Free Version | 2021

Global Esports & Live Streaming Market Report

Market Sizing | Forecasts | Activating in Esports and Streaming
COVID-19 Impact | Live Streaming in China | Trends

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01. Introduction

Foreword

Esports is changing. Over the past few years, the lines between esports, live streaming, and even influencer marketing have become blurred. This year, we have expanded the report to recognize the significant role that live streaming plays in the gaming and esports ecosystems. We thus proudly present to you our first-ever **Global Esports and Live Streaming Market Report** (Free Version). We're very excited to introduce streaming coverage for the first time, presenting an overview of the market, a look back at 2020, profiles of key influencers, and audience sizing for all existing countries/markets we cover. We also added a section highlighting some of the best strategies for various stakeholders to approach esports and streaming. In line with the market's changes, including impacts from the pandemic, we've also taken time to revisit our audience models, which you can learn more about in the Methodology chapter.

Last year, the pandemic disrupted the esports and live-streaming markets alike. On the live-streaming side, lockdown measures resulted in spiking viewership across all platforms. More consumers were—and still are—confined to their homes, driving them to spend more time on platforms like Twitch, YouTube, and Huya. These platforms also flourished as social hubs for many consumers, resulting in an impressive year overall for streamers and the broader live-streaming market. While the esports market faced more challenges, it also managed significant growth, with markets and regions that previously had little-to-no esports activity suddenly entering the scene and flourishing—most notably, India. The explosion of PUBG Mobile in the region prior to the government's ban on the game, as well as the growing popularity of Mobile Legends: Bang Bang, has created an Indian esports boom that is likely here to stay.

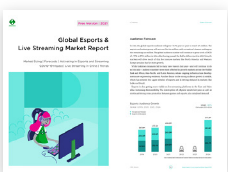
On the other hand, ecosystem instability and economic instability have negatively impacted key esports revenue streams. The cancelation of in-person events eliminated ticket revenues while also having a knock-on effect on merchandise across the board. These factors presented challenges to arena and homestand ventures too, putting many investments on hold. Market uncertainty has also reduced new sponsorship deals; while current partners still see value and are renewing, the number of new deals declined from 454 deals in 2019 to 358 in 2020. It should also be noted that this reduction was partially driven by an increase in the number of multi-year agreements versus one-year rolling renewals.

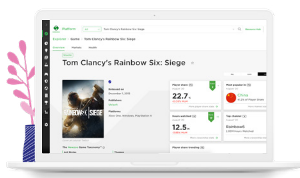
International circuits like CS:GO and Dota 2 were also severely disrupted by travel restrictions. While the shift to regional play elevated the European CS:GO scene, other scenes for the game suffered, funneling many North American organizations away from

CS:GO, either leaving the scene or toward other games (including Riot's big 2020 release, Valorant). Cancelations were even more challenging for Dota 2, whose loss of The International last year heavily impacted the scene. Nevertheless, the pandemic has underlined the resilience of regional ecosystems for the wider market, which may shift strategies and ensure a more secure esports market for the future.

The complete, paid version of this report features key insights into five different regions and nine submarkets, as well as our latest forecast scenarios for the live-streaming audience, the esports audience, and the esports economy. We discuss the continued growth of mobile esports, short- and long-term pandemic impacts, the state of live streaming in China, and more. 2021 is an important year for the industry, and we're excited to help you navigate it.

Remer Rietkerk
Head of Esports



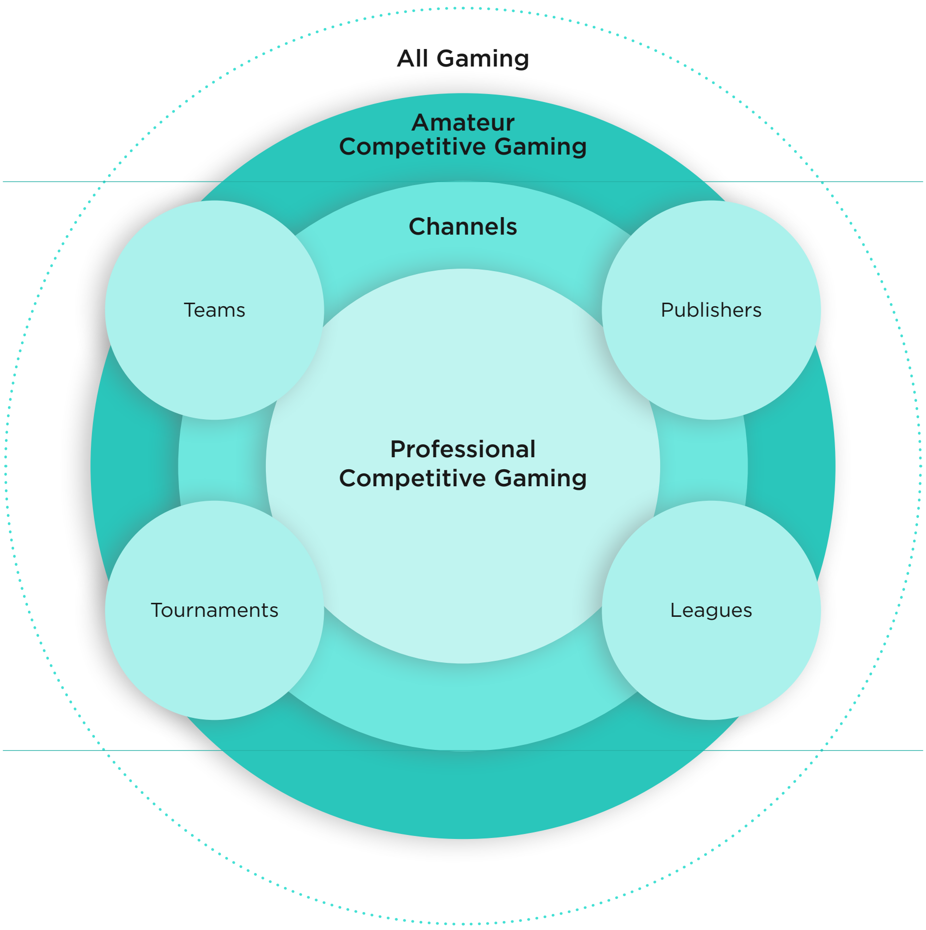


Includes access to the Newzoo Platform and Newzoo Pro data

Scope of Report

Audience & Revenue Scope

This report aims to give a reliable and realistic overview of the current status and future of the live streaming audience and esports market. Multiple data sources were used in shaping the Global Games Live Streaming Audience, Global Esports Audience and Revenue Model, which is continually updated. Market sizing figures for esports in this report reflect the professional competitive gaming scene and exclude viewership or revenues generated through amateur competitive gaming.



Boundaries of Esports

There are various interpretations of what the esports industry encompasses. In addition to differing opinions about the market's boundaries, there are many definitions of the term esports. We define esports as follows: professional or semi-professional competitive gaming in an organized format (tournament or league) with a specific goal/prize, such as winning a championship title or prize money. Our esports market sizing includes revenues and viewership from professional competitive gaming content only. We do not include amateur competitions or live streaming around non-organized competitive gaming.

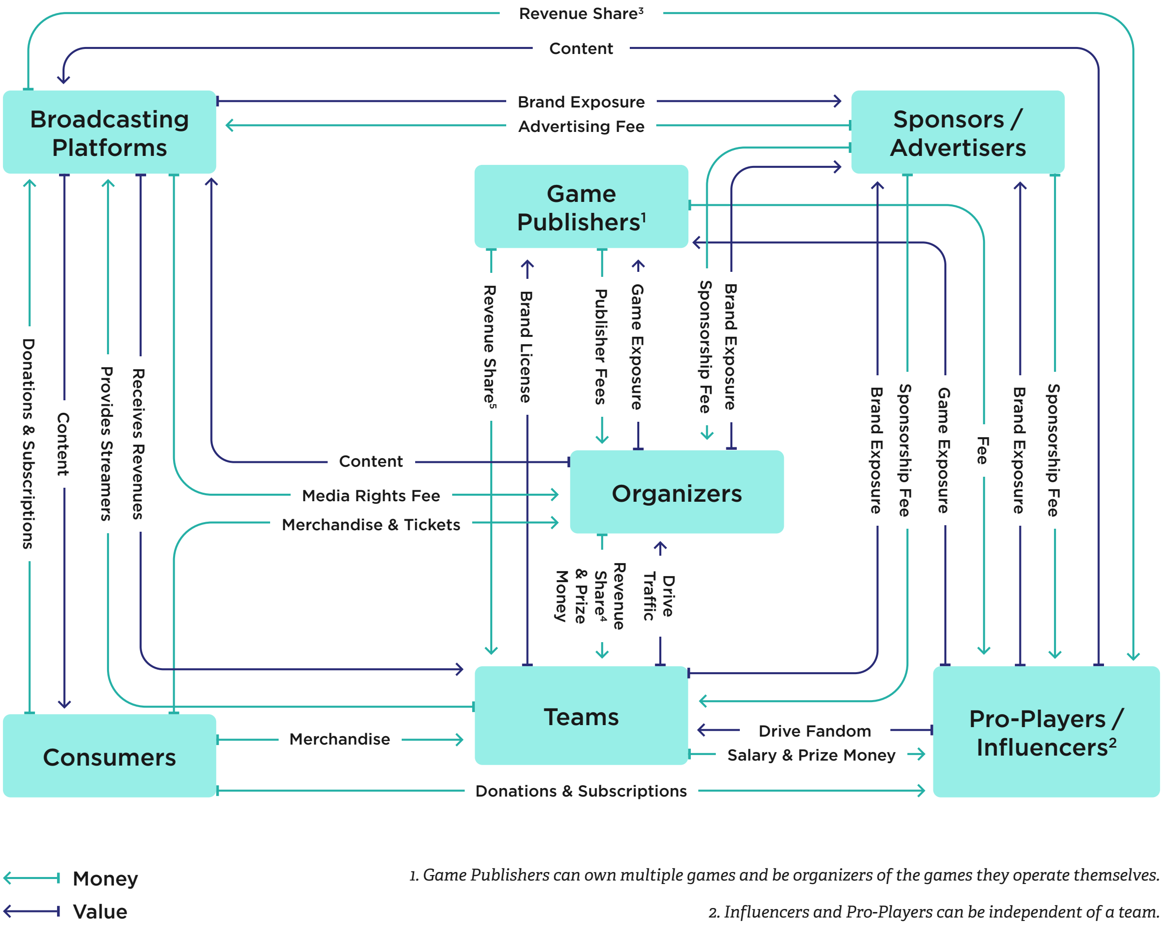
Still, live streaming around non-organized competitive gaming is an exciting industry full of its own developments. We refer to this industry as the live-streaming market, but it is also commonly known as game streaming. The industry sees gamers live broadcasting themselves playing online. Some of these streamers have grown to celebrity status, including Ninja and Shroud. We consider the live-streaming market separate from esports. There is a significant audience overlap between both markets, their content and monetization strategies differ—for now. The lines are beginning to blur, owing to the increasing frequency at which esports and live-streaming formats are overlapping. For example, popular streamers are competing in pro-level esports more often, and some tournaments are allowing their competitors to live stream themselves competing. We are excited, however, to bring you coverage of the live-streaming market this year for the first time.

We also make a clear distinction between amateur participation in tournaments, competitive games in general, and esports. Amateur participation in competitive gaming is vastly different from the professional scene. Even if amateur competitions offer prizes, the focus is on participation and not on entertaining viewers. While we do size the market for amateur competitive participants, such as those who compete in online tournaments like ESL, FACEIT, or Toornament, and/or in LAN events, they are not a part of our esports audience market sizing.

It's important to note that while a recent academic article by Joseph Ahn, William Collis, and Seth Jenny published in the International Journal of Esports pointed toward $24.9 billion as the market size for 2019, it included revenues from the underlying games and digital tools associated with esports (e.g., Discord). For the purposes of this report, we do not include core game revenues, excluding revenue shares for team intellectual property-based digital goods, nor do we include revenues from digital tools associated with esports.

Ecosystem Overview

There are many different stakeholders for esports, and each of these has a unique part to play. This makes the ecosystem complex and varied. Below, we visualize the relationships between these stakeholders, including how money/added value flows between them. Generally, consumers view a game via a broadcasting platform. However, game publishers work with many different companies to produce video content. Therefore, there are many ways content is monetized. For readability, we excluded agencies from the overview, as they are simply the mediators of the deals. We also chose not to include third-party stakeholders like Patreon, as these organizations simply facilitate the revenue flow between consumers and key stakeholders.



1. Game Publishers can own multiple games and be organizers of the games they operate themselves.

2. Influencers and Pro-Players can be independent of a team.

3. Revenue share includes a share of subscription, donation, and advertisement revenues.

4. Revenue share include a share of sponsorship and media rights revenue.

5. Revenue Share includes a share on in-game digital goods.

Key Takeaways

1. Global esports revenues will grow to $1,084 million in 2021, a year-on-year growth of +14.5%, up from $947.1 million in 2020.

2. In 2021, $833.6 million in revenues—over 75% of the total market—will come from media rights and sponsorship. This will grow to $1,185 million by 2024.

3. The global games live-streaming audience will hit 728.8 million in 2021, growing +10.0% from 2020. It will grow to 920.3 million by 2024, a CAGR of +9.2%.

4. The pandemic accelerated the adoption of live streaming. We expect the growth rates to progressively return to their natural growth by 2024. Growth rates will stay in the double digits for most developing economies throughout 2024: Latin America with a CAGR of +14.0%, the Middle East and Africa with a CAGR of +15.1%, Central Southern Asia with a CAGR of +14.8%, and Southeast Asia with a CAGR of +14.8%.

5. Spanish and Portuguese live broadcast showed the biggest growth in 2020, positioning themselves after English as the most-watched languages on live-streaming platforms. Spanish grew by +369% to reach 1.4 billion hours watched, while Portuguese grew by +189% to 1.1 billion hours watched.

6. Globally, the total esports audience will grow to 474.0 million people in 2021, a year-on-year growth of +8.7%. Esports enthusiasts will make up 234 million of this number, growing +8.7% year on year.

7. China will have the most esports enthusiasts in 2021 with 92.8 million, followed by the U.S. and Brazil. China will also be the largest market for games live streaming, with an audience of 193.0 million in 2021.

8. China is also the largest market by revenues, with total revenues of $360.1 million in 2021. This is up +14.0% from 2020's total of $315.1 million. It is followed by North America, with total revenues of $243.0 million, and Western Europe, with total revenues of $205.8 million.

9. The global average revenue per esports enthusiast will be $4.63 this year, up +2.8% from $4.40 in 2020. It is important to note this is down from 2019's $4.86 per esports enthusiast, but we expect it to jump up to $5.25 in 2022 after live events are restored.

10. The League of Legends World Championship was 2020's biggest tournament by live viewership hours on Twitch and YouTube, with 91.9 million hours. League of Legends Champions Korea Summer was the most-watched league by live viewership hours on Twitch and YouTube, generating 53.9 million hours.

02. Methodology & Terminology

Audience Revamp

This edition of the report features a significant refresh to our audience model, influencing the audience groups involved and adding a new one. We evaluate our models regularly, taking new partner data and our ongoing first-party research data into account, ensuring we remain consistent with the latest dynamics in this evolving market.

It is important to highlight our new independent audience group. The **games live-streaming audience group comprises people who watched live-streamed gaming content at least once in the last six months**, including esports and general game live streaming across all platforms. The scope of the data is live broadcast content, not VOD (video on demand) content, and the broadcast content must be game-related.

With respect to our existing audience groups, we have adjusted our model to no longer include the urban and rural approach to estimating audience size. We removed this factor as we no longer observe this as a key driving element in the market; instead, we focus more on internet wealth factors, online population, and macroeconomic developments. We believe these changes reflect the esports audience more accurately. Beyond that, data inputs remain the same, including population, online population, internet penetration, economic growth metrics, and our proprietary primary consumer research.

In terms of our primary research, we narrowed the input for the organized competitive-gaming participants by **setting a stricter boundary for the frequency of participating in organized competitive events**. Participants are required to participate in esports tournaments with prize pools **at least once a month**, whereas in the previous methodology, participation was defined as at least once a year. The narrower definition is intended to provide a more actionable metric for entities approaching the amateur esports market. For the remaining audience groups, the primary research data has remained unchanged.

Our market and region scope has also remained largely unchanged, with the exception of adding Central Southern Asia as a dedicated sub-region to our forecasts. This was due to the market's sudden increase in notable local and endemic esports activity, driven by mobile multiplayer titles such as Mobile Legends: Bang Bang (ML:BB) and PUBG Mobile.

Lastly, our later-year forecast methodology for audiences has changed in line with our revenue methodology. **Primary growth drivers in later forecast years are now more led by market fundamentals like online population and macroeconomic growth as short-term impacts dissipate**. Previously, esports' nascent state provided market conditions to carry growth through the later-year forecasts. As the market matures, we believe audience growth will more closely track macroeconomic factors, with saturation slowing growth.

Methodology

Sizing the Market With a Variety of Data

Newzoo aims to provide its clients with the best possible assessment of the esports market, in terms of sizing and its future potential. We synthesize many data points to provide estimates on a regional and individual country/market level. Below, we describe our approach in detail, explaining what underpins our forecasts.

Newzoo focuses on three key high-level metrics for each market: esports enthusiasts, occasional viewers, and revenues. We define a market as a country, region, or other territory.

The data on esports enthusiasts and occasional viewers is largely based on our proprietary primary consumer research, which continues to form the basis of our detailed analysis of consumers, esports, and games. In 2020, we carried out research in more than 32 countries/markets, covering more than 60,000 consumers. Starting in 2009 with six countries/markets, it is now the world's largest games-related consumer research program.

Newzoo's games live-streaming audience is based on similar metrics and inputs as our esports audience numbers. In addition, we review these numbers based on our own viewership data and that collected from different streaming platforms to validate our estimates.

The esports enthusiast and occasional viewer ratios resulting from this consumer research are projected against the online population, using population, internet penetration, and economic growth metrics. Internet wealth development is an important driver for the number of esports viewers and is an indicator of how much structural growth a country or market can expect in the population of potential esports viewers.

Revenue forecasts are based on our predictive esports market model, incorporating data from many sources: macroeconomic and census data, primary consumer research, data provided by our industry data partners, public event data for viewership and attendees, media reports, and third-party research. These include revenue actuals from leading teams and companies in the industry. Our partner list can be found on the following page. We also receive valuable input from clients, including leaders in the esports industry.

Market size estimates and growth forecasts for individual countries/markets and in aggregate for the total industry are validated against our analysis of various contextual metrics. Our market model calculates the average revenue generated per esports enthusiast, which is then compared with historical numbers, other regions, GDP per capita, and traditional sports spending. Overall, our forecasts are always the outcome of an iterative process, reviewing the implications of our assumptions on a very granular level.

Newzoo's Partners: Leading Esports Teams and Organizations

We define industry revenues as the amount the industry generates via the sale of sponsorship, media rights, digital, streaming, tickets and merchandising, and publisher fees. Currently, only teams account for digital revenues. We are committed to ongoing research so we can continue to accurately model and project digital esports revenues from publishers.

Our revenue numbers exclude prize pools and player salaries, which we consider to be cost items at an industry level. The revenue numbers also exclude fan contributions to prize pools, as they would be pass-throughs to a cost center.

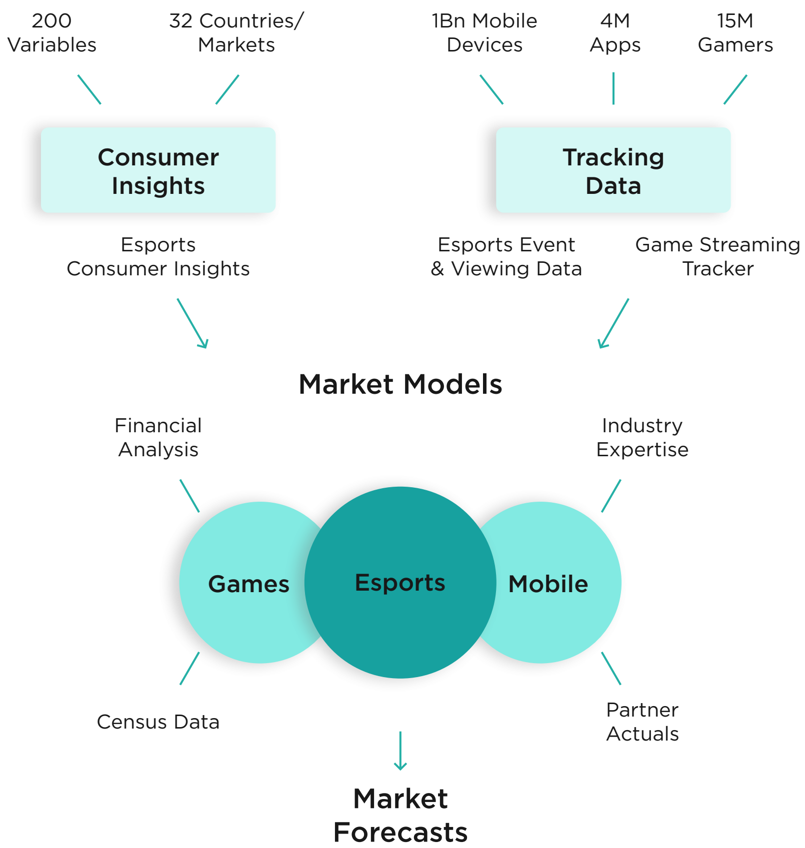
We also exclude revenues from online gambling and betting related to esports (e.g., via BWIN, Unikrn). We do not include capital investments in esports organizations, as we think it is important to distinguish between revenues and investments. To clarify, capital investment is the activity of investing funds in a firm or enterprise to further its business objectives. The term brand investment refers to deals made by companies around brand sponsorships, marketing activations, and content licensing deals.

It's important to note we do not include core game revenues, excluding revenue shares for team intellectual property-based digital goods, nor do we include revenues from digital tools associated with esports. Instead, core game revenues can be found in our Global Games Market Report.

Our historical revenues and growth rates reflect the year-end U.S. dollar exchange rate. Our projected growth rates assume steady exchange rates going forward, but we take into consideration historical growth rates in local currency rather than in U.S. dollar, as this gives a better picture of underlying growth.

In terms of countries, markets, and regions, we define the market size as the amount generated by consumers in that specific territory.

The methodology and various inputs are visualized by the illustration below.



Terminology

Definitions of Often-Used Terms

Esports: Competitive gaming at a professional level and in an organized format (a tournament or league) with a specific goal (i.e., winning a champion title or prize money) and a clear distinction between players and teams that are competing against each other.

Esports Enthusiasts: People who watch professional esports content more than once a month.

Occasional Viewers: People who watch professional esports content less than once a month.

Esports Audience: All people who watch professional esports independent of frequency: esports enthusiasts and occasional viewers combined.

Esports Awareness: People who have heard of esports, including the group of people who are aware of esports but are not participants or viewers.

Organized Competitive Gaming Participant: People who participate in (online) competitive gaming leagues at a pro or amateur level at least once a month. E.g., through FACEIT, Toornament, and ESL Play. Note: This definition has been updated since 2020, where the participation requirement was once per year.

Streaming: This is when one person, or sometimes a group of people, streams live video of him/herself via a streaming platform, allowing viewers to see what he/she is playing at that moment in time.

Games Live Streaming Audience: People who have watched live-streamed gaming content at least once in the last six months.

Esports Event: A competitive gaming tournament or league in which players and/or teams compete against each other with the goal to win.

League: An event featuring regular matches played over several months following a planned schedule. Teams typically play at least one game against every other competing team.

Tournament: An event that typically happens over a short period of time. Its format frequently includes a group stage, from which teams can advance to a knock-out phase. As some teams are eliminated before the final, not all teams will play directly against one another.

Independent/Third-Party Organizer: An organization that hosts esports events but does not own or publish the game(s) played at the event.

Online Population: People within a country or region who have access to the internet via a computer or mobile device.

Esports Density: The share of esports enthusiasts in the online population.

Players or Gamers: People who play games on a PC, console, or mobile device.

Gaming Peripherals: Gaming-related hardware products, such as mice, keyboards, headsets, controllers, or monitors.

Media Rights Revenues: Revenues generated through media property, including all revenues paid to industry stakeholders to secure the rights to show esports content on a channel. This includes payments from online streaming platforms to organizers to broadcast their content, foreign broadcasters securing rights to show content in their country, or copyright costs to show video content or photos of an esports competition.

Merchandise and Ticket Revenues: Revenues generated by the sale of tickets for live esports events and of merchandise. Merchandise sold by esports teams and event organizers is included, as well as merchandise sold by publishers.

Digital Revenues: Revenues generated from digital sales of in-game items that utilize Team IP or signed player likeness. These are currently limited to the revenues that teams earn. Publisher cuts of these revenues will arrive in a future update.

Sponsorship Revenues: Revenues generated by teams and organizers through sponsorship deals. This includes all deals relating to sponsoring an event, including product placement, sponsoring teams, and payments by brands for the use of team, event, or game-specific IP rights in their marketing communications. Any advertisements sold as part of a sponsorship package are also included in sponsorship revenues.

Game Publisher Fees: Revenues paid by game publishers to independent esports organizers for hosting events. This excludes investments or spending by game publishers on their own events, as we consider that to be part of their regular marketing efforts.

Streaming Revenues: Revenues generated through professional players or signed streamers streaming—either on their own channels or on team channels.

Revenue per Enthusiast: Average annual revenue generated per esports enthusiast (esports revenues divided by esports enthusiasts).

03. Key Global Trends

Brandification and Content Creator Strategies

Team Diversification Is Paving the Way for a Healthier Esports Market

The early strategies of esports team organizations have largely followed in the footsteps of traditional sports teams, focusing predominantly on constructing competitive rosters and making sponsorship deals with brands looking to target viewers. Other analogous revenue streams include ticket sales and merchandise from match-day attendance, media-rights disbursements from leagues, and occasionally prize pools. Within esports, one of these revenue streams accounts for far more of the market than any other: sponsorships, the core foundation upon which esports is built. The other traditional sports revenue streams remain underdeveloped and have yet to fully unlock their potential in a meaningful way. At the same time, growing esports organizations and heightened competition for talent are driving up team costs, creating a stronger need to diversify revenues. Esports sponsorship—and thus the revenues it generates—is also heavily dependent on consumer brands. As the pandemic has emphasized and accelerated, these companies, in particular, are tied to the cyclic nature of the global economy, pressuring esports teams to seek alternative sources of revenues, such as positioning themselves as a lifestyle brand or moving toward content-creator strategies.

Find the complete trend on brandification and content creator strategies in the full report.

Beyond Games and Esports

Twitch Is No Longer a Gaming-Only Platform

Last year, non-gaming content made a significant comeback on Twitch. Esports fans used the platform to band together to form virtual communities, but 2020 saw entire populations becoming isolated and socially distanced, driving similar desires to develop virtual communities around entertainment circles beyond gaming. In fact, non-gaming-related category **Just Chatting** was the **most-watched category on Twitch in 2020**, coming in at nearly 1.9 billion live hours watched, while second-place **League of Legends** generated roughly 1.5 billion hours watched.

Find the complete trend on non-gaming content on Twitch in the full report.

Small Screen, Huge Engagement

Esports and Live Streaming Enter the Upper Echelon on Mobile

The Inflection Point

How Lockdown Measures Accelerated the Convergence of Esports and Traditional Sports

The Esports League-Tournament Divide

Lessons Learned from the Pandemic and Traditional Sports

The Rise of Charity Streaming

Find all six trends in the full report.

04. Special Focus Topics

China's Live-Streaming Market

History and Development

China's esports and game-streaming market first boomed in the early 2010s, when professional Chinese esports teams won key early tournaments in **League of Legends** and three times in **Dota 2**'s **The International** events. This success led to the formation of game-focused live-streaming platforms like **Douyu**, **Huya**, **Zhanqi**, **Huomao**, and **PandaTV** throughout 2013 and 2014. As the development of the Chinese esports market and streaming market were so intertwined, many of China's top streamers during this time were also pro esports players. Although game streamers were mostly amateurs in the early days, they led the game-streaming trend and displaced the 30-minute game tutorials or walk-through videos that previously dominated the market.

Differences Between China and the West

Challenges for the Chinese Live Streaming Market

Find the complete special focus topic on China's live-streaming market in the full report.

COVID-19's Impact on the Esports Market

While some presume the pandemic was a huge boon for esports, this is not necessarily the case. The misconception is understandable; esports was a key pastime for many consumers when lockdowns began, and traditional sports seasons were suspended while esports quickly adapted to the new environment and continued. The natural assumption for many is that esports must be profiting from the crisis. The reality, however, is that esports has seen a mixed result.

Viewership

Business Challenges

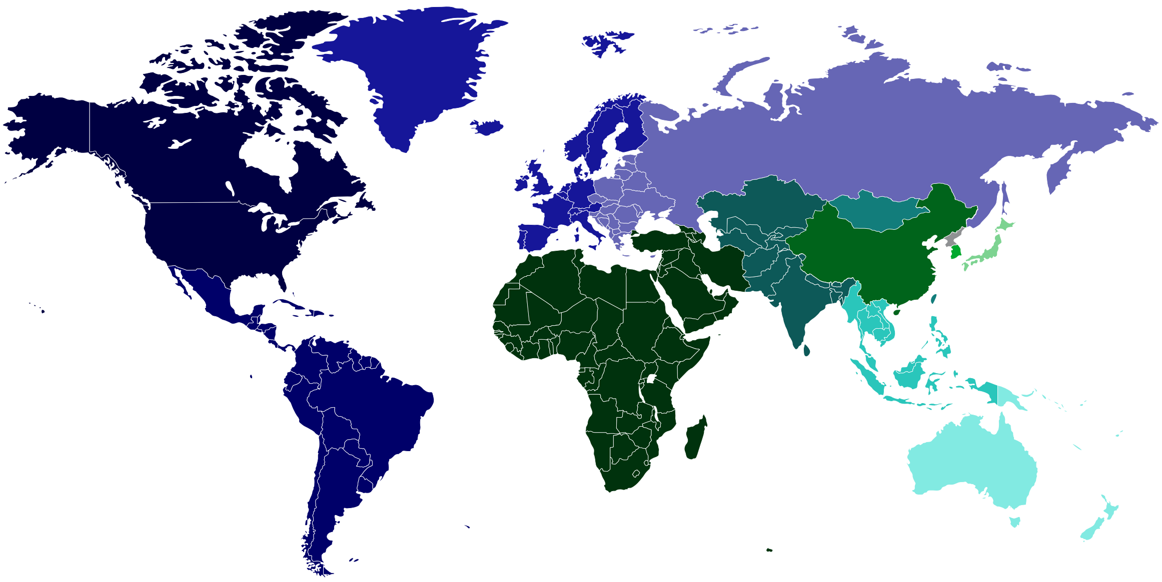
Looking Forward

Find the complete special focus topic on COVID-19's impact on the esports market in the full report.

05. Global Overview

Estimates in this chapter are from March 2021. We review these quarterly and update them if needed here: newzoo.com/key-numbers.

Global Overview



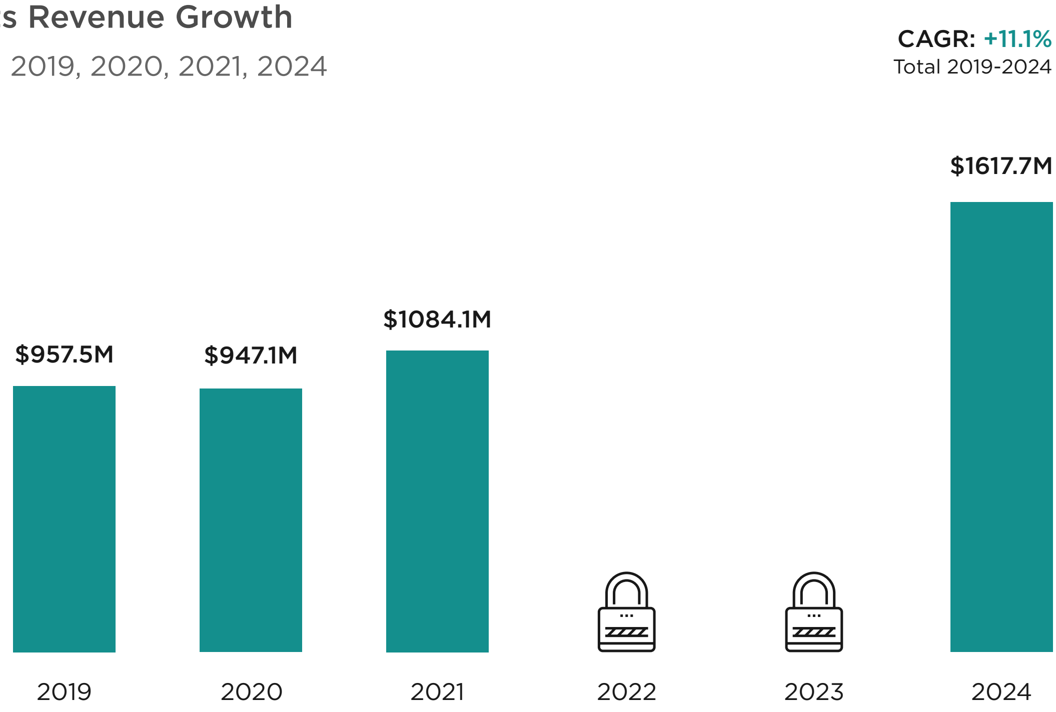
2021	
Population	7,754,045,885
Online Population	4,566.5M
Awareness	1,889.7M
Games Live Streaming Audience	662.7M
Esports Enthusiasts	215.4M
Esports Revenues	$947.1M
Annual Revenue/Enthusiast	$4.40

Revenue Forecast

Esports is on track to generate strong revenues by the end of 2021, when we expect the market's yearly revenues to reach $1.08 billion—up from 2020's $947.1 million (a year-on-year growth of +14.5%). China will generate more than a third of worldwide esports revenues. The global revenue number will exceed $1.6 billion by 2024, representing a healthy CAGR of +11.1%, and revenue growth will be strong across the board—in mature and growth markets.

Esports Revenue Growth

Global | 2019, 2020, 2021, 2024



Find the complete 2019-2024 forecasts for esports revenues, esports audience, and games live streaming audience in the full report.

2021 Revenue Streams

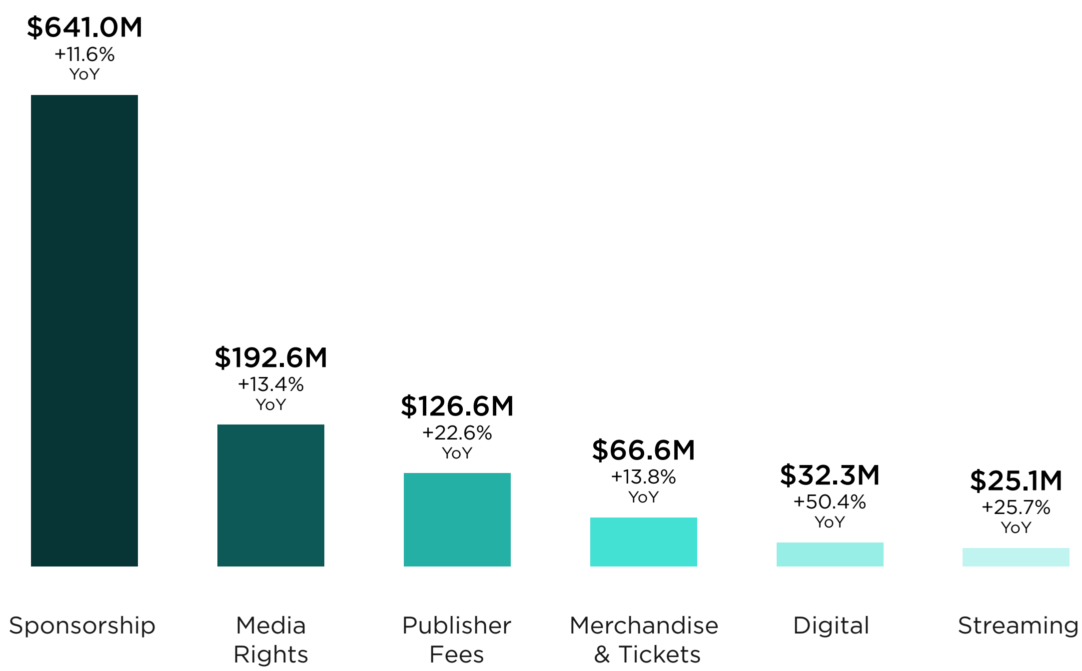
Sponsorship revenues are the foundation on which the esports market was built, so it's no surprise that it continues to be the highest-grossing revenue stream, generating $641.0 million in 2021, or 59% of the entire market. However, this share will decrease slightly in the coming years as ticket revenues recover from COVID-19 restrictions and esports organizers and teams continue to diversify—another sign of a healthy market.

Due to fewer real-world events, revenues from tickets and merchandise will remain lower this year, generating $66.6 million in 2021, a reduction that will not recover until 2022. For the same reason, the streaming and digital revenue streams also jumped last year. Successful lessons learned by organizers will keep this share above 3% through to 2024.

More details on our esports revenue model and the individual revenue streams can be found in Chapter 2: Methodology and Terminology.

Esports Revenue Streams

Global | 2021



Audience Forecast

In 2021, the global esports audience will grow +8.7% year on year to reach 474 million. The esports enthusiast group will account for 234 million, with occasional viewers making up the remaining 240 million. The global audience number will continue to grow with a CAGR of +7.7% to 577.2 million in 2024, after having passed the half-a-billion mark in 2022. Growth markets will drive much of this, but mature markets like North America and Western Europe are also due for more growth.

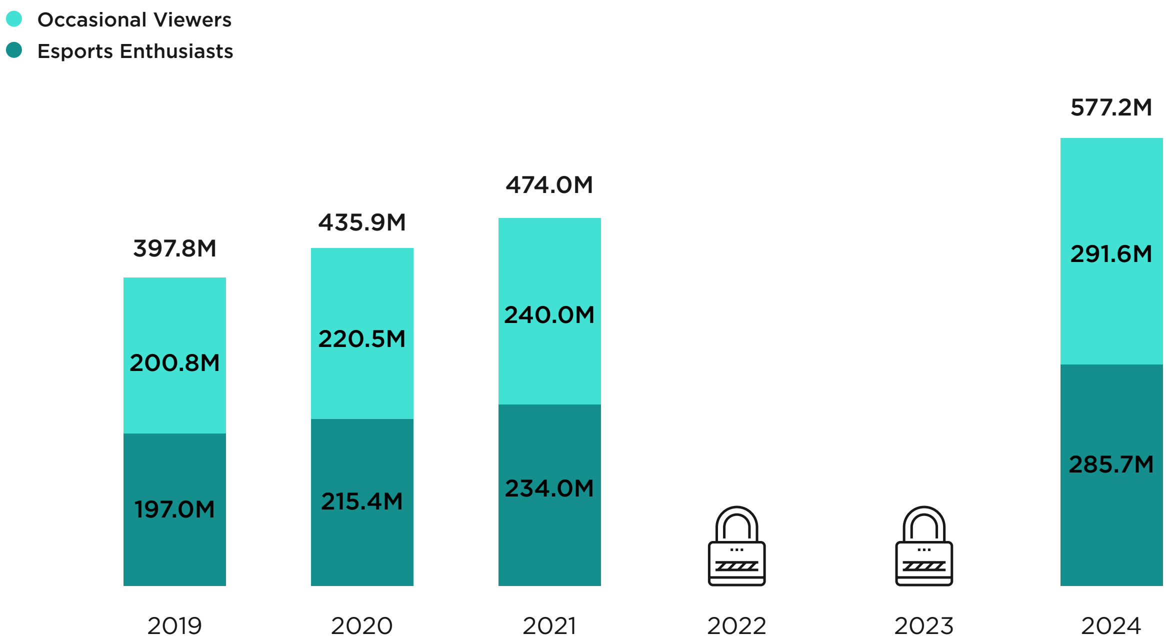
While lockdown measures led to many new viewers last year—and will continue to do so into 2021— audience numbers were most affected by growth markets across the Middle East and Africa, Asia-Pacific, and Latin America, whose ongoing infrastructure developments are empowering residents. Another factor in the strong audience growth is mobile, which has entered the upper echelon of esports and is driving demand in markets like India and Brazil.

Esports is also getting more visible on live-streaming platforms in the East and West alike, increasing discoverability. The interruption of physical sports last year, as well as continued strong cross-promotion between games and esports, also catalyzed demand.

Esports Audience Growth

Global | 2019, 2020, 2021, 2024

CAGR: +7.7%
Enthusiasts 2019-2024



Due to rounding, Esports Enthusiasts and Occasional Viewers do not always add up to the total audience.

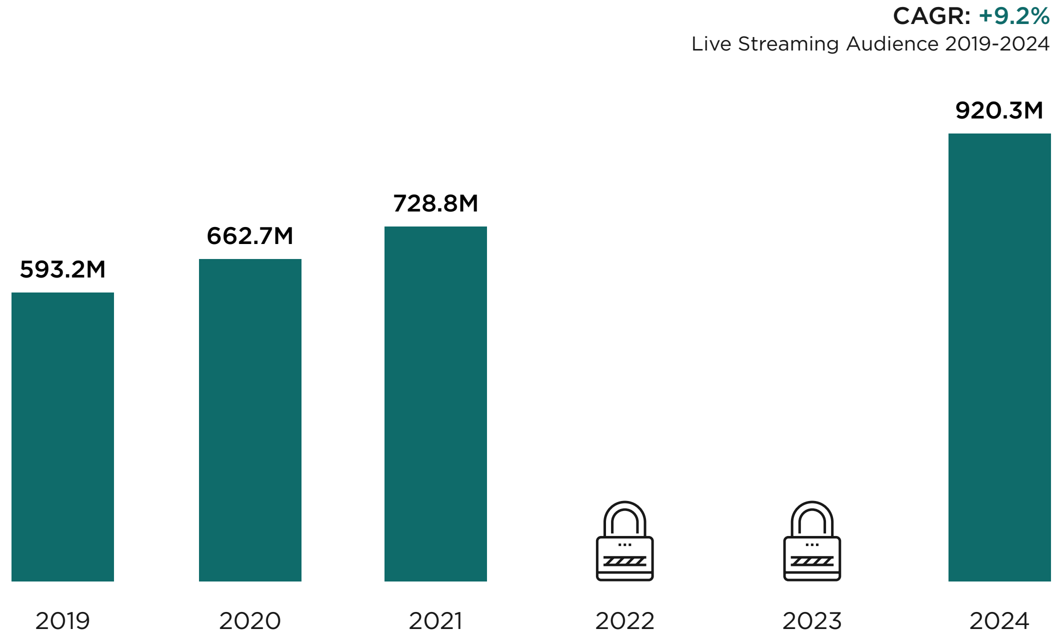
Streaming Audience Overview

The games live-streaming audience will grow by +10.0% year on year to reach 728.8 million globally in 2021. It will increase with a CAGR of +9.2% to 920.3 million from 2019 to 2024. The increased time spent at home and social distancing requirements during the pandemic accelerated interest in streaming broadly, driving the audience to grow by +11.7% globally between 2019 and 2020. In a period of increased isolation, the role of live-streaming channels as social communities where people can spend time together has been a key contributor to this viewership. Developing economies, such as South American countries and India, will retain high growth rates throughout 2024.

China was an early and fast mover when it comes to games live streaming, and the lower growth rates are also a reflection of its status as a mature market. For the next four years, China is predicted to be the country with the largest audience, growing from 185.5 million in 2020 to 214.3 million in 2024. The growth of mobile esports in developing economies will also act as a strong driver for the games live-streaming audience, with countries in Southeast Asia growing by more than +20% for the next two years.

Games Live Streaming Audience

Global | 2019, 2020, 2021, 2024

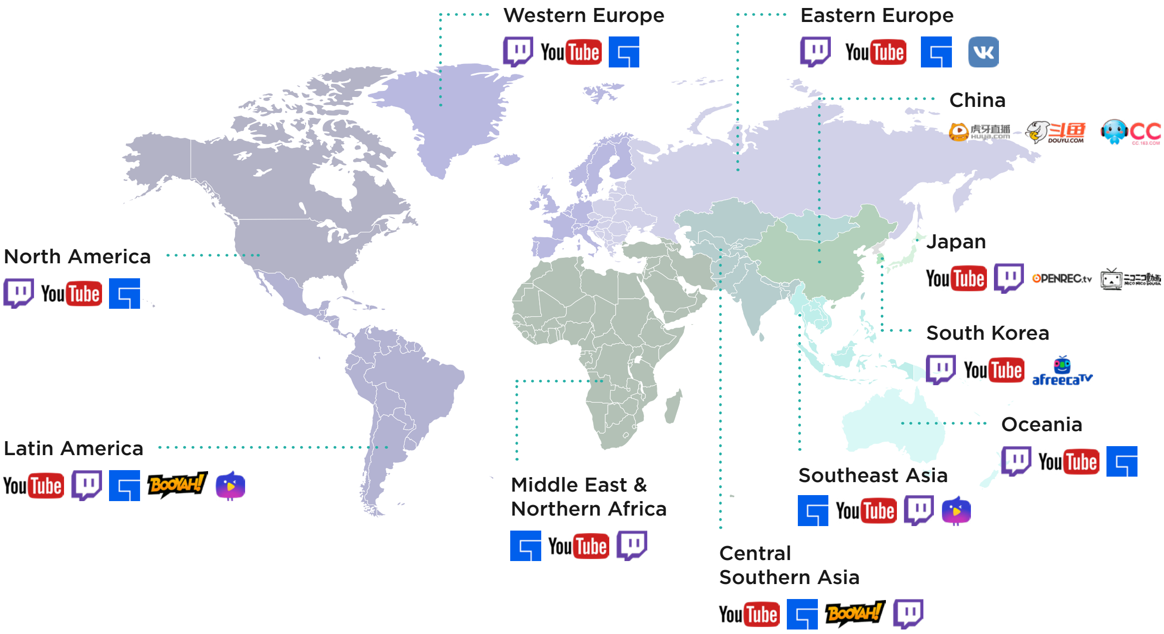


06. Intro to Live Streaming

Definition of Live Streaming

Live streaming is the act of simultaneously recording and broadcasting content (including gaming) to a live audience through social platforms. These live-streaming platforms allow users to actively participate as content creators or as viewers. The content creators, or streamers, record themselves live while engaging in video communication with their viewers. In turn, the audience spectates the gameplay and communicates with the streamer via text chat, allowing both parties to interact. In some cases—for example, during tournaments—little to no interaction occurs. While most content on live-streaming platforms is free, viewers can choose to financially support the streamers through various avenues, including monetary donations or via a monthly subscription to the streamer's channel.

Key Platforms in Different Markets



Find a complete chapter on the live-streaming market, including 2020 in review, underlying trends, and audience demographics in the full report.

07. Key Influencer Profiles

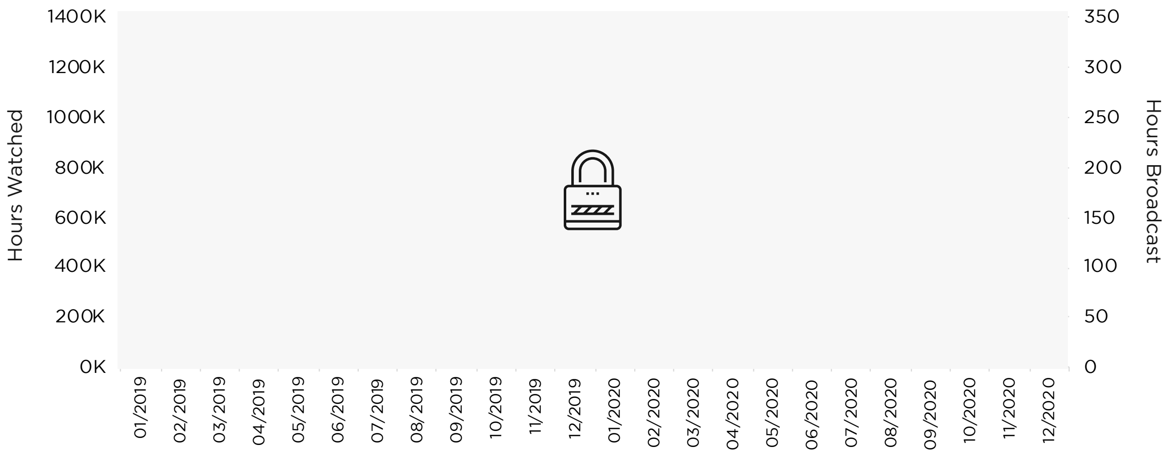
Fl0m

11,900 Followers | 122,200 Followers | 127,000 Subscribers | 693,000 Followers

Fl0m Live Hours Watched and Broadcast

Global | 2019-2020

Hours Watched   Hours Broadcast



2020 Recap

Streaming Performance	YoY
Platform	
Language	
Hours Watched	
Hours Broadcasted	
Peak Viewers	
Average Viewers	
Twitch Followers	

Most Watched Games

Games	Live Hours Watched

Erik Flom, better known under his alias **Fl0m**, is an American professional **CS:GO** player for team **Mythic** and a **Twitch** streamer signed under Loaded.GG. We asked him to elaborate on the past year as a content creator and the advantages of advertising through live-streaming platforms.

Q. **What are the advantages of brands doing activations with streamers/content creators as opposed to more traditional celebrities and influencers? What added value do content creators present to potential partners?**

Depending on the product, you get a lot more genuine feedback and interaction with the product with a streamer than you would with a normal celeb. We're all still kids at heart, who grew up playing video games. And we get to do what we love every day as a profession. I also think traditional celebs have a lot more expectations thrust upon them to be "perfect," but with a streamer, our expectations are to be authentic, and that really resonates with the viewers. It's the whole reason we're blessed with this job to begin with, authentically connecting with people. In terms of value adds, the demographic streamers tend to skew Millennial and Gen-Z, some of the hottest demos advertisers are seeking out these days.

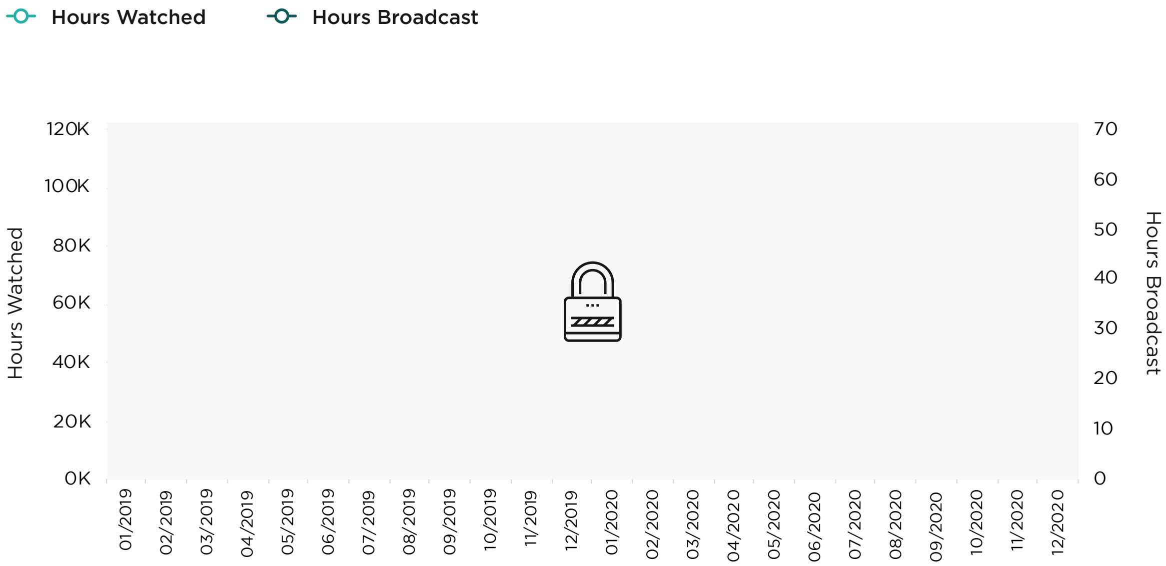
Find full data and interviews of key influencers in the full report.

Travis Gafford

22,800 Followers | 162,600 Followers | 209,000 Followers | 79,100 Followers

Travis Gafford Live Hours Watched and Broadcast

Global | 2019-2020



2020 Recap

Streaming Performance	YoY
Platform	
Hours Watched	
Hours Broadcasted	
Peak Viewers	
Average Viewers	
Twitch Followers	

Most Watched Games

Games	Live Hours Watched

Travis Gafford is a **League of Legends** interviewer, **Twitch** streamer, and **YouTuber**. Gafford is also the founder and owner of two online talk shows focused on esports: **State of the League** and **Whose League Is It Anyway**. Having been in the industry for years, Gafford has had several chances to work with brands on online platforms. Thanks to Loaded.GG, we had the opportunity to ask him some questions about advertising on live-streaming platforms.

Q. **What do you think are the key factors that make an activation successful? Are the most successful activations the ones with a lot of guidance? Or the ones where you are given more freedom to run the show?**

A huge key factor is authenticity. Many agencies/brands come in with an idea that feels inauthentic to the stream or content and that everyone working on the project knows will fail, and then will blindly insist on doing it anyway despite having an obvious lack of knowledge on the space. Not all content creators will choose to take such work, but the folks who are willing to just take the money are also the ones least likely to do a good job on what becomes a very forced and awkward integration. The most successful activations are where both sides can collaborate with each other. A brand/agency who hears from many creator agencies or creators themselves that their plan isn't ideal should be looking to pivot. On the other hand, creators should use their knowledge to help guide a brand and agency towards a successful activation that feels authentic. That's the model upon which both sides can succeed.

Find full data and interviews of key influencers in the full report.

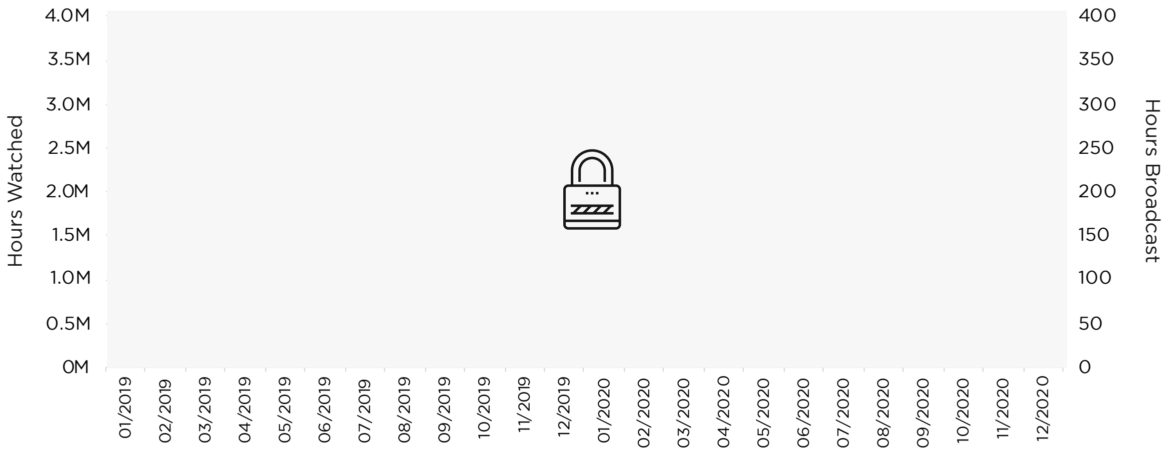
Sacriel

17,800 Followers · 86,700 Followers · 1,294 Followers · 111,000 Subscribers · 689,000 Followers

Sacriel Live Hours Watched and Broadcast

Global | 2019-2020

Hours Watched   Hours Broadcast



2020 Recap

Streaming Performance	YoY
Platform	
Language	
Hours Watched	
Hours Broadcasted	
Peak Viewers	
Average Viewers	
Twitch Followers	

Most Watched Games

Games	Live Hours Watched

Chris Ball, known on Twitch as **Sacriel**, is a British educational variety streamer from London. Sacriel also has a YouTube channel with more than 110 thousand subscribers, where he uploads VOD content built around his live-streamed content. The streamer started his career in 2012 and has since gathered more than 680 thousand followers. His popularity increased sharply in Q1 2020, when **Escape From Tarkov** partnered with Twitch to advertise their latest update. Today, Sacriel is one of the most prominent streamers of the game. Sacriel's personality and maturity make him a top pick for brands. Most of the brands sponsoring his channel are hardware and gaming peripheral manufacturers. In July 2020, Sacriel signed under Loaded and has agreed to answer our questions.

Q. **Has the lockdown impacted the type of people your stream draws or how your fans interact with you on social media?**

I'd say there's more working professionals and teens tuning in now more than ever. Being at home 24/7 has driven up the amount of available time people have to watch a stream, and streams are something people turn to when they need to fill the day with social engagement and a familiar interactive voice. One of the most common messages I receive on stream or in YouTube comments is people thanking me for taking their mind off the state of the world. I've had these kinds of messages for years, but there has definitely been a significant increase in the number of people consuming content to help cope with life, or even just to have on while they "WFH". It feels great to be helping others in all of this, even in some small way.

Find full data and interviews of key influencers in the full report.

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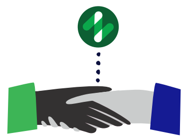

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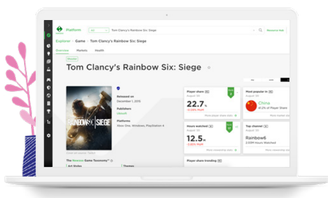

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