games spend on their entire launch campaign. OG Fortnite brought record breaking numbers of players back to the game with classic Fortnite gameplay, then gave them an exciting new collab experience with LEGO Fortnite in the holiday season.



## Honkai: Star Rail shows the power of cross-platform.

Honkai: Star Rail was the 9th highest worldwide grossing mobile game and the #1 game by ad spend 2023.

Honkai: Star Rail was the #2 brand by ad spend May 2023, outspent only by Amazon.

miHoYo was the #3 advertiser by ad spend May 2023, outspent only by P&G and Amazon

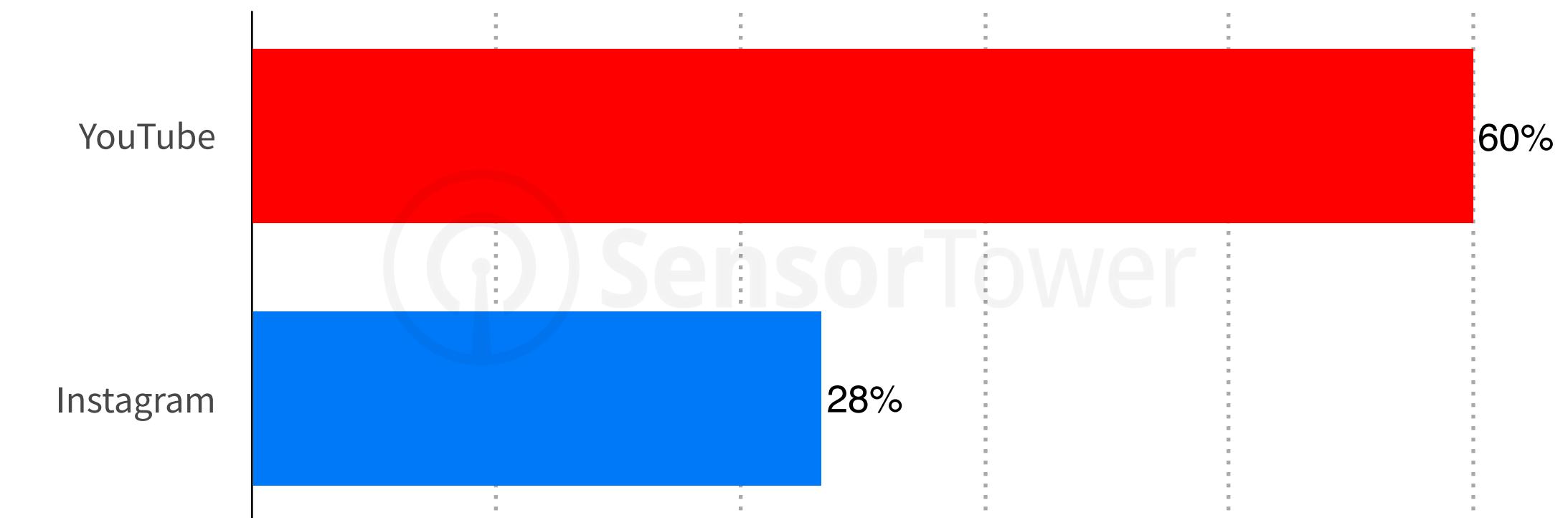
Honkai: Star Rail spent to acquire users overwhelmingly on mobile. From there, players can engage with the game on multiple platforms.

**Honkai:Star Rail**  
*Ad spend by platform 2023*



On PC/Console, Honkai: Star Rail focused on YouTube and Instagram; two channels well suited to showing off its high quality anime visuals.

**Honkai: Star Rail**  
*Ad spend by channel 2023*

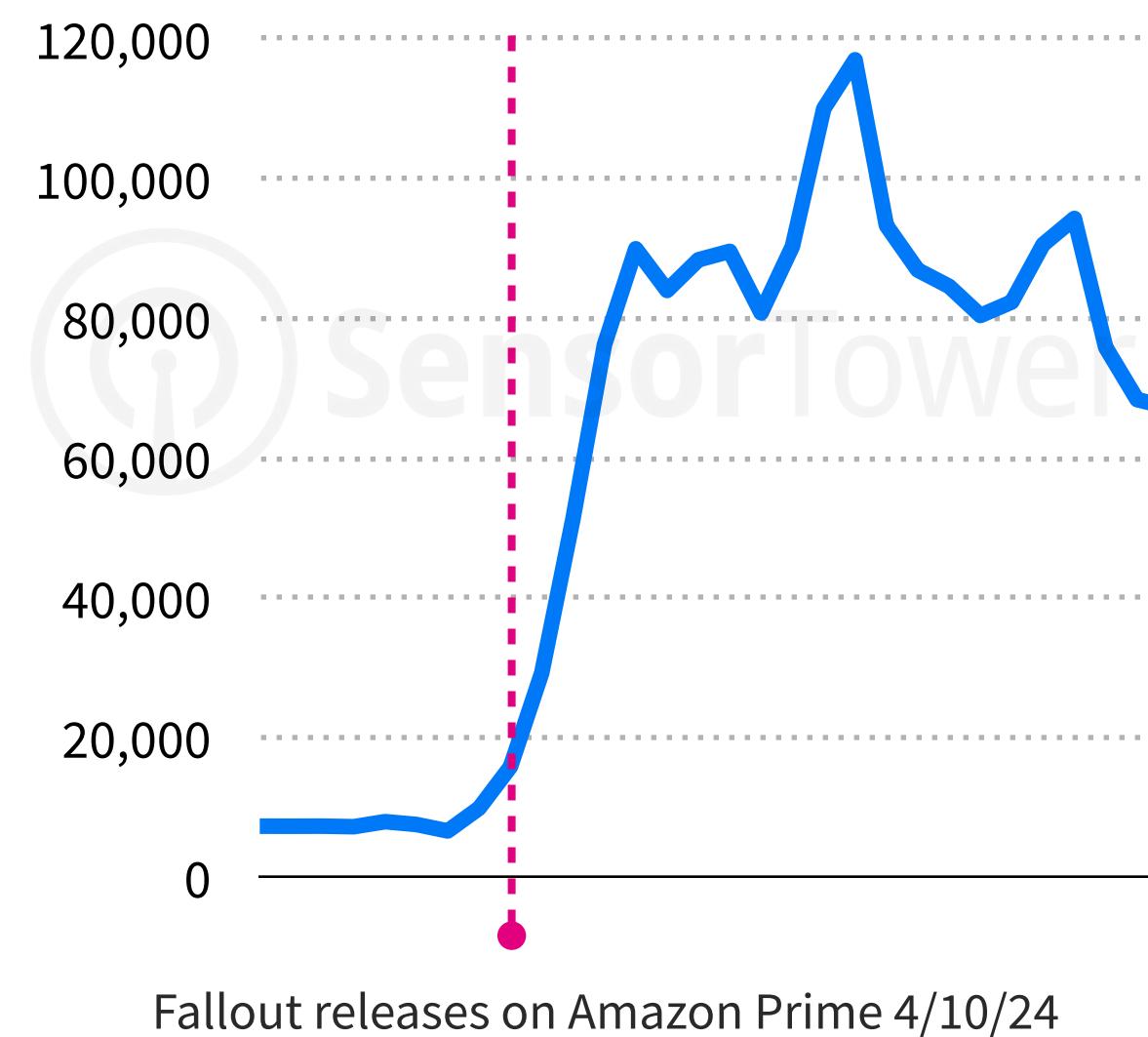


## Fallout's transmedia strategy takes off.

The Fallout show on Amazon Prime was Amazon's 2nd most viewed show of all time, with 65 million viewers. Fallout games universally saw a surge in players.

Fallout Shelter on mobile saw its daily downloads surge 6x as the show released.

*Fallout Shelter daily downloads*



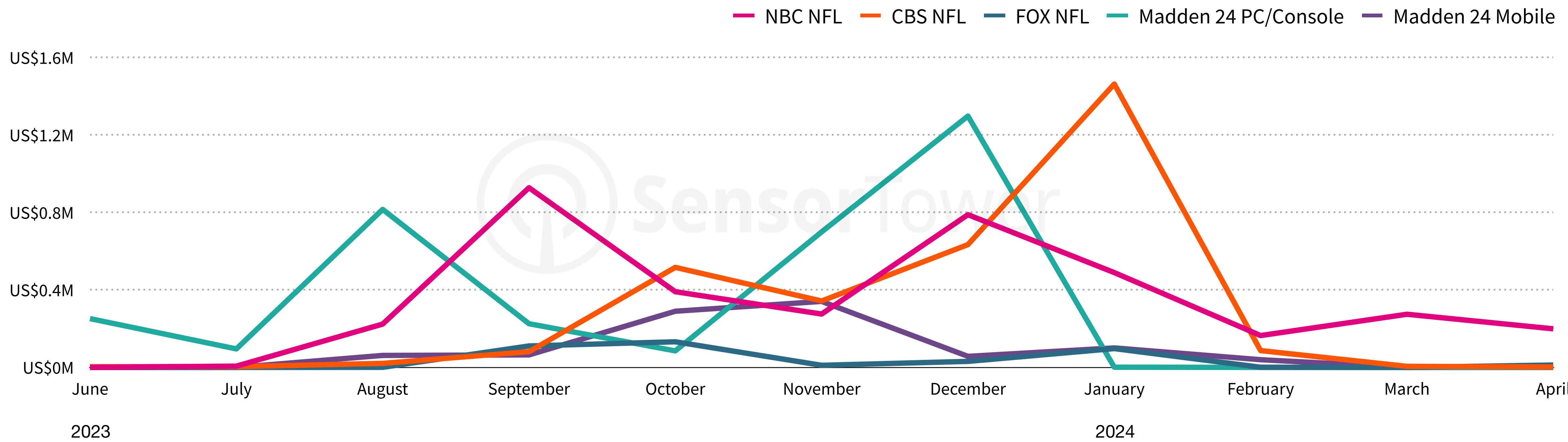
Fallout 76 ran a campaign timed with the show release.

*Fallout 76 daily ad spend*



# Madden 24 PC/console had the 2nd biggest online ad presence of any NFL advertiser.

Monthly digital ad spend of NFL IP advertisers



Madden 24 PC/console outspent NBC NFL, CBS NFL, FOX NFL, and Madden 24 Mobile in digital advertising. The PC/console game also started gearing up advertising a month earlier, which falls in line with its release date occurring about a month before the start of the NFL season.



# Organic successes were still be found in 2023.

Key Art	Game	Key Stat	Price at Launch	Estimated Ad Spend 2023	Notes
	Baldur's Gate 3	"Way" over 10 million players (1)	US\$60	\$4.2 million	Long awaited sequel to the classic RPG Baldur's Gate 2 and made by the creators of the acclaimed Divinity: Original Sin. Baldur's Gate 3 comes from the older but surging Dungeons & Dragons IP and won Game of the Year 2023.
	Lethal Company	Estimated 10 million + copies sold	US\$10	0	Created by solo developer Zeekerss, Lethal Company checks many of the boxes for good content: horror, humor, and multiplayer. Popular content creators picked up the game, and friends were eager to introduce Lethal Company to each other.
	PalWorld	15 million Steam copies sold, 10 million Xbox players	US\$30	\$19k	Known colloquially as "Pokemon with Guns," PalWorld is certainly an engaging game taking cues from survival games like Ark: Survival Evolved, but the inescapable comparison to Pokemon was the catalyst for its virality.
	BattleBit Remastered	3.7 million	US\$15	0	Created by a three man developer team, BattleBit Remastered is in many ways a simplified version of EA's Battlefield. Players touted its streamlined gameplay and simple monetization: \$15 up front and no microtransactions.

Sources:

1. Michael Douse, Larian Studio Director of Publishing (<https://twitter.com/Cromwelp/status/1761874915752325387>)
2. Push to Talk, [steam-revenue-calculator.com](http://steam-revenue-calculator.com)
3. gematsu (<https://www.gematsu.com/2024/02/palworld-early-access-tops-15-million-sales-on-steam-10-million-players-on-xbox>)
4. GameDiscoverCo (<https://newsletter.gamediscover.co/p/battlebit-remastered-how-did-it-sell>)



# Fortnite had an especially diverse list of partners.

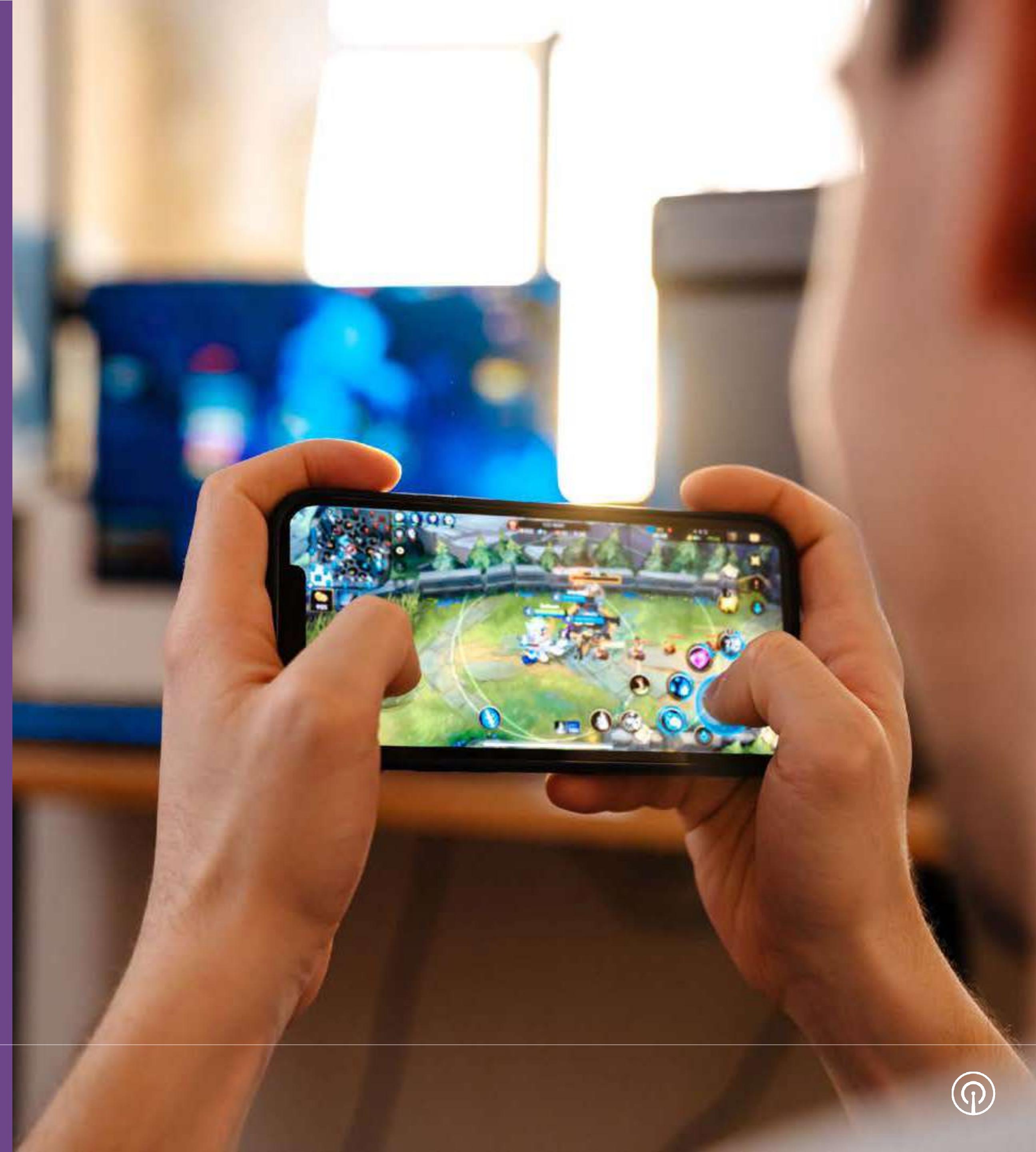
Creative Gallery, Jan 1, 2018 - Nov 30, 2023, All Countries/Regions



Fortnite is a platform as well as a game, allowing it to accommodate a wide variety of brands. One partnership to keep your eye on is Epic Games x Disney: ultimate metaverse platform knowhow + arguably the top IPs in the world.

# Key Takeaways

- 2023 was a year for groundbreaking launches.
- YouTube is the primary ad channel for PC/Console games in the US.
- Top PC/Console games in 2023 all took advantage of huge existing audiences to varying degrees.
- Fortnite is the top game by ad spend in US PC/console gaming 2023.
- Activision Blizzard is the top publisher by ad spend for US PC/console gaming in 2023.
- Hogwarts Legacy was the biggest launch of 2023, both by sales and by ad spend.
- Hogwarts Legacy messaged Harry Potter IP fantasy fulfillment expertly in its launch campaign.
- Diablo IV was the biggest launch of 2Q2023 and its performance might be underestimated given its live services.
- Diablo IV started running sales campaigns only a few months after launch.



# Key Takeaways

- Diablo IV was the biggest launch of 2Q2023 and its performance might be underestimated given its live services.
- Diablo IV started running sales campaigns only a few months after launch.
- Starfield might have been the most highly anticipated game of 2023, being the first original work from the creators of Skyrim and Fallout in 25 years.
- Starfield was available on Xbox's Game Pass from Day 1, but still had a top 10 best selling performance of 2023.
- Call of Duty: Modern Warfare 3 saw a mixed reception at launch, but still managed to become the second best selling game of the year.
- Key differences can be spotted between how Activision ran the MW3 campaign and how they ran the MW2 campaign.



# Meet the Author

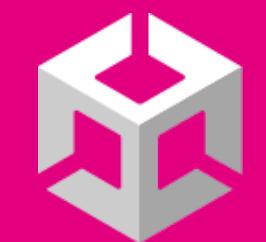
Sam is a Gaming Insights Analyst for Sensor Tower. He has experience as a product manager in gaming and holds a Master's of Business Administration from the University of Southern California. Sam has been passionate about games his entire life and now shares insights about gaming from Sensor Tower with the industry through reports and on LinkedIn.



**Sam Aune**

Insights Analyst, Gaming





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