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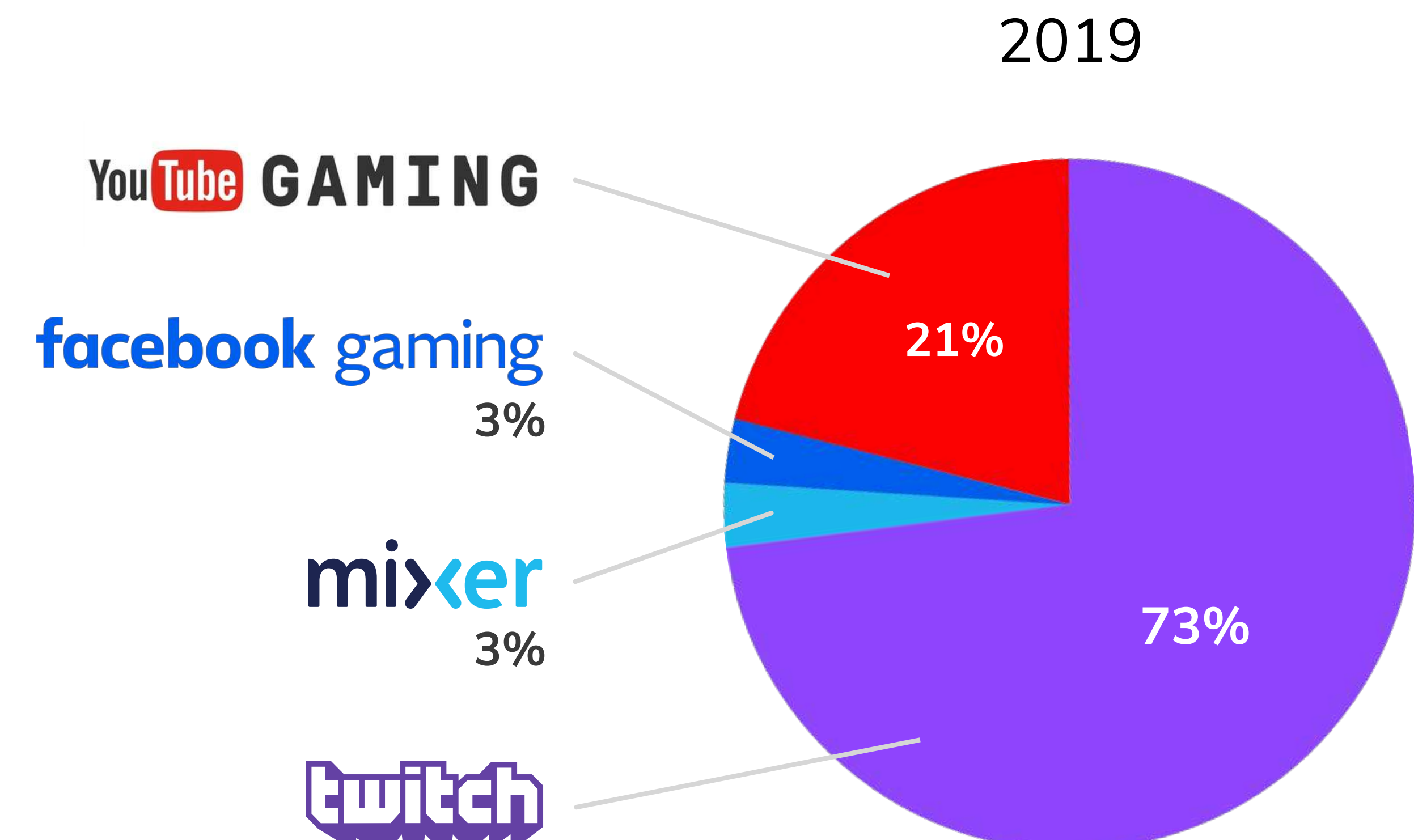
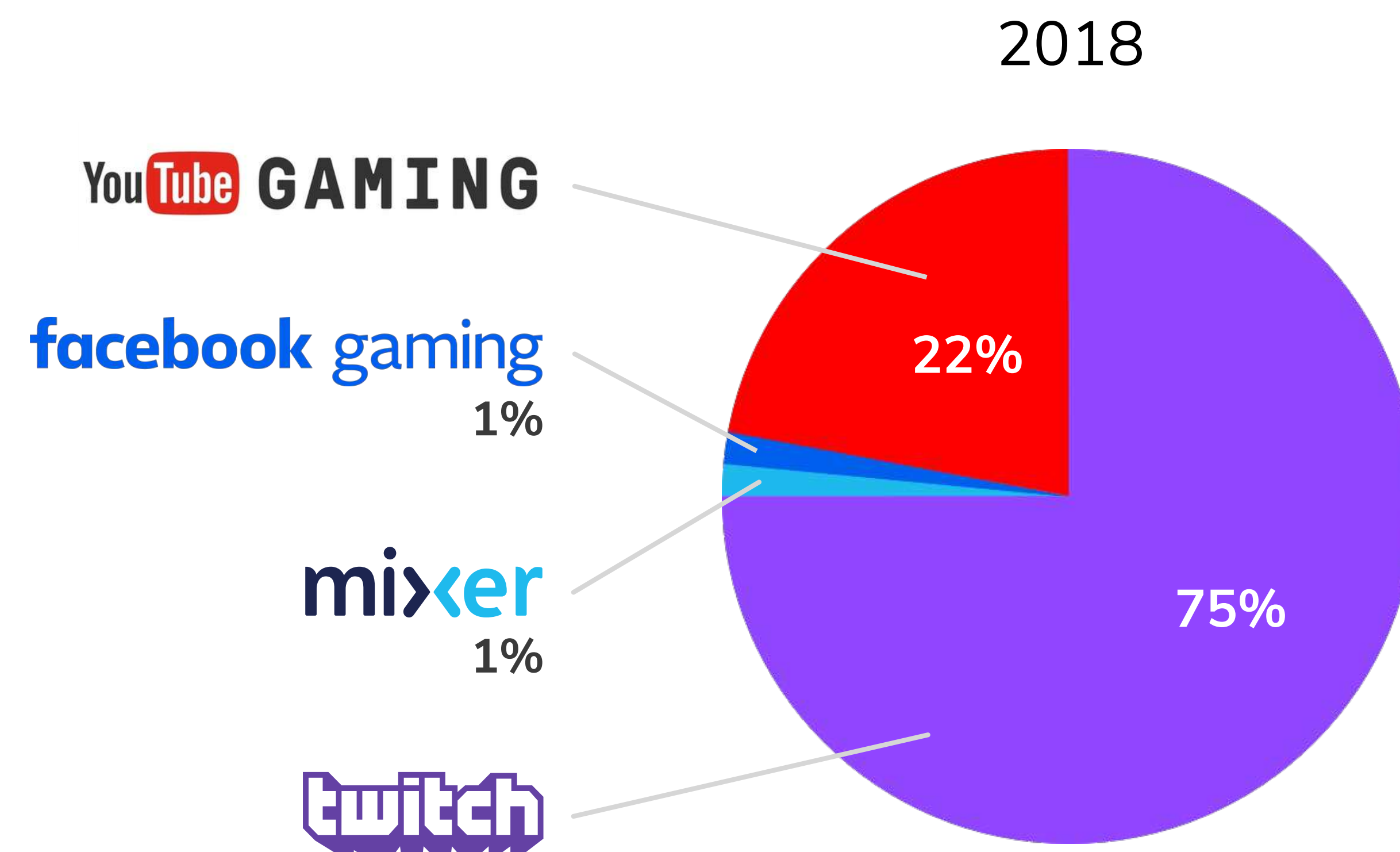
StreamElements & Arsenal.gg Present State of the Stream 2019

The Year in Review

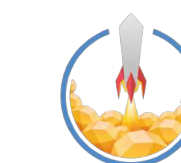
Winds of change as rival platforms nibble away at Twitch's market share

Twitch still holds the high ground in an industry that can take years for the competitive landscape to mature, but there's room for all to succeed.

Platform market share by hours watched



Mixer and Facebook Gaming have been slowly growing all year prior to talent acquisitions which illustrates their organic appeal.



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All top livestreaming platforms continue to grow with Facebook Gaming making the biggest strides

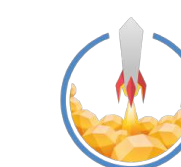
Streaming platform hours watched: 2018 vs 2019

Platform	2018	2019	YoY Growth
 Twitch	7,777,879,411	9,340,229,175	20%
You  GAMING	2,310,000,000	2,681,436,455	16%
 facebook gaming	114,754,621	356,242,965	210%
 mixer	142,223,690	353,777,685	149%

League of Legends reclaims game of the year on Twitch after 7-year streak broken in 2018 by Fortnite

Top 10 Games on Twitch: 2018 vs 2019

	Game	2018 Hours Watched		Game	2019 Hours Watched	Change in %
1	Fortnite	1,221,207,484	1	League of Legends	990,286,084	+7%
2	League of Legends	929,576,203	2	Fortnite	884,923,121	-28%
3	Just Chatting	458,109,908	3	Just Chatting	651,482,796	+42%
4	Dota 2	452,199,454	4	Grand Theft Auto V	523,263,689	+277%
5	PlayerUnknown's Battlegrounds	416,775,717	5	Dota 2	458,993,535	+1%
6	Counter-Strike: Global Offensive	380,471,727	6	Counter-Strike: Global Offensive	397,730,313	+5%
7	Hearthstone	350,726,191	7	World of Warcraft	372,471,119	+55%
8	Overwatch	263,750,318	8	Apex Legends	294,463,401	New release
9	World of Warcraft	240,780,526	9	Overwatch	247,522,205	-6%
10	Grand Theft Auto V	138,693,759	10	Hearthstone	217,592,241	-38%
Total Top ten		4,852,291,285	Total Top ten		5,038,728,503	



Popular new games Apex Legends and Teamfight Tactics drove massive hours on Twitch thanks to star-powered streamers

PlayStation's Death Stranding and Days Gone illustrate platform exclusive titles still command an audience.

Top 10 new IPs/franchises of 2019

Game	Hours Watched
Apex Legends	294,463,401
Teamfight Tactics	158,915,480
Sekiro: Shadows Die Twice	41,257,640
Death Stranding	20,582,653
Anthem	13,729,480
Star Wars Jedi: Fallen Order	12,140,965
Days Gone	9,129,891
Mordhau	8,638,918
Remnant: From the Ashes	6,912,088
Planet Zoo	6,608,577



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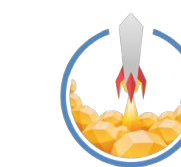
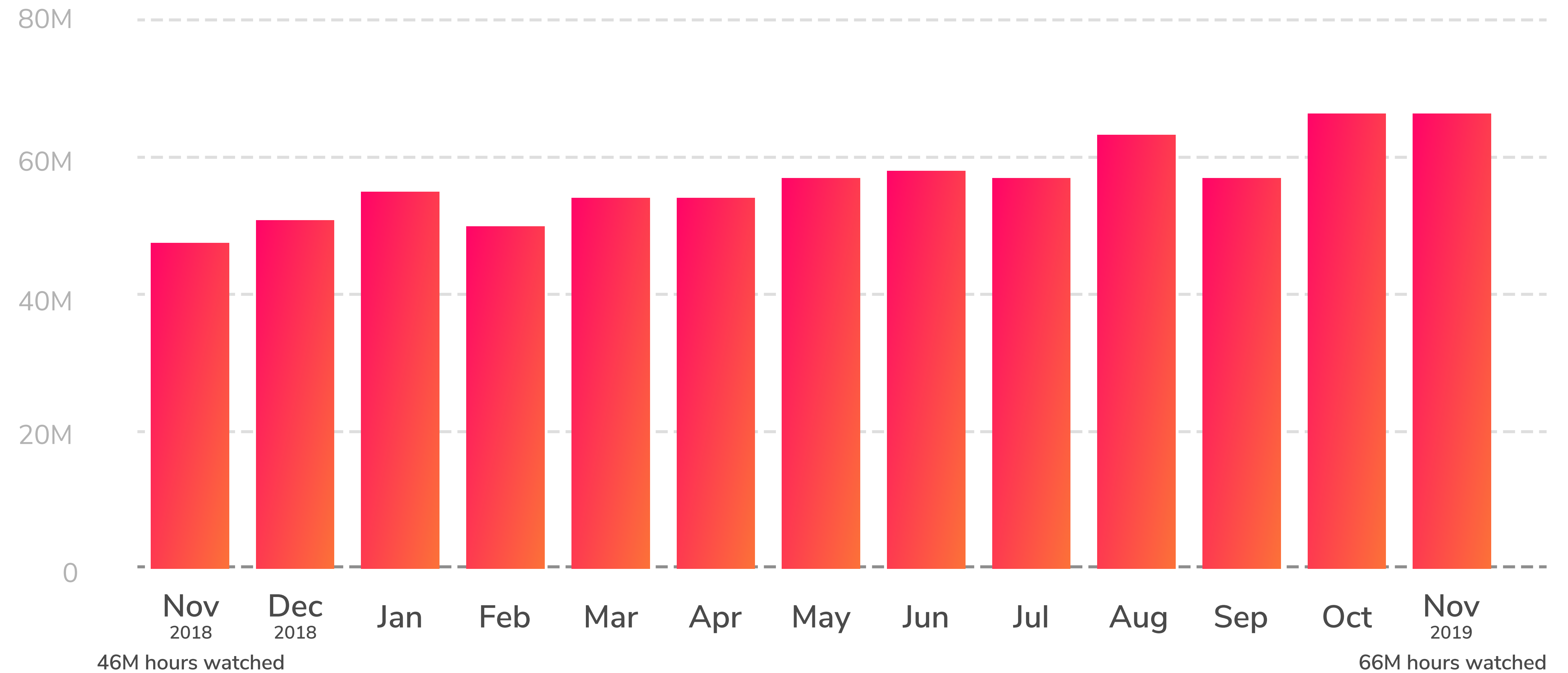


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Non-gaming is on target to be the #2 category on Twitch in 2020 with Just Chatting growing 44% year-over-year



Just Chatting hours watched



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ASMR settles into the top 40 categories on Twitch illustrating a collective love of sound



- Twitch launched the ASMR category in August 2018. It went from 151K hours watched in September to 1.6M in October 2018. Since then, it ranges between 2.4M and 3.1M each month
- Amouranth and MaryJLeeee are both among the top 10 most watched female streamers on Twitch

Top 10 ASMR streamers on Twitch in 2019 based on hours watched

	Streamer	ASMR hours watched
1	Amouranth	3,308,717
2	Japan_ASMR	1,644,501
3	CopyKat_	1,072,628
4	MaryJLeeee	817,920
5	ASMRCast	356,030
6	FuchsK	307,460
7	trinkel_bay	294,686
8	RubyTrue	268,814
9	Samuse	267,364
10	DizzyKitten	243,744

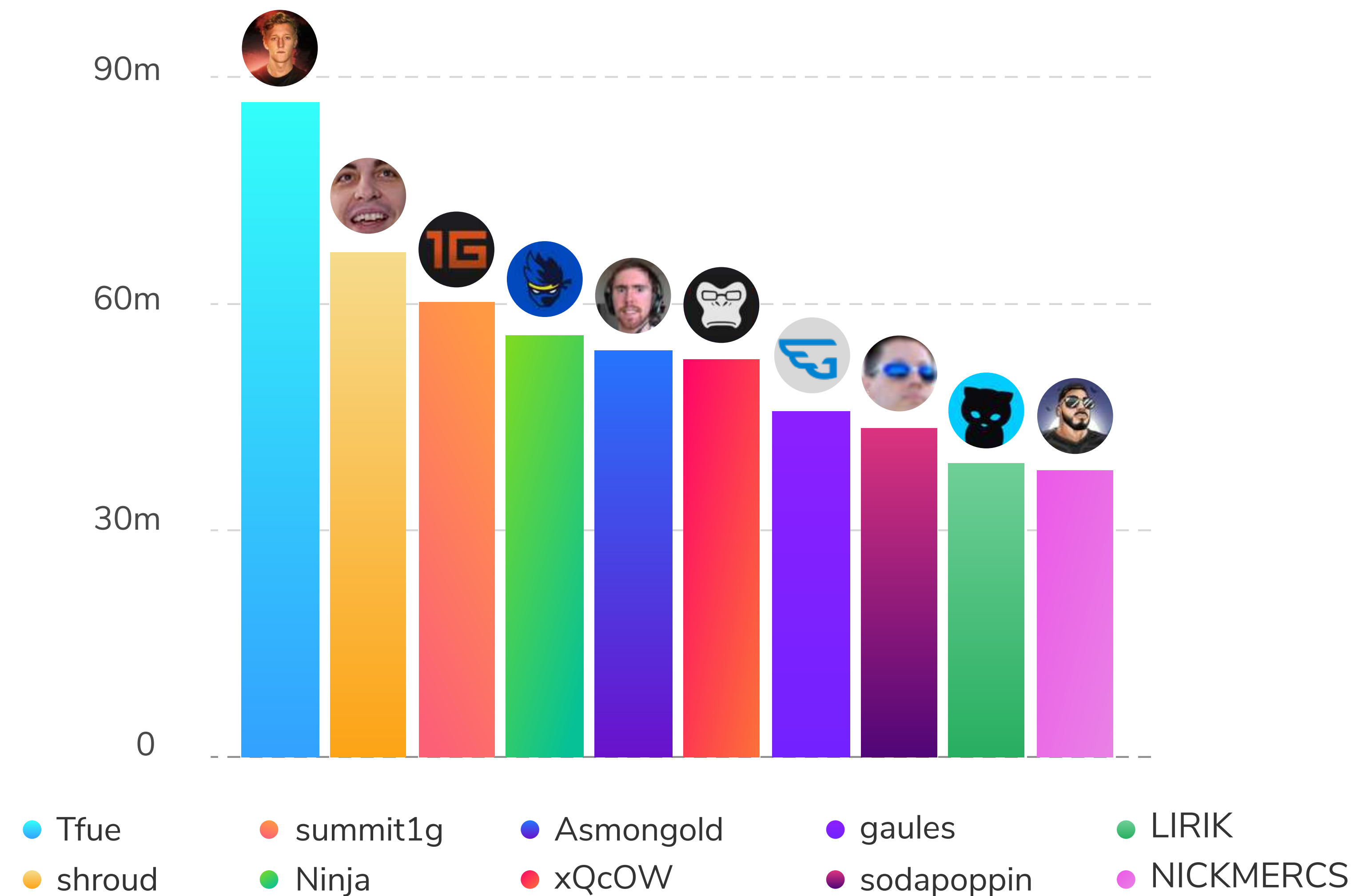


Amouranth



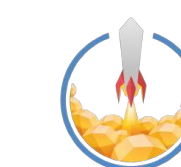
Tfue crowned the king of Twitch in 2019 with more live hours watched than anyone else across all rival platforms

Top 10 streamers in 2019 based on hours watched



Streamers	Hours watched
Tfue	87,789,883
shroud*	65,807,447
summit1g	60,960,294
Ninja*	57,951,217
Asmongold	55,403,041
xQcOW	53,385,731
gaules	44,437,154
sodapoppin	41,419,831
LIRIK	38,824,374
NICKMERCS	37,444,502

* Includes combined data from Twitch and Mixer

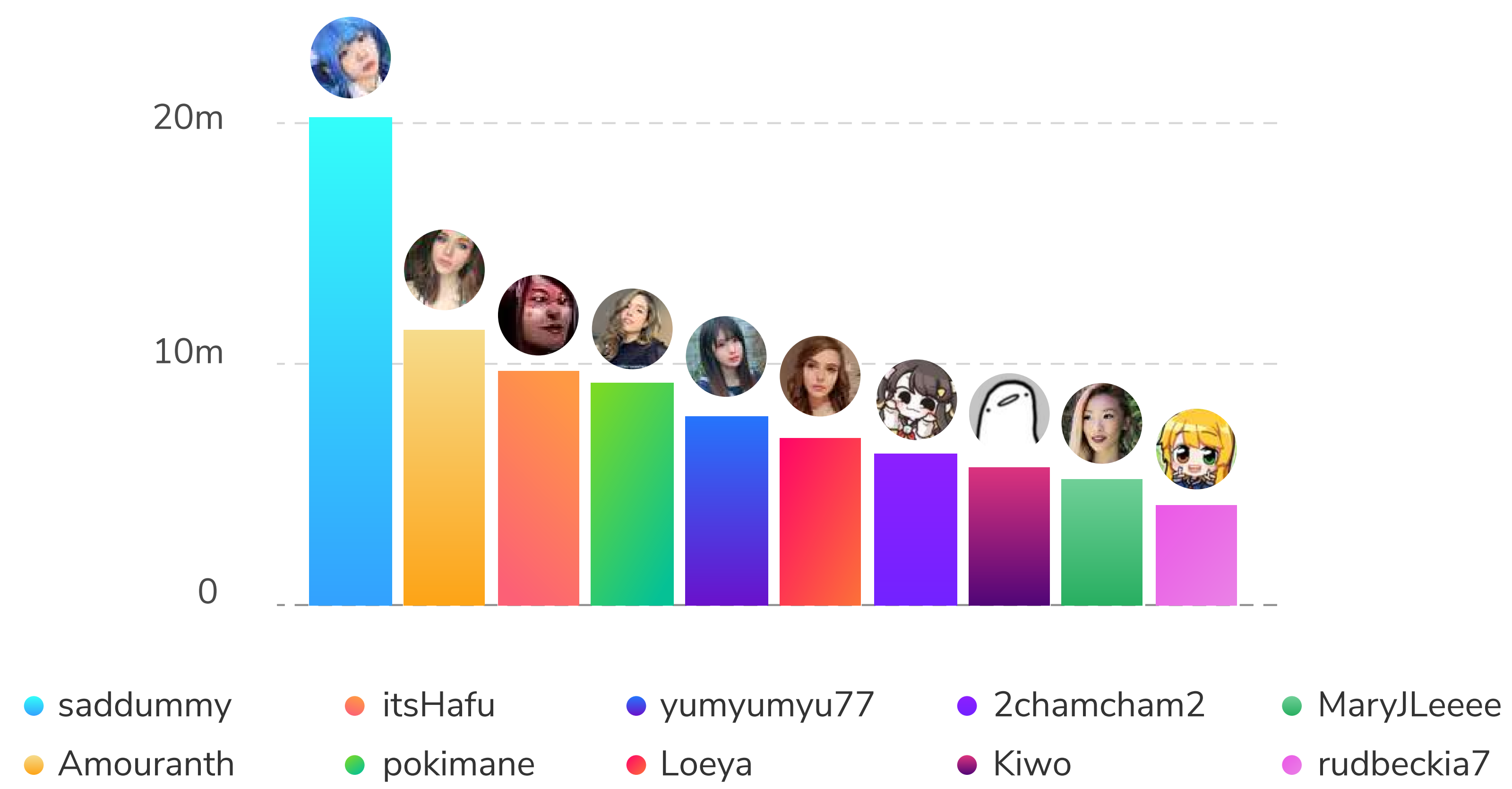


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Korean and English language speakers make up the top 10 female streamers on Twitch

Top 10 female streamers on Twitch in 2019 based on hours watched



	Streamers	Hours watched
1	saddummy*	20,207,568
2	Amouranth	10,994,859
3	itsHafu	9,502,502
4	pokimane	8,969,550
5	yumyumyu77*	7,733,202
6	Loeya	6,476,408
7	2chamcham2*	5,693,275
8	Kiwo	5,032,164
9	MaryJLeeeee	4,976,771
10	rudbeckia7*	4,588,904

* Korean language streamer

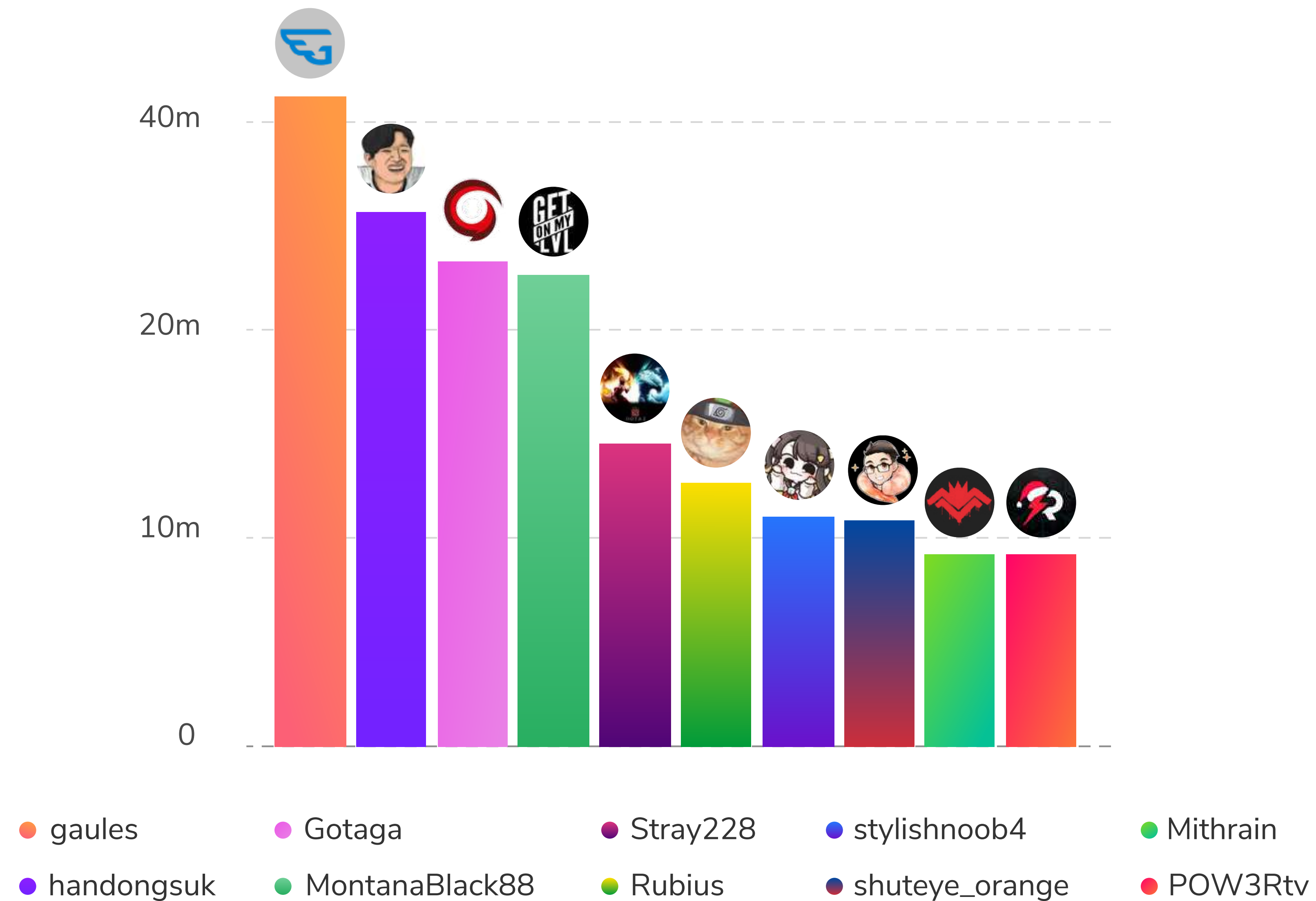


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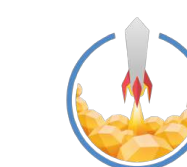
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Twitch appeals to an international audience with each of the following streamers being the most popular in their respective language



International Power Ranking

Individual		Hours watched	Language
gaules		44,353,259	Portuguese
handongsuk		31,949,992	Korean
Gotaga		26,775,135	French
MontanaBlack88		25,637,872	German
Stray228		14,899,868	Russian
Rubius		13,286,802	Spanish
stylishnoob4		11,629,409	Japanese
shuteye_orange		11,102,233	Chinese
Mithrain		8,845,594	Turkish
POW3Rtv		8,877,196	Italian

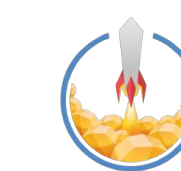


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Old school is new school again

- Hours watched of Dungeons & Dragons increased 26% year-over-year, with a peak viewership in 2019 of over 13M viewers
- When World of Warcraft Classic launched, it set a milestone for weekly viewers on Twitch with over 50M hours watched in its first full week of availability. It also helped propel Asmongold to the top streamer on Twitch for 3 consecutive months
- Marking the biggest comeback on Twitch, Grand Theft Auto 5 grew 277% year-over-year (139M hours watched to 523M)



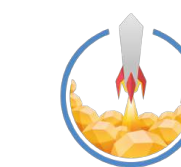
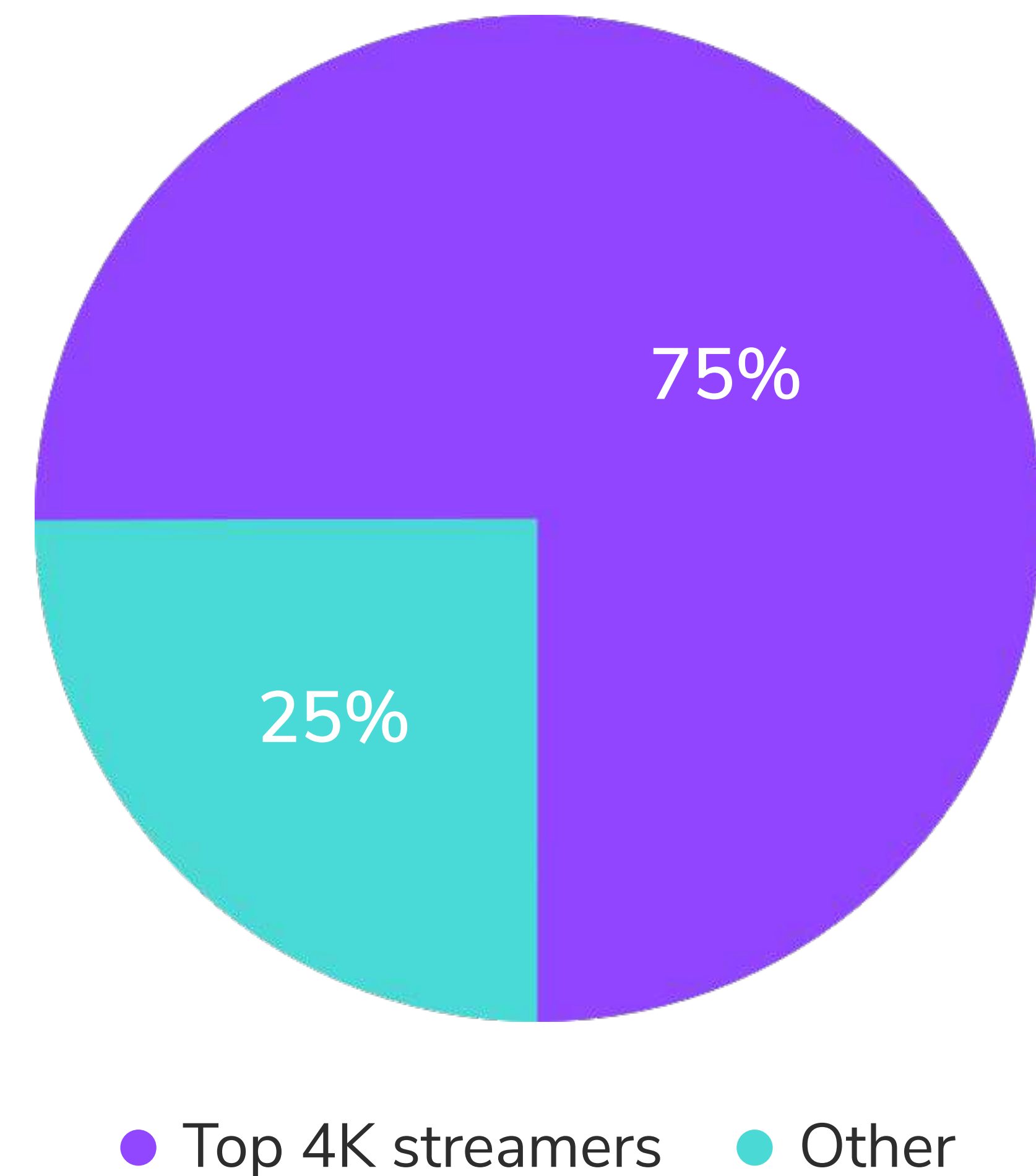
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Bonus big numbers on Twitch

- Biggest viewership segment: 75% of the hours watched on Twitch are being generated by the top 4K streamers
- Biggest new release of 2019 based on hours watched: Apex Legends
- Biggest year-over-year drop among the top 10 games: Fortnite with a 27% drop (336M hours)
- Biggest month for a single game: Over 121M hours of League of Legends were watched in October which is when the 2019 League of Legends World Championship kicked off
- Biggest concurrent viewership on an individual's channel: Tfue with 323K on October 13th during Fortnite Fall Skirmish

Live hours watched on Twitch



Top Streaming Events 2019



mixer
LVL CAST

LevelUp Cast 2 Year Anniversary
(Mixer)

May 24th

1,462,081



Fortnite World Cup Finals
(YouTube + Twitch)

July 28th

1,202,804



League of Legends World Championship
(YouTube + Twitch)

Nov 9th

1,305,335



Free Fire World Series
(YouTube)

Nov 16th

1,094,942



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StreamElements is the fastest growing provider of tools and services for live stream production, monetization, audience engagement, influencer marketing, and brand sponsorships. StreamElements powers many of the top digital content creators on Twitch, YouTube Live, Facebook Gaming, and Mixer with the only 100% cloud-based collection of overlays, bots, alerts, tipping apps, merch, loyalty programs, and more. StreamElements is also harnessed by brands who want to tap into influencers for sponsorships and other activations.

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