



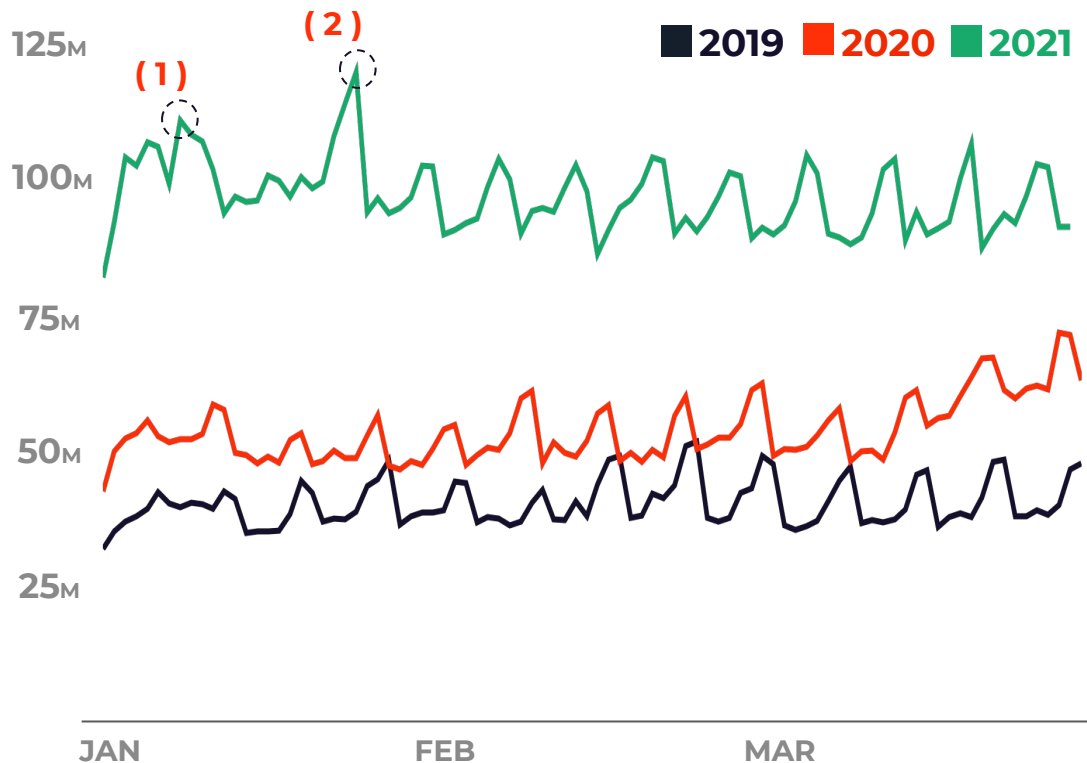
STREAM™
HATCHET

LIVE GAME STREAMING TRENDS

Q1 2021

DAILY STREAMING HOURS WATCHED INCREASE 80% YOY

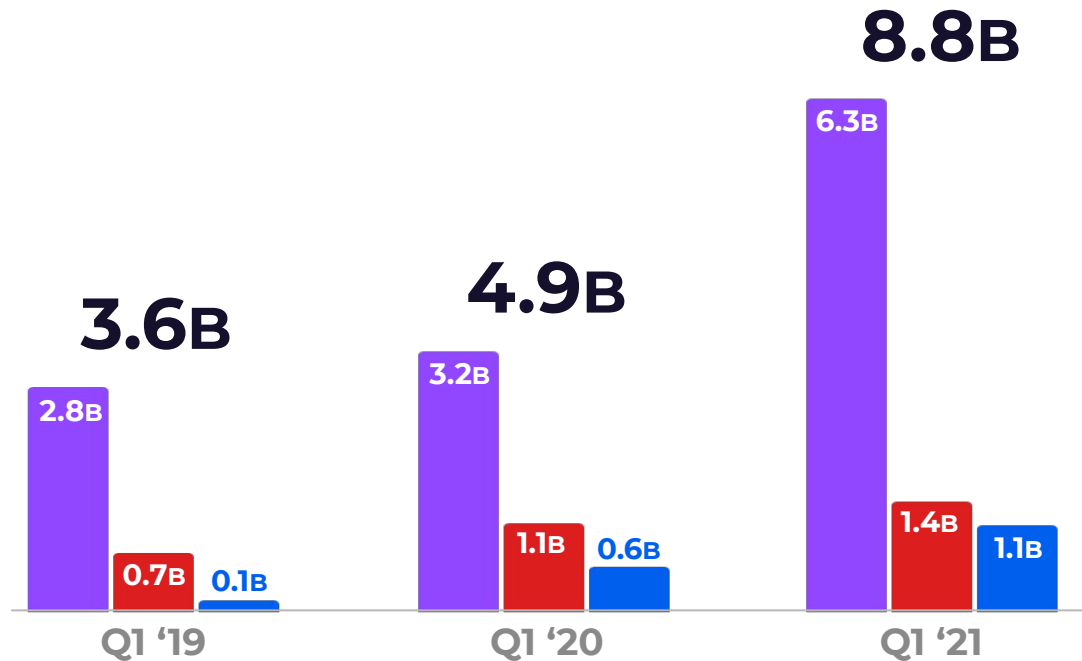
Q1 2019, 2020, 2021 |  TWITCH,  YOUTUBE GAMING,  MIXER, AND  FACEBOOK GAMING



- Live streaming audiences continue to skyrocket. In 2021, audiences watched an average of 97 million hours of live streams a day; an 80% increase since 2020 and a 139% increase since 2019.
- **(1)** 2021's first major viewership spike was driven by massively popular video game Rust and its role-playing servers. The servers featured some of the most popular streamers in gaming including: xQcOW, Myth, shroud, Pokimane, Valkyrae, and Ludwig.
- **(2)** On January 24th, Q1 hit a peak of 120 million hours watched, driven largely by the Mobile Legends: Bang Bang World Championship finals.




HOURS WATCHED TOP WESTERN STREAMING PLATFORMS

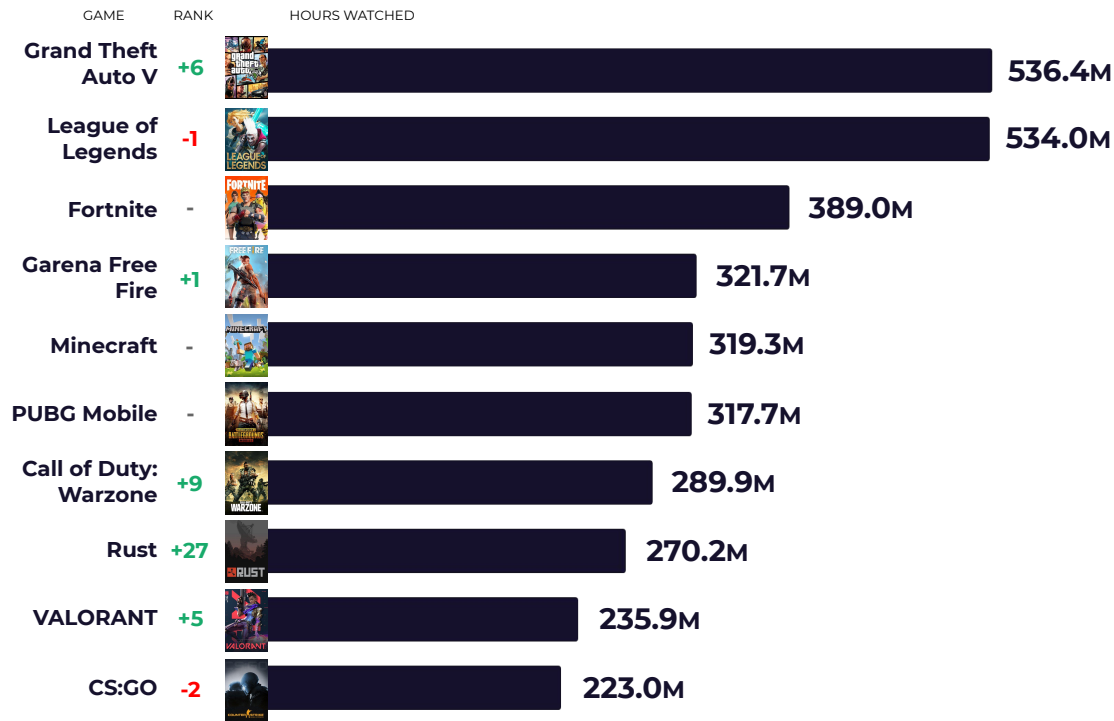
Q1 2019, 2020, 2021 | ON  TWITCH,  YOUTUBE LIVE GAMING, AND  FACEBOOK GAMING



- The western game streaming platforms reached 8.8 billion hours watched this quarter, a year-over-year increase of 80% compared Q1 2020.
- The greatest increase came from Twitch which generated 6.3 billion hours watched in Q1 2021; a 97% increase from the prior year.
- Live hours watched on YouTube Gaming increased from 1.1 billion to 1.4 billion, making it the 2nd most watched live streaming platform.
- Facebook Gaming audiences surged year-over-year with an increase of 87% compared to 2020.




TOP 10 MOST WATCHED GAMES IN STREAMING

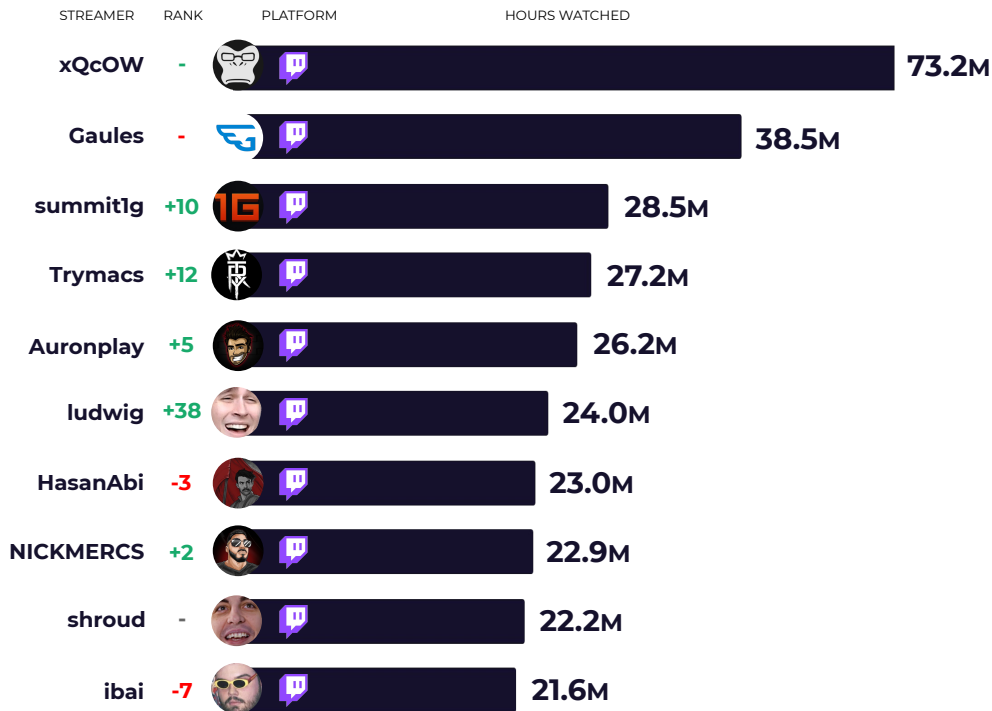
Q1 2021 HOURS WATCHED | ON  TWITCH,  YOUTUBE LIVE GAMING, AND  FACEBOOK GAMING



- Personality driven roleplay games stole the spotlight from major esports. GTA V overtook League of Legends as the most watched game in streaming.
 - NoPixel, a custom Grand Theft Auto V server, enabled streamers to become fictional characters in a faux reality television style environment.
 - Popular creators flocked to Rust, a multiplayer survival game, creating private streamers servers. The hype made it the 8th most watched game in Q1 2021.
- The Battle Royale genre has sustained its popularity, taking 4 of the top 10 spots in the ranking.




TOP 10 GAMING INFLUENCERS

Q1 2021 HOURS WATCHED | ON  TWITCH,  YOUTUBE LIVE GAMING, AND  FACEBOOK GAMING



- Variety streamer, xQcOW, tops the charts as the most watched influencer of Q1 2021. His GTA V RP streams fueled his popularity during the quarter, generating 30 million hours watched on his channel.
- Ludwig has emerged as one of fastest growing creators on Twitch, largely driven by his unique approach to streaming content. Not only was he the host of the popular Twitch game show, “Hive Mind”, but his “Subathon”, a non-stop nearly month-long live stream, reached a peak of 107k viewers.
- Live streaming continues to expand to global audiences with 4 out of 10 creators living outside the United States.




TOP 5 FEMALE GAMING INFLUENCERS

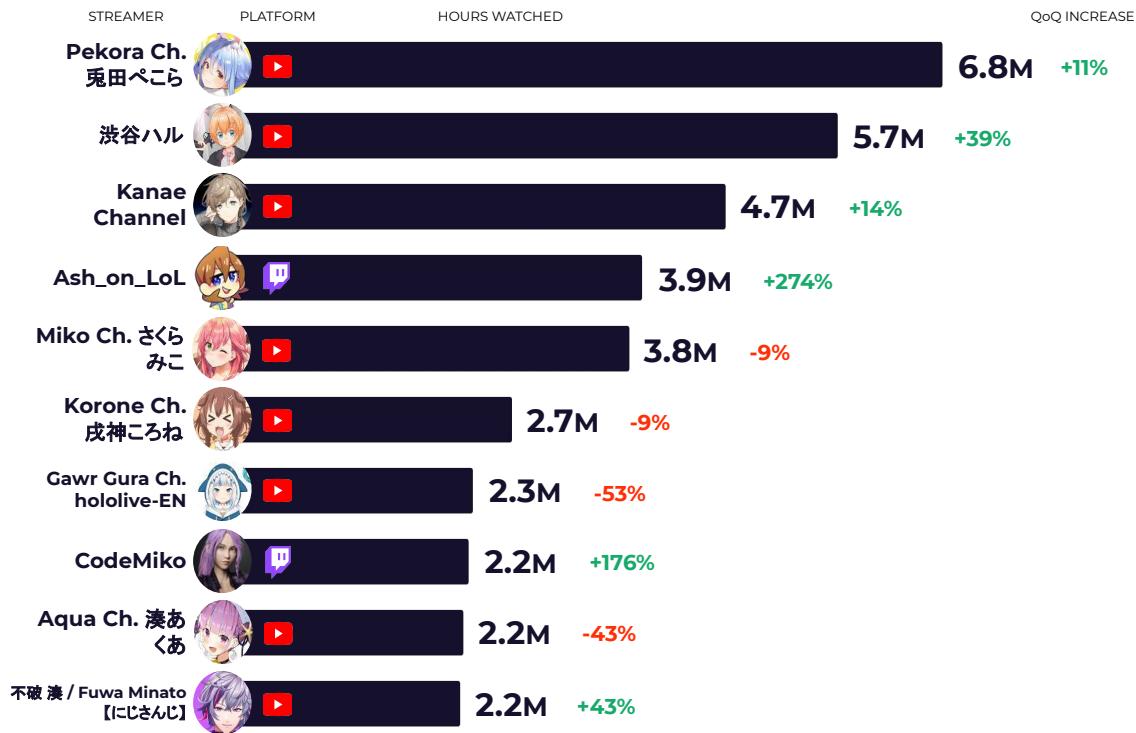
Q1 2021 HOURS WATCHED | ON  TWITCH,  YOUTUBE LIVE GAMING, AND  FACEBOOK GAMING



- Valkyrae finished as the #1 female streamer in Q1 2021 almost doubling the next closest streamer in total hours watched.
- Valkyrae has continued to bridge the gap between gaming culture and more general popular culture. Rae recently appeared in a “Machine Gun Kelly” music video as “Corpse”. The video has hit over 12.3M YouTube views.
- The male/female streamer gap is still substantial. Valkyrae placed 27th overall in total hours watched across both male and female streamers and Pokimane placed 98th.

TOP 10 VTUBER GAMING INFLUENCERS

Q1 2021 HOURS WATCHED | ON  TWITCH,  YOUTUBE LIVE GAMING, AND  FACEBOOK GAMING



- VTubers like Pekora, Gawr Gura, and CodeMiko emerged in Q1 as a popular subgenre of streaming culture.
- A VTuber or “Virtual YouTuber” is a streamer who broadcasts as an animated avatar. Often these avatars have anamorphic traits allowing the streamer to incorporate physical changes to their avatars as part of the content.
- Most VTubers broadcast in Japanese or Korean, and as a result there are strong similarities between VTubing and Anime.
- While YouTube has long been the primary platform for VTube content, two Twitch Streamers, Ash_On_LoL (274%) and CodeMiko (176%) experienced the strongest growth in Q1 2021.

TOP 5 ESPORTS EVENTS BY HOURS WATCHED

Q1 2021 | ON  TWITCH,  YOUTUBE LIVE GAMING,  FACEBOOK GAMING, AND  AFREECA

HOURS WATCHED

LEC 2021
Spring
Season



LCK 2021
Spring
Season



MLBB World
Championship
2020



2021 ESL Pro
League 13



PUBG Global
Invitational.S
2021

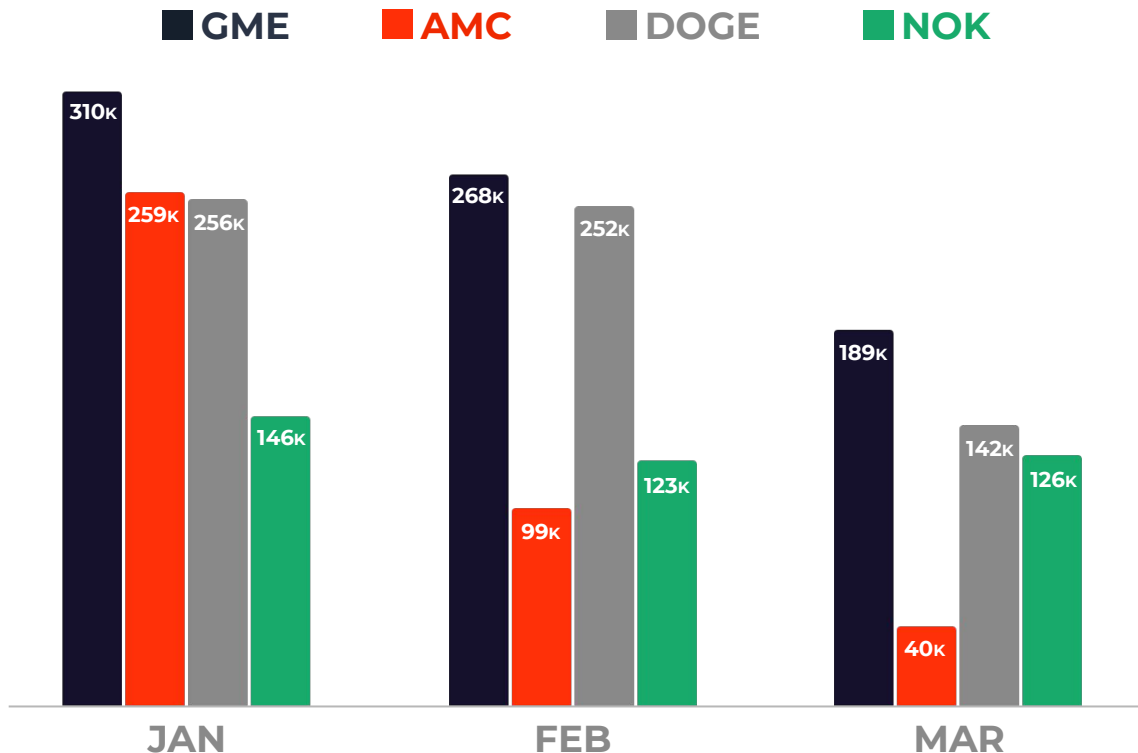


PEAK VIEWERS

- League of Legends leads as the most watched esport this quarter. Their European and Korean based leagues have taken the top two spots with over 60 million hours watched between them.
- The Mobile Legends: Bang Bang World Championship reached a mind-boggling peak of 2.47 million concurrent viewers; that's almost 4x greater than the peak viewers reached by other top events.
- The MOBA, Multiplayer Online Battle Arena, genre has emerged as the top esport format (ahead of Tactical FPS and Battle Royale) in Q1 2021.

WALL STREET BETS STOCK CRAZE IN TWITCH CHAT Q1 2021

Q1 2021 | ON  TWITCH



REPORT BY // STREAM HATCHET

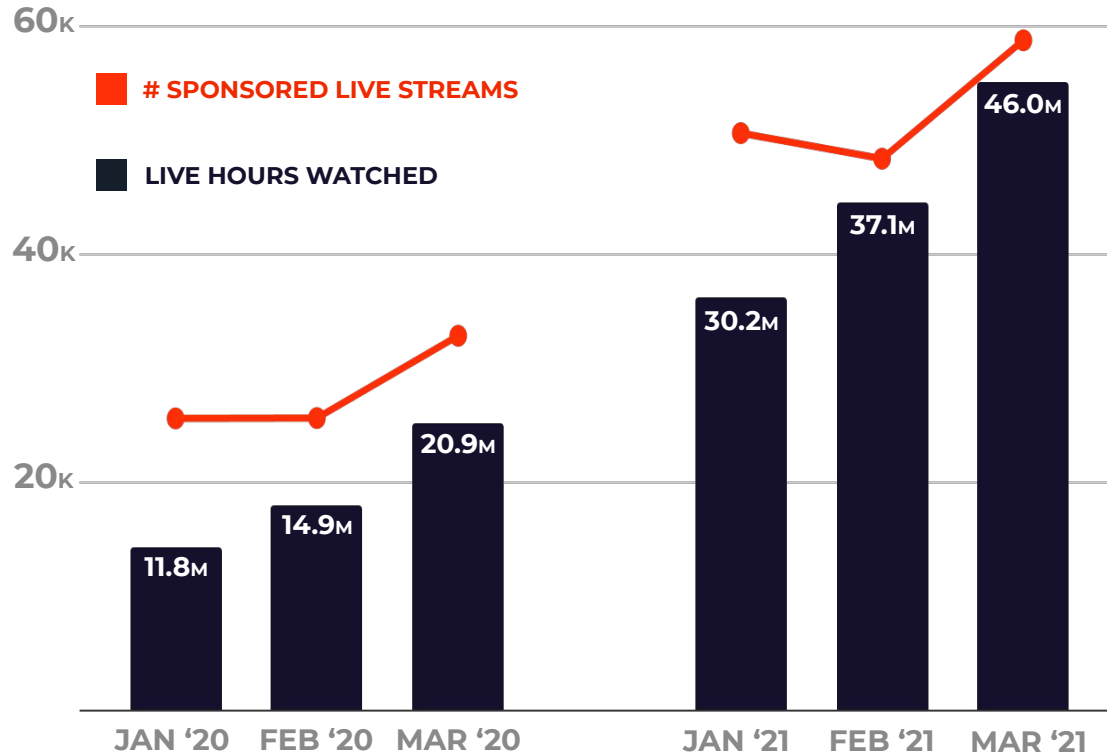
9

- GameStop (GME), AMC, Nokia (NOK) and other 'meme' stocks dominated financial headlines in Q1 after a group of social media investors, stemming from the Reddit community 'Wall Street Bets', began buying stocks to counter short positions held by major investment firms.
- While \$GME and \$AMC captured the initial spotlight, DOGE, a cryptocurrency, was able to sustain the January hype into February.
- Although the original surge in stock mentions tapered off in March, there is still significant engagement around financial news on gaming platforms.

SPONSORED LIVE STREAM WATCH TIME INCREASES BY 137% IN Q1

LIVE STREAMS CONTAINING KEYWORDS “SPONSORED” AND “#AD” Q1 2020 - Q1 2021

ON  TWITCH,  YOUTUBE LIVE GAMING, AND  FACEBOOK GAMING






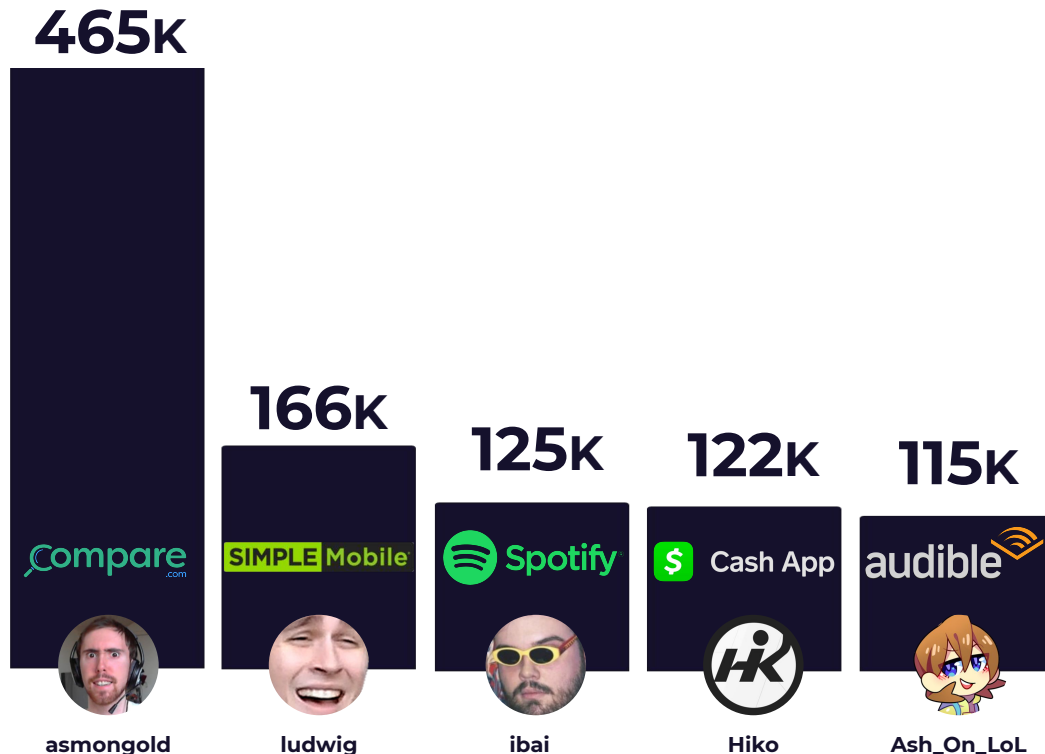
REPORT BY // STREAM HATCHET

10

- Audiences flocking to streaming platforms presented a ripe opportunity for brands to sponsor streaming content to reach gaming audiences.
- Streamers are required to use “Sponsored” or “Ad” in stream titles to denote sponsored content within their live broadcasts.
 - Ex: “CHIPOTLE CHALLENGER SERIES FEATURING FORTNITE. #sponsored”.
- Both the total number of sponsored streams (+88%) and the sponsored hours watched (+137%) have grown at a dramatic rate since Q1 2020.

TOP NON-ENDEMIC SPONSORED STREAMS

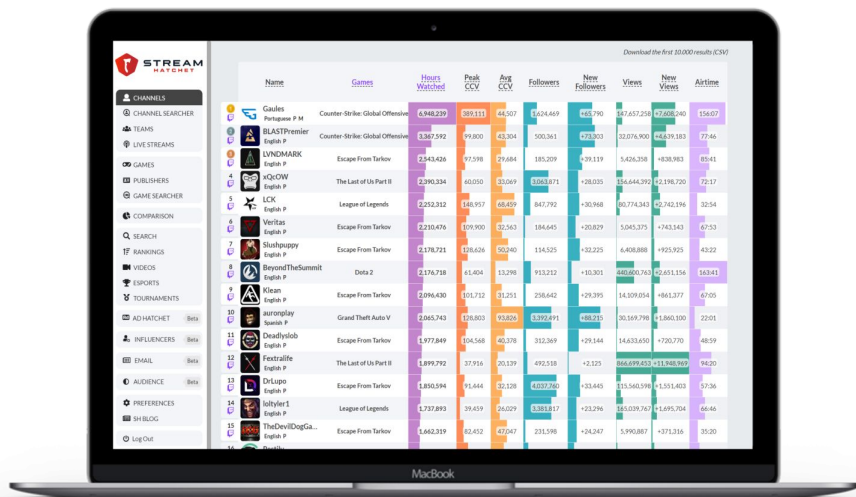
Q1 2021 HOURS WATCHED | ON  TWITCH,  YOUTUBE LIVE GAMING, AND  FACEBOOK GAMING



- Major non-endemic brands including Spotify, Cash App and Audible have topped the charts as some of the most watched sponsored streams in Q1 2021.
- Compare.com, an auto insurance quote database, reached just under ½ million live hours watched on asmongold's channel. Almost 3x greater than the 2nd most watched non-endemic sponsored live stream.
- SIMPLEMobile's ludwig sponsorship engaged his channel at the perfect moment, sponsoring the first day of his epic nearly month long 'subathon'

EMPOWERING MARKETING IN ESPORTS AND GAMING WITH REAL TIME DATA AND INSIGHTS

INDUSTRY LEADING DATA ANALYTICS PLATFORM & REPORTING AGENCY FOCUSING ON INFLUENCER MARKETING AND SPONSORSHIP MEASUREMENT



DATA ANALYTICS FOR LIVE GAMING ACTIVATIONS

Browse millions of streaming channels globally, to discover gaming creators, report on campaigns and benchmark against competitors.

THE INDUSTRY STANDARD FOR LIVE STREAM MEASUREMENT

Reference both historical and live data to make the most informed decisions. Compare and contrast metrics, time frames, and results all in one product.

UNPARALLELED ACCESS TO GRANULAR DATA IN REAL TIME

Measure the ebbs and flow of an audience at a minute level granularity. Optimize content by understanding the full context of a livestream.

SET UP A CONSULTATION TODAY



StreamHatchet.com