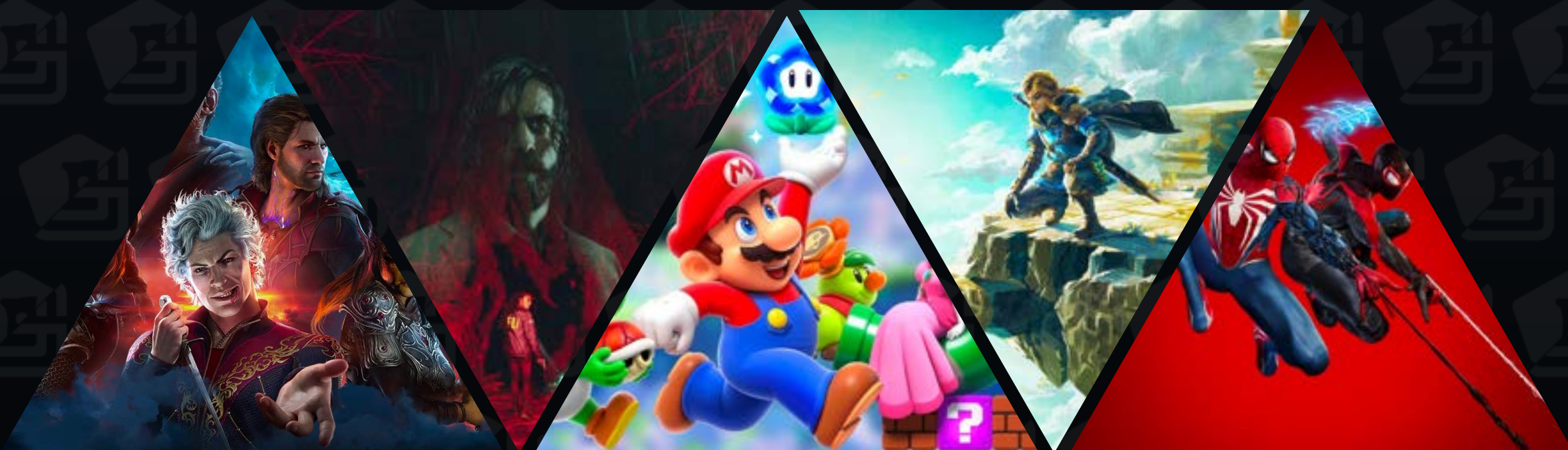




A GAMESQUARE X STREAM HATCHET REPORT

2024 Live- Streaming, Esports, & Social Trends Report



WELCOME

Stream Hatchet & GameSquare have teamed up for the 2024 Live-Streaming, Esports, and Social Trends Report. 2023 was a year full of new innovations in the gaming and live-streaming industry, and this report will help you navigate the trends for this year and understand the possibilities within the market.

Subscribe to our newsletter today!

Stream Hatchet works with a consortium of industry-leading analysts and business leaders to understand key trends related to the impact of live-streaming audiences on gaming creators, esports and the broader video games industry.



"Stream Hatchet's powerful insights are a key component to GameSquare's end-to-end solutions. The combination of our data and technology assets with our gaming and esports teams drive a significant competitive advantage and fuel GameSquare's leading marketing and creative services. As a result, GameSquare is at the leading edge of gaming trends and culture, providing an unmatched value to our global brand partners. Our 2024 trends report is an example of this value we provide."



"Stream Hatchet is excited to release this 2024 Trends Report for the live-streaming, gaming, and esports industries. Together with the insights and knowledge from the other Gamesquare teams, our data helps bring to light some interesting trends for those working in the industry. We hope you enjoy this report and we look forward to continuing to provide best-in-class data analytics for the live-streaming industry."



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LIVE-STREAMING TRENDS



RPGS & ACTION-ADVENTURE ARE HOT

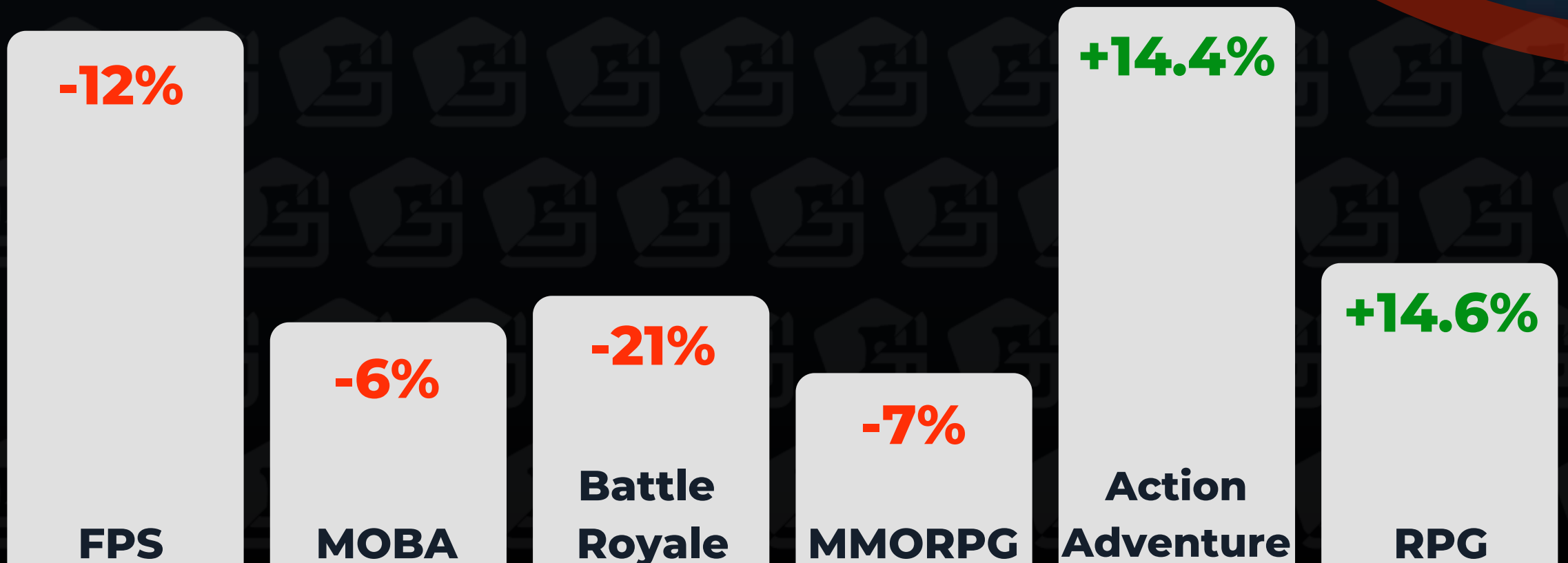
BALDUR'S GATE 3 & DIABLO IV DOMINATE RPG & NOSTALGIA

In 2023, the **Role-Playing and Action-Adventure** genres were the two major genres to show growth in the live-streaming scene. Excluding esports viewership, both genres experienced an increase of over 14% in average audience in 2023 from 2022.

Traditionally viewed as a game for a niche audience, Baldur's Gate 3 broke through the confines of its genre to capture widespread attention, earning its place as Game of the Year at the Game Awards. It generated **79 million hours watched** across streaming platforms.



Average Audience Change 2022-2023 By Genre Across Live-Streaming Platforms
Not including esports viewership



RPGS & ACTION-ADVENTURE ARE HOT

2023 releases **Diablo IV** and **Legend of Zelda: Tears of the Kingdom** also took the streaming world by storm and generated tens of millions of hours watched, utilizing nostalgia and innovative, updated gameplay to draw in huge audiences.

RPGs and Action-Adventure games are excellent choices for live-streaming creators because they allow for creativity, commentary, and slower moments to enjoy the aesthetics and story of these games.

In a departure from fast-paced First-Person Shooter, MOBA, and Battle Royale Games, these games allow for the creators themselves to be part of the main attraction for audiences. During their streams, creators can build community with their viewers and share their love and passion for games like BG3 and Zelda.



NOSTALGIA IS A 'NEW' TREND?

FORTNITE 'OG' BROKE RECORDS



The release of Fortnite OG indulged the nostalgia feeling among returning players and allowed new players to enjoy Fortnite at its inception.

The game saw its highest daily hours watched on the OG map release day since 2019, and it jumped to the 2nd most-watched game in live-streaming for the first time in months.

Other games are also tapping into Millennial nostalgia as the generation grows up and continues to grow in purchasing power. We expect this trend to continue into 2024.

Fortnite Viewership Stats on OG map release day

NOVEMBER 3RD

14.4M HOURS WATCHED

1.6M PEAK VIEWERS

227K UNIQUE CHANNELS STREAMING

DOMINATION OF THE INDIES

EXPANDED OPPORTUNITY IN 2024

In 2023, indie games thrived as a vital part of the gaming industry. With the increasing accessibility of game development tools and platforms for indie developers, the market sees a diverse array of innovative and creative titles.

The refreshing storylines, unique gameplay, and overall focus on fun and entertainment are often what attract players to indie games.

Games like Battlebit Remastered, Lethal Company, Cult of the Lamb, and Only Up! were hits with live-streaming creators in 2023. The games provided refreshing content for the viewers as well as endless possibilities for hilarious clips for social media. These clips were also responsible for creating continued buzz and interest for the games.

As time goes on, I think more and more players are going to turn towards indie games as a source of entertainment and an alternative to the big box sequels. Indie devs should look to partner with smaller and mid-tier creators to create buzz for their games.



AMANDA BROOKS
MARKETING DIRECTOR
STREAM HATCHET



MULTI-PLATFORM SIMULCASTING

EXPANDING AUDIENCES AND REACH

Simulcasting has emerged as a dynamic tool in a content creator's arsenal. With just a few clicks, creators can broadcast across multiple platforms at once, like Twitch, YouTube, TikTok, X, and Kick. While simulcasting is not a new phenomenon, in October of 2023, Twitch allowed signed Partners to do so, boosting participation.

On initial analysis, simulcasting boosted the average audience size of creators, as they were able to reach more viewers at once.

Stream Hatchet analyzed 3 creators who started simulcasting: Ninja, Willeyrex, and TheGrefg. In the weeks following their switch, their average audience surged by 68.9% across platforms, indicating that for every 1,000 viewers on one platform, an additional 700 viewers were reached per minute on another.



**NINJA'S SIMULCASTING
AVG AUDIENCE**

23.7K VIEWERS

+108%

FROM 2023
AVERAGE

I love multicasting and definitely think it's the future for all gaming creators. I've never looked back since making this move late in 2022. I'm stoked with the audience growth and engagement I've seen across the board, and that I can connect with my fans at the same time, no matter the platform they are using.



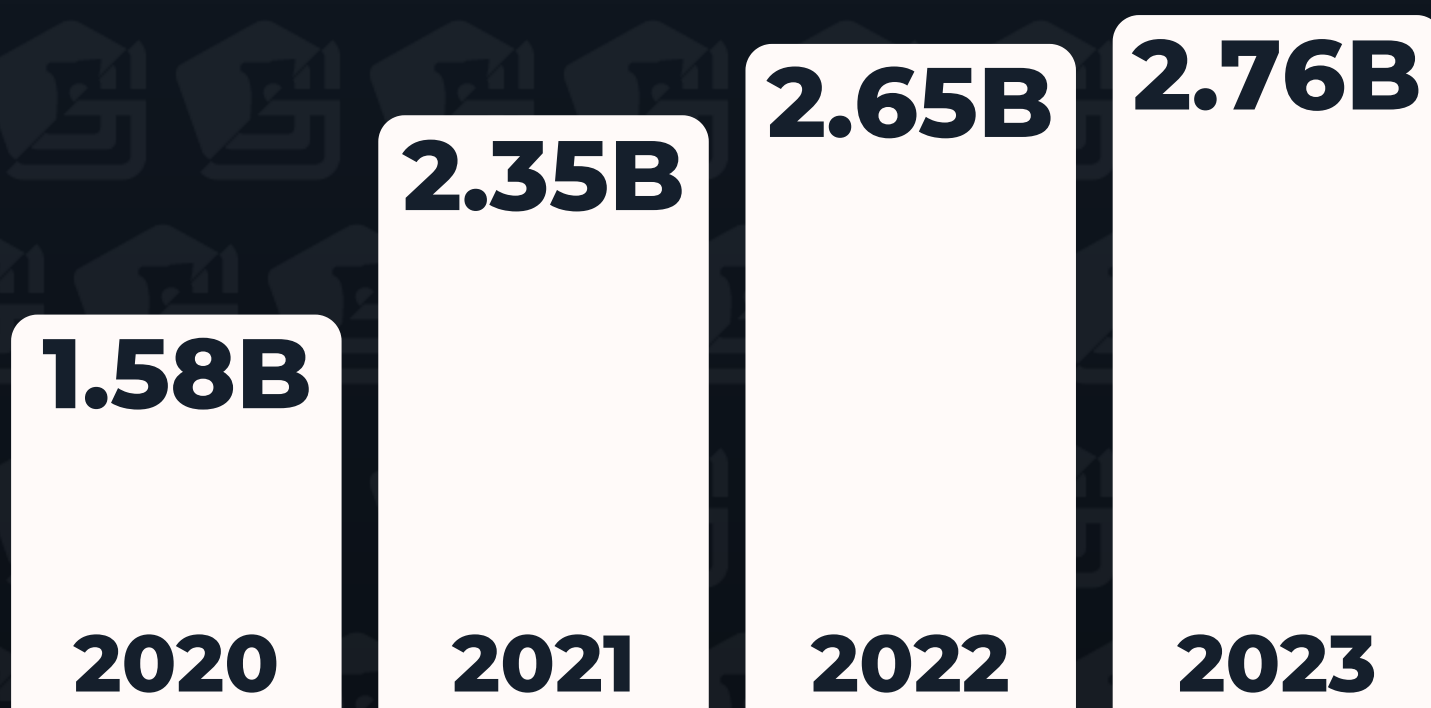
ESPORTS TRENDS



ESPORTS IS INCREASING

ESPORTS UP 75% FROM 2020

HOURS WATCHED



Despite the worries of an “Esports Winter,” demand for esports is still high and viewership continues to increase year over year.

League of Legends continues to be the most-watched esports title, with Mobile Legends: Bang Bang, CS:GO, Dota 2, and VALORANT in the top 5.



With packed arenas and rising livestream numbers, esports is clearly in an exciting phase, pushing boundaries and engaging global audiences. This is due mainly to two things in my opinion - the live product continues to improve, and more successful collaborations with creators are driving viewership.



ERIC ANDERSON
PRESIDENT, HEAD OF ESPORTS
FaZe CLAN

INCREASED DEMAND FOR SPORTS

SPORTS

KINGS & QUEENS LEAGUES DOMINATE STREAMING

Sports events viewership on live-streaming platforms like Twitch and YouTube is up over 2,100% from 2022 to over 150 million hours watched.

This viewership was boosted by popular European football events like the **King's and Queen's League** run by Gerard Piqué and Ibai Llanos, featuring both popular content creators and professional football players.

Thursday Night Football from the United States also gained in popularity in 2023 on Twitch, with over 4 million hours watched.

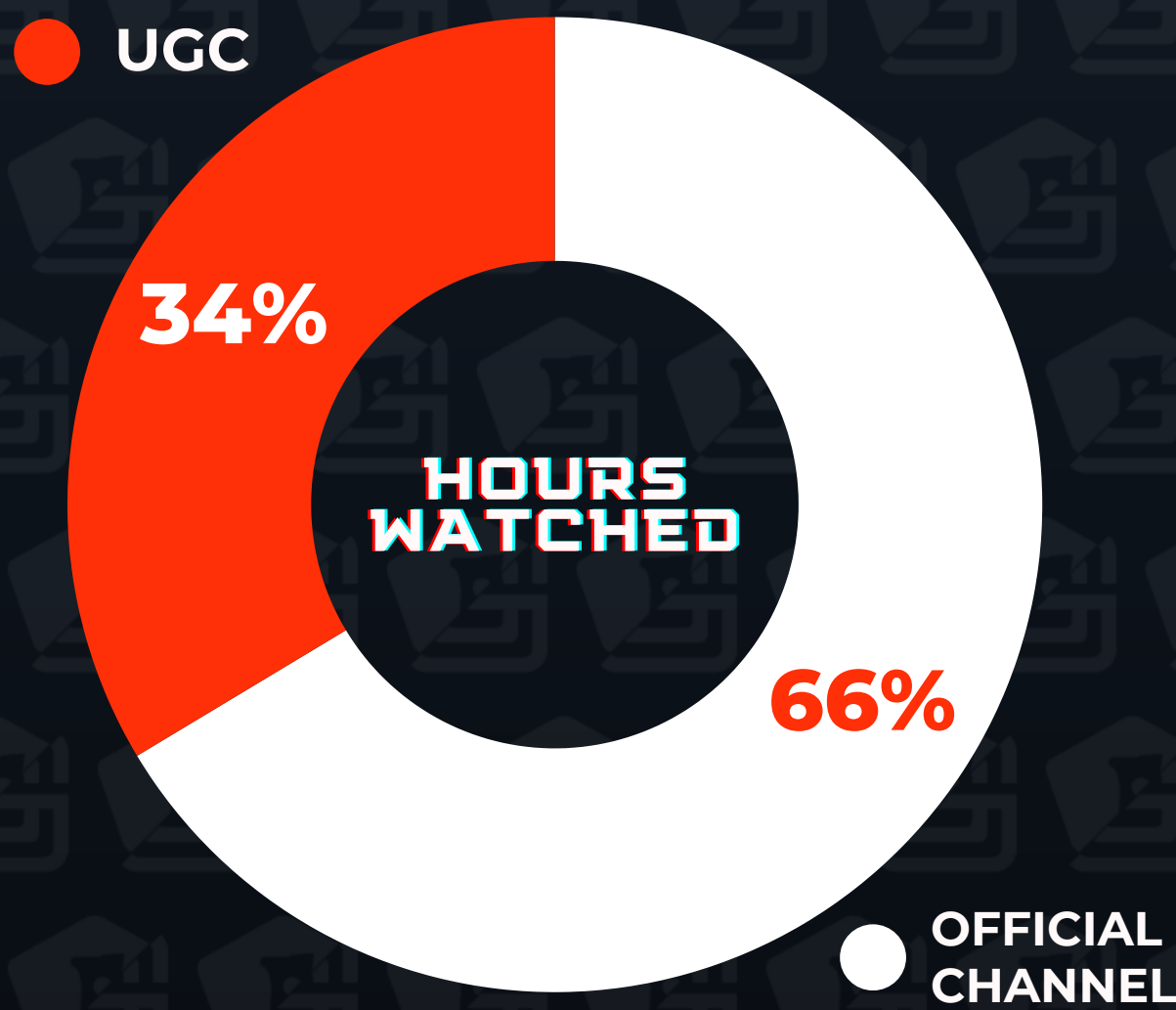
We expect more growth in this category across live-streaming platforms in 2024, with a giant opportunity for those running events.



ESPORTS BOOSTED BY CO-STREAMERS

USER-GENERATED CONTENT

Co-streaming viewership is up from 10% in 2020 to over 1/3 of the market share in 2023.



Publishers are no longer shying away from having creators co-stream their tournaments. The community and core audience these co-streamers build on their own bring an energy and love for the games to the tournaments, and we predict will continue to be a developing trend into 2024.

Top Co-Streamers & 2023 Game Viewership (hours watched)



CALL OF DUTY
scump
21.6M



VALORANT
tarik
69.3M



DOTA 2
Nix
35.5M

The dynamic that was initially seen as threatening to media rights holders has evolved to create synergies between event hosts and individual content creators. Establishing guard rails to create mutually beneficial opportunities has provided fans with additional ways to consume compelling event content, allowing event stakeholders to further reach highly engaged fans.



KYLE BAUTISTA
COO
COMPLEXITY GAMING

INFLUENCER MARKETING TRENDS



CREATOR-DRIVEN EVENTS ARE KING

CREATORS BUILD ENGAGED AUDIENCES



Creator-driven events had their moment in 2023. From La Velada to Squidcraft Games, and Chessboxing to Minecraft Extremo, some of the biggest moments in streaming last year were made by creators.

Content creator events are generally shorter and more concentrated than esports events, but often result in higher average viewership and chat participation among viewers.

The top 2023 creator events had an average viewership of 1.5 million viewers, 415% higher than the top esports events. Additionally, their average chat participation was around 8.4%, 2 percentage points higher than that of the esports events.

We are in the middle of a content revolution where Creators have become some of the biggest brands in the world with highly engaged audiences that are the envy of the brand world. Brands have had enormous success using a blend of digital and IRL strategies as a key driver for fan engagement and now we are seeing Creators using similar strategies to excite and grow their already huge fan bases.



PAUL IOAKIM
HEAD OF EVENTS
GAMESQUARE HOLDINGS

CREATOR-DRIVEN EVENTS ARE KING

CREATORS BUILD ENGAGED AUDIENCES

Ibai Llanos has dominated the live-streaming scene for years. Starting as a League of Legends caster, he has ventured into hosting events that feature other streaming creators.

His most successful event, La Velada del Año 3, has grown to become one of the most popular events on Twitch. **15 Million unique viewers** tuned into 2023's event, almost **200%** more than the previous year.

YouTube creator Ludwig is also known for his professional events bringing together creators for events like **Creator Dodgeball and Chessboxing**, that also bring in millions of viewers.

Continued investment in creators will be beneficial for anyone looking to tap into the robust and dynamic live-streaming market. Community-building and highly engaged audiences will be beneficial for anyone running creator programs in 2024.



BUILD LONG-TERM CREATOR PROGRAMS

PROGRAMS

CREATOR PROGRAMS BUILD TRUST AND HELP PROGRESS

Choosing creators for your brand marketing campaigns is important. Do they have the right audience and metrics for the size of my campaign? Do they play the right games or talk about topics adjacent to my brand?

These are all questions to ask yourself when setting up a brand marketing campaign utilizing influencers and creators.

Data can help you find the right ones, and utilizing tools like Sideqik and Stream Hatchet can help you discover these creators, and keep them.

Building up a long-term creator program can help your brand gain trust, not only with the influencers themselves, but also with their audiences. Analyzing the results of the campaign, listening to feedback, and adjusting your tactics accordingly are all important steps in executing your campaign.



BRAND MARKETING TRENDS



BUILDING CREATIVE EXPERIENCES

FORTNITE LEADING THE WAY

Fortnite has successfully built a metaverse experience, achieving what no other company could.

Fortnite has become more than a game and has turned into a hub for players of all ages. Virtual concerts, shopping experiences, custom skins, new games and modes, and communication with friends is all available for players.

Brands of all types have found success creating virtual worlds using the Unreal Editor for Fortnite, from apparel brands to fast food to toys.

The possibilities for creativity and innovation are endless and the experiences can engage the younger Gen Z audiences brands are eager to connect with.



There are very few ways of engaging with a brand in a more authentic and immersive way than what is possible within UEFN. There is incredible potential to create lifelong fans of your brand within UEFN purely because a player randomly discovered your branded world one day. That is the real, larger opportunity with UEFN, in my opinion.



ZACH ELLER
DIRECTOR OF STRATEGY
ZONED

BUILDING CREATIVE EXPERIENCES

UTILIZE CONTENT CREATORS TO PROMOTE THE EXPERIENCE

Fortnite's latest Lego game collaboration saw incredible pickup from players and live-streaming creators. In the first week of release, over **11 million hours of Lego content** were watched on Fortnite streams across live-streaming platforms.

Working with big creators like Ninja, TimtheTatman, and Illojuan helped promote the game and get fans talking about both Fortnite and Lego.

On Twitch, "Lego" became the most-mentioned brand during the launch with almost **200K mentions** in one day. It overtook "Amazon" which regularly holds the top spot.



It's really important to understand that UEFN should be seen as the new age billboard or TV commercial - they're amazing to have for your marketing campaign, but you have to ensure visibility by utilizing content creators within the Fortnite space to promote the world.



CARLOS TOVAR
MANAGING DIRECTOR
ZONED

PERFORMANCE MARKETING

DIRECTLY ATTRIBUTE BRAND \$

A benefit of running campaigns with influencers on live-streaming and other social media platforms is the increased ability for brands to directly measure the ROI on their spending.

The interactive chat and engaged audiences allow for brands to input direct links to stores, websites, and other landing pages in their live-streaming chatrooms and directly attribute link clicks and purchases to individual influencers or campaigns.

With all-in-one tools, campaign managers can also keep track of results on a live basis, and make changes to campaigns on the go to optimize performance.

The same evolution that happened with email marketing campaigns is occurring in influencer marketing. The focus has shifted from **impressions** to **engagement** and now finally **conversion** to get the most value out of the content.

In 2024, we're going to see brands utilizing Performance Marketing a lot more in their social and live-streaming campaigns. Being able to show direct attribution from influencers is such a great way to get accurate ROI data, and you can optimize campaigns in real time.



ZUBAIR HOSSAIN
DIRECTOR OF CUSTOMER SUCCESS
& BIZ OPS
SIDEQIK

KNOW YOUR LIVE-STREAMING KPIs

Live-streaming is still an untapped and under-utilized mode of advertising for many brands. The metrics used for measuring success look different than other platforms, so here's a guide to getting started:

HOURS WATCHED

Hours watched is defined as the total number of hours an audience spent watching live content. Traditional television campaigns often measure in "reach" or the total number of viewers that saw the program, but this metric doesn't take into account how long they were watching for. Hours Watched is a better metric to show just how much content was seen.



UNIQUE REGISTERED VIEWERS

The total number of unique viewers that watched the live content and were logged into the platform. Logged-in viewers are often more engaged and repeat viewers of creators, and can be a better metric to base a campaign on.

BRAND MENTIONS

Measuring the number of mentions your brand has across live-streaming chat can be informative to keep track of performance. These mentions can help you find who is already talking about your brand, about your competitors, and help you find where to activate with creators.



CHAT ENGAGEMENT

Chat Engagement measures the number of users watching the live content that typed at least one message in the live-stream chat. Measuring chat engagement can help show how active and interested a streamer's audience is in the content on screen. The more engaged an audience, the more likely they'll pay attention to a campaign.

GET STARTED

Get started with your live-streaming, gaming, and influencer activations today:

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**STREAM
HATCHET**

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