



TWITCH ADVERTISING

Samsung CE + Twitch

Data, Insights, Strategy & Tactics



P A S S I O N A T E G A M E R S S E E K P E R F O R M A N C E

The Big Idea

Connect marquee Twitch influencers, Samsung CE products, and custom branded content.

The Big Result

Inspire, align, and reinforce Samsung products with the most influential gaming audience in the world.

Main Tenets

Loyalists are rewarded. Upgrading is essential. Being the fastest is key.



SAMSUNG CE + TWITCH

Agenda Overview

Schematic + Timeline

Research Overview

Data Sources + Methodology

Twitch RPG

Audience + Product Tie-In

QLED 4K Target Profile

Gaming Monitor Target Profile

SSD Target Profile

Summary of Key Insights + Recs

Individual Product

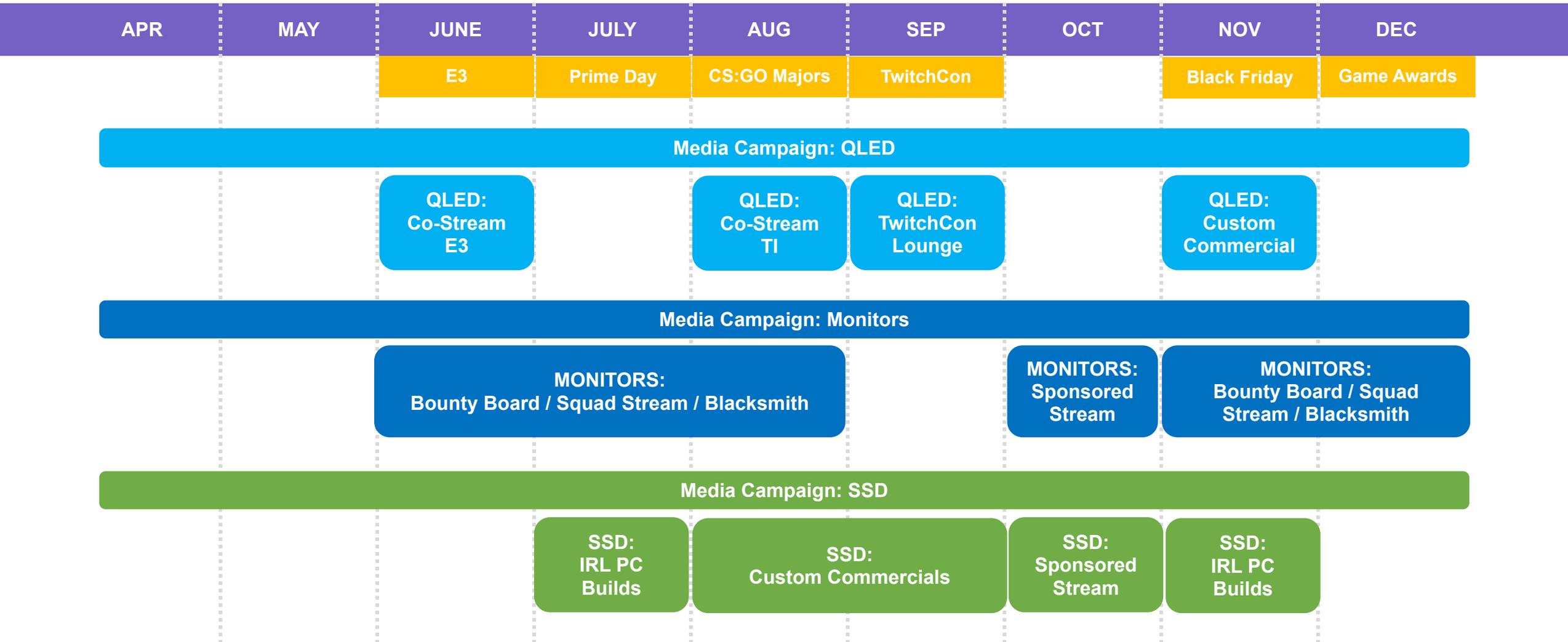
Recommendations

QLED 4K: Reward Your Loyalists.

Monitors: Upgrading is Essential

SSD: Being the Fastest is Key

Schematic + Timeline



DATA METHODOLOGY

Research Overview

Data Sources of Insights

The data cited in this presentation come from these sources:

Twitch Audience Research

Twitch Research Power Group (RPG) is Twitch's proprietary opt-in survey panel made up of 60,000 Twitch viewers and broadcasters globally. Panelists provide feedback and insights about their habits, attitudes, preferences, and brand experiences in exchange for swag, prizes, bits (Twitch currency), or contest entries.

Global Web Index

GlobalWebIndex is a syndicated research study which interviews over 550,000 internet users across the world each year, in four waves. Each respondent is questioned in detail, resulting in 35,000 data points for consumer profiling. The tool collects data on demographics, online behavior, device access, media consumption, social media, and psychographics. The numerical distance from 100 shows the percentage difference compared to the base audience. For example, an index figure of 110.0 means that your Audience is 10% more likely than the base audience to match with a data point.

comScore

comScore is a digital audience measurement solution, considered the digital currency of the advertising industry. Through a hybrid methodology combining an Internet panel with census-level site tagging, comScore weights and projects the size and behavior of digital audiences across the web.

Twitch Internal

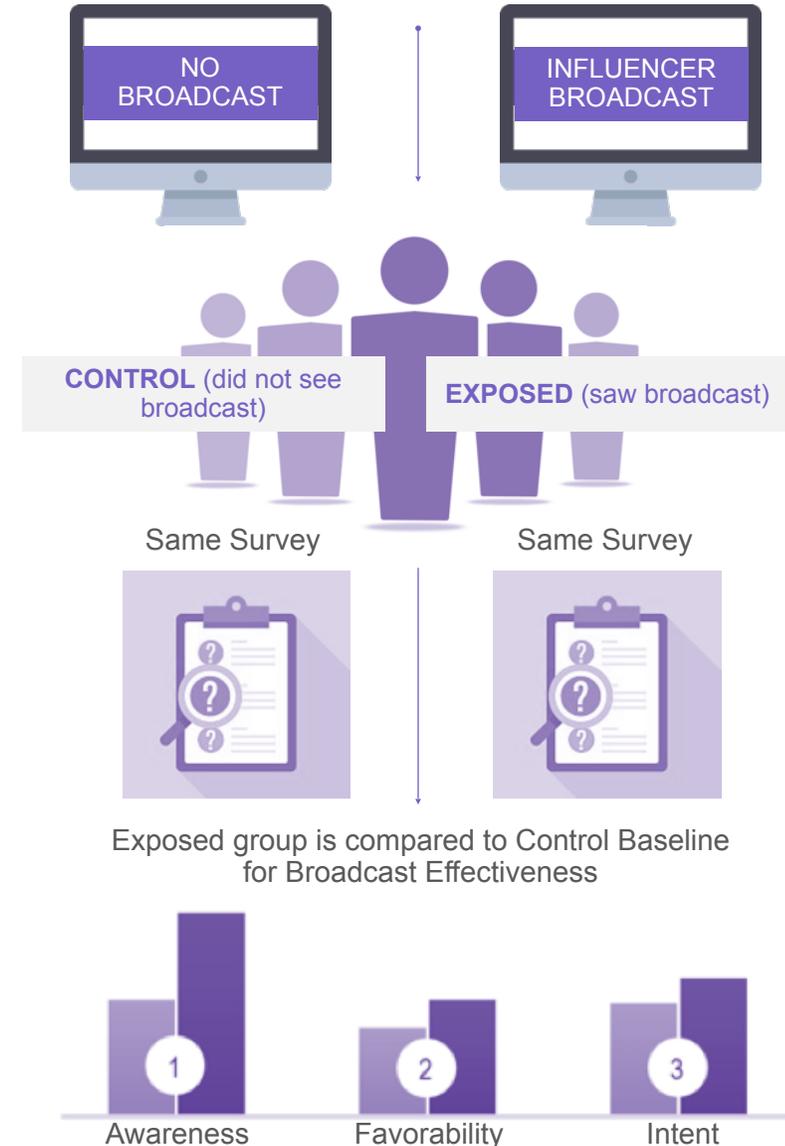
Internal Twitch Data is collected via site-side events, measuring a multitude of user behaviors including time spent, viewership habits, and device usage.

Twitch Audience Research

Using a survey-based approach and control/exposed research design, Twitch RPG Influencer studies quantifies the difference in attitudes between those **exposed and unexposed to branded content on Twitch.**

Branded content is defined as advertiser-sponsored 2hr Influencer streams on Twitch where select broadcasters discuss brands' products or services live with their communities. Sponsors' visual branding is also present for the duration of the livestream.

HOW IT WORKS



TWITCH AUDIENCE DATA + SAMSUNG CE

Audience + Product Tie-In

QLED 4K Target Profile



Twitch Audience Data

High HHI
\$100K+

48%
A18-34 HHI
\$100k+

18%
A18-34 HHI
\$200+

Seeks Status Brands

129 Index

Tend to buy the premium version of products.

Among Twitch TV purchase intenders, the majority already own a Samsung.

Samsung: 55%
Vizio: 33%
LG: 31%

Pays More for New Tech

160 Index

Having the latest technological products is very important.

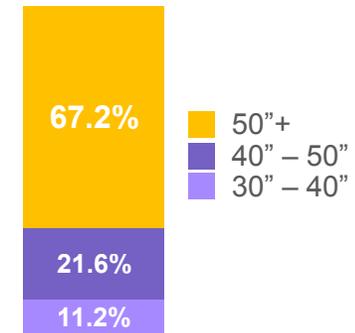
49%
value TV picture quality over price

86%
Would switch TV brands for better technology

Prefers TVs 50"+

67.2%

intend to purchase a 50"+ screen TV among Twitch TV owners who plan to purchase a TV in 2019



Premium TV Purchaser who Buys on Emotion

169 Index

I would buy a product / service simply for the experience of being part of the community built around it.

192 Index

Their favorite brands connect them with other fans of the brand.

Source:
Twitch Research Power Group, February 2019, 18+, n=12,241
Twitch Internal Data, Jan 2019.
comScore US, Jan 2019.
GlobalWebIndex, Jan 2019

Monitor Target Profile

Core Gamers / PC Gamers

Male Skew / 20s to mid 40s



Twitch Audience Data

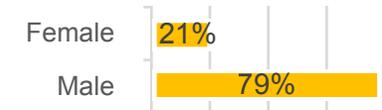
Gaming Type

PC Gamer: **70%**
Console Gamer: 38%
Mobile Gamer: 20%
All Gaming: **14%**

Time Spent Gaming (avg/month)



TOTAL AUDIENCE



48%

A18-34

28%

of Twitch Audience
is M18-34

Who are PC monitor customers on Twitch?

- **83%** of Twitch users own a PC monitor
- They're significantly bigger PC gamers than console gamers (81% heavy PC gamers, 41% console gamers)
- **33% of them plan to buy a new monitor in 2019**
- Current Samsung owners are **+67%** more likely than non-owners to stay brand loyal

Source:
Twitch Research Power Group,
February 2019, 18+, n=12,241
Twitch Internal Data, Jan 2019.
comScore US, Jan 2019.
GlobalWebIndex, Jan 2019

SSD Target Profile

PC Users

Males Age 20-40

Performance + Speed

Content Creators

Tech Early Adopter

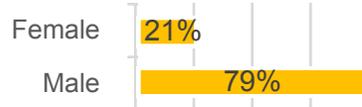


Twitch Audience Data

57% of Twitch PC owners built their PCs themselves

Gaming Type
 PC Gamer: **70%**
 Console Gamer: 38%
 Mobile Gamer: 20%
 All Gaming: **14%**

TOTAL AUDIENCE



48%
A18-34.

28% of Twitch Audience is M18-34

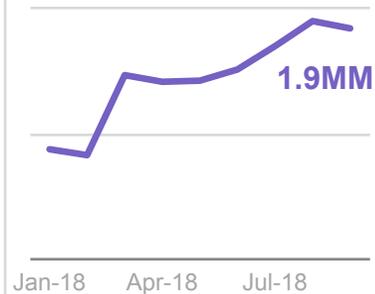
68% Agree that "I would be less competitive in PC gameplay without the fastest SSD technology."

88% Would switch SSD brands for better technology

55% Value SSD performance over price

In 2018, Twitch's monthly active streamers grew **33%**

Monthly Active Streamers



160 Index
Having the latest technological products is very important.

129 Index
Regularly inform friends and family on new products/services.

Source:
 Twitch Research Power Group, February 2019, 18+, n=12,241
 Twitch Internal Data, Jan 2019.
 comScore US, Jan 2019.
 GlobalWebIndex, Jan 2019

Key Insights

- ▶ Twitch users are willing to pay for quality / performance when it comes to their consumer electronics.
- ▶ Samsung demonstrates mid-to-high brand loyalty among existing owners of its products on Twitch
- ▶ Twitch users show a high willingness in all categories to switch brands for better tech / performance
- ▶ All potential purchasers in these categories skew more heavily toward PC gaming than console gaming

Recommended Strategies

Show love for your **Loyals**—your existing customers want to stay, so give them great reasons to do so.

Expect (and exploit) fickleness—for the best performance, **purchasers are willing to switch brands**, so give non-Samsung-owners a good reason to do so.

Surface and celebrate **speed/superior technology**—it's what Twitch users care about most.

TV/ QLED Recommendations

Strategy:

Reward Your Loyalists.

Leverage the existing lead in brand penetration and the brand loyalty among current customers to re-capture Samsung QLED/TV owners, with an eye toward swaying other buyers who are very willing to switch brands

Tactics:

Gaming Event Co-Streams*

During 2019's most exciting gaming events, we'll make sure Twitch fans know that Samsung's QLEDs are the best way to experience every exciting moment by partnering with some of our most popular Influencers. In sponsored streams timed during press conferences, conventions and esports events our Influencers will react live as they watch along on QLED displays specially installed in their gaming rooms.

QLED Lounge @ TwitchCon

With Samsung on as a major sponsor of TwitchCon 2019, the new QLEDs will be the focal point of the event's must-see booth. We'll drive fan excitement in the days leading up to the convention with an Influencer broadcast where they'll show off their own QLED and encourage fans to come check them out in-person during a meet-and-greet in the Samsung QLED booth.

**Co-streaming has become a legitimate phenomenon on Twitch. A live update to the now-ubiquitous VOD reaction genre, co-streaming lets fans experience engaging moments in real time with their favorite Influencers.*

Monitor Recommendations

Strategy:

Inspire Upgrading.

Lean hard into customers' strong affinity for PC gaming and into the strong brand loyalty among existing Samsung monitor owners, leveraging Samsung owners' enthusiasm for the brand and others' willingness to switch for better technology

Tactics:

Bounty Board

Pre-launch, we'll tap into hundreds of influencers and their highly engaged micro communities to view video content and build excitement for the release of Samsung's newest monitor. These influencers will incorporate Samsung's talking points and introduce the monitor in their own unique way.

Squad Stream

Equip a squad of Twitch streamers to test drive the latest gaming monitors in real time with a Squad Stream. This new Twitch feature allows up to 4 influencers to stream together in a single view, showcasing the immersive gameplay and performance of Samsung monitors.

Blacksmith Extensions

We'll invite a top influencer to introduce their audience to the new features of Samsung's gaming monitors with a 2 hour sponsored broadcast. This broadcast will feature the Blacksmith extension, which allows streamers to feature their gear as an on-stream overlay and invites viewers to seamlessly purchase by clicking through to Amazon. We'll also include chatbots throughout to encourage viewers to discover more on relevant product pages.

SSD Recommendations

Strategy:

Be the fastest.

Leverage strong affinity for PC gaming, high willingness to switch brands, and strong interest in quality to demonstrate superior speed to Twitch's audience of potential SSD customers.

Tactics:

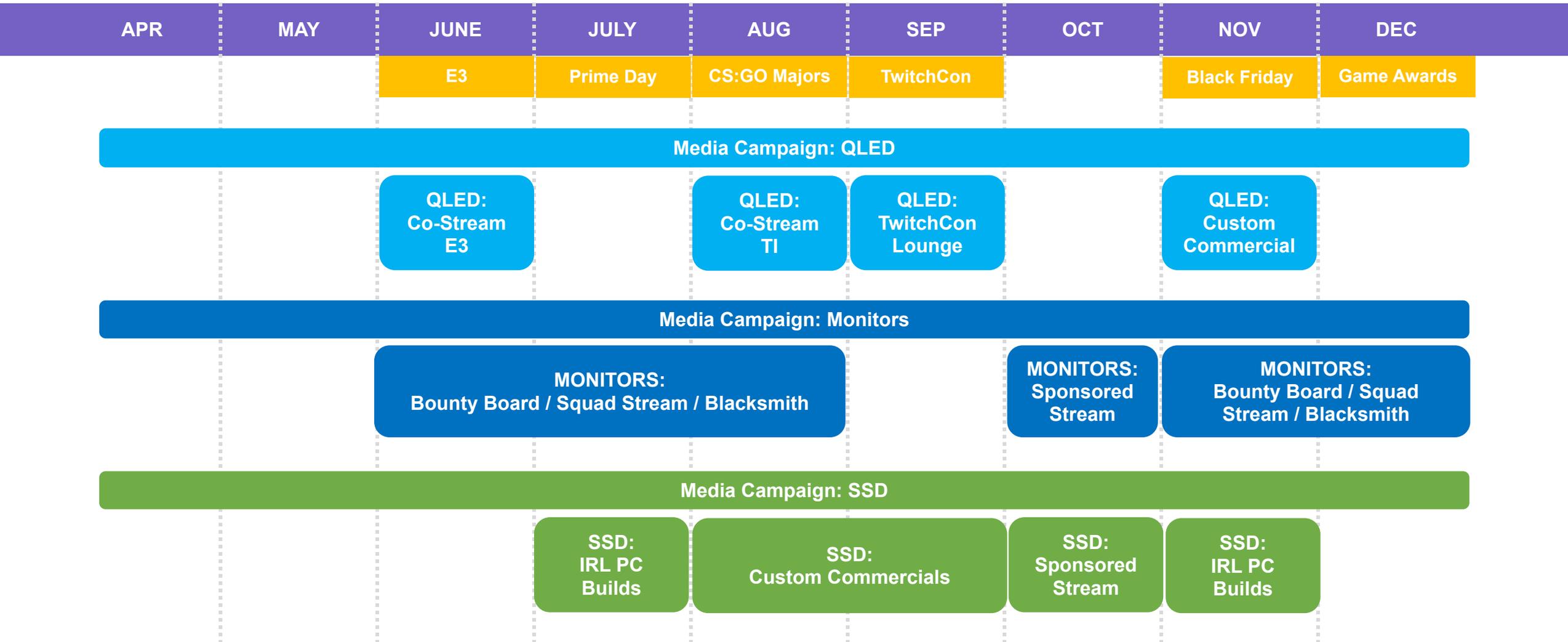
Ultimate IRL PC Build

Building the perfectly customized high-performance machine is a *thing* on Twitch. It's the reason Twitch viewers will watch their favorite broadcasters rebuild their gaming set-ups, as well as purchase the same hardware through the channel's Extension. To underscore this, we'll have a marquee Twitch broadcaster build the Ultimate Gaming PC from scratch using Samsung hardware.

Custom Commercials

Every PC gamer has their own preferred gaming setup. To punctuate the importance of Samsung's SSD speed and importance in gaming, we'll create a series of custom commercials – using both Twitch celebrities and esports legends – wherein they emphasize the importance of having the type of speed only a Samsung SSD can deliver.

Schematic + Timeline



Thank You!



INSIGHTS AND RECOMMENDATIONS

Appendix

2018 PERFORMANCE

QLED

Media with 1 influencer stream showcasing the QLED TV.

1,937,694

HPTO Impressions

2,634,713

Cross Screen Video Impressions

92%

Cross Screen VCR

4,654,187

SureStream Video Impressions

96%

SureStream VCR



CUSTOM PERFORMANCE

N3RDFUSION

325,277

Total Views

11,605

Max Concurrents

492,480

Minutes Watched

243,411

Unique Video Views

9,514

Average Concurrents

2018 PERFORMANCE

SSD

Media with 3 influencer broadcasts and custom commercial.

4,472,302

Cross Screen Video Impressions

91%

Cross Screen VCR

9,719,730

SureStream Video Impressions

92%

SureStream VCR



CUSTOM PERFORMANCE

DrLupo

325,743

Total Views

16,931

Max Concurrents

13,5687

Average Concurrents

6,186

Channel Chat Activity

CouRageJD

376,491

Total Views

18,314

Max Concurrents

15,020

Average Concurrents

8,290

Channel Chat Activity

KingGothalion

403,590

Total Views

33,715

Max Concurrents

18,817

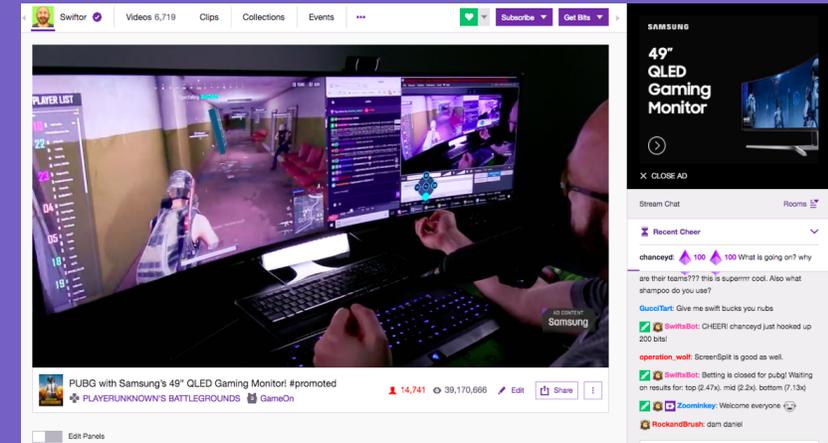
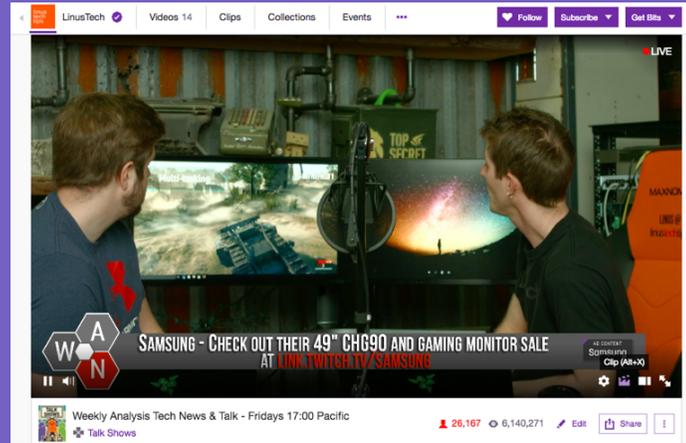
Average Concurrents

5,707

Channel Chat Activity

PC Monitors

The WAN Show episode sponsorship and 5 influencer streams.



CUSTOM PERFORMANCE HIGHLIGHTS

The WAN Show

479,081
Total Views

20,612
Average Concurrents

5,905
Channel Chat Activity

17,869
Link Clicks In Chat

Swiftor

655,050
Total Views

12,397
Average Concurrents

5,748
Channel Chat Activity

1,068
Link Clicks In Chat

FuturemanGaming

625,101
Total Views

10,150
Average Concurrents

2,292
Channel Chat Activity

501
Link Clicks In Chat

Brand Study Metrics Glossary

FAMILIARITY – measures respondents awareness of a brand

- **Sample Question:** How familiar are you with the following _____?
- **Sample Response Options:** Very familiar, familiar, moderately familiar, vaguely familiar , never heard of it

AFFINITY – evaluates positive sentiment towards a brand

- **Sample Question:** What is your opinion about the following _____?
- **Sample Response Options:** Love it, Like, Neutral, Dislike, Hate it

PURCHASE INTENT – determines respondent's desire to buy a product

- **Sample Question:** How likely are you purchase the following _____?
- **Sample Response Options:** Definitely will, probably will, may or may not, probably will not, definitely will not

RECOMMEND – unveils the respondent's willingness to refer a product or brand to a friend

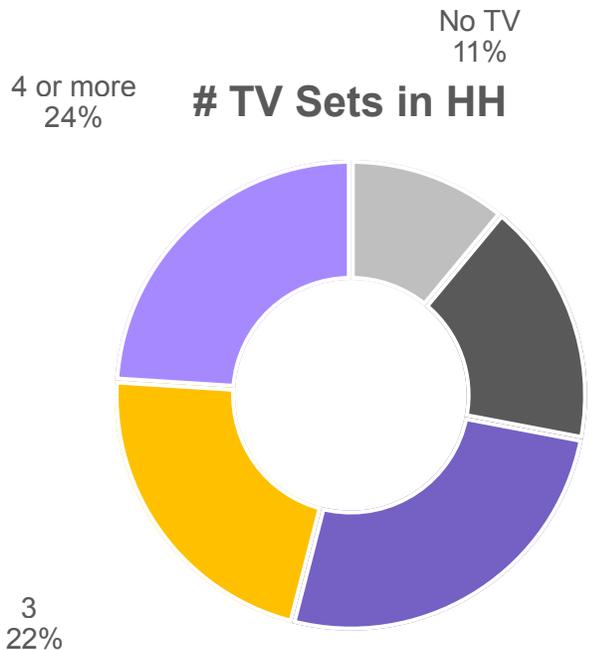
- **Sample Question:** How likely are you to recommend to a friend any of the following _____?
- **Sample Response Options:** Definitely will, probably will, may or may not, probably will not, definitely will not

*Sample questions will be asked before and after exposure to ad or branded content

TV Market on Twitch

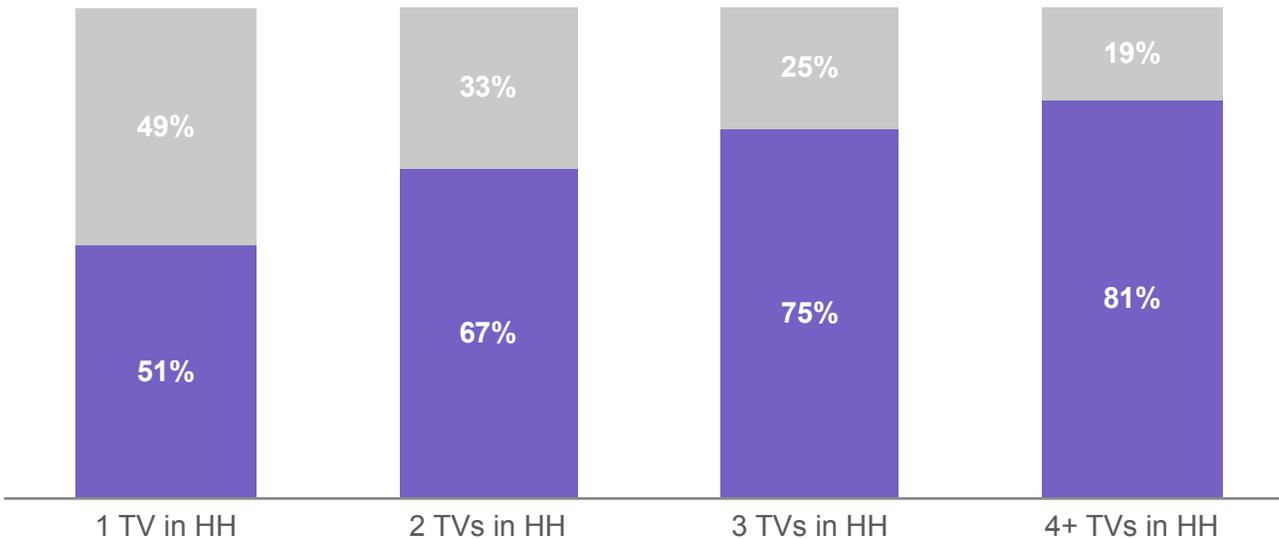
81% of Twitch TV viewers own at least 1 TV set

69% of Twitch TV owners own a smart TV;
The more TV sets in the HH, the more likely they are to already have a smart TV



Smart TV Ownership

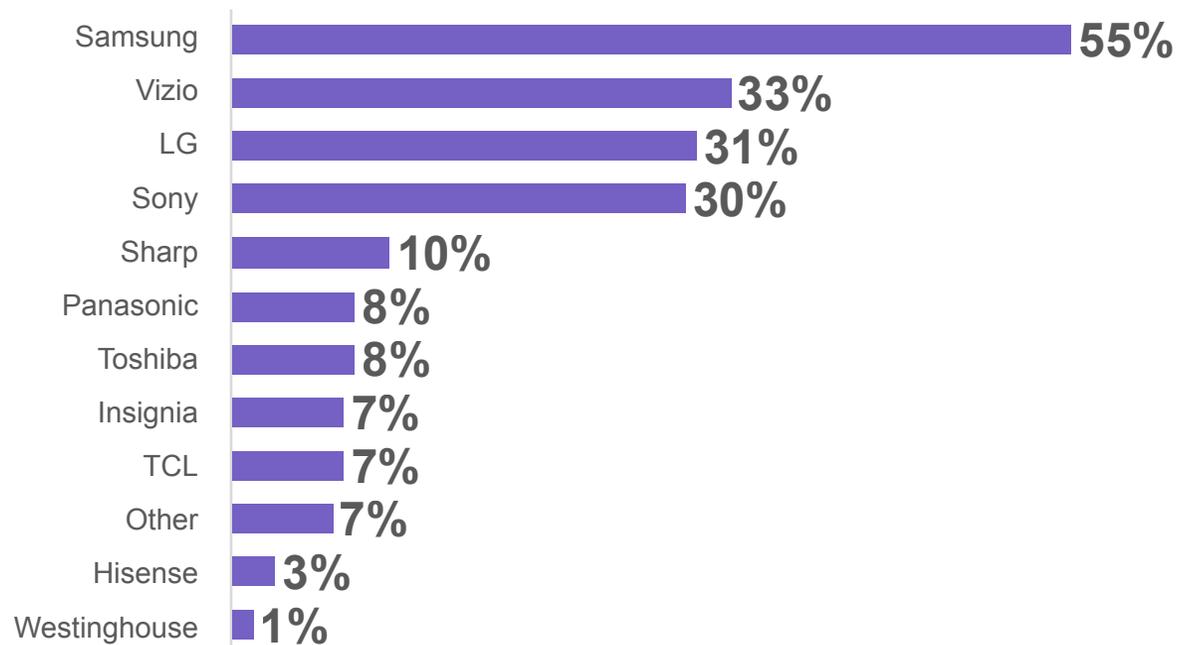
■ Owns a smart TV ■ Does not own a smart TV



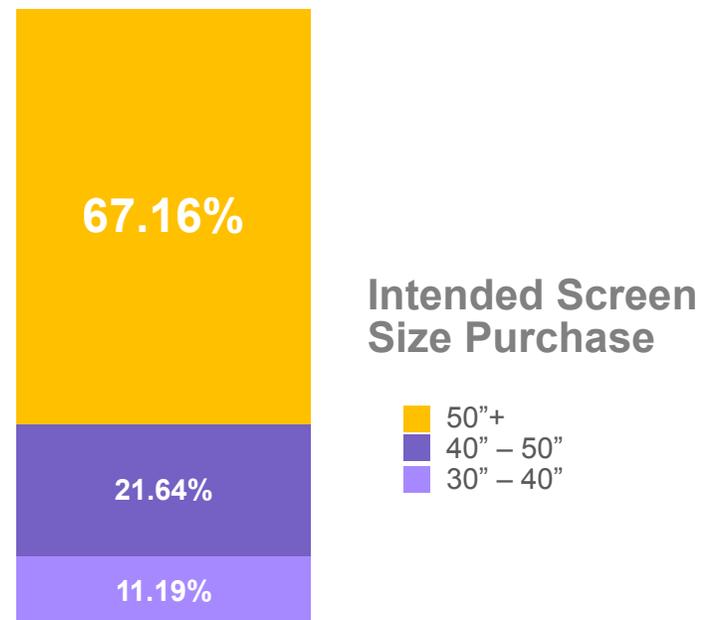
Source: Twitch Research Power Group, January 2019, 18+, n=16,632

23% of Twitch TV Owners Plan to Buy a New TV in the Next Year

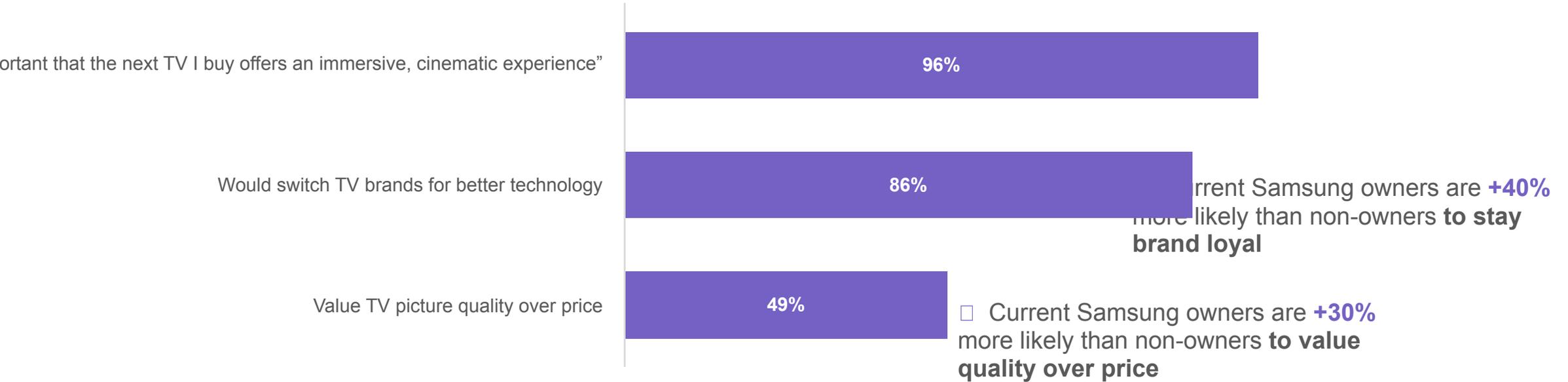
Among TV purchase intenders, the majority already own a Samsung...



...and plan on purchasing a large screen TV



Twitch TV Purchase Intenders Value Quality Over Anything Else



TAKEAWAY

Find TV Quality-Seekers Across the Twitch Platform

“TV Quality-Seeker”

Twitch users who are in the market for a new TV *and* look for the “best picture quality” rather than the “best deal”



66% of Monitor Quality-Seekers are **heavy PC gamers** (20+ hrs/wk)

55% of Monitor Quality-Seekers are **heavy console gamers** (20+ hrs/wk)

PC Monitor Market on Twitch

▶ **83%**

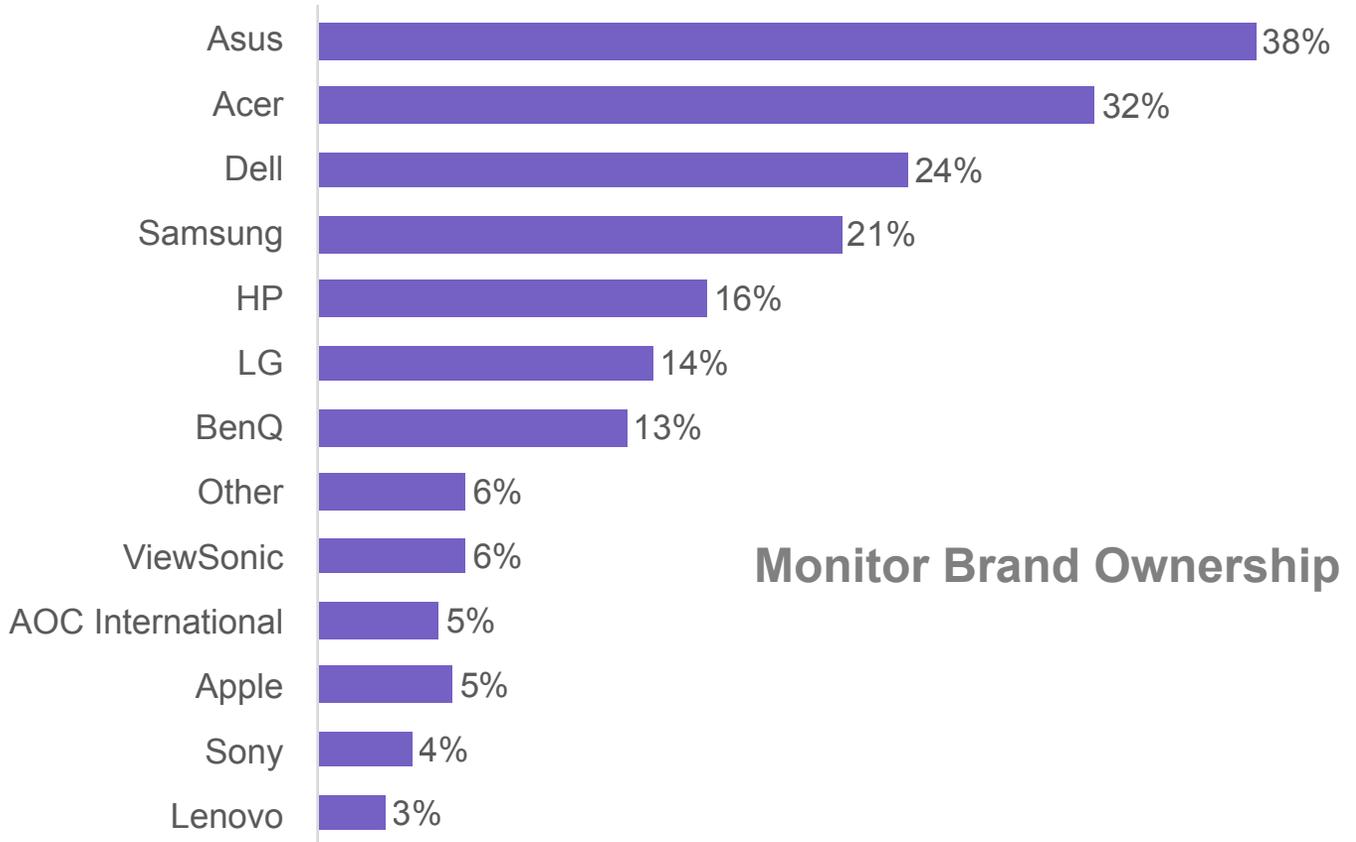
of Twitch users own a PC that they use for gaming

▶ **33%**

of Twitch PC owners plan on buying new monitors in the next year

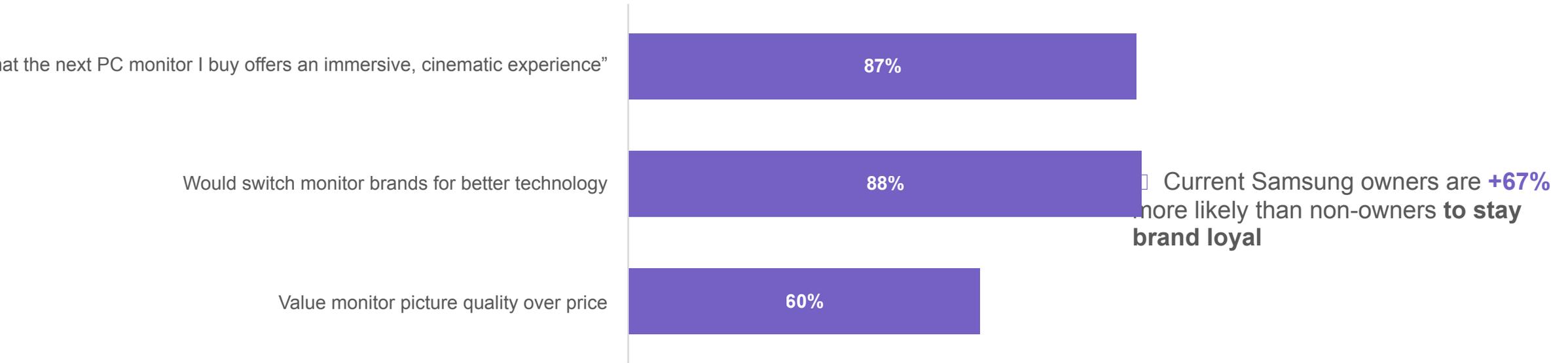
▶ **21%**

of PC monitor purchase intenders already own Samsung



CATEGORY: PC MONITOR

Twitch PC Monitor Purchase Intenders Value Quality Over Anything Else



Source: Twitch Research Power Group, January 2019, 18+, n=16,632

TAKEAWAY

Find Monitor Quality-Seekers Primarily in PC Game Content on Twitch

“Monitor Quality-Seeker”

Twitch users who are in the market for a new SSD *and* look for the “best picture quality” rather than the “best deal”



81% of Monitor Quality-Seekers
are **heavy PC gamers**
(20+ hrs/wk)

41% of Monitor Quality-Seekers
are **heavy console gamers**
(20+ hrs/wk)

SSD Market on Twitch

▶ **57%**

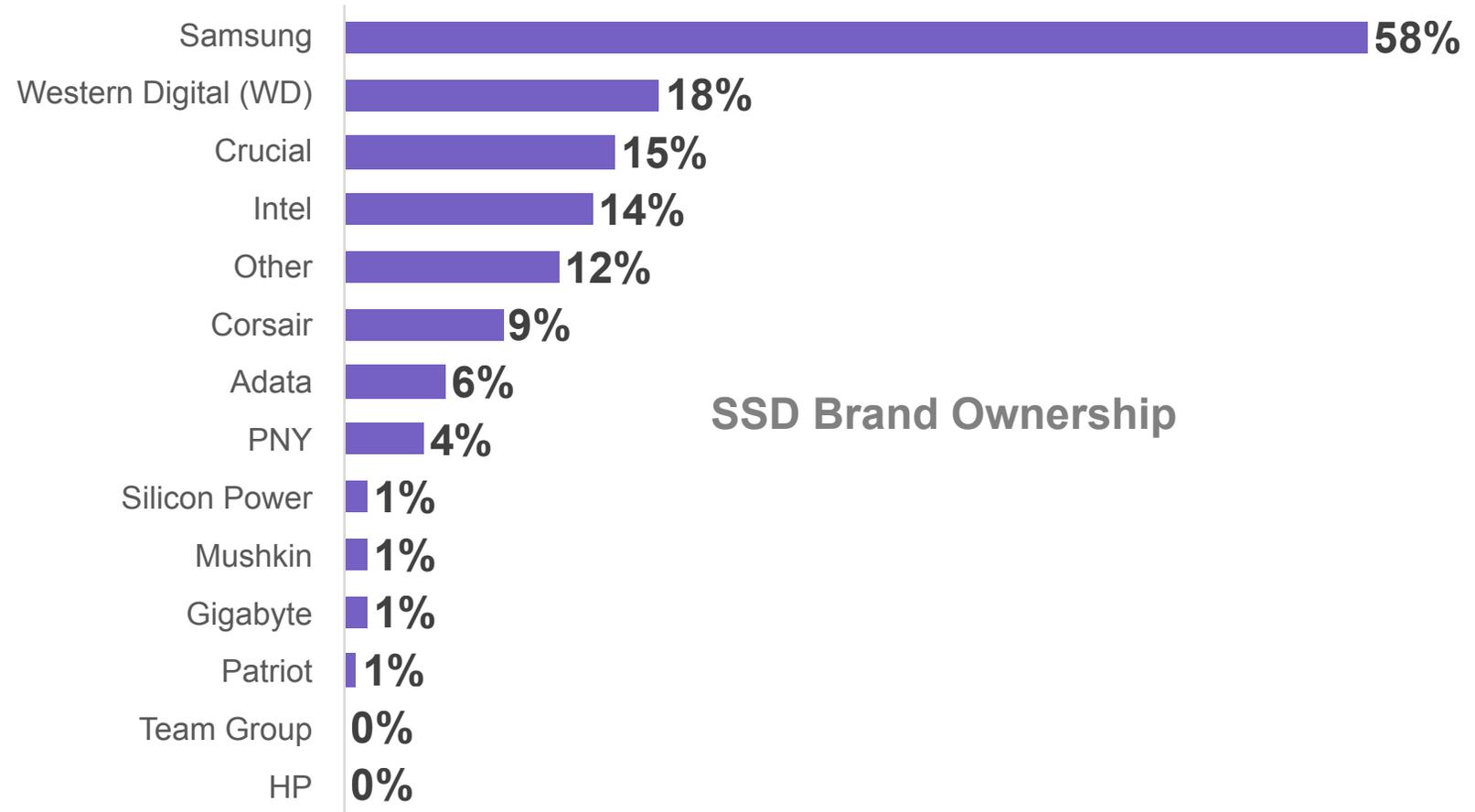
of Twitch PC owners built their PCs themselves

▶ **41%**

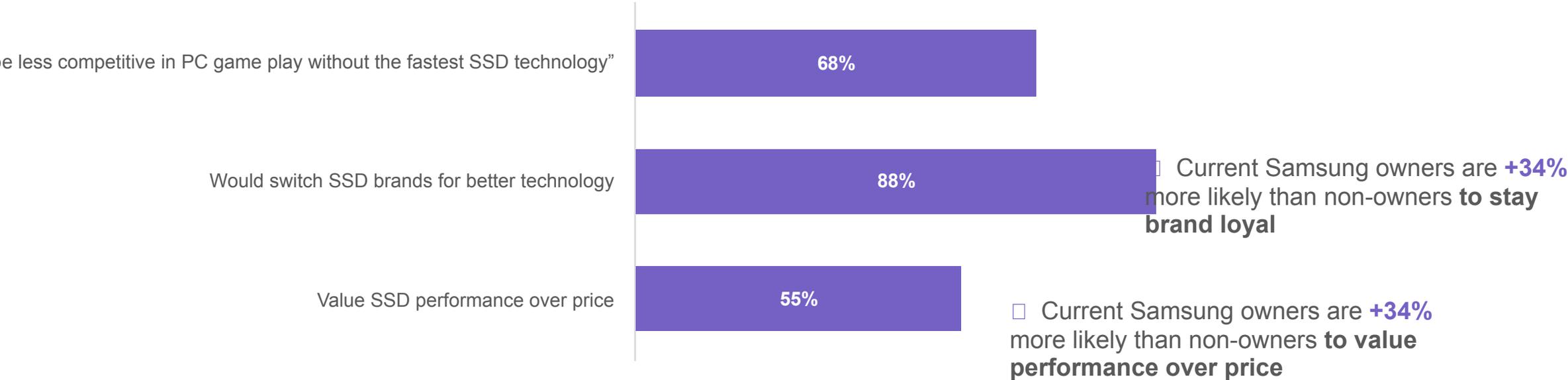
of PC builders plan on buying new storage in the next year

▶ **58%**

of SSD purchase intenders already own Samsung



Twitch SSD Purchase Intenders Value Quality Over Anything Else



Source: Twitch Research Power Group, January 2019, 18+, n=16,632

TAKEAWAY

Find SSD Quality-Seekers Primarily in PC Game Content on Twitch

“SSD Quality-Seeker”

Twitch users who are in the market for a new SSD *and* look for the “best performance” rather than the “best deal”



82% of SSD Quality-Seekers are
heavy PC gamers
(20+ hrs/wk)

35% of SSD Quality-Seekers are
heavy console gamers
(20+ hrs/wk)