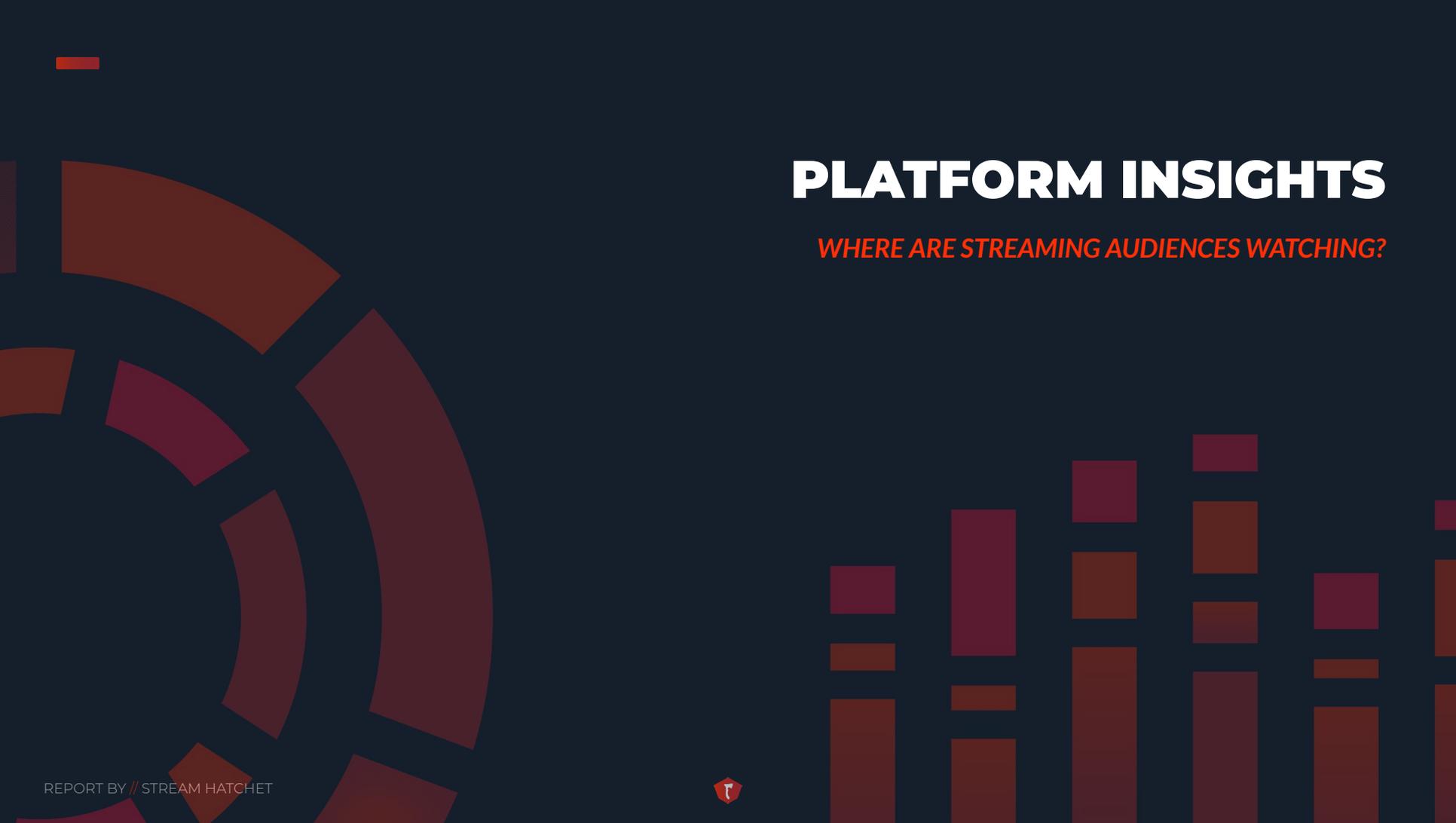


Q3 2021 LIVE STREAMING REPORT

GROWTH TRENDS, PLATFORM VIEWERSHIP, AND MORE

REPORT BY STREAM HATCHET





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

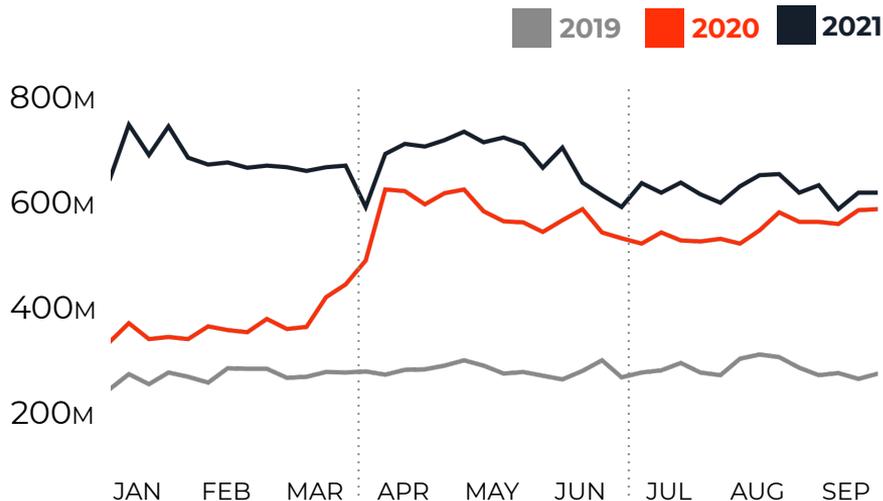
Following an impressive Q2, live streaming viewership has dipped slightly this past quarter. However, hours watched are still **well above** what they were in 2020.

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

	2019	2020	2021
Q1	3.6B	4.9B	8.8B
Q2	3.7B	7.5B	9.0B
Q3	4.1B	7.7B	8.7B



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.

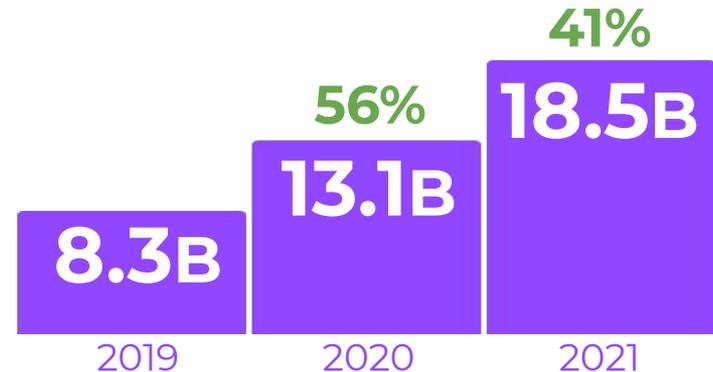
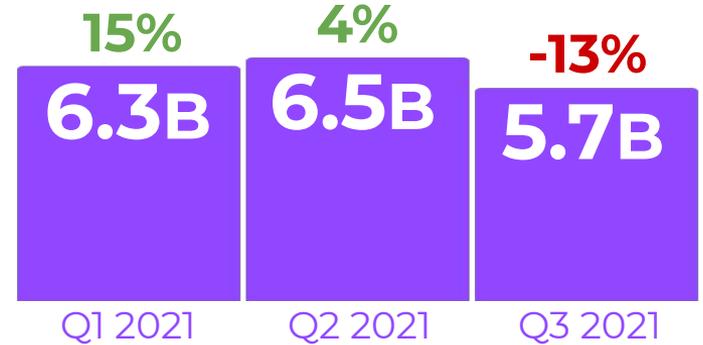
Through Q3, Twitch has seen a **41%** increase in hours watched to reach a total of **18.5 million**; that's more than double the viewership that it had in 2019. Live streaming and gaming are at the crux of pop culture and the ever-growing metaverse, opening doors for exponential growth. So how has Twitch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



HOURS WATCHED ACROSS ALL TWITCH CHANNELS

Q1 - Q3 | 2019-2021



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?

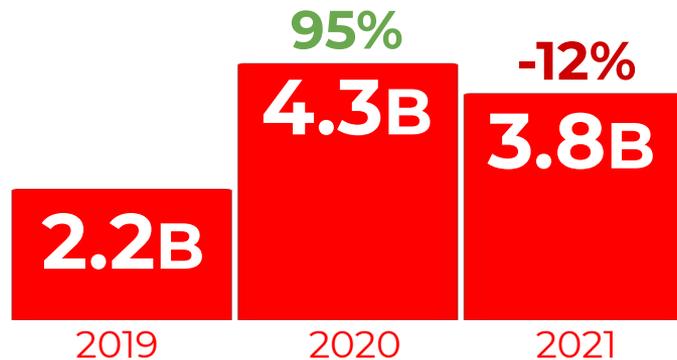
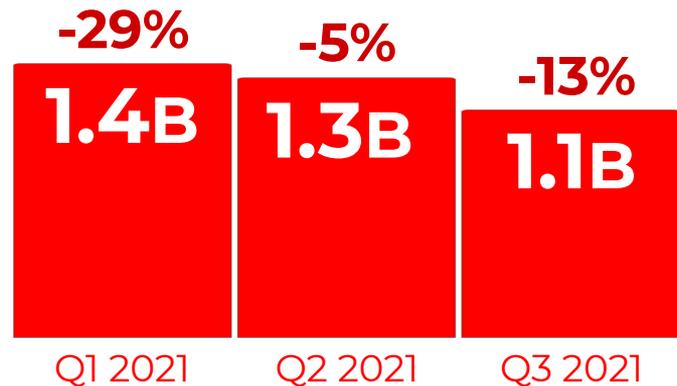
It's unlikely that the platform will fall further through Q4, but it's important to acknowledge part of the 2020 success was from the growth of live streaming during quarantine. Part of the decline can likely be attributed to **audiences returning to a somewhat normal lifestyle** with entertainment options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



HOURS WATCHED ACROSS ALL YOUTUBE LIVE GAMING CHANNELS

Q1 - Q3 | 2019-2021



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.

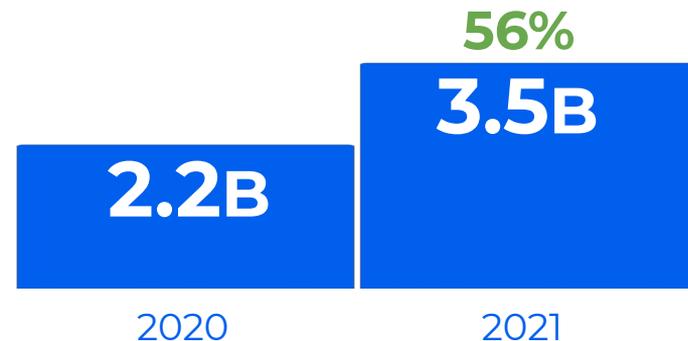
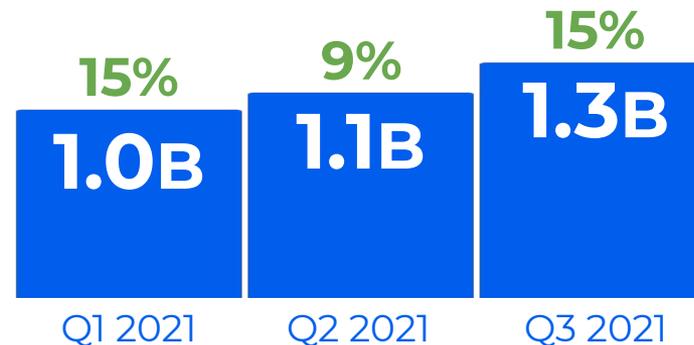
The YoY increase of **56%** is the **largest** of the western platforms. The upward trend is likely due to a growing mobile gaming community and the popularity of Facebook worldwide. In Q3, Facebook Gaming produced over **75%** of viewership for **PUBG Mobile** and **Mobile Legends: Bang Bang**, two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



HOURS WATCHED ACROSS ALL FACEBOOK LIVE GAMING CHANNELS

Q1 - Q3 | 2019-2021



ARE OTHER STREAMING PLATFORMS GENERATING WORTHWHILE VIEWERSHIP?

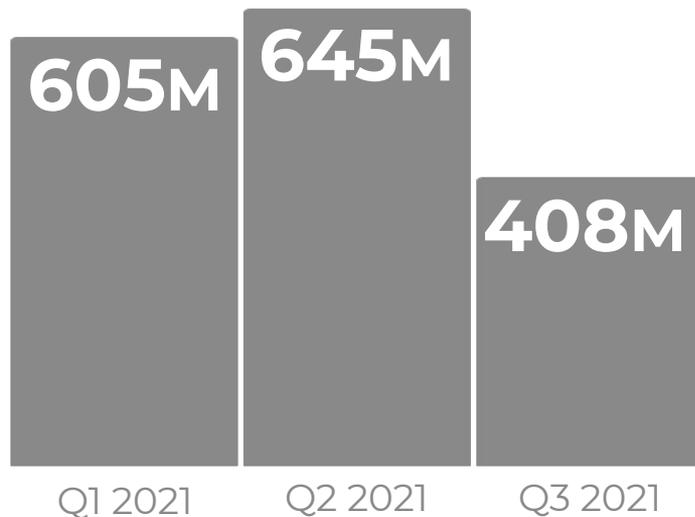
HOW EASTERN STREAMING SITES ARE SLOWLY GAINING POPULARITY

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**.

HOURS WATCHED OTHER LIVE STREAMING PLATFORMS



**Data includes viewership from Steam, Trovo, NaverTV, Mildom, DLive, Nonolive, AfreecaTV, Openrec, Garena LIVE, VK, & KakaoTV*





CREATOR INSIGHTS

WHO ARE STREAMING AUDIENCES WATCHING?



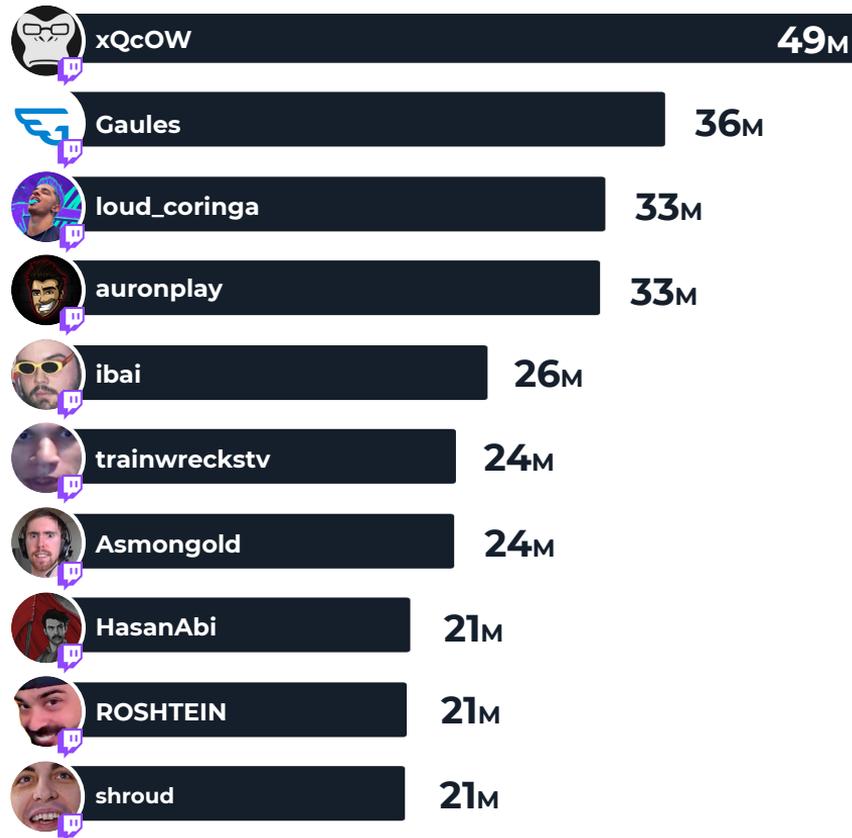
TOP STREAMERS OF Q3 2021

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.



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**.

ENGAGEMENT RATE

SOCIAL REACH



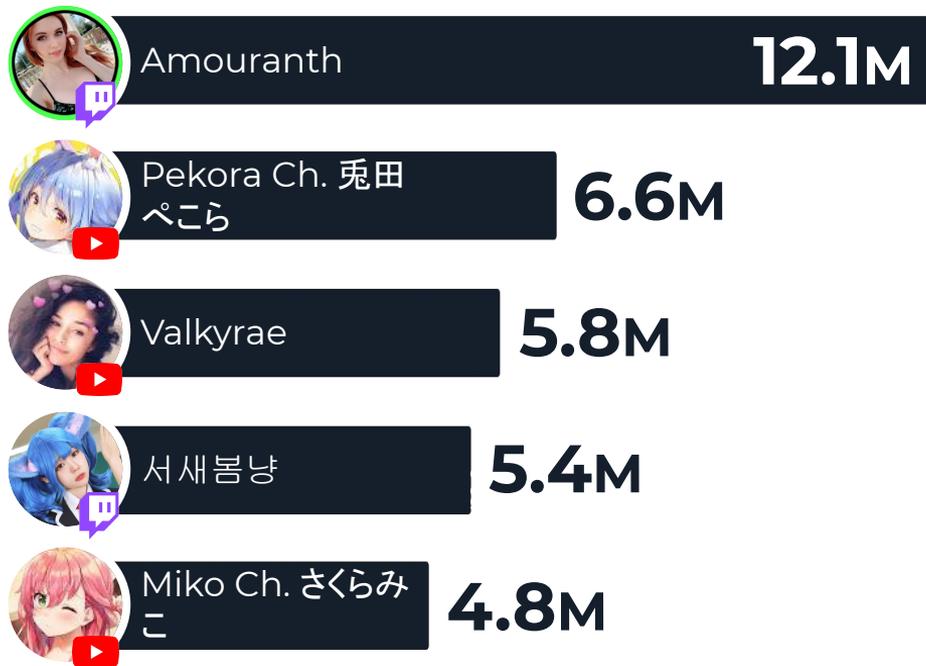
TOP FEMALE STREAMERS OF Q3 2021

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**.

ENGAGEMENT RATE

SOCIAL REACH



Valkyrae

3.30

9.9M



Amouranth

0.01

4.8M



Pekora Ch.
兔田ぺこら

0.75

2.7M



Miko Ch.
さくらみこ

0.79

2.2M



서새봄냥

0.18

1.0M



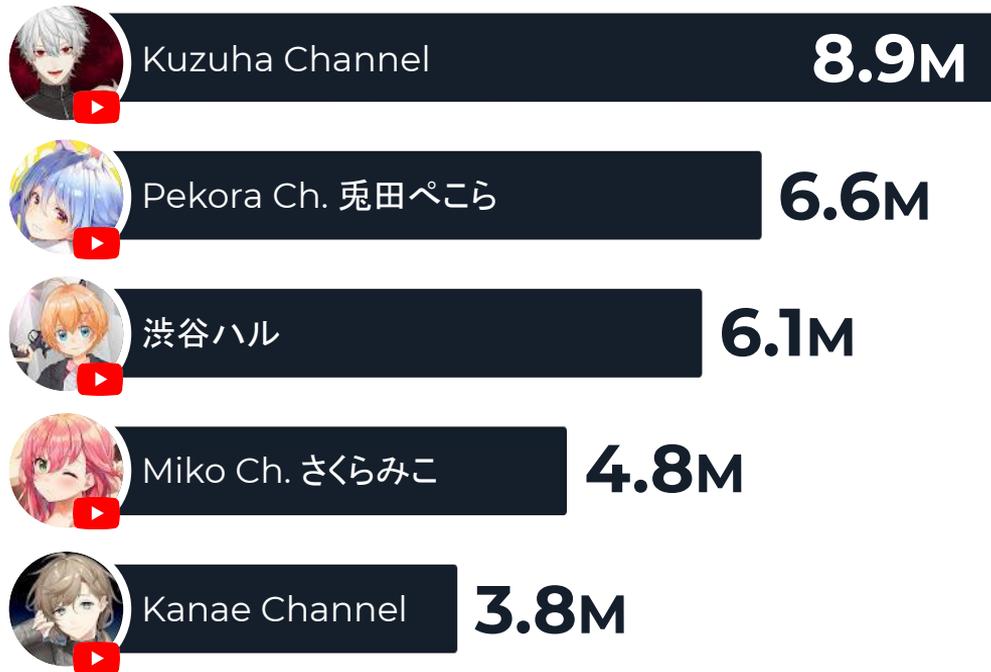
TOP VTUBERS OF Q3 2021

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

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.



Just Chatting

708M



GTA V

657M



League of Legends

443M



Garena Free Fire

325M



Minecraft

305M



VALORANT

282M



Apex Legends

270M



PUBG Mobile

247M



Fortnite

246M



Mobile Legends:
Bang Bang

240M



NON-GAMING CONTENT CONTINUES TO SURGE ON TWITCH

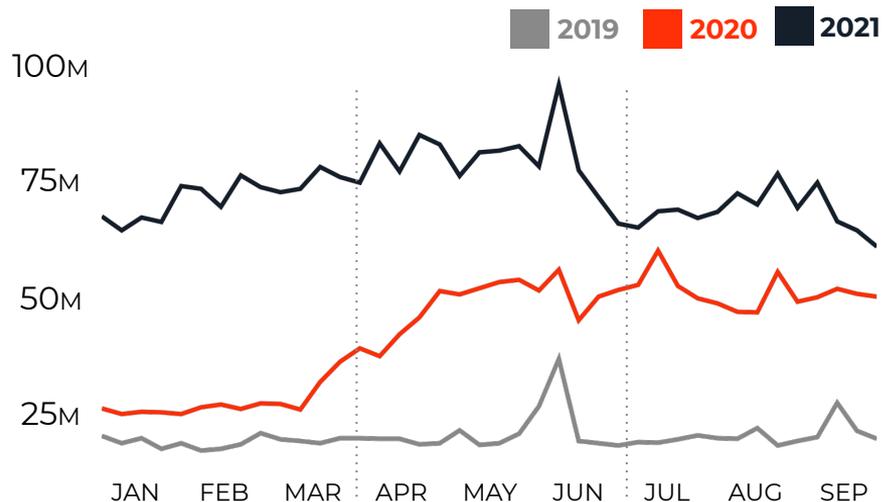
TOTAL HOURS WATCHED OF ALL NON-GAMING CATEGORIES ON TWITCH INCLUDING JUST CHATTING, SPORTS, ASMR AND OTHER CATEGORIES

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 experience 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



	2019	2020	2021
Q1	250M	365M	929M
Q2	284M	640M	1,052M
Q3	274M	681M	914M



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**.

Tencent 腾讯

1.1B



0.7B

ACTIVISION | BLIZZARD

0.6B



0.4B



0.4B



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.

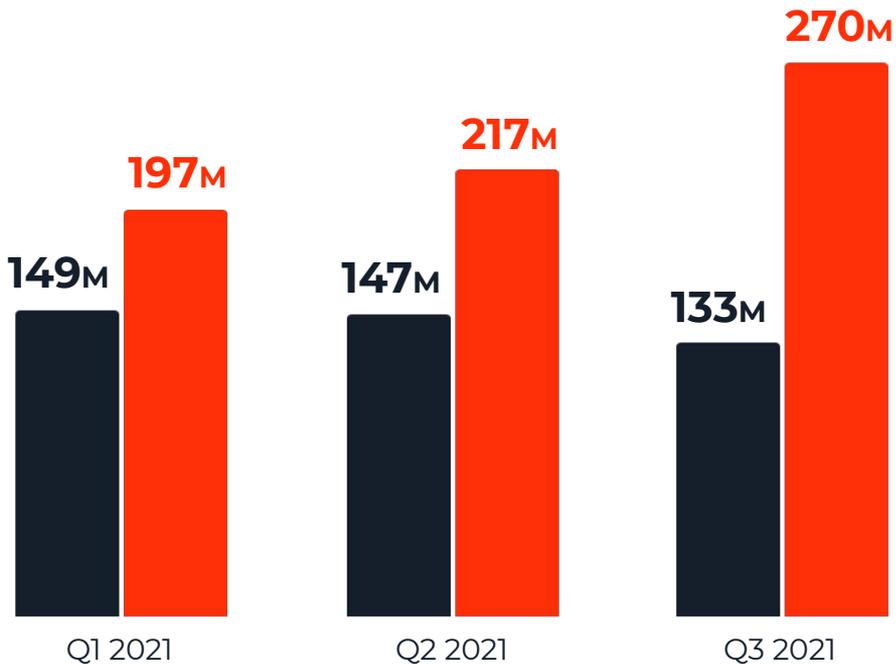
Much of the game's success can be attributed to popular streamers making the switch to Apex Legends for a change of pace. Creators like **NICKMERC'S** wanted fresh content while still providing competitive battle royale gameplay. Once other creators saw how successful Apex Legends could be, many followed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

GROWTH OF APEX LEGENDS COMPARED TO BATTLE ROYALE AVERAGE

HOURS WATCHED | Q1 - Q3 2021

AVERAGE OF TOP 10 BATTLE ROYALE GAMES

APEX LEGENDS



VALORANT ON PACE TO BUILD MASSIVE AUDIENCES FOR ESPORTS

RIOT GAMES HAS CREATED ANOTHER GLOBAL ESPORTS GIANT

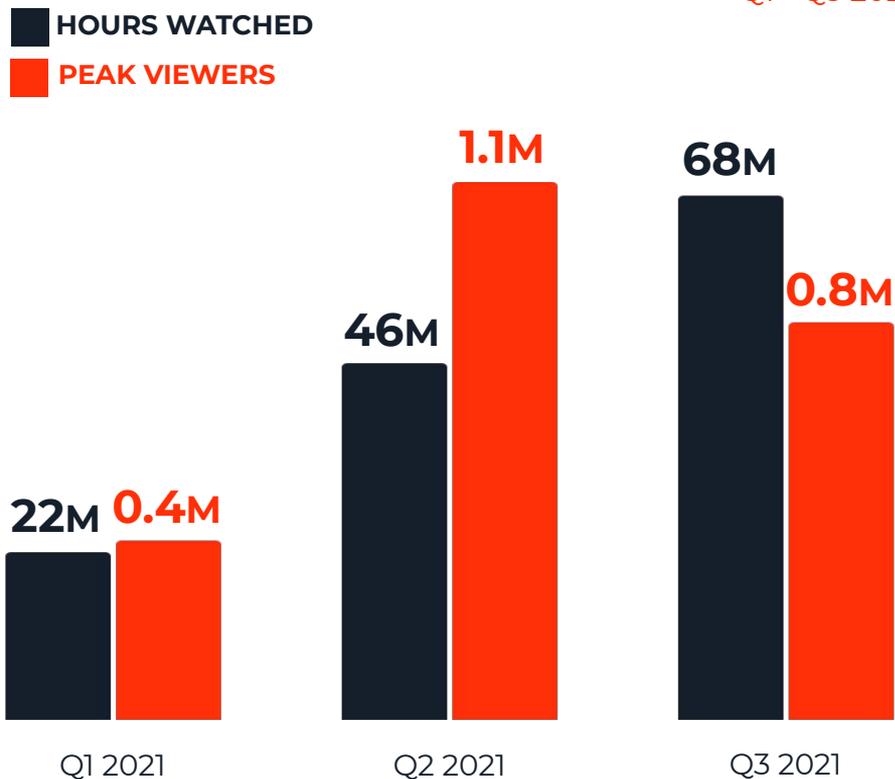
The success of League of Legends Esports has paved the way for Riot Games to continue building a global esports audience. In just over a year, **VALORANT** has amassed multi-millions of hours in watch time.

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.

VALORANT ESPORTS VIEWERSHIP

Q1 - Q3 2021





STREAM
HATCHET

