



STREAM™
HATCHET

VIDEO GAME STREAMING TRENDS REPORT

2020 YEARLY REPORT

ABOUT STREAM HATCHET

- Stream Hatchet provides data from the top video game streaming sites via a robust business intelligence platform. We power insightful, informed decisions leading to innovation and growth through the aggregation of dynamic, granular data.
- Stream Hatchet's Yearly Report is a culmination of the biggest trends, stories, and insights from the live streaming and gaming industry in 2020. A quarterly report is also distributed every 90 days.

ABOUT ENGINE MEDIA HOLDINGS

- Stream Hatchet is a wholly owned subsidiary of Engine Media Holdings Inc. and traded publicly under the ticker symbol (TSX-V: GAME) (OTCQB: MLLLF).
- Engine Media's robust portfolio of solutions delivers deeply immersive experiences for sports and gaming fans, intimate consumer touch point for brands and partner activations, and unparalleled audience and market insights.



IN THIS REPORT

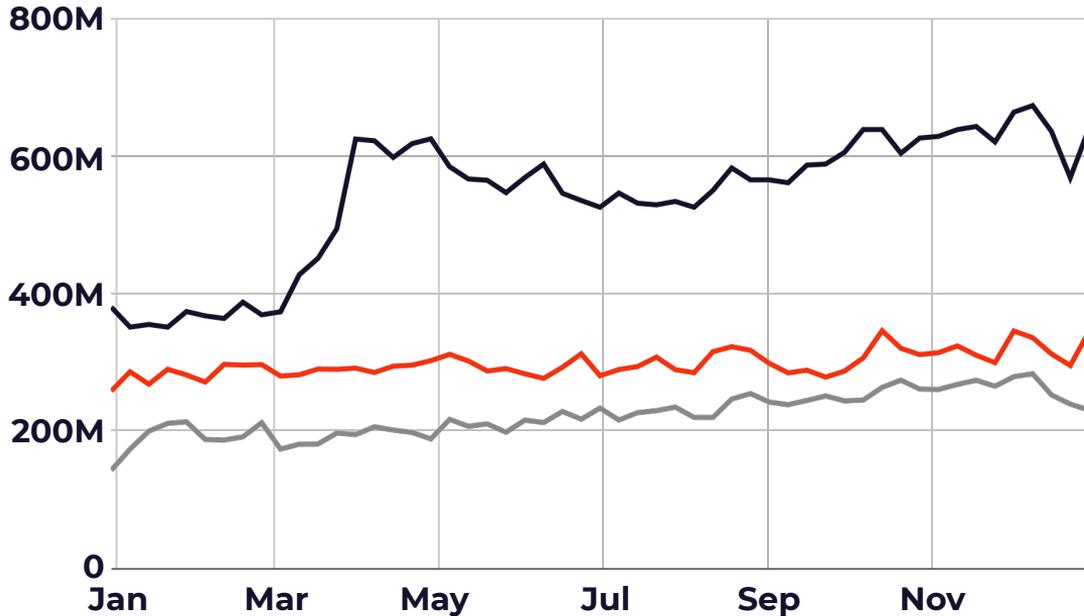
2020 was a breakthrough year for video games and esports intertwining with popular culture.

- Video Game Live streaming hours watched grew **69%** in 2020 and up **81%** from 2019.
- League of Legends surpasses Fortnite as the most popular video game in live streaming, generating nearly **2 Billion** hours watched .
- Are gaming audiences truly male dominated? According to a YouGov poll, **30%** of video game viewers are female, yet only **2%** of the top 250 Twitch influencers are female.
- Politicians are leveraging Gaming ecosystems to reach young audiences who have disconnected from traditional media sources. Representative Alexandria Ocasio-Cortez reached a peak of **438K** viewers streaming Among Us.

WEEKLY STREAMING HOURS WATCHED INCREASE 81% YOY

Q1 2020 - Q4 2020 | ON  TWITCH,  YOUTUBE GAMING, AND  FACEBOOK GAMING

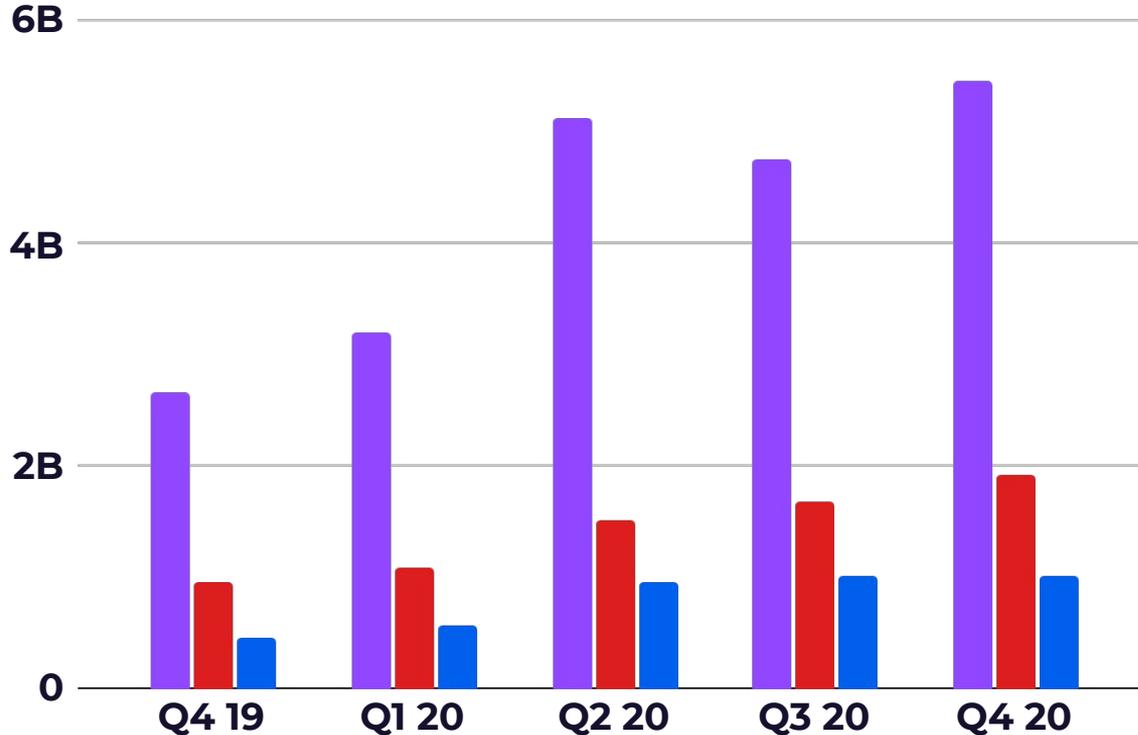
■ 2018 ■ 2019 ■ 2020



- Live streaming viewership set record highs in 2020 in the wake of the COVID-19 impact on all aspects of life, especially entertainment options.
- Jan-Mar 2020 growth vs. the same period in 2019 was consistent with what was seen vs. 2018. But from March, a whole new level was reached.
- Not only was live streaming able to grow during the initial impact of the pandemic, but interest was maintained throughout 2020, even after traditional sports and entertainment were reintroduced.
- Unique crossovers, like Marvel Universe characters in Fortnite, have cemented gaming's place in today's pop culture.

HOURS WATCHED: TOP WESTERN STREAMING PLATFORMS

Q4 2019 - Q4 2020 | ON  TWITCH,  YOUTUBE GAMING, AND  FACEBOOK GAMING



- Twitch remains the giant among the western streaming platforms, dominating live events from general gaming to political bouts.
- From Q4 19 to Q4 20 Twitch doubled its hours watched from 2.7B to 5.4B.
- YouTube Live Gaming grew steadily, largely on the back of securing some esports broadcast exclusivity and their ownership of the VOD sector.
- Facebook Gaming also showed steady growth, reliant on mobile gaming and their global dominance where broadband internet is less prevalent.
- Microsoft's Mixer didn't survive 2020 despite the uptick in streaming worldwide.

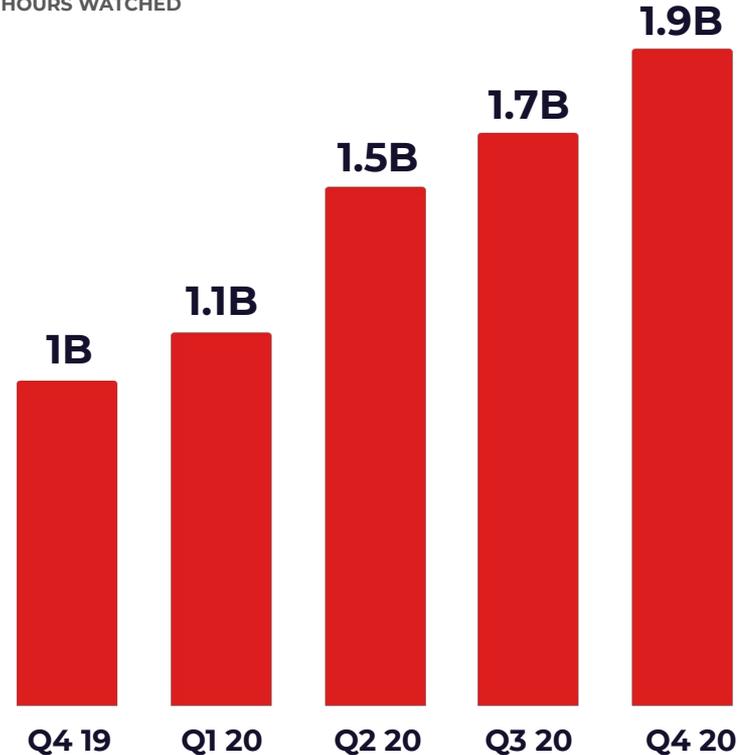
EXPLOSIVE GROWTH OF YOUTUBE GAMING

YouTube has dominated gaming VOD content for the last decade, this year it's making waves in video game live streaming.

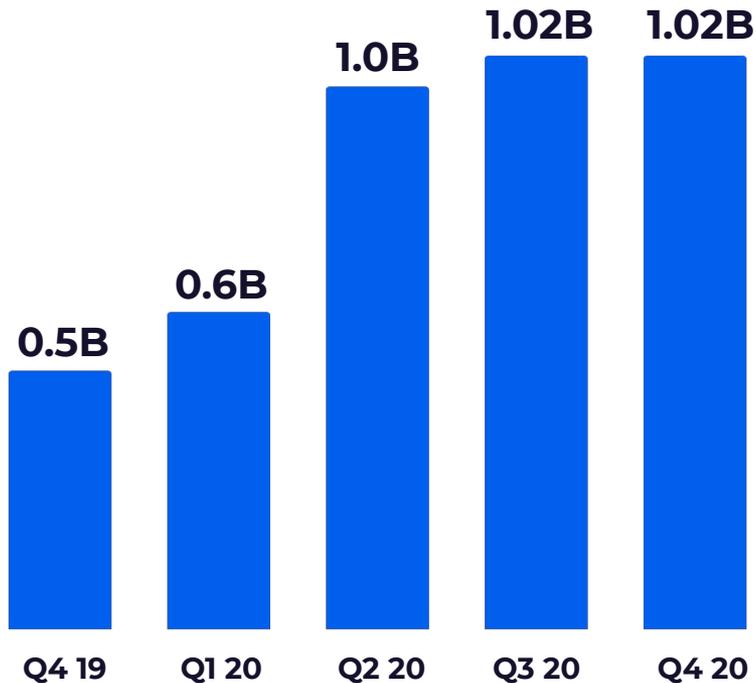
- YouTube Gaming racked up impressive growth in 2020, including more than **10 billion** hours of live streaming watch time.
- Massive growth in the number of gaming creators on the platform - and subscribers to these channels are up.
- YouTube's Partnerships team was highly active this year signing notable streamers like Valkyrae and bringing major esports tournaments like Call of Duty League to audiences on the platform.
- Global outreach is key to YouTube Gaming's growth with significant upticks in Spanish-speaking markets, Brazil and India.
- Of the top **100** streamers across western streaming sites, **25%** of the **48** international streamers are on YouTube Gaming.

YouTube Gaming

HOURS WATCHED



HOURS WATCHED



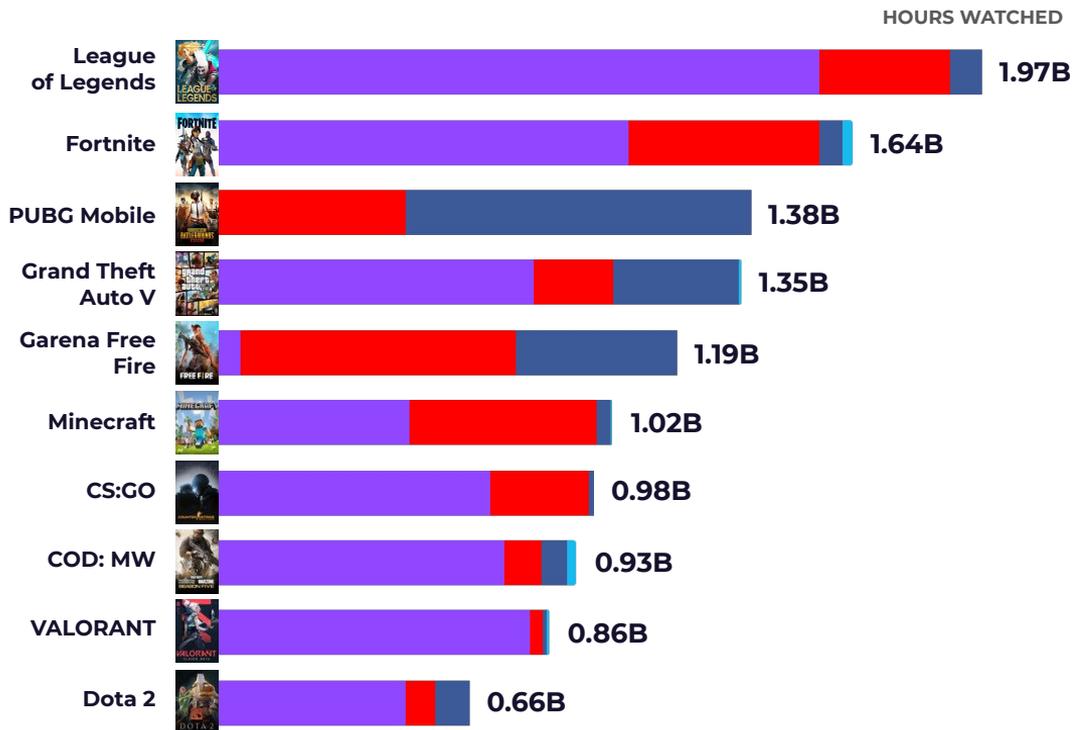
IS FACEBOOK GAMING THE NEXT BIG PLAYER IN LIVE STREAMING?

Facebook represents a key leader in digital media; with a new Microsoft alliance, it sets its sights to tackle the realm of live game streaming

- In July 2020, Microsoft made the decision to cease operations of the Mixer platform, forging a strategic relationship with Facebook Gaming. Since then, Facebook has announced several initiatives to grow its audiences around live game streaming.
- Facebook Gaming launched programs to transition Mixer Partners to their equivalent programs.
- Facebook Gaming formed music industry partnership allowing partner creators to play popular music while streaming.
- Facebook Gaming's Live Hours Watched **doubled** from Q419 to Q420.

TOP 10 GAMES OF THE YEAR

JAN 2020 - DEC 2020 | ON  TWITCH,  YOUTUBE GAMING, AND  FACEBOOK GAMING



- Released by Riot Games in 2009, League of Legends is the most popular game over a decade later with almost 2B hours watched in 2020.

- Riot Games is the only publisher to produce 2 of the top 10 games with the inclusion of VALORANT, released in April 2020, further proving the power streaming platforms have in audience acquisition.

- Mobile gaming continues to grow on western streaming sites as both PUBG Mobile and Garena Free Fire landed in the top 5 most watched games. However, their presence is mainly found on YouTube Gaming and Facebook Gaming.

- Although Battle Royales held 3 of the top 5 most watched titles, MOBA, Tactical Shooter, and Open World games also dominated the charts.

TOP 10 STREAMERS OF THE YEAR

JAN 2020 - DEC 2020 | ON  TWITCH,  YOUTUBE GAMING, AND  FACEBOOK GAMING

HOURS WATCHED

xQcOW   148.9M

Gaules   129.1M

summit1g   109.4M

NOBRU    87.5M

NICKMERC'S   73.4M

loltyler1   68.7M

auronplay   68.4M

lbai   68.2M

Rubius   62.8M

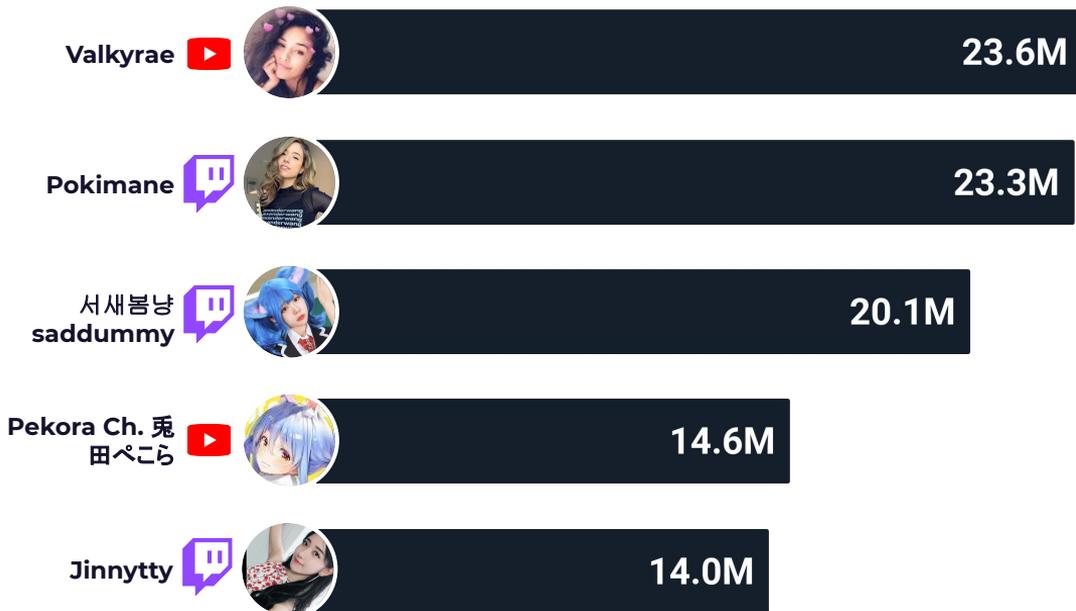
TimTheTatman   57.2M

- Variety streamer xQcOW outperformed all others across western streaming sites with almost 150M hours watched in 2020.
- While YouTube Gaming and Facebook Gaming continue to make large strides, they still haven't toppled Twitch's hold on the top overall streamers.
- NOBRU streams on both Twitch and YouTube Gaming. His 4th place total of 87.5M hours watched is a combination of the two.
- The top YouTube Gaming streamer (excluding NOBRU) was TheDonato at 18th while the top Facebook Gaming streamer was Tarboun at 26th.

TOP 5 FEMALES OF THE YEAR

JAN 2020 - DEC 2020 | ON  TWITCH,  YOUTUBE GAMING, AND  FACEBOOK GAMING

HOURS WATCHED



- Female streamers have been increasing in popularity with Valkyrae leading the pack with almost 24M hours watched in 2020.
- Valkyrae made immense strides in 2020, growing over 7,304% in hours watched from Jan-Dec.
- The gap between top female and male streamers is continuing to close. Across all streamers, Valkyrae placed 63rd.
- Brands, like Amazon and female-first dating app Bumble, are leveraging the growth of female streamers to reach new audiences more appropriate for their target market.

FEMALES IN GAMING

Are gaming audiences disproportionately skewed male?

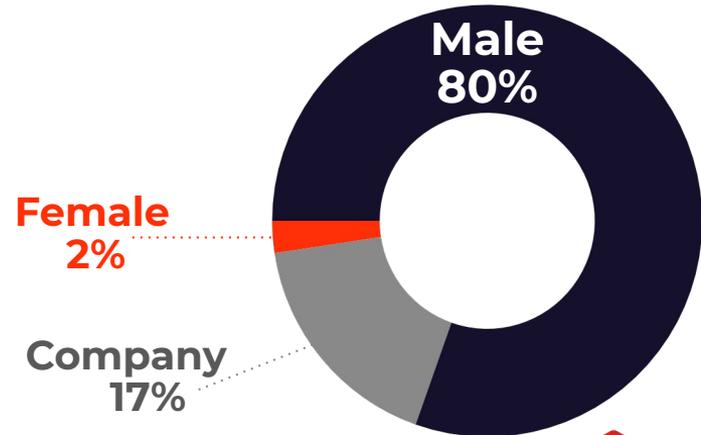
- While Gaming has been thought of as a traditionally male-dominated space, more and more females (and gender non-conforming people) are active in the space.
 - According to a YouGov poll, **30%** of game streaming viewers are female.
 - Stream Hatchet estimates that only **2%** of the top 250 Gaming Influencers on Twitch are female.
- Ensuring that the community is considered a safe space will continue to drive participation. Twitch has stepped out in front of the competition in this area, announcing an updated Hateful Conduct and Harassment policy which goes into effect 1/22/21. The Twitch policy change will likely drive similar efforts by YouTube and Facebook Gaming.

YouGov®

LIVE STREAMING AUDIENCE DEMOGRAPHICS

Viewer Gender	Streamer Audience Avg
Male	70%
Female	30%

TOP 250 TWITCH CHANNELS



ADVERTISING WITH VIDEO GAMING INFLUENCERS

Faster than ever before, advertisers are rushing to live gaming platforms leveraging influencers to reach millennials and gen-z eyeballs.

- Video gaming and esports reach a demographic that can be otherwise difficult to tap; in the US, that's a millennial male with a greater than average income.
- Traditionally, this demographic was reached via real-world sports but brands are now flocking to in-game advertising, competition sponsorships and integrations and other non-traditional methods to reach this cadre.
- While most in-person tournaments and competitions were canceled due to COVID-19, the industry has pivoted and events are still taking place in the virtual world, allowing brands to continue to reach their markets.
- Gaming audiences watched **355 Million** hours of sponsored live streams in 2020.

#ADS OF THE YEAR

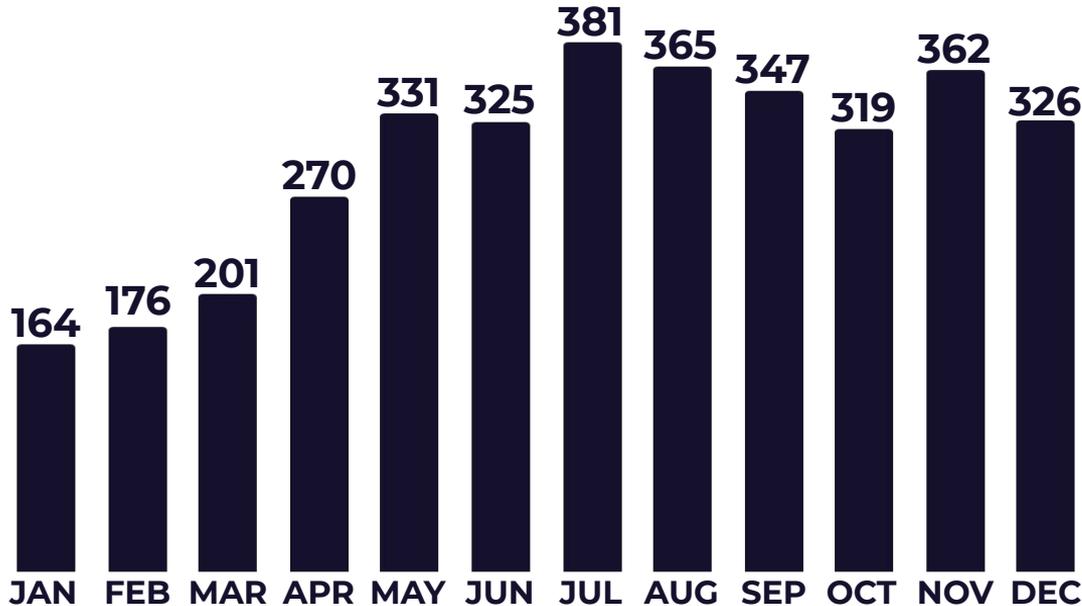
TOP SPONSORED STREAMS



MOBILE GAME STREAMING HOURS WATCHED GREW 98%

JAN 2020 - DEC 2020 | ON  TWITCH,  YOUTUBE GAMING, AND  FACEBOOK GAMING

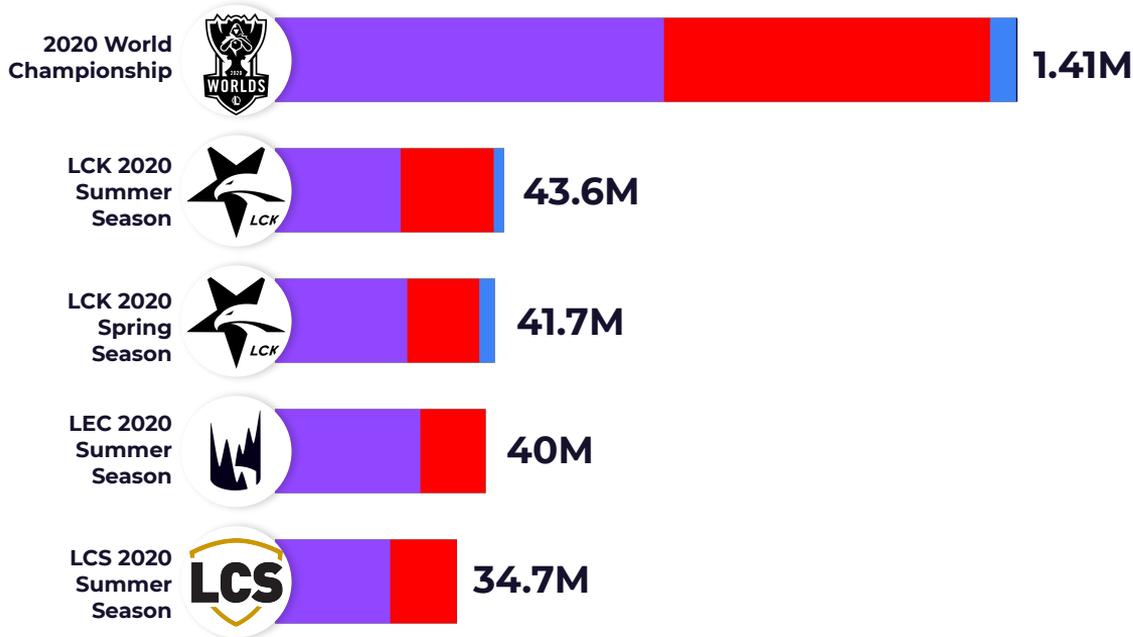
HOURS WATCHED
(MILLIONS)



- Mobile games have grown substantially in popularity in 2020, especially across YouTube Gaming and Facebook Gaming.
- Although Twitch leads all other western streaming platforms, the site pales in comparison regarding mobile viewership.
- PUBG Mobile and Garena Free Fire dominated all other mobile games across western platforms and both placed among the top five most watched games of 2020.
- A large factor in mobile game growth is the accessibility and free-to-play nature of many popular titles which appeals to the global audience.

TOP 5 ESPORTS EVENTS BY HOURS WATCHED

JAN 2020 - DEC 2020 | ON  TWITCH,  YOUTUBE GAMING,  AFREECA, AND OTHERS*



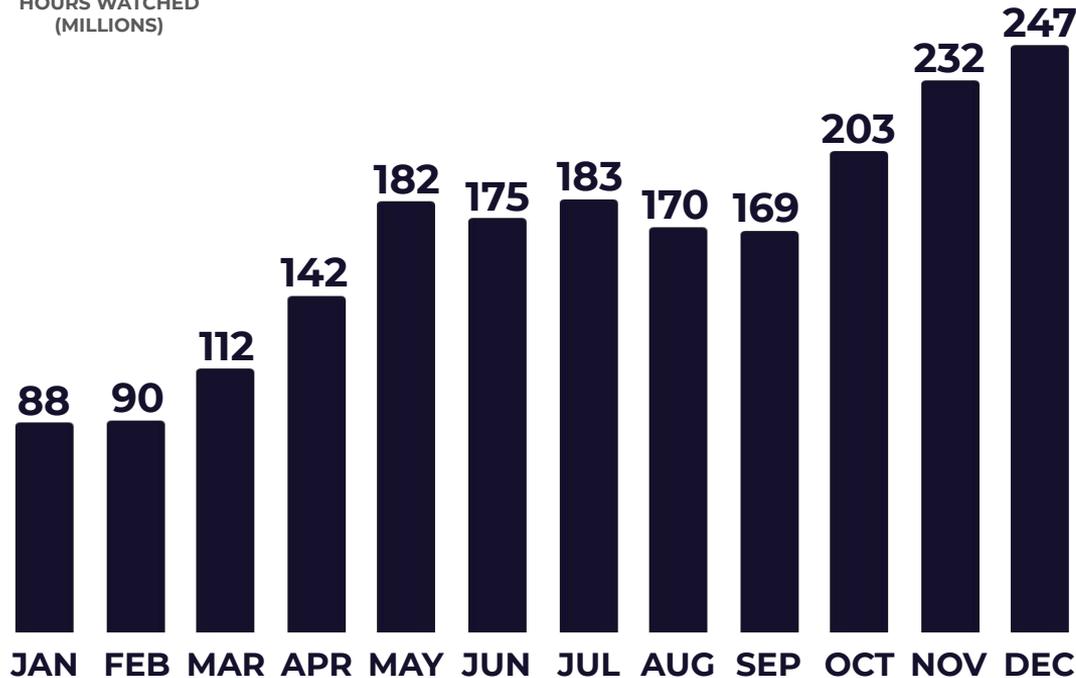
*Platforms include Facebook Gaming, Trovo, VK, Mildom & Openrec

- The 2020 League of Legends World Championship was once again the top event of the year while also growing 63% YoY.
- Riot Games dominated the esports scene holding all five of the most watched events of 2020.
- Cementing itself as a premier game publisher, Riot Games has perfected the esports league structure generating regional interest and global viewership.
- The top esports events on western streaming platforms are truly global as four of the top five events were outside of North America.
- Although not shown, mobile esports viewership is increasing rapidly and may push for a top five spot in 2021.

JUST CHATTING HOURS WATCHED UP 180% IN 2020

JAN 2020 - DEC 2020 | ON  TWITCH,  YOUTUBE GAMING, AND  FACEBOOK GAMING

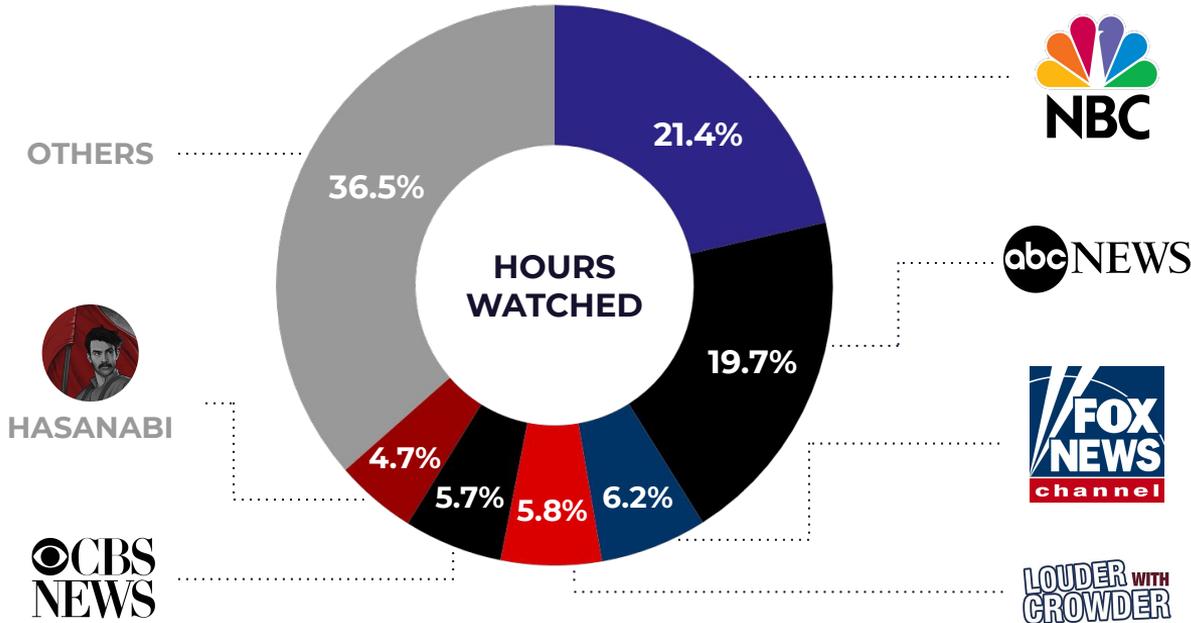
HOURS WATCHED
(MILLIONS)



- Just Chatting was one of the fastest growing categories on Twitch in 2020, reaching 180% growth in hours watched.
- Streamers leveraged the genre as a way to generate new, unique content outside of direct gameplay to diversify and further connect with their audiences.
- Just Chatting likely also benefited from the impact of COVID-19 as viewers turned to streamers for comfort that's easily shared via casual, relatable conversation.
- Just Chatting will likely continue to grow on Twitch as more streamers are using the category as an intro and outro for their streams.

ELECTION DAY COVERAGE LIVE STREAM HOURS WATCHED

NOV 3-4 2020 | ON  TWITCH,  YOUTUBE GAMING, AND  FACEBOOK GAMING

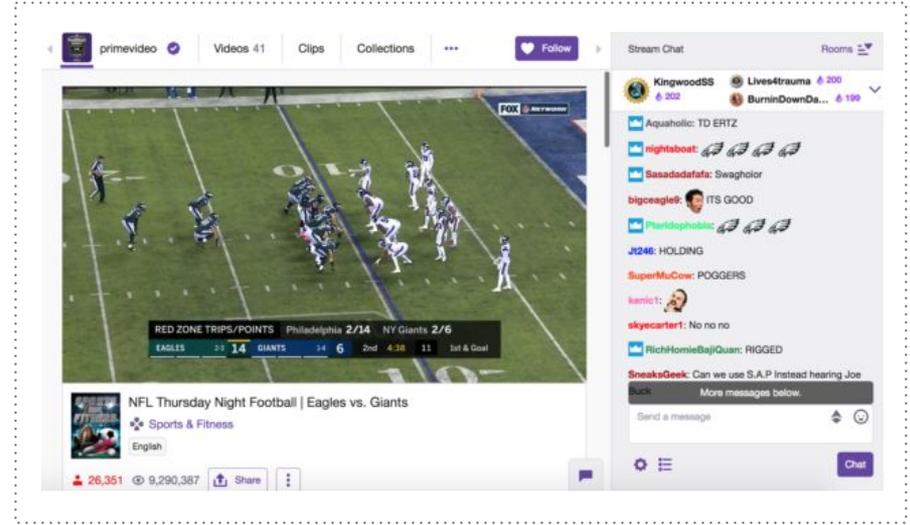


- The 2020 U.S. Election and supplementary events were live streamed across Twitch, YouTube, and Facebook as an additional avenue to reach a broader market outside of linear coverage.
- Although the live streams were not as popular as other content on the sites, official channels like CNN, FOX News, and others still generated sizeable viewership.
- Using the live streaming sites as a platform to express personal political opinions, streamers like HasanAbi were able to secure increased viewership from the election season.
- In total, the Election Day coverage on streaming platforms reached 51M hours watched and 5 million peak viewers.

STREAMING SITES MOVE BEYOND GAMING

Traditional sports are racing to gaming platforms to reach younger audiences on their home turf.

- Live streaming sites have been steadily pushing content boundaries past video games and esports events to include concerts, debates, professional sports and much more.
- The NFL partnered with Twitch and a few streamers for at least two years to broadcast their Thursday Night Football games, dipping into the live streaming market.
- Twitch has also created a separate tab on their homepage specifically designed to highlight music channels.
- As live streaming continues to grow in popularity and market share, streaming sites like Twitch and YouTube may be in line to uproot linear media or direct more premium brands to spend digitally.



2020 NFL THURSDAY NIGHT FOOTBALL HOURS WATCHED ON TWITCH

1.8 MILLION

AOC PEAK VIEWERS DURING HER DEBUT STREAM ON TWITCH

438K VIEWERS



POLITICS TURN TO LIVE STREAMING

Politicians are leveraging Gaming ecosystems to reach young audiences who have disconnected from traditional media sources

- The 2020 Election pushed politicians and news outlets onto live streaming sites in an attempt to maximize reach and awareness.
- Congresswoman Alexandria Ocasio-Cortez (better known by her followers as “AOC”) thrived in her debut on Twitch generating 438K peak viewers while playing Among Us with popular streamers.
- Over 4.7M viewers tuned into Twitch or YouTube to watch election coverage across channels like CNN and FOX News.
- With the rise of cable cutters, news outlets may continue to use live streaming sites to reach their target audiences. It may also be a way for individuals politicians to penetrate the impersonal boundary perceived by the public.



- **Stream Hatchet** provides live streaming data analytics from the leading video game streaming sites to power data-driven solutions leading to innovation and growth through the aggregation of readily accessible data.
- **Stream Hatchet** offers live streaming data analytics solutions to game publishers, marketing and influencer agencies, esports organizations, and brands to help them leverage their products or services across the gaming and esports industry through data-driven decisions.
- **Stream Hatchet** analyzes 6 million broadcasting channels daily across 20 unique platforms around the world, transforming around 2.5 Terabytes of data into 50,000 pieces of actionable analytics and business intelligence tool sets.

OUR SERVICES

We provide **Business Intelligence** products tailored to the needs of the organizations around esports and the livestream scene.



web

Analytic dashboards of the live streaming platforms



reports

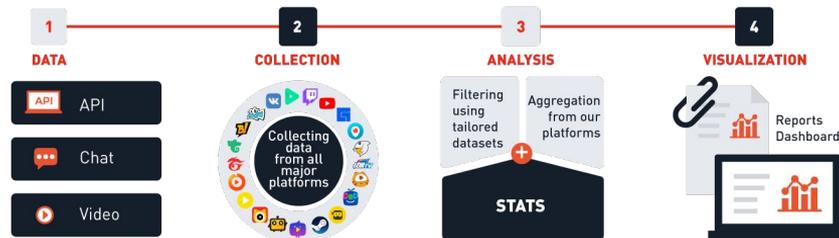
Custom reports for esports events, brand impact, games, sponsorship events and audience engagement



api

Our API enables you to build your esports solution using **Stream Hatchet** infrastructure and data

Methodology





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