



STREAM™
HATCHET

Q2 2021 LIVE STREAMING REPORT

INSIGHTS INTO GROWTH OF TWITCH, YOUTUBE LIVE GAMING AND FACEBOOK GAMING

LIVE STREAMING // INDUSTRY REPORT





STREAMING PLATFORMS

GROWTH OF LIVESTREAMING ON AND ACROSS TWITCH,
YOUTUBE LIVE GAMING AND FACEBOOK GAMING



LIVE STREAMING VIEWERSHIP GROWTH SLOWS, YET POPULARITY REMAINS

2021 LIVE STREAM VIEWERSHIP STILL WELL ABOVE 2019 BASELINE

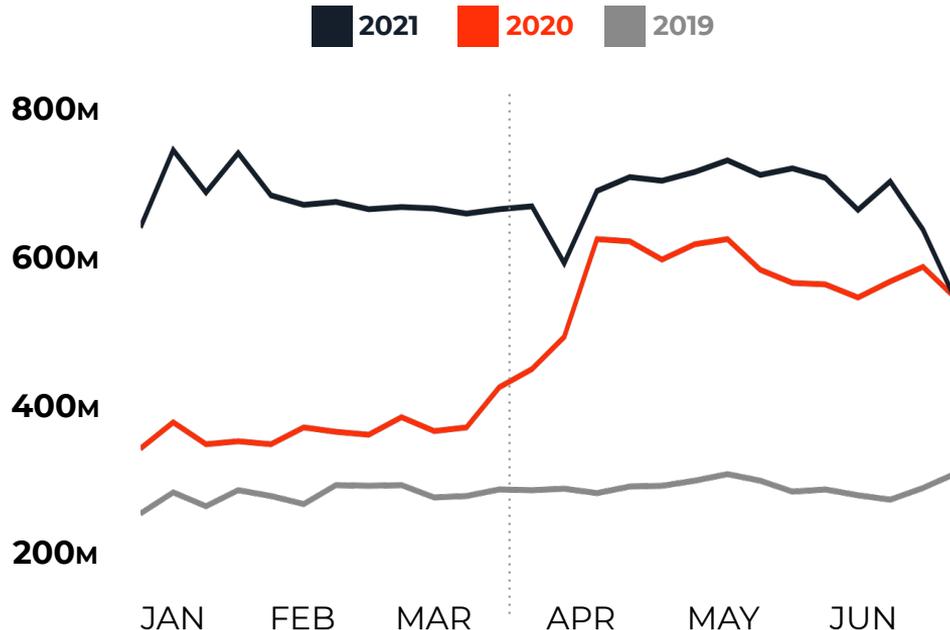
Live streaming has grown substantially over the past 24 months influenced largely by global lock downs amidst the COVID-19 pandemic. The growth of the industry is still prevalent year-over-year but has recently slowed down, perhaps influenced by the lifting of stay at home orders.

For the first time in over 2 years, weekly live streaming watch hours decreased from the previous year. The week of June 22nd was down **0.45%** compared to 2020.

While the rate of growth in live streaming viewership is beginning to decline, the industry as a whole has increased by an average of **49%** in 2021 compared to last year. The viewership gained during the 2020 period, is likely here to stay.

WEEKLY LIVE STREAMING WATCH HOURS

TWITCH, YOUTUBE LIVE GAMING & FACEBOOK GAMING | 2019-2021



TOTAL QUARTERLY HOURS WATCHED

8.8B	Q1	2021	Q2	9.0B
4.9B	Q1	2020	Q2	7.5B
3.6B	Q1	2019	Q2	3.7B



TWITCH SCALES WITH LIVE STREAMING GROWTH

THE LEADER IN LIVE STREAMING HAS ITS BIGGEST HALF-YEAR YET

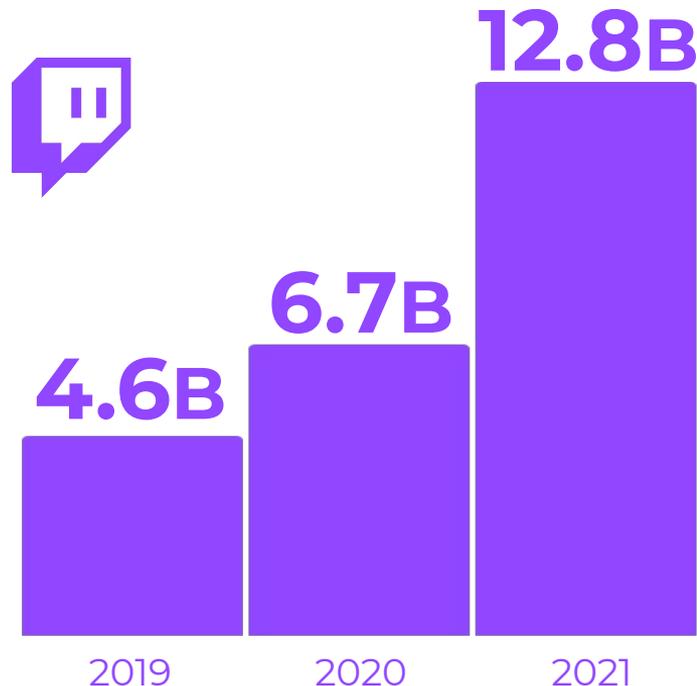
Through Q2 2021, Twitch has continued to grow its platform engagement at incredible pace. While the 2019 - 2020 increase was impressive (**46%**), 2020 to 2021 has grown at an ever faster rate, reaching a **90%** increase in total watch hours during the first half of the year.

Twitch has continued to expand both its casual and hardcore gaming audiences, along with reaching into new categories like Sports, Music, News and lifestyle content. This year, **non-gaming** live streams accounted for **12%** of Twitch Hours Watched.

However, the platform still skews towards top channels rather than other communities. The top 50 channels on Twitch in Q2 accounted for **10%** of the total platform watch hours. Streamers like xQcOW and summit1g consistently produce upwards of **30M+** watch hours each quarter.

YoY WATCH HOURS ACROSS ALL TWITCH CHANNELS

Q1 & Q2 | 2019-2021



YOUTUBE LIVE GAMING ADVANCING VIEWERSHIP AND TECHNOLOGY

HOW YOUTUBE LIVE GAMING HAS BECOME A CONTENDER FOR ALL THINGS LIVE STREAMING AND GAMING

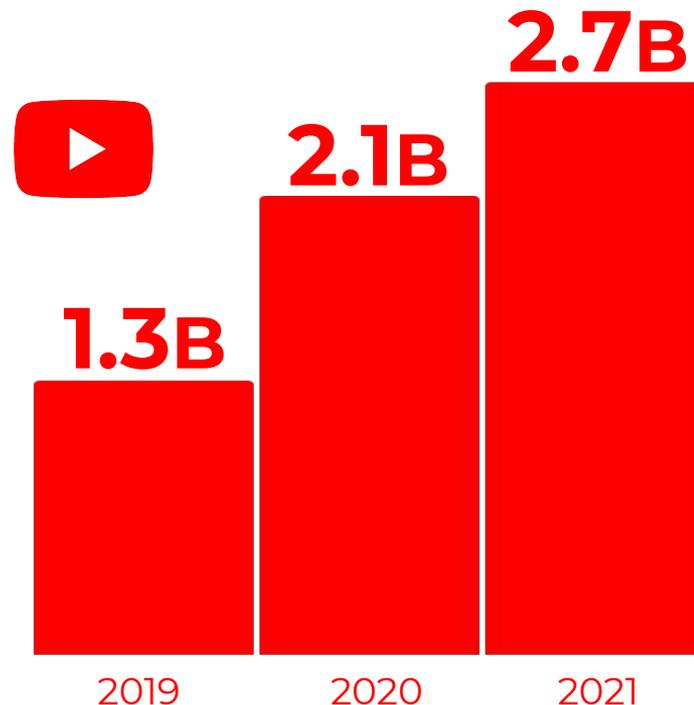
YouTube Live Gaming is quickly becoming a go-to destination for esports. Apart from the exclusive Activision Blizzard deal, the platform also pulls massive viewership for League of Legends, mobile titles, and special events.

Additionally, YouTube Live Gaming is a popular home for many top gaming creators. Valkyrae, DrDisrespect, and CouRage have cultivated substantial audiences around their live streams and YouTube videos. As a result of their momentum, along with other streamers and esports leagues, YouTube Live Gaming has experienced a **110%** increase in total watch hours since 2019.

The team at YouTube Live Gaming has been focused on generating new engagement tools to help creators grow audiences. With the release of their newest feature, Shorts, YouTube Live Gaming has a more unique offering than any other platform. The combination of Shorts, VOD, and Live empower creators to reach the largest gaming audience in the world reaching 100B hours of total watchtime across all formats in 2020 per the [YouTube Live Gaming yearly report](#).

YOY WATCH HOURS ACROSS ALL YOUTUBE LIVE GAMING CHANNELS

Q1 & Q2 | 2019-2021



FACEBOOK GAMING IS FASTEST GROWING LIVE STREAMING SITE

FACEBOOK GAMING EXPERIENCES MASSIVE GROWTH IN Q1 & Q2 2021

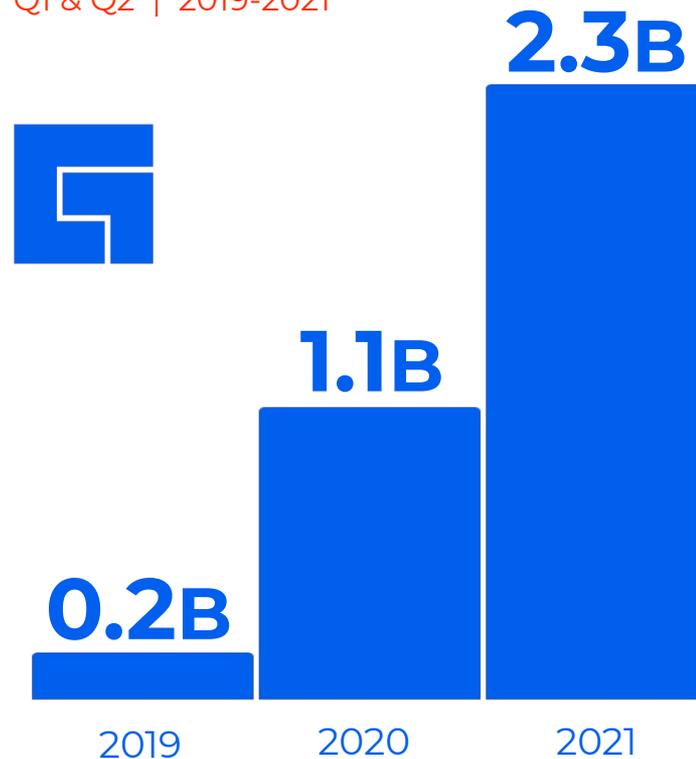
Since its kick off in 2018, Facebook Gaming has continued grow at an impressive rate, an average of **300%** in total watch hours across the first half of the last two years. This should come as no surprise given the nearly **3 Billion** people worldwide with Facebook accounts.

Mobile gaming is at the forefront of the Facebook Gaming experience with titles like Garena Free Fire and PUBG Mobile dominating platform market share. On average, mobile game streams generate **50%** of Facebook Gaming's monthly watch hours.

It's leadership in emerging gaming categories, like mobile, could prove ample opportunity for its investments in **virtual reality**. In June, Facebook moved forward with the acquisition of BigBox VR, the developers behind popular multiplayer game Population: ONE, which positions the platform to lead the VR game streaming category.

YOY WATCH HOURS ACROSS ALL FACEBOOK GAMING CHANNELS

Q1 & Q2 | 2019-2021





LEADERBOARDS

TOP STREAMING CATEGORIES AND CREATORS



TOP STREAMING CATEGORIES OF Q2 2021

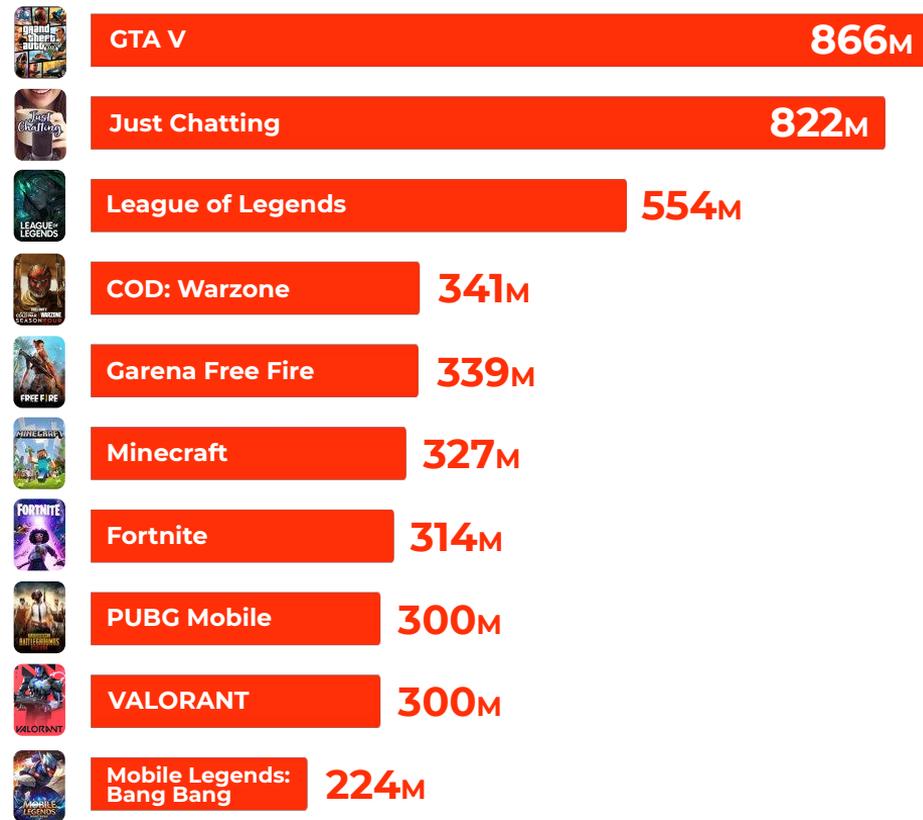
HOURS WATCHED ON TWITCH, YOUTUBE LIVE GAMING, AND FACEBOOK GAMING

GTA V still remains the most watched game. The Role Play servers amongst the streaming community have proven to be extremely powerful and engaging. Most of the game's viewership comes from Twitch (**76%**) but a substantial portion also comes from Facebook Gaming (**16%**).

Even though GTA V has generated the most viewership, **battle royales** are still dominating. The genre holds **5** of the top **10** categories in Q2 and reached **2.4B** watch hours.

Additionally, free-to-play games are still trending and claim **70%** of the top categories. The outdated pay-to-play format is quickly vanishing.

Older games are also still on top. Of the top categories, only COD: Warzone and VALORANT were released after 2018. Constant updates, new gameplay, and creative freedom seem to be the key to longevity.



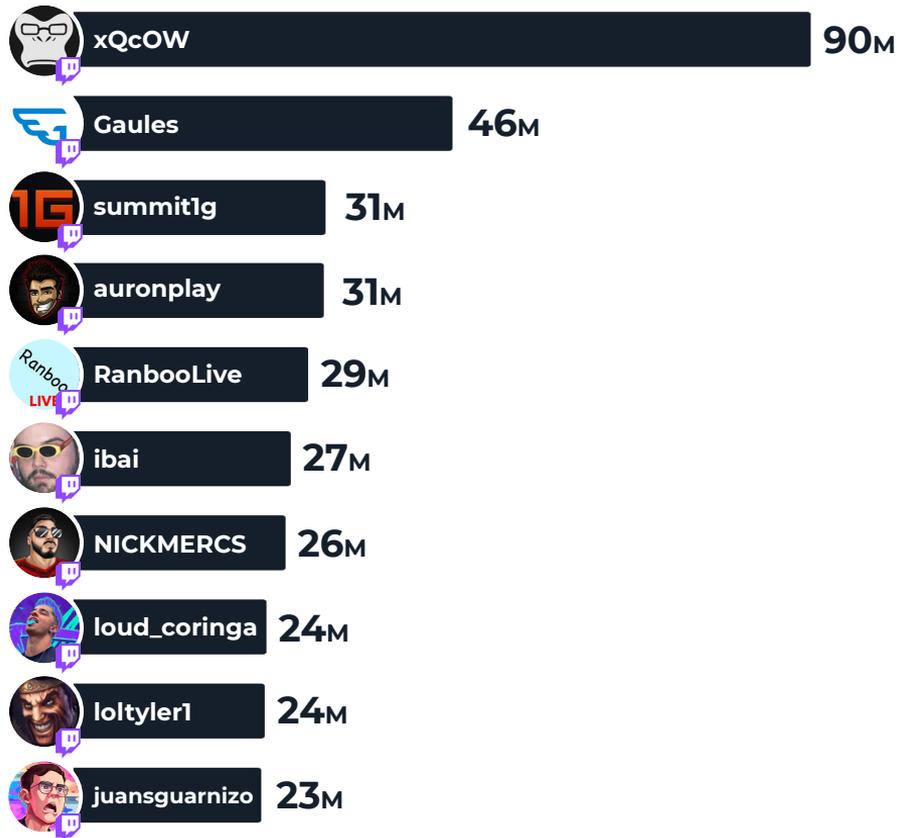
TOP STREAMERS OF Q2 2021

TOTAL LIVE STREAM HOURS WATCHED | TWITCH YOUTUBE LIVE GAMING AND FACEBOOK GAMING

Once again, **xQcOW** led all streamers in total watch hours this quarter. The former Overwatch pro has generated over **90M** hours watched while playing a variety of games. However, xQcOW has primarily played **GTA V**; helping the trend of GTA V Role Play climb even higher.

Of the top 10 streamers of Q2, **50%** of them are outside of North America. Countries like Brazil, Spain, Portugal, Korea, and many others have a blossoming live streaming industry with massive audiences. Streamers like **ibai** or **auronplay** regularly average **50K+** viewers.

Sticking to one game is a surefire way to create a community live streaming. However, many top streamers often branch out to play a variety of games once their following is large enough; allowing for more freedom of content. Of the top streamers, **70%** played **15+** games in Q2.



TOP FEMALE STREAMERS OF Q2 2021

HOURS WATCHED ON TWITCH, YOUTUBE LIVE GAMING,
AND FACEBOOK GAMING

In Q2, **Amouranth** became the most watched female streamer surpassing Valkyrae who held the title for all of 2020.

Amouranth is known for her Just Chatting streams but has recently explored both Hot Tub and ASMR content. Although she has been banned a few times, that hasn't stopped her from being the **33rd** most watched streamer across all channels in Q2.

Valkyrae secured 2nd place this quarter with **8M** watch hours but had about a third of the broadcast hours that Amouranth did. The audience she commands on YouTube Gaming is nothing short of incredible.

Of the top 5 female streamers, **2** of them are located outside of North America. Additionally, **3** of the **5** are Twitch streamers while the remainder come from YouTube Gaming.





STREAMING INSIGHTS

EMERGING TRENDS AROUND MUSIC, SPORTS AND VIRTUAL REALITY



IS TWITCH THE NEW RADIO?

LIVE STREAMING PLATFORMS HOST THOUSANDS OF 24/7 MUSIC STREAMS

Music was one of the many industries that turned towards live streaming during the global pandemic last year. To match demand, Twitch created a dedicated tab to music on their homepage. The communal, interactive nature of live streaming provides the audience with engagement, like listening parties.

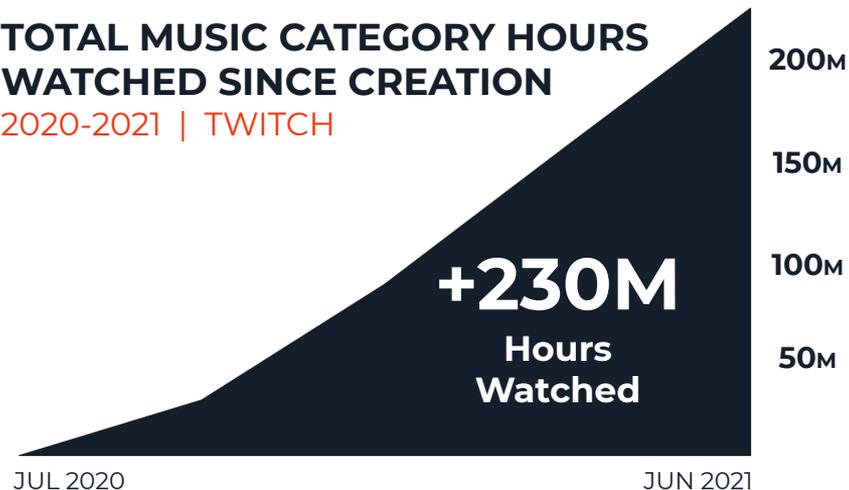
Since the creation of the “Music” category on Twitch, channels have generated a total of over **230M** watch hours. On average, that’s over **21M** watch hours per month.

The most popular channels streaming music on Twitch might not be what you expect. Channels like **Monstercat** and **RelaxBeats** are non-stop mixes of certain music genres - think radio stations with live chat.

Will Twitch become the new radio? Do they have a leg up on other music streaming platforms because of live chat and more ways for brands to engage with audiences?

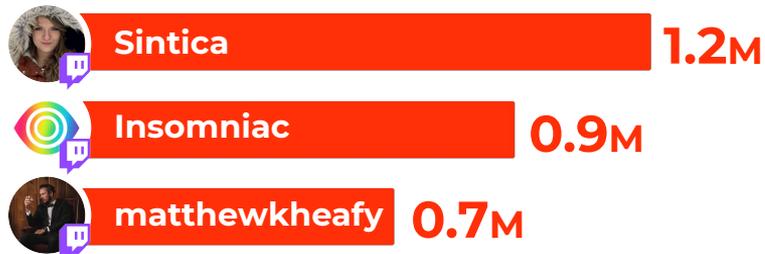
TOTAL MUSIC CATEGORY HOURS WATCHED SINCE CREATION

2020-2021 | TWITCH



TOP MUSIC CHANNELS ON TWITCH

HOURS WATCHED | Q2 2021



LIVE STREAMING THE FUTURE HOME FOR TRADITIONAL SPORTS LEAGUES

SPORTS LEAGUES REACH NEW AUDIENCES VIA LIVE STREAMS AND CO-STREAMING

Twitch is quickly becoming a place where viewers can tune in to watch their favorite sports leagues. Twitch's partnerships team has been hard at work to bring major sports leagues to the platform, helping to increase the "Sports" category hours watched by **82%** from Q1 2021.

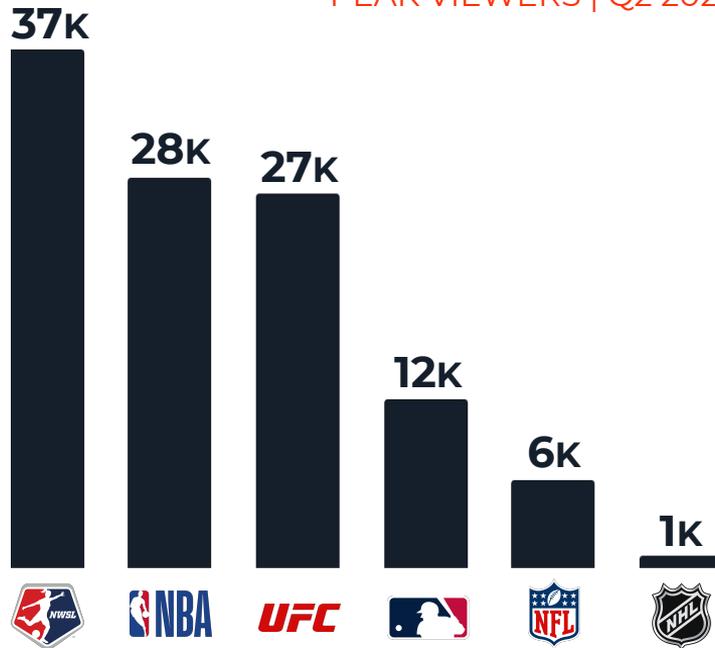
The top league by peak viewers in Q2 2021 was the **National Women's Soccer League** reaching **37K** peak viewers during the **North Carolina vs Louisville** matchup. Additionally, the league is the fastest growing sports property in North America.

The **NBA** placed a close **2nd** by utilizing co-streaming tactics. They have been broadcasting playoff games on Twitch in partnership with Brazilian streamer Gaules.

While the **NFL** placed **5th** in Q2, the return of **Thursday Night Football** could see the league pull ahead. Previously the NFL has co-streamed in partnership with **NICKMERCS** and **TimTheTatman**.

TOP NORTH AMERICAN SPORTS LEAGUES ON TWITCH

PEAK VIEWERS | Q2 2021



VIRTUAL REALITY BECAME THE NEW WAY TO SOCIALIZE

THE VRCHAT CATEGORY SEES SUBSTANTIAL GROWTH IN 2021

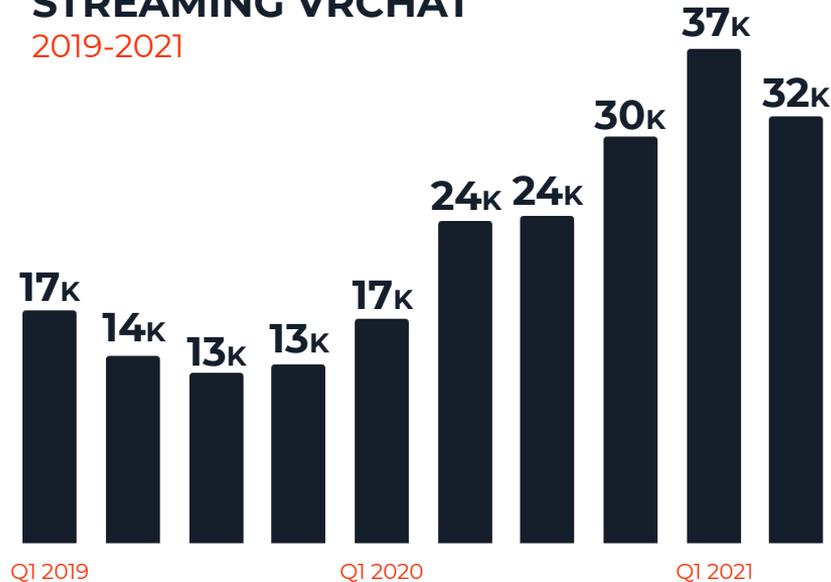
Virtual reality has become far more accessible for the everyday consumer. Because of this, headsets like the Oculus Quest 2 have more options for video games and more streamers are creating VR content.

The most popular virtual reality category in streaming is **VRChat**, an online social platform. Players are able to enter a virtual world and socialize like any real-world public space using their customizable character.

Since the beginning of 2019, VRChat has seen an increase of **82%** in unique quarterly channels streaming the game. The growth may be due, in part, to the lack of traditional socialization in 2020 caused by the global pandemic.

QUARTERLY UNIQUE CHANNELS STREAMING VRCHAT

2019-2021



TOP VRCHAT STREAMERS

HOURS WATCHED | Q2 2021



roflgator
832k



MurderCrumpet
662k



Lolathon
322k





ESPORTS INDUSTRY INSIGHTS

SPOTLIGHT ON GROWTH OF CALL OF DUTY, CO-STREAMING AND MOBILE GAMES



CALL OF DUTY BREAKS THROUGH AS TOP FPS TITLE IN Q2 2021

WARZONE POPULARITY AND THE CDL GROWTH DRIVES LEADERSHIP ACROSS SHOOTER AND BATTLE ROYALE LIVE STREAM CATEGORIES FOR COD

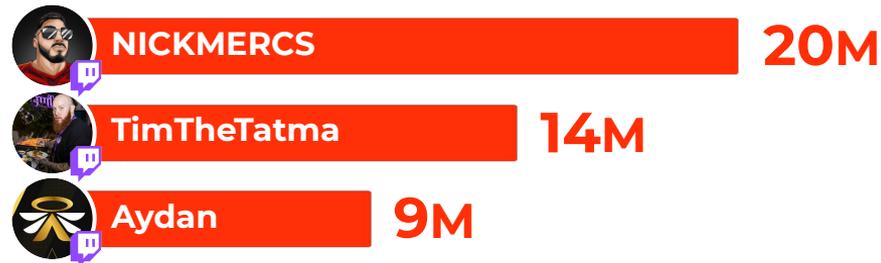
Call Of Duty has been a blockbuster franchise for years but the introduction of Warzone, as well as the format change of the **Call Of Duty League**, has pushed the game to new heights in pop culture.

Warzone increased monthly average concurrent viewers by **238%** since the game mode received its own category on live streaming sites in November 2020. In total, the category has generated **737M** watch hours! Top celebrities including Devin Booker, Luke Combs, Joe Jonas, and T-Pain have squaded up with top streamers to take Verdansk.

Additionally, the 2020 **CDL** season saw a **101%** increase in peak viewership compared to the previous format of COD esports. The CDL is the most watched North American esports leagues on YouTube Live Gaming accounting for **49%** of the region's total esports watch hours on the platform.

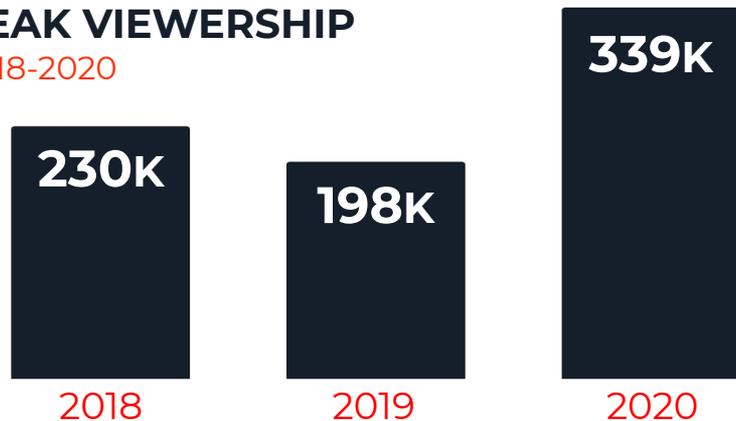
With more Warzone content on the way, including the new **World Series of Warzone** and the CDL finals quickly approaching, expect Call Of Duty to remain a top game.

TOP WARZONE SREAMERS WARZONE WATCH HOURS | Q2 2021



CALL OF DUTY ESPORTS PEAK VIEWERSHIP

2018-2020



CO-STREAMING: TREND OR STAPLE?

HOW DIFFERENT REGIONS ARE LEVERAGING CO-STREAMING FOR INCREASED REACH

Esports leagues have recently been testing the use of co-streams, the authorized rebroadcasting of an event while providing live commentary, offering new and exciting perspectives on live competition.

Although top international esports events have moderately introduced co-streams, North American events are heavily leveraging the additional channels. About **31%** of the hours watched of the top 10 Q2 NA esports events came from co-streaming channels.

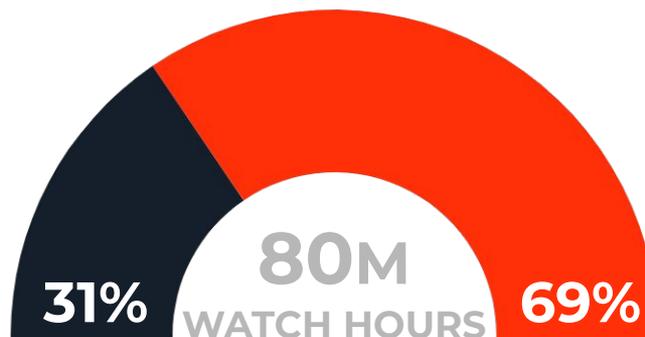
Year-over-year, co-streaming watch hours have increased by **5 percentage points**. Audiences have been tuning into streamers like **shroud** or **ibai** to watch an event more frequently than before. But the question remains: will co-streaming be here to stay?

2021 TOP 10 GLOBAL ESPORTS EVENTS



■ CO-STREAM ■ NON CO-STREAM

2021 TOP 10 NORTH AMERICAN ESPORTS EVENTS



ESPORTS INDUSTRY GIANTS TAKE AIM AT MOBILE GAMING

LARGE PUBLISHERS LOOK TO STEAL MARKET SHARE OF MOBILE GAMING AND ESPORTS

Mobile esports continue to grow both within North America as well as globally. This quarter, there have been **19** mobile esports events resulting in **97M** total watch hours.

The mobile category in Q2 was led by **Mobile Legends: Bang Bang**, a popular MOBA game. The title generated the **3rd** most esports watch hours out of any mobile or non-mobile game.

However, AAA publishers have recently been trying to change the narrative of mobile gaming. Games like Wild Rift and COD Mobile have launched in an attempt to capture market share and increase engagement in North America.

Wild Rift is already hosting esports events with substantial viewership and COD Mobile reportedly generated **270 million** downloads in one year.

TOP MOBILE ESPORTS TITLES

ESPORTS HOURS WATCHED | Q2 2021



43M



18M



13M

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

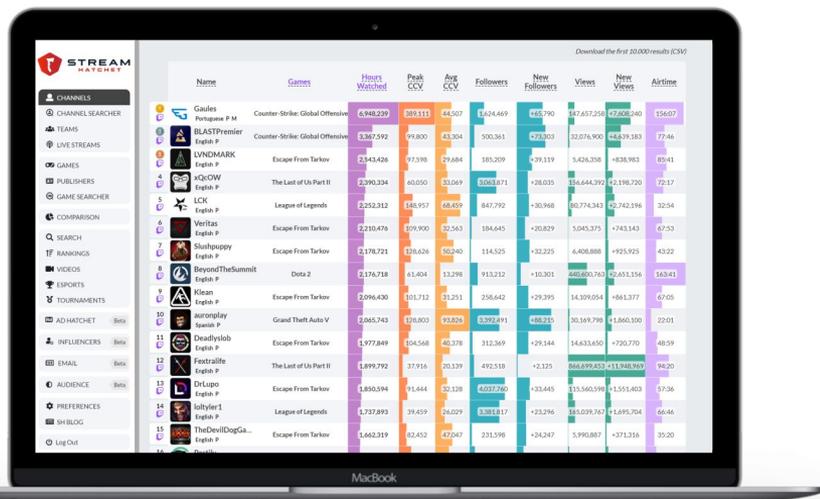
Browse millions of streaming channels globally, to discover gaming creators, report on campaigns and benchmark against competitors.

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