PLATFORM INSIGHTS

WHERE ARE STREAMING AUDIENCES WATCHING?
Q3 STREAMING GROWTH ON PAR WITH 2020 INCREASE

2021 STILL ON TRACK FOR RECORD-SETTING VIEWERSHIP DESPITE DECLINE FROM Q2

Following an impressive Q2, live streaming viewership has dipped slightly this past quarter. However, hours watched are still well above what they were in 2020.

This slowdown in growth could be due to audiences moving away from live streaming now that offices, restaurants, and other aspects of everyday life are reopening. With that being said, users are consuming more video content in 2021 than ever before. So how does live streaming continue to grow in Q4?

The release of new games in the fall and winter could propel live streaming to its best quarter ever. Additionally, the expansion of streaming beyond gaming could play a massive role in the industry’s continued success.

WEEKLY LIVE STREAMING WATCH HOURS
Twitch, YouTube live gaming & Facebook gaming | 2019-2021

TOTAL QUARTERLY HOURS WATCHED

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>3.6B</td>
<td>4.9B</td>
<td>8.8B</td>
</tr>
<tr>
<td>Q2</td>
<td>3.7B</td>
<td>7.5B</td>
<td>9.0B</td>
</tr>
<tr>
<td>Q3</td>
<td>4.1B</td>
<td>7.7B</td>
<td>8.7B</td>
</tr>
</tbody>
</table>
**Twitch Shows Massive YoY Growth**

The Amazon-owned platform is outperforming last year’s record viewership.

**Twitch** leads live streaming viewership among the western platforms. It has also become home to many of the most popular streamers remaining the go-to site for console and PC esports events.

Through Q3, Twitch has seen a 41% increase in hours watched to reach a total of *18.5 million*; that’s more than double the viewership that it had in 2019. Live streaming and gaming are at the crux of pop culture and the ever-growing metaverse, opening doors for exponential growth. So how has Twitch put itself in a position to succeed in the new wave of live streaming?

Apart from gaming, Twitch has diversified its presence to music, podcasts, and sports - even the *Olympics* broadcasted content on the streaming site. Moving forward, Twitch has a deal in place to exclusively stream **NFL Thursday Night Football** starting in 2022 and running through the 2032 season. The platform remains the place to be for the next big concert, talk show, or sporting event.

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**Hours Watched Across All Twitch Channels**

<table>
<thead>
<tr>
<th>Quarter</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>8.3B</td>
<td>13.1B</td>
<td>18.5B</td>
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<tr>
<td>Q2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**YOY Growth**

- Q1 2021: +15%
- Q2 2021: +4%
- Q3 2021: -13%

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YOUTUBE LIVE GAMING CARRIES HUGE GROWTH POTENTIAL

WILL EXCLUSIVE CREATORS AND ESPORTS REVERSE THE PLATFORM’S DOWNWARD Q3 TREND?

YouTube Live Gaming experienced explosive growth in 2020 as the platform made leaps in live streaming tech and partnerships. While still generating impressive viewership in 2021, YouTube Live Gaming is down about 12% YoY. But does that mean that trend will continue in Q4 and beyond?

It’s unlikely that the platform will fall further through Q4, but it’s important to acknowledge part of the 2020 success was from the growth of live streaming during quarantine. Part of the decline can likely be attributed to audiences returning to a somewhat normal lifestyle with entertainment options outside their homes.

However, YouTube Live Gaming is primed to trend upward with the additions of DrLupo and TimTheTatman streaming exclusively on the platform. While the two can produce sizeable viewership, the bigger implication is how YouTube will be viewed by the live streaming community. It has now cemented itself as a legitimate destination for streamers to build careers.

WILL EXCLUSIVE CREATORS AND ESPORTS REVERSE THE PLATFORM’S DOWNWARD Q3 TREND?

HOURS WATCHED ACROSS ALL YOUTUBE LIVE GAMING CHANNELS

<table>
<thead>
<tr>
<th>Q1 2021</th>
<th>Q2 2021</th>
<th>Q3 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>-29%</td>
<td>-5%</td>
<td>-13%</td>
</tr>
<tr>
<td>1.4B</td>
<td>1.3B</td>
<td>1.1B</td>
</tr>
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</table>

WILL EXCLUSIVE CREATORS AND ESPORTS REVERSE THE PLATFORM’S DOWNWARD Q3 TREND?

<table>
<thead>
<tr>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.2B</td>
<td>4.3B</td>
<td>3.8B</td>
</tr>
<tr>
<td>95%</td>
<td>-12%</td>
<td></td>
</tr>
</tbody>
</table>
FACEBOOK GAMING EMERGES AS FASTEST GROWING WESTERN PLATFORM IN Q3

ANOTHER HUGE YEAR FOR FACEBOOK GAMING SETS THE PLATFORM UP TO SURPASS COMPETITORS

While Twitch and YouTube have at least a decade of video gaming history under their belts, Facebook is fairly new to the market. Since launch, Facebook Gaming has significantly grown its live streaming audience.

The YoY increase of 56% is the largest of the western platforms. The upward trend is likely due to a growing mobile gaming community and the popularity of Facebook worldwide. In Q3, Facebook Gaming produced over 75% of viewership for PUBG Mobile and Mobile Legends: Bang Bang, two of the largest mobile games on the market.

Facebook Gaming also made strides in technology and tools for creators. In September, the platform expanded the ability to use music as background elements for those within their Level Up program. Additionally, Facebook Gaming reopened their Black Gaming Creator Program to provide funding and training to those who qualify.
Everyone knows about Twitch, YouTube Live Gaming, and Facebook Gaming. But what about the other live streaming platforms? The sites popular in Asia, South America, and Oceania?

Although eastern live streaming platforms like NaverTV and Nonolive generate hundreds of millions of hours watched each year, they're still miles behind the western sites individually. But that doesn't mean they're insignificant in the market. Combined, these platforms reached 1.7 billion hours watched so far in 2021, about half of Facebook Gaming's total.

The content on these platforms are also seeing some levels of success. One channel on NaverTV placed 29th in total hours watched in Q3 with over 12.6 million. That's more than streamers like Mizkif or LIRIK produced over the same period. While these live streaming sites still have a way to go to become prominent in western streaming culture, they are certainly showing signs of continued growth.
CREATOR INSIGHTS

WHO ARE STREAMING AUDIENCES WATCHING?
TOP STREAMERS OF Q3 2021

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

With 49 million hours watched, xQcOW was the most watched streamer for yet another quarter. Even though this massively popular streamer produced 41 million less hours watched than last quarter - due to 167 less hours streamed - xQc was still 13 million hours above the next highest streamer.

These top streamers are diverse in content as well as culture. Of the top five streamers of Q3, four are non-English speaking creators. This is a great example of how the demand for live streaming has grown on a global level.

Former professional CS:GO player shroud rounded out the top ten with just over 21 million hours watched. This streaming veteran leveraged co-streaming to generate substantial audiences throughout the quarter. Notably, he was one of the official co-streams of various VALORANT events. Viewers would tune into his channel to hear his commentary over the official broadcast.

REPORT BY // STREAM HATCHET
# Social Reach of the Top Streamers Q3

RANKED BY REACH ACROSS SOCIAL MEDIA PLATFORMS

This quarter, Stream Hatchet has partnered with sister company, Sideqik, a leading influencer marketing platform, to report the social reach and engagement rates of the top streamers of Q3.

The popularity of top creators on live streaming platforms **doesn’t always translate** to other social media platforms. Streamers like xQcOW and Gaules are top two in viewership, but have a much smaller **social reach**. Their audiences tend to consume most of their content on Twitch rather than Twitter or Instagram, for example.

Engagement rate is very important for creators. Not only does it indicate **how audiences interact**, but it also creates opportunity for partnerships.

<table>
<thead>
<tr>
<th>Social Media</th>
<th>Engagement Rate</th>
<th>Social Reach</th>
</tr>
</thead>
<tbody>
<tr>
<td>xQcOW</td>
<td>1.03</td>
<td>50.4M</td>
</tr>
<tr>
<td>Asmongold</td>
<td>1.50</td>
<td>26.5M</td>
</tr>
<tr>
<td>loud_coringa</td>
<td>0.11</td>
<td>19.7M</td>
</tr>
<tr>
<td>ausroth</td>
<td>2.68</td>
<td>18.0M</td>
</tr>
<tr>
<td>ibai</td>
<td>0.22</td>
<td>12.5M</td>
</tr>
<tr>
<td>shroud</td>
<td>0.75</td>
<td>5.9M</td>
</tr>
<tr>
<td>hasanabib</td>
<td>1.07</td>
<td>3.9M</td>
</tr>
<tr>
<td>xQcOW</td>
<td>0.22</td>
<td>12.5M</td>
</tr>
<tr>
<td>TRAINWRECKSTV</td>
<td>0.23</td>
<td>2.2M</td>
</tr>
<tr>
<td>ROSHTEIN</td>
<td>0.23</td>
<td>1.0M</td>
</tr>
</tbody>
</table>

*Social data from Twitter, Instagram, Facebook, Twitch, TikTok, Pinterest, YouTube, and Tumblr. Provided by Sideqik*
TOP FEMALE STREAMERS OF Q3 2021

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

Amouranth was the most watched female streamer for the second consecutive quarter. After popularizing the Hot Tub streams in Q2, she found similar success with ASMR content. Out of all channels in Q3, she placed 35th overall in hours watched.

Female streamers are also finding success on YouTube Live Gaming with three of the top five listed here calling the platform home. Both Pekora Ch. and Valkyrae are commanding massive audiences as each streamer averaged above 22 thousand viewers in Q3.

The top female streamers also followed suit in content diversity as three of the top five listed are non-English streamers and two are VTubers.
SociaL REACH OF THE TOP FEMALE STREAMERS Q3

RANKED BY REACH ACROSS SOCIAL MEDIA PLATFORMS

Valkyrae has created a massive online presence in addition to her community on YouTube Live Gaming. She also has a 3.30 engagement rate across all social platforms, an extremely high mark and something to boast for potential partnerships.

On the other hand, Amouranth has a very low engagement rate. This is due to having large audiences across social media and streaming platforms but generating a low volume of likes, comments, and clicks.

The combination of total social reach and engagement rate is vital for brands to understand but doesn’t always tell the full story.
The VTuber trend is here to stay as three of the top five listed land within the top 100 most watched channels of Q3.

VTubers are extremely popular globally, with many top creators speaking Japanese or Korean. This lends itself to YouTube Live Gaming since the platform has shown success outside of just North American viewership.

The top VTuber, Kuzuha Channel, primarily played Apex Legends in Q3, benefiting greatly from the growth of the title. However, VTubers tend to play a variety of games to generate new content. All of the top VTubers listed streamed at least 15 different games during Q3, a different approach than some other creators who stick to only a few popular titles.
CONTENT INSIGHTS

WHAT ARE STREAMING AUDIENCES WATCHING?
TOP STREAMING CATEGORIES OF Q3 2021

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

After falling to second place last quarter, **Just Chatting** is back as the **most watched** streaming category of Q3. Streamers continue to use the category both before and after the main content of their streams to engage with audiences leading to high viewership. However, many creators have excelled with Just Chatting as their primary content.

Of the top ten categories, three are **mobile titles** that amassed a combined **812 million** hours watched in Q3. Mobile gaming is still growing, which may lead to higher rankings for mobile titles in the future.

One of the biggest trends in Q3 was the resurgence of **Apex Legends**. This game went from not making the top ten last quarter to being the most watched non-mobile battle royale with **270 million** hours watched. Many top streamers made the switch to Apex Legends for a while, leading to this dramatic jump in viewership.
NON-GAMING CONTENT CONTINUES TO SURGE ON TWITCH

With Just Chatting topping the leaderboards as the most watched category in streaming, it should come as no surprise that non-gaming content has continued to build strong audiences on Twitch. Additionally, other categories including Sports and ASMR have experienced substantial year over year growth.

Streamers like HasanAbi, GeorgeNotFound and Ibai made waves in the Just Chatting category in Q3. Viewers of Twitch watched 21 million hours of Just Chatting content on Hasan’s channel, roughly 3% of the total time watched. GeorgeNotFound amassed nearly ¼ million peak viewers while streaming an IRL meet up with Tommy Innit. Ibai peaked at 196 thousand viewers while interviewing international football star Gerard Piqué.

With sports superstars flocking to Twitch, the Sports category has grown substantially, a 441% increase in hours watched since Q3 2020. The return of Thursday Night Football will likely buff audiences heading into Q4.

WEEKLY LIVE STREAMING WATCH HOURS
TWITCH NON-GAMING CONTENT | 2019-2021

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>250M</td>
<td>365M</td>
<td>929M</td>
</tr>
<tr>
<td>Q2</td>
<td>284M</td>
<td>640M</td>
<td>1,052M</td>
</tr>
<tr>
<td>Q3</td>
<td>274M</td>
<td>681M</td>
<td>914M</td>
</tr>
</tbody>
</table>
TOP PUBLISHERS OF Q3 2021

RANKED BY HOURS WATCHED ACROSS TWITCH, YOUTUBE LIVE GAMING, AND FACEBOOK GAMING

Tencent, the massive Chinese conglomerate, was the only publisher to eclipse 1 billion hours watched in Q3. Riot Games, a Tencent owned entity and the creators of League of Legends and VALORANT, were responsible for a substantial portion of the viewership.

Take-Two Interactive finished with the second most hours watched due to the success of GTA V. Of the 700 million hours watched, GTA V accounted for 89% of T2’s viewerships in Q3.

Activision Blizzard generated much of their viewership from Call of Duty: Warzone, but also had sizeable audiences for World of Warcraft and Hearthstone.

EA produced their majority through Apex Legends and Xbox Games Studios through Minecraft.

REPORT BY // STREAM HATCHET
**APEX LEGENDS RISES TO THE PINNACLE OF THE BR GENRE**

**HOW APEX LEGENDS SURPASSED ALL OTHER BATTLE ROYALES IN Q3**

Compared to the previous quarter, Apex Legends’ viewership surged to over 50 million hours watched, becoming the most watched non-mobile battle royale.

In a time when battle royales are seeing a dip in average viewership QoQ, Apex Legends has managed to reverse the trend. In Q3, the game beat the average hours watched of the top 10 battle royales by nearly 140 million hours.

Much of the game’s success can be attributed to popular streamers making the switch to Apex Legends for a change of pace. Creators like NICKMERCS wanted fresh content while still providing competitive battle royale gameplay. Once other creators saw how successful Apex Legends could be, many followed suit and also made the game their primary content in Q3.

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**GROWTH OF APEX LEGENDS COMPARED TO BATTLE ROYALE AVERAGE HOURS WATCHED | Q1 - Q3 2021**

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Average of Top 10 Battle Royale Games</th>
<th>Apex Legends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1 2021</td>
<td>149M</td>
<td>197M</td>
</tr>
<tr>
<td>Q2 2021</td>
<td>147M</td>
<td>217M</td>
</tr>
<tr>
<td>Q3 2021</td>
<td>133M</td>
<td>270M</td>
</tr>
</tbody>
</table>

*Battle Royale data includes Apex Legends viewership*
VALORANT ON PACE TO BUILD MASSIVE AUDIENCES FOR ESPORTS

RIOT GAMES HAS CREATED ANOTHER GLOBAL ESPORTS GIANT

The success of League of Legends Esports has paved the way for Riot Games to continue building a global esports audience. In just over a year, VALORANT has amassed multi-millions of hours in watch time.

Through Q3 2021, VALORANT eclipsed 136 million hours watched; a 209% growth rate from Q1 to Q3. Not only has the game’s total hours watched skyrocketed, but the number of VALORANT events have decreased from the previous quarters. More viewership from fewer events clearly indicates massive interest in VALORANT esports moving forward. So what’s next for Riot Games’ tactical FPS?

VALORANT is set to continue to build massive audiences around Riot Games Esports, alongside several other successful properties.
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

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

ENHANCE
Optimize content by understanding the full context of a livestream to enhance data-driven decisions.

MEASURE
Reference both past and live data to make the most informed decisions. Compare and contrast metrics, time frames, and results to measure the ebb and flow of an audience at a minute level granularity.

Stream Hatchet is the global leader in live-streaming gaming viewership analytics across all major video distribution platforms. The organization provides robust consumer insights to leading publishers, brands, agencies and teams. Sideqik is a market innovating influencer marketing platform enabling targeted creator discovery, activation and measurement across all major social platforms. Both Stream Hatchet and Sideqik are wholly owned subsidiaries of Engine Media Holdings, Inc, a publicly traded company under the ticker symbol (NASDAQ: GAME) (TSX-V: GAME). Engine Media provides premium social sports and esports gaming experiences, as well as unparalleled data analytics, marketing, advertising and intellectual property to support its owned and operated direct-to-consumer properties while also licensing these serves to enable its clients and partners.

CONTACT SALES