



バーチャル

CULTURE & TRENDS REPORT

VIRTUAL CREATORS

The virtual evolution
of the creator

THE CREATOR LANDSCAPE IS EVOLVING

The launch of YouTube in 2005 brought with it the introduction of an entirely new type of creative professional: the Creator. Uninhibited by industry gatekeepers, creators were able to bring their visions directly to broad audiences without needing to shape their content to fit within any established norms or brand guidelines. That freedom afforded them something invaluable that still eludes mainstream media today: **authenticity**.^{1,2} Always evolving, YouTube is today being revolutionized by a new type of digital-born personality native to our virtual world.

Enter: Virtual creators and artists. These animated digital avatars demonstrate that even after twenty years, YouTube creators are still surprising, delighting, and challenging us to broaden the circumference of our appreciation for self-expression and creativity.

*Hi I'm Cat,
I am a VTuber!*



¹ According to a survey by MTM, 61% of viewers in EMEA agree that when they watch content from creators on YouTube they think they're authentically themselves. Source: Google/MTM, Why We Watch Indispensability, EMEA, 2024. Base: UK, FR, DE, ES, IT NL, PL, SE, KSA: People who claim to use video content services at least once a week: n = 12,000

² According to a survey by MTM, viewers in EMEA rated the authenticity of YouTube creators significantly higher than that of creators and producers on Broadcast or Social Media platforms. Source: Google/MTM, Why We Watch Indispensability, EMEA, 2024. Base: UK, FR, DE, ES, IT NL, PL, SE, KSA: People who claim to use video content services at least once a week: n = 12,000

VIRTUAL INFLUENCE IS HERE

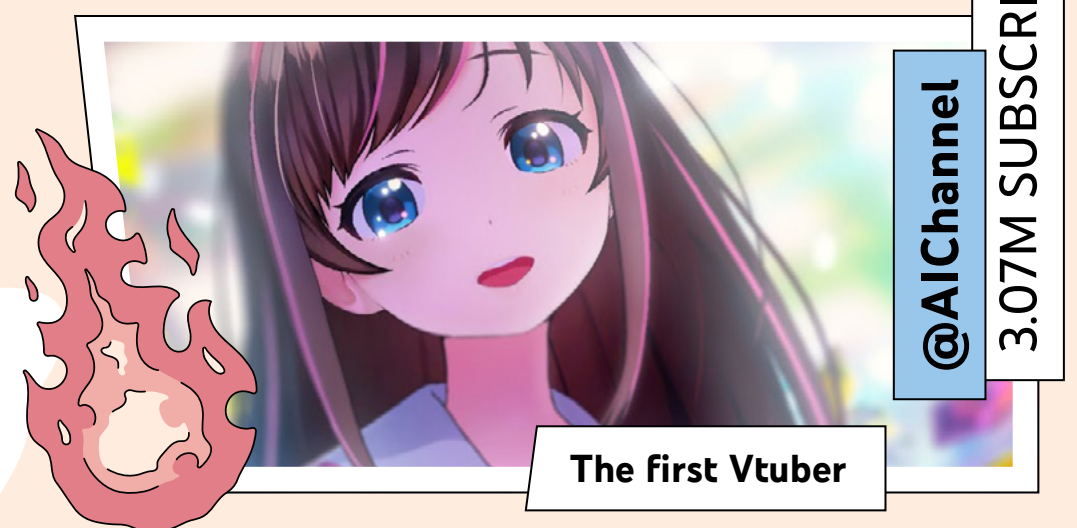
Our first mention of virtual creators and artists came in our 2020 Culture and Trends Report as we touched on Vtubers as an emerging phenomenon, but it's clear they are having a breakthrough moment. That breakthrough can be measured in terms of **direct**, **broad**, and **mainstream** influence.

Directly, last year a sample of just 300 Virtual Creators on YouTube earned over 15 billion views across videos, live streams, and Shorts, with one billion of those views coming from the U.S. alone.³

Broadly, last summer they drove viewership of gaming content, pushing Grand Theft Auto into the #1 spot for most-watched game on live streams for the month of June.⁴

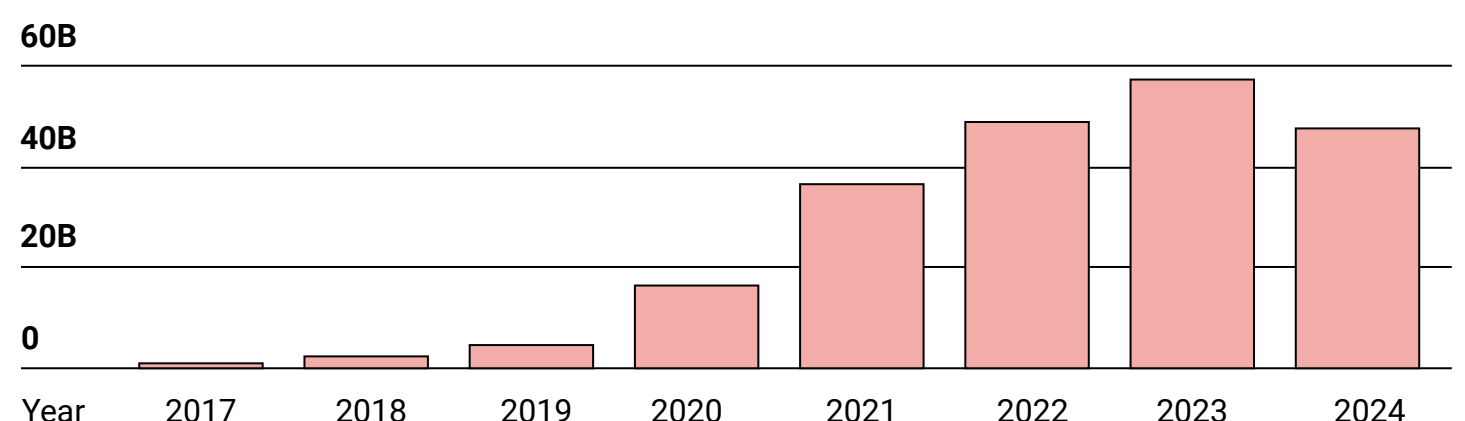
In the **mainstream**, virtual singer Hatsune Miku appeared “IRL” at the Coachella Music Festival, virtually at the Fortnite Festival and was featured in a McDonalds marketing campaign (exclusive to Japan).

Five years ago, it would've been easy to dismiss virtual creators and artists as a fad. Today, they are undeniably significant players driving culture in a rapidly evolving online creative landscape.



ANNUAL VIEWS OF VIDEOS RELATED TO VTUBERS⁵

OVER THE PAST THREE YEARS, VIDEOS RELATED TO VTUBERS HAVE AVERAGED 50 BILLION VIEWS ANNUALLY.



³ Source: YouTube Data, Global, 2024. ⁴ Source: YouTube Data, Global, June 2024. ⁵ Source: YouTube Data, Global, 2017 - 2024.

CURRENT VIRTUAL CREATOR LANDSCAPE

At first glance, the Virtual Creator community may seem homogenous. But the landscape of Virtual Creators - specifically what kinds of Virtual Creators there are - is a diverse one. We will explore four different types of Virtual Creators.

VTuber



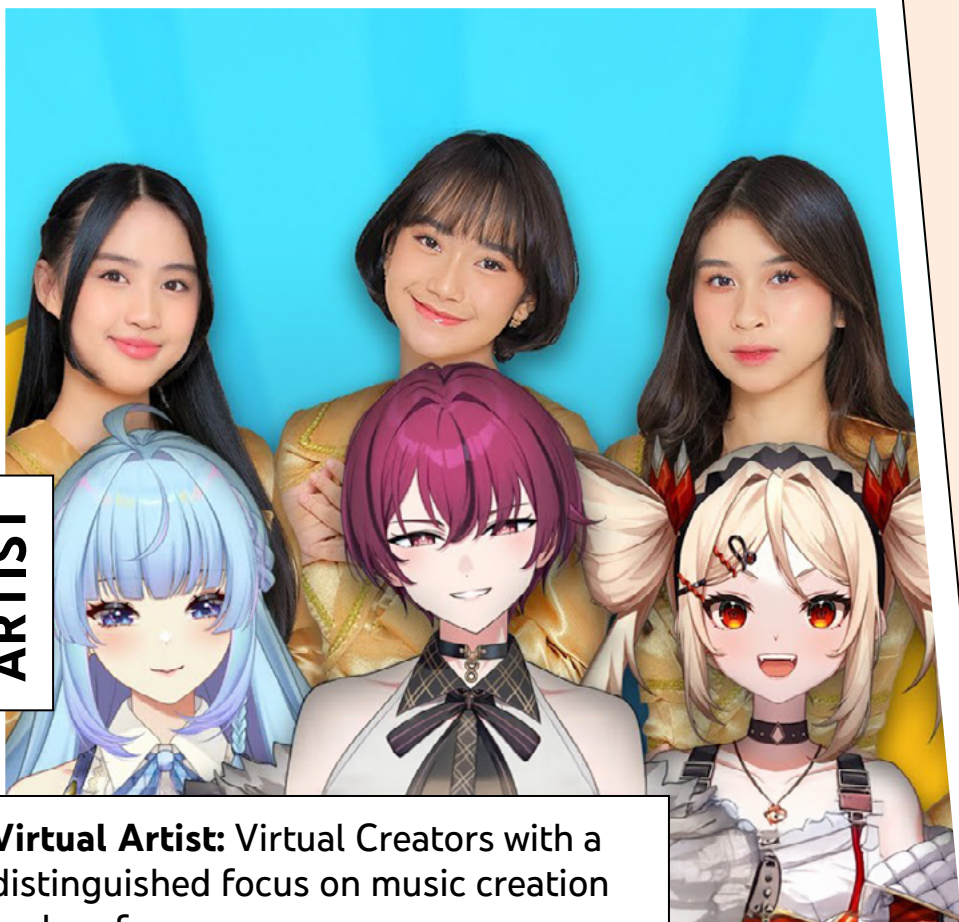
Vtuber: A distinct type of on-screen persona, a virtual character living in the real world.

GAMING



Gaming Virtual Creator: Virtual creators who utilize the character creation in video games to develop virtual personas.

ARTIST



Virtual Artist: Virtual Creators with a distinguished focus on music creation and performance.

HUMAN



Virtual Human: Virtual Creators who represent themselves more “realistically” than their fantastical video game or anime-derived counterparts.

DEFINING VIRTUAL CREATORS

A Virtual Creator is a constructed persona represented by a digital avatar - usually (but not always) created and performed by a real-live human being who behaves just like an actual Creator.

Production

Virtual Creators and artists are brought to life through a variety of technical means.

- ✦ Video Game Software
- ✦ Live Motion Capture
- ✦ Other CGI Tools
- ✦ Holographic Projection
- ✦ Artificial Intelligence

The Virtual Creator's avatar isn't meant to resemble the performer but embodies a distinct persona. A shared illusion invites both creator and audience to treat it as independent from its human counterpart—essentially, an animated character existing in the real world, creating platform-native content.

Defining Characteristics

- ✦ **CGI Avatar Representation**
Virtual Creator or artist is an online persona represented by a CGI avatar.
- ✦ **Not Representative**
The avatar is not a direct representation of the performer.
- ✦ **Audience Understanding**
Its audience must knowingly interact with the persona as a Virtual Persona and not as the performer.
- ✦ **Platform-Native Content**
The creator or artist must create in formats endemic to their platforms.



Aesthetics & Style



Anime-Inspired
Character designs for Vtubers inherit anime and manga aesthetics.



Video Game
Gaming virtual creators inherit the aesthetics of the video game the character is based in.



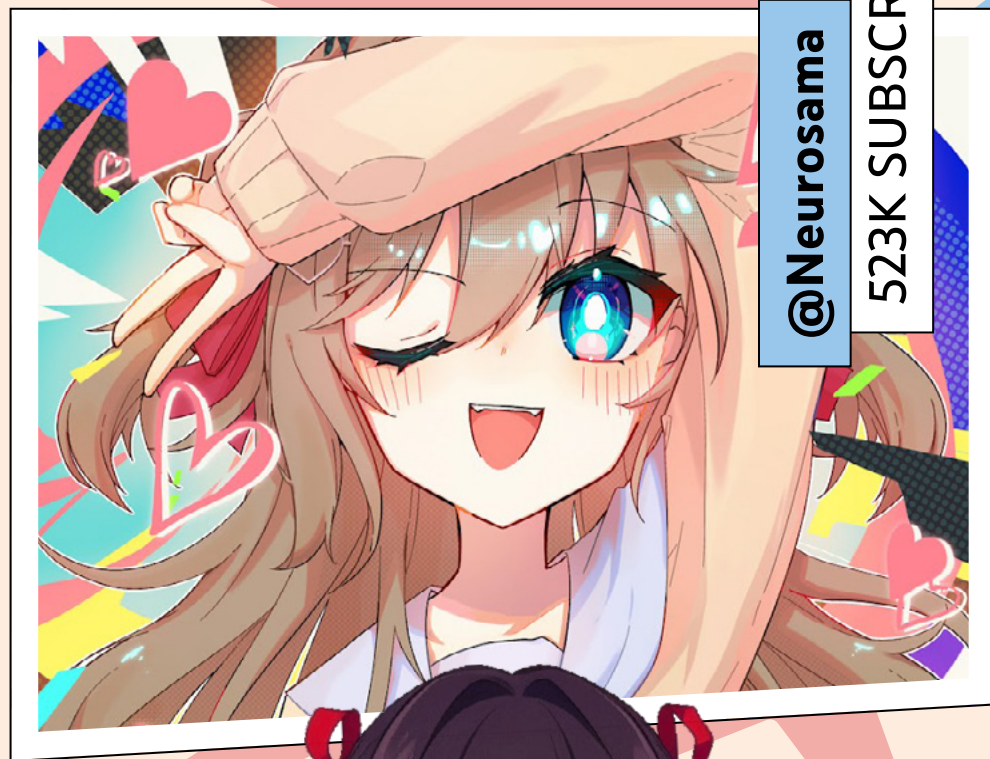
Digital Realism
Virtual humans attempt to more fully and realistically replicate the human body and face.

VTUBER

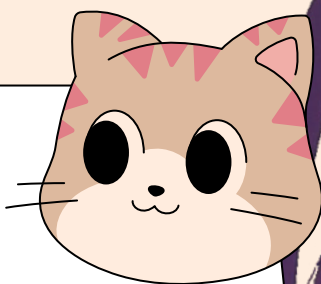
When we say “VTuber,” we refer to a distinct type of on-screen persona, a virtual character living in the real world. An invention of Japanese online culture, VTubers almost monolithically resemble anime characters both in the way that they look and how they interact with the world around them.

Some VTubers are developed by agencies like hololive in Japan, which treat them as intellectual property for branding. Smaller agencies often operate like independent creators, using the VTuber persona to attract views and generate ad revenue.

Also worth mentioning are the AI creators, like **Neuro-Sama**, a VTuber with nearly five hundred thousand subscribers, whose presence is entirely run by a LLM.



16/20



**Channels with the Greatest
Superchat Revenue of all time
belong to Vtubers (as of Feb 2025).**

GAMING VIRTUAL CREATORS

Video games that offer flexibility in character creation and player activity have created an easy way for creators to develop virtual personae. Of these, Roblox and VRChat have emerged as increasingly popular platforms from which game-based virtual creators can emerge.

@iDatchy

1.84M SUBSCRIBERS



@Princejeth16

4.52M SUBSCRIBERS

Many creators have YouTube channels helmed by their Roblox avatars, with performances carried out in-world. But they also often participate in real-world content trends — such as dance challenges — as seen with creators like **Nats Venturina** and **iDatchy**. Because this technology is easily accessible, we expect more experimentation here.

VIRTUAL ARTISTS

Unlike VTubers, Virtual Artists are distinguished by their focus on music creation and performance. And we can further identify Virtual Artists by the extent to which they have digitized themselves:

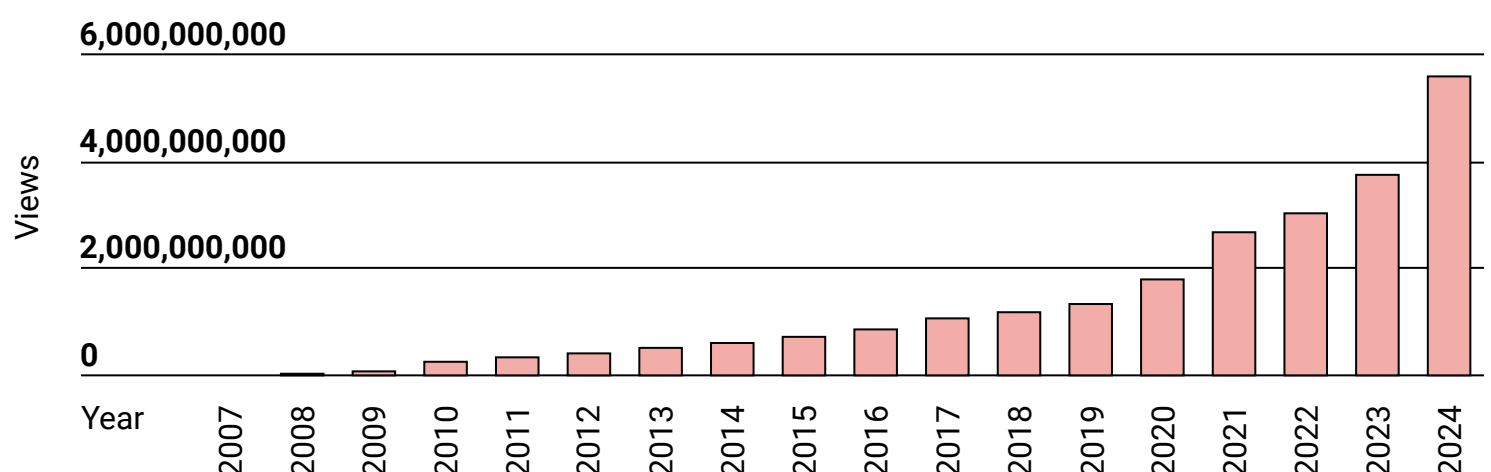
Vocaloids™: Vocaloids™ are synthesized singing voices, the most famous of all belonging to **Hatsune Miku**, who is both a singing voice and a character developed by Crypton Future Media, INC. These characters may function as virtual artists.

Virtual artists: Virtual artists are brought to life in a number of ways. Some perform a digital persona with a real-life singing voice from the character's creator. For example, JKT48 uses this technology to create digital representations of their real-world counterparts. The girl group Aespa takes this a step further with virtual representations of physical-world members and one fully virtual member of the group, AI-generated Naevis. Finally, there are also fully virtual K-Pop bands like Plave and MAVE: who only exist digitally.



ANNUAL VIEWS OF VIDEOS RELATED TO HATSUNE MIKU⁸

VIEWS OF VIDEOS RELATED TO HATSUNE MIKU HIT ALL-TIME HIGH IN 2024



⁸ Source: Google/SmithGeiger, YouTube Trends Survey, US May 2024, N=312 online Gen Z respondents fans age 14-24. ⁸ Source: YouTube data, Global, 2007 - 2024 Source: Google/SmithGeiger, YouTube Trends Survey, US May 2024, N=847 online fans age 14-44.

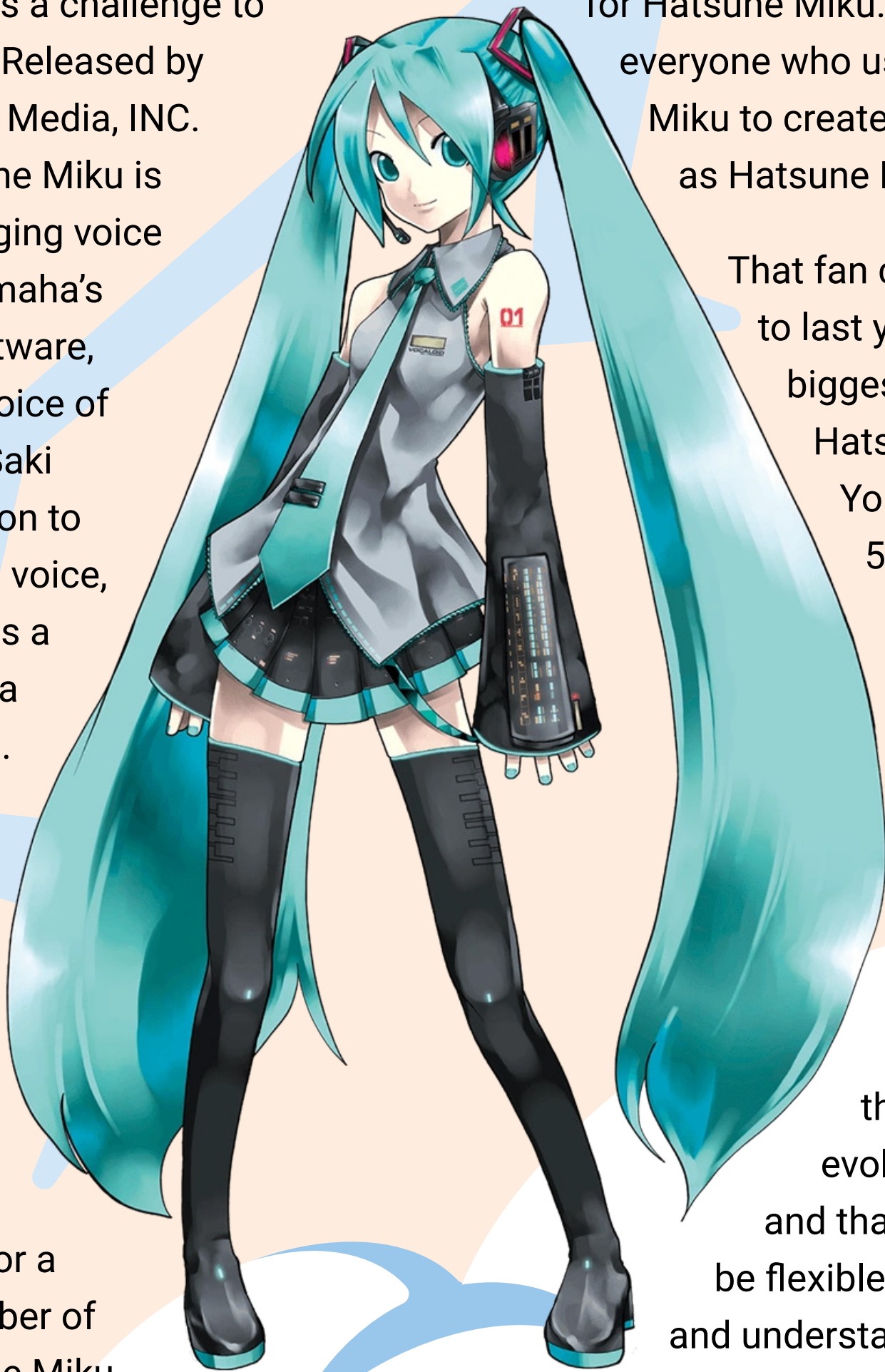
THE RULE-BREAKER

Although we have said that virtual creators and artists are digital personas being performed by a human, Hatsune Miku represents a challenge to that definition. Released by Crypton Future Media, INC. in 2007, Hatsune Miku is a synthetic singing voice created for Yamaha's VOCALOID software, based on the voice of voice actress Saki Fujita. In addition to being a singing voice, Hatsune Miku is a character with a specific design. Hatsune Miku has her own songs, but because she's a voice anyone can use, she has been the singing voice for a countless number of songs. Hatsune Miku was designed to be used

by others to express their creativity, so, unlike with many other virtual creators and artists, there is no one performer for Hatsune Miku. Instead, everyone who uses Hatsune Miku to create then performs as Hatsune Miku.

That fan creativity led to last year being the biggest ever for Hatsune Miku on YouTube with over 5.5 billion views of videos related to Hatsune Miku.

Hatsune Miku's inability to fit neatly within the definition provided serves as a reminder that this is an evolving landscape, and that we will need to be flexible in our definitions and understanding of the space to fully appreciate it.



VIRTUAL HUMANS

Whereas VTubers aim to look more like fantastical video game and anime characters, Virtual Humans are meant to represent a more “realistic” Virtual Creator.

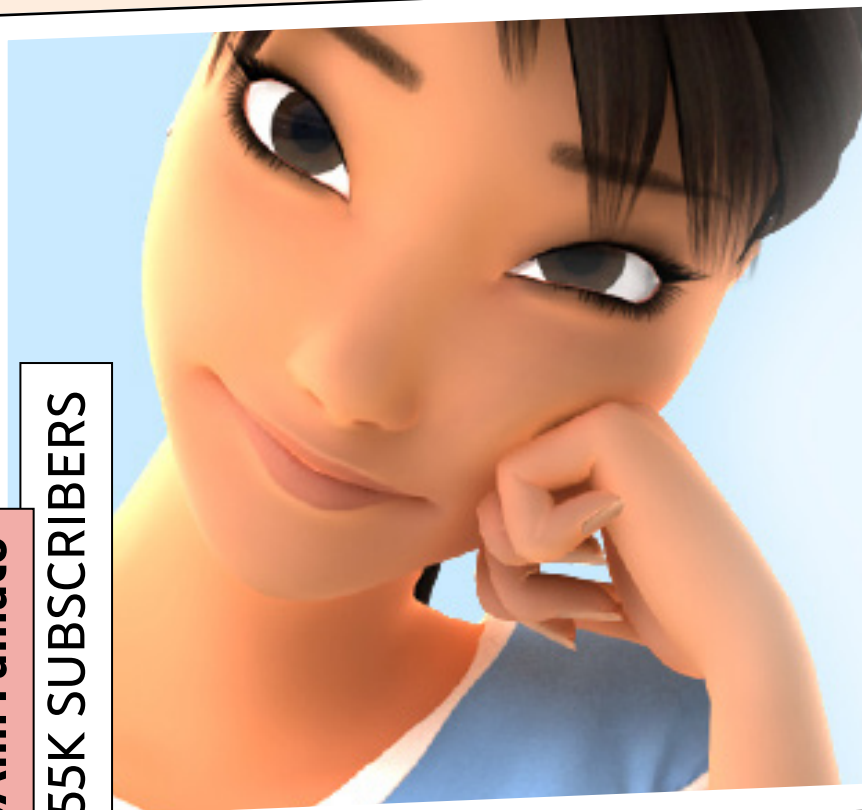
There’s **Ami Yamato**, who is arguably the first and longest-running Virtual Creator, **first appearing on YouTube in June of 2011**. There is also **Lil Miquela**, a persona who pioneered the concept of a “virtual influencer,” promoting and selling products on its channel since 2016. Recent leaps in technology have brought life to Virtual Humans like **Code Miko**, whose content looks and feels like that of other massively popular creators.

There is a growing effort to create Virtual Humans that are nearly indistinguishable from real people. Services like **dobstudio** allow users to “build a whole new digital life” with unique faces for content on platforms like YouTube, Instagram, and TikTok. Currently focused on B2B, it’s only a matter of time before similar services become available to the general public.



@lilmiquela

273K SUBSCRIBERS



@AmiYamato

155K SUBSCRIBERS



@CodeMiko

665K SUBSCRIBERS

HISTORY

We are entering a breakthrough moment for Virtual Creators, but the journey to that moment began almost thirty years ago.

1996

Kyoko Date. First character developed to be a CGI idol, her “little sister,” **Ayano**, would become a VTuber.

2001

Virtual Band **Gorillaz** release first album.



沿革

2007

Vocaloid™/Virtual Singer **Hatsune Miku** released.



Ami Yamato's first upload.
First Virtual Creator.

2011



2015

Lil Miquela.
First virtual influencer.



2016

Kizuna AI.
First VTuber.



2017

Tokino Sora.
First hololive VTuber.



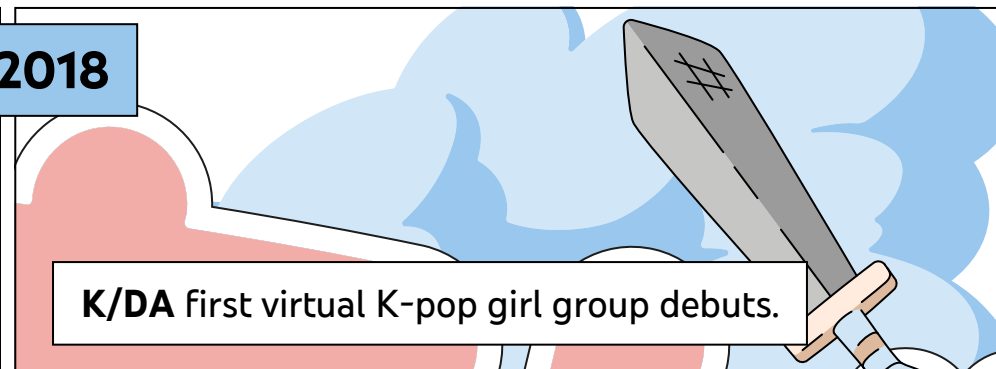
2018

First **Nijisanji** VTubers debut with 2D models.



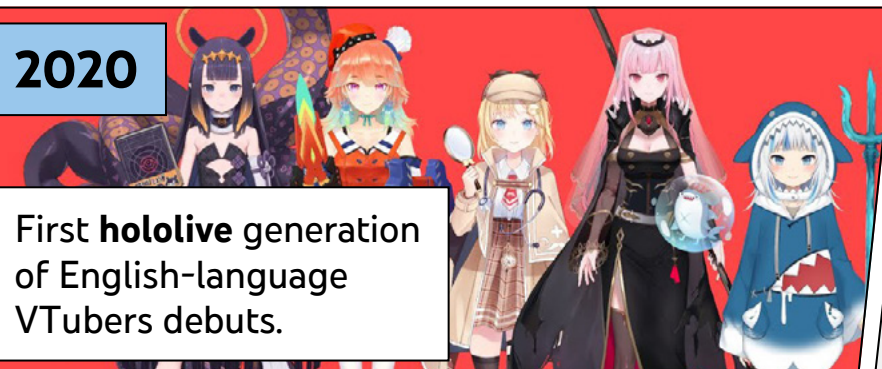
2018

K/DA first virtual K-pop girl group debuts.

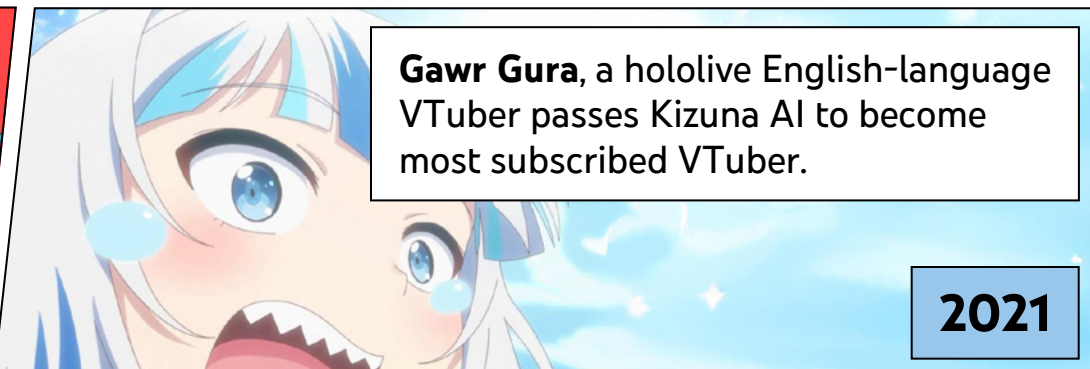


2020

First **hololive** generation of English-language VTubers debuts.



Gawr Gura, a hololive English-language VTuber passes Kizuna AI to become most subscribed VTuber.



2021

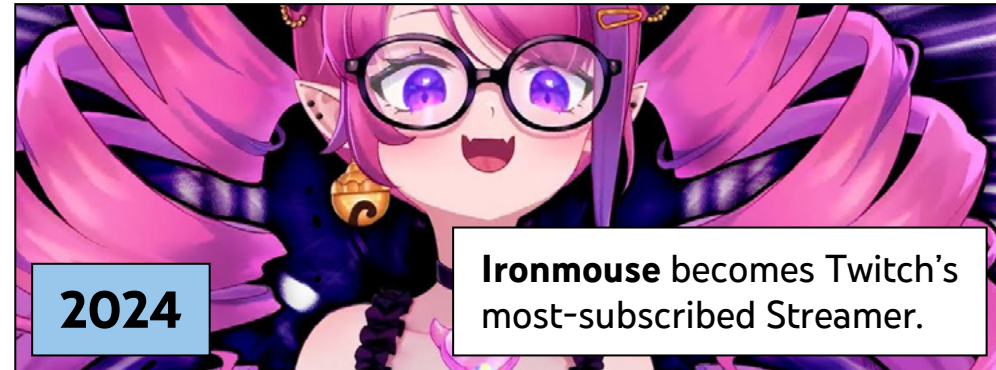
2022

Neuro-sama. Reputed to be the first AI VTuber.



2024

Ironmouse becomes Twitch's most-subscribed Streamer.



HOW WE GOT HERE

People have *attempted* to manifest Virtual Creators for nearly thirty years, but the conditions necessary to realize that aspiration have only really materialized recently:

Technology: Persistent, gatekeeper-free platforms like YouTube provided the infrastructure for the content to live on while also ensuring that the endeavor is economically viable, but innovations in software, like Live2D, made it easy for these creators to produce content.

Audience: Younger audiences were primed for VTubers by pre-existing tastes, including their appreciation for video games, anime, and YouTube content. Their fluency in online



57%

Of people surveyed (online 14-44 year olds) watched a VTuber (Virtual YouTuber or Influencer) in the past 12 months.^{6,7}

⁶ According to a SmithGeiger study conducted in the US, May 2024.

⁷ Source: Google/SmithGeiger, YouTube Trends Survey, US May 2024, N=312 online Gen Z respondents fans age 14-24.

fandom, including creating fan art and clipping livestreams, helped spread the reach of these VTubers.

Gaming: Gameplay streaming is both mechanically ideal and aesthetically complementary to virtual creators, and it's familiar to YouTube viewers. In 2025, new gaming tournaments are uniting VTubers. A notable event hosted by VTuber **Sakura Miko** featured 26 VTubers in a "loser advances" format, while the hololive New Year Game Festival on January 13 saw over 50 VTubers in teams. Both events topped Trending, showcasing their popularity. In June 2024, Grand Theft Auto V became the most-watched live video game of the month thanks to VTubers streaming collaboratively.




@SakuraMiko

2.31M SUBSCRIBERS

1/3 OF THE TOP 100

Channels with the most live watchtime related to GTA V in June 2024 were VTubers.



THE HUMAN ELEMENT

Behind the “virtual” lies an engine of human connection, fueled by the authenticity of its creators. Many find that adopting an alter ego allows them to express their talents and creativity more fully, often making them seem more genuine than their peers. This virtual persona helps alleviate the anxieties of creators who may hesitate to share their passions or their person, allowing them to showcase their ideals rather than their material circumstances.

And let’s not forget about the humans on the other side of the screen. The relationships between virtual creators and artists and fans mirror those of human creators and fans both in how they work mechanically and in the degree of influence they have on YouTube and pop culture. Importantly, virtual creators and artists have benefited greatly from fan creation, including clipping and sharing livestreams and creating songs with Hatsune Miku.



In fact, a recent survey by Japanese website, **Nifty Kids**¹, found that more kids wanted to be VTubers than YouTubers, meaning that not only do viewers find Vtubers to be relatable but also aspirational. This suggests they see becoming virtual creators as a way that they may express their own identity and creativity.

¹ Source:
Nifty Kids https://kids.nifty.com/research/work_20250102/

WHAT IT MEANS FOR YOU

Our 2020 trends report indicated that fewer than half of respondents were open to watching videos from virtual creators, but the 2024 fandom trends report found that 57% of 14 to 44-year-olds watched a virtual creator in the past year. With Vtuber-related videos averaging 50 billion views annually over the past three years, the moment for virtual creators has arrived, bringing new ideas about the future of online content and community.

01

The virtual creator and virtual artist have moved past technological novelty to creator archetype. Virtual creators represent a diverse group of tastes and talents, and as tools for creating these identities become more accessible, the variety is expected to grow.

02

Virtual creation can be lightweight and casual. Becoming a Vtuber requires technical effort, but games like Roblox offer an easier way to create virtual personas. Shorts trends like dance challenges show that virtual creation does not preclude casual content.

03

Authenticity is contextual. Synthetic creators further reinforce “authenticity” as rooted in the message and messenger rather than appearance. Viewers find authenticity in synthetic personas, so must we.

04

The line between subculture and mainstream culture has blurred. This is another example of how the internet rapidly transforms niche trends into mainstream phenomena. This fundamental mechanic suggests that mainstream culture is simply a patchwork of subcultures. Marketers and brands, like viewers, should focus on their personal relevance.

