

A group of four men are in a large, dimly lit esports arena. Two men in blue and yellow jerseys are embracing; one has bright green hair. Another man in a blue jersey with a headset is clapping. A fourth man in a yellow hoodie is also clapping. In the background, a large crowd is visible, and signs for 'LAN', 'PEARL ABYSS', and 'Esports Stage' are illuminated.

/ Live  
/ Community  
/ Multiplayer Entertainment  
**We are social TV.**



**Entertainment  
has changed.**

People want to be  
entertained but  
also want to have a  
part in how they  
are entertained.



We earn consumer screen time away from a very broad set of competitors. We compete with, and lose to, Fortnite more than HBO.

Reed Hastings, **NETFLIX** CEO



# What is Twitch?

/ World's leading multiplayer experience



**NICKMERC'S** ✓

Videos 1,211 Clips Events Followers 2,479,604 Following 49

Follow Subscribe

Stream Chat Rooms



Gauntlet Duos | @Nickmercs On Socials | @100Thieves

Category: Fortnite • Team: 100 Thieves

English Shooter

22,573 52,724,542 Edit Share

sageatom911629 mango\_bab... 20,000 10,000 moyerism86 10,000

Jpsnowman1: This dude sound like Dakotaz lol

iBelleAR Subscribed at Tier 1. They've subscribed for 2 months, currently on a 1 month streak! iBelleAR: IF you hold the pickup it will switch for the current (ie: tac for pump)

justinzuniga: B

mangorange6: @BrazNathan Always keepin it real. I'm finally done after this semester.

wfnk: nice 1st shot

Mjm325: Flawless baguette

Nightbot: Guarantee your PC gaming performance with BLD by NZXT. The simplest way to get a customized gaming PC. Choose the games you want to play, set a budget, and BLD takes care of the rest. Built and shipped within 48 hours with a 2-year warranty. https://nzxt.co/Nickmercs

shoomster: Sens!

Starz36: i love Knee so much

DDavidid: dude

Send a message

Chat

# Diverse content...



Sports

Talk Shows



Entertainment

Esports



Creative

Gaming



...and so  
much content



## Every day

nearly half a million streamers broadcast live on Twitch.

Oct 2018

## Every month

there are over 3 million unique broadcaster channels.

Dec 2018

## In 2018

505 billion minutes of content were watched.

**That's 960,807 years!**



**Massive  
Reach and  
Engagement**

**116.3 Million**

MONTHLY UNIQUES

**17.6 Million**

DAILY UNIQUES

**773 Million**

MONTHLY LIVE HOURS WATCHED

*Source:*

Twitch Internal Data, Jan 2019.

comScore US, Jan 2019.

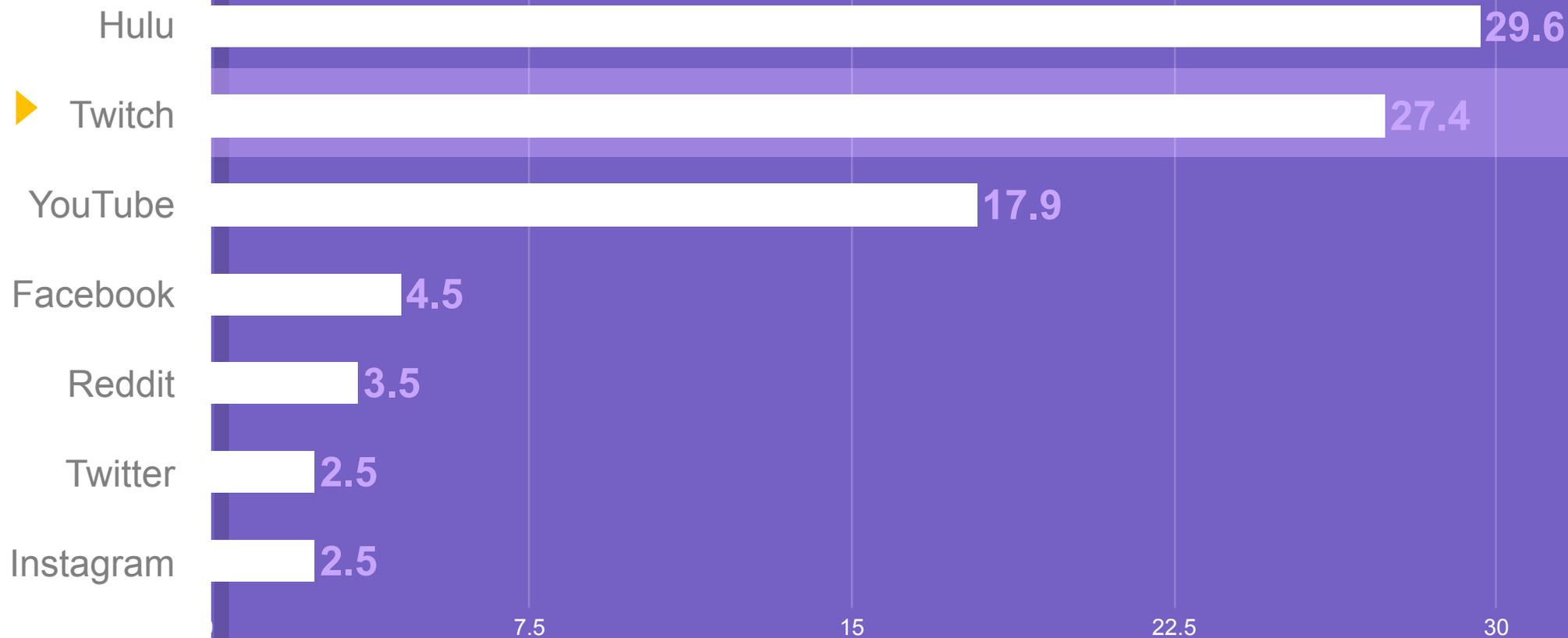
US Only Monthly Uniques: 27,481mm

Avg Min Per Visit: 27.4

Avg Mins Per Visitor: 353.5

# Leading Engagement

Average Minutes Per Visit



comScore: January 2019; Average Minutes per Visit among ad supported platforms

# Twitch: A Replacement for TV

Our viewers prefer entertainment on Twitch over TV due to...



## Innovation

Twitch ranks #1 when it comes to the most innovative viewing experience ahead of Netflix and YouTube.

## Community

56% would rather watch a TV show live on Twitch with the community than live on TV.

## Experience

Compared to 29 different TV networks and 4 streaming services, Twitch ranks as the #3 viewing experience to watch **live with friends** behind only live sports on ESPN and the NFL Network.

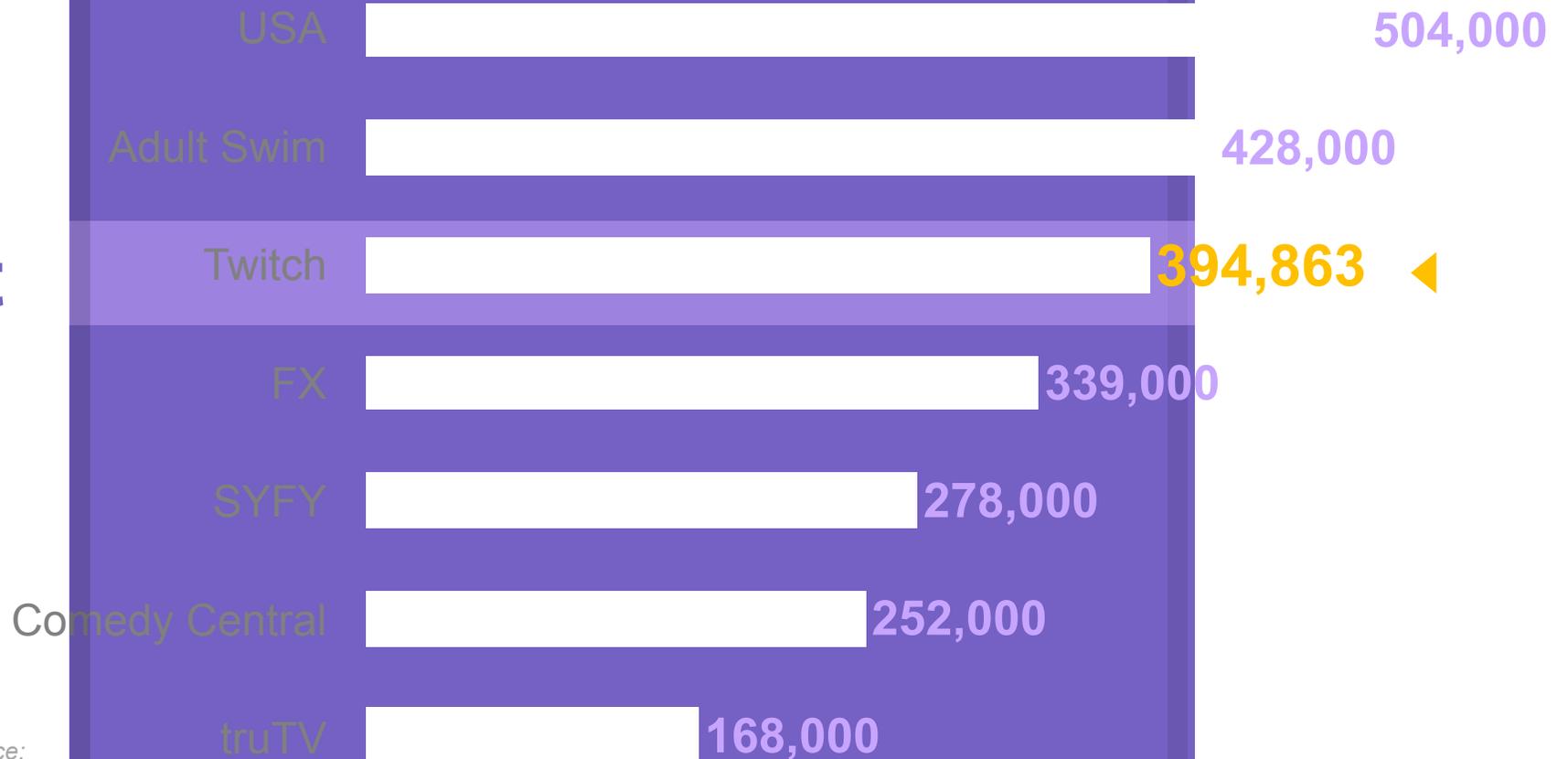


More people watch live streams on Twitch during prime time than the number of people who watch cable networks like MTV and CNN. **Viewers watch an average of one hour 45 minutes of content every night.**

FAST COMPANY

# Twitch's live audience in the USA is just as large as major cable entertainment networks

P13-54 Primetime Live Average Minute Audience



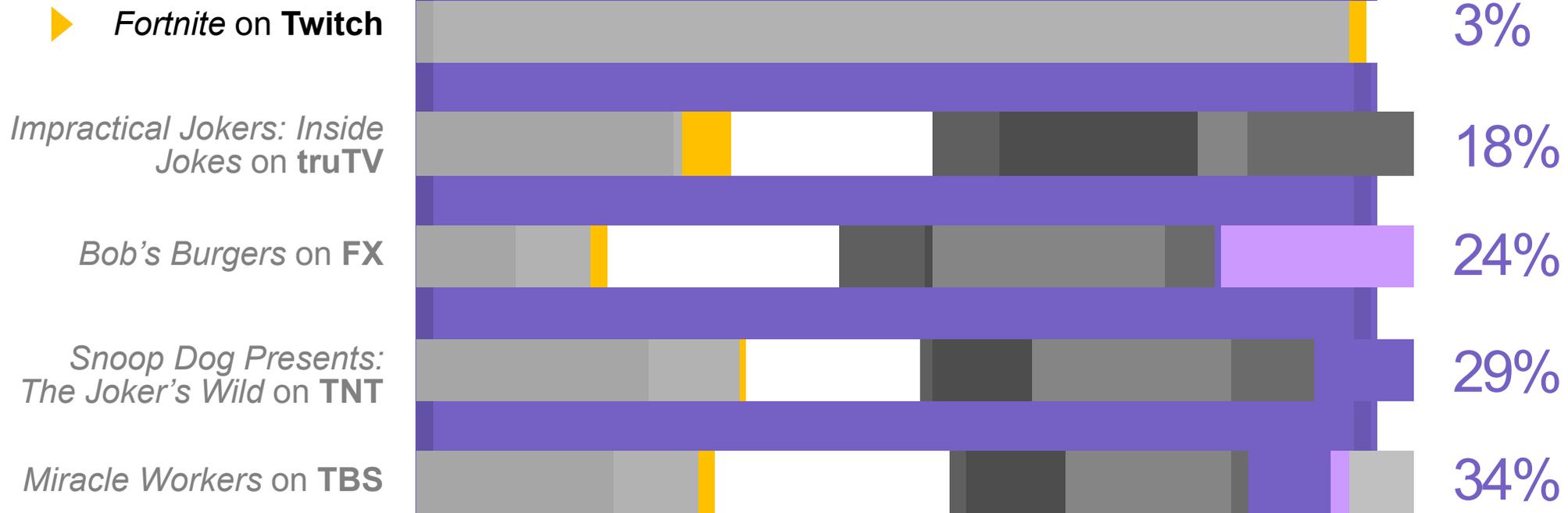
Source:  
Nielsen Average Audience & Twitch  
Concurrent Viewers. Live Only viewing.  
12/31/18-1/27/19. P13-54. Excludes all  
traditional sports programming. Primetime =  
M-Sa 8p-11p, Su 7p-11p.

# Less Ad Clutter = More Impact

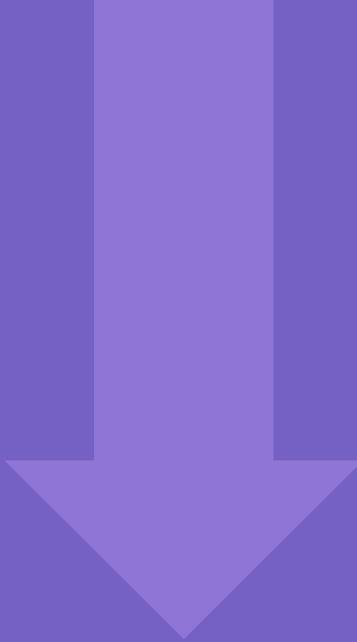
## Commercial Pod Structure 30-Minute Format

● Content ● Ad ● Network Promo

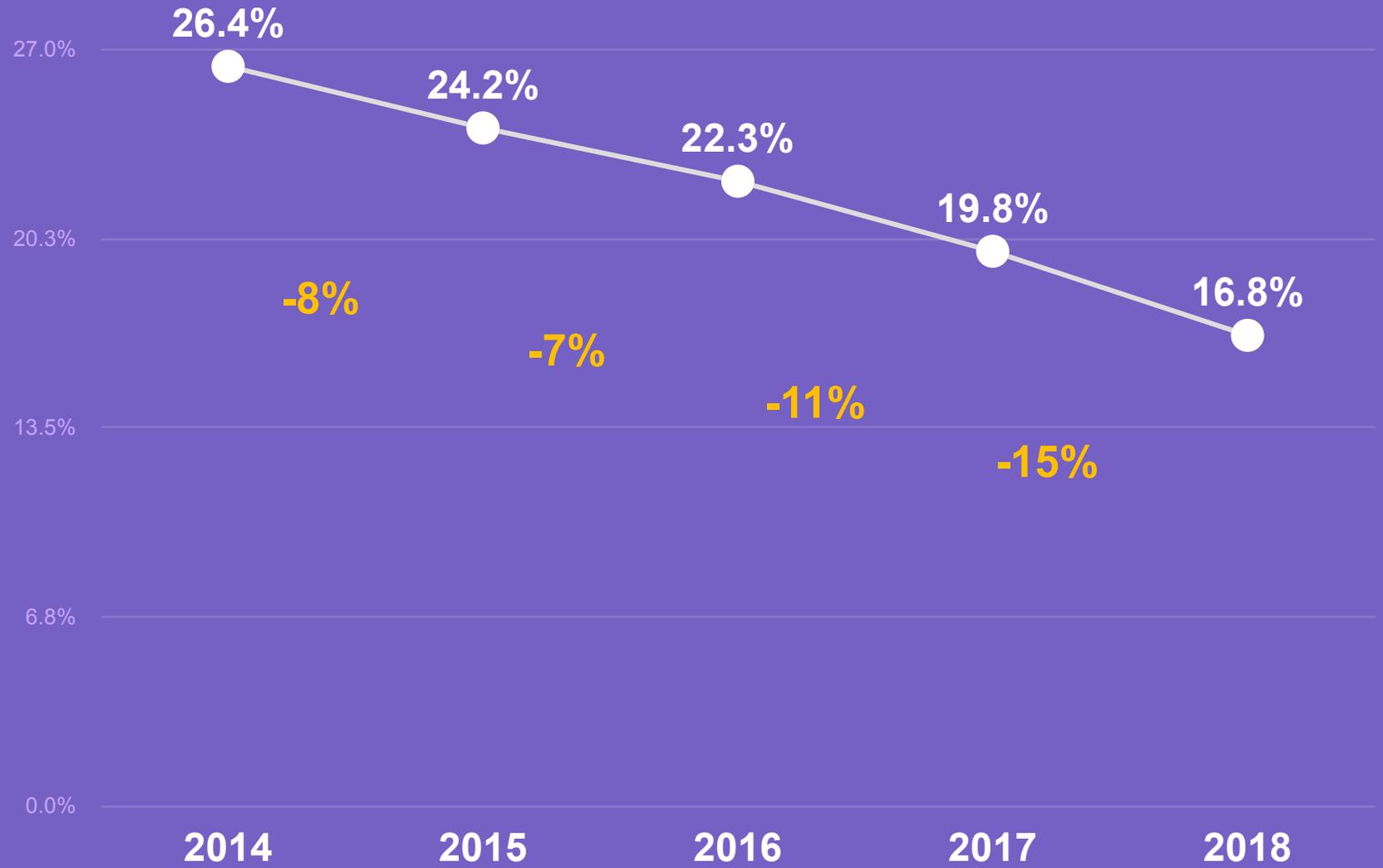
% of Minutes  
Dedicated to Ads/  
Promos



Source: Actual airings; Miracle Workers, 3/6/19 10:30pm; Impractical Jokers, 3/5/19 9:30pm; Snoop Dog Presents: The Joker's Wild, 3/6/19 10:30pm; Bob's Burgers, 3/10/19

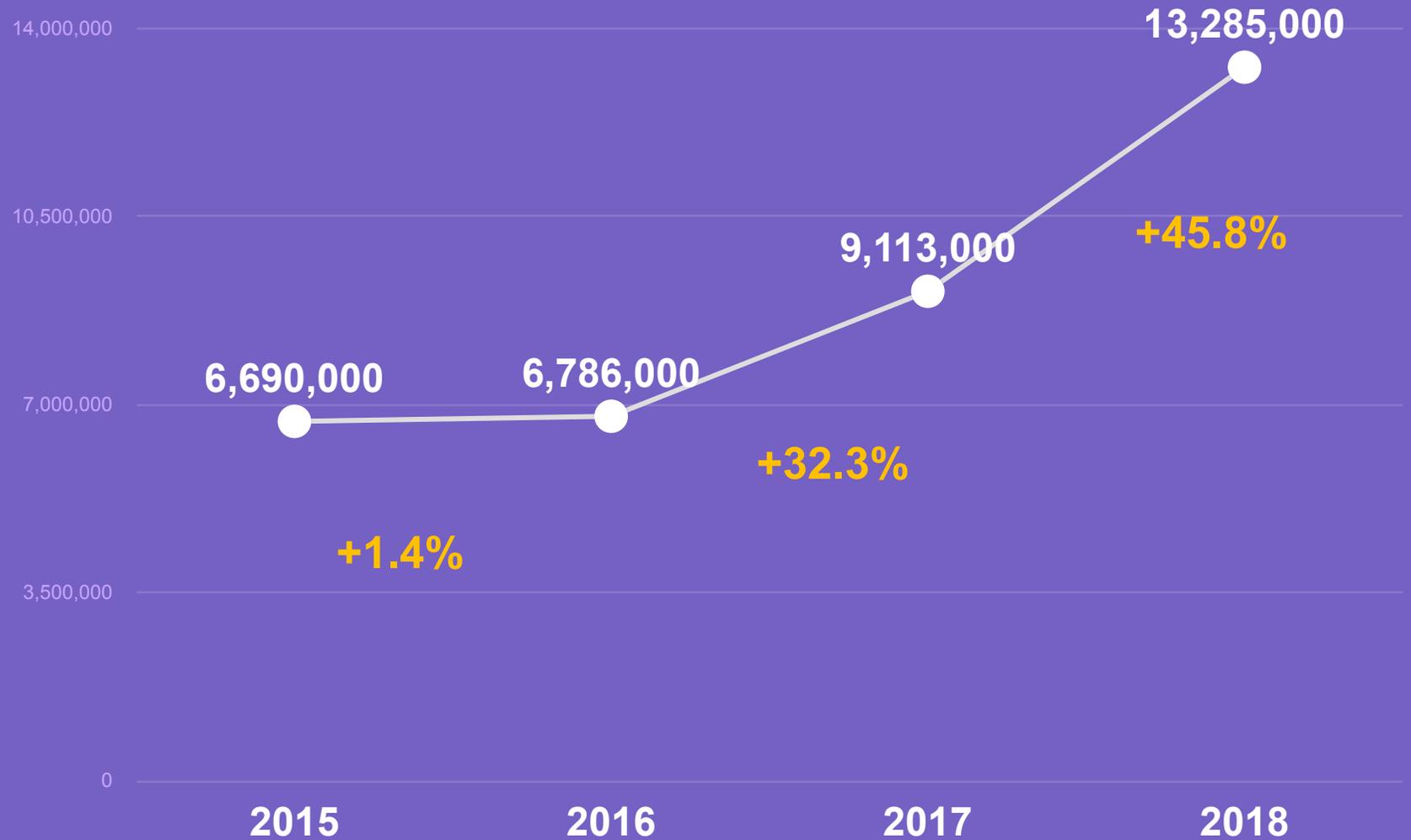


# Television: The P18-34 USA TV Audience is in Steep Decline



Source: Marketingcharts.com analysis of Nielsen Data

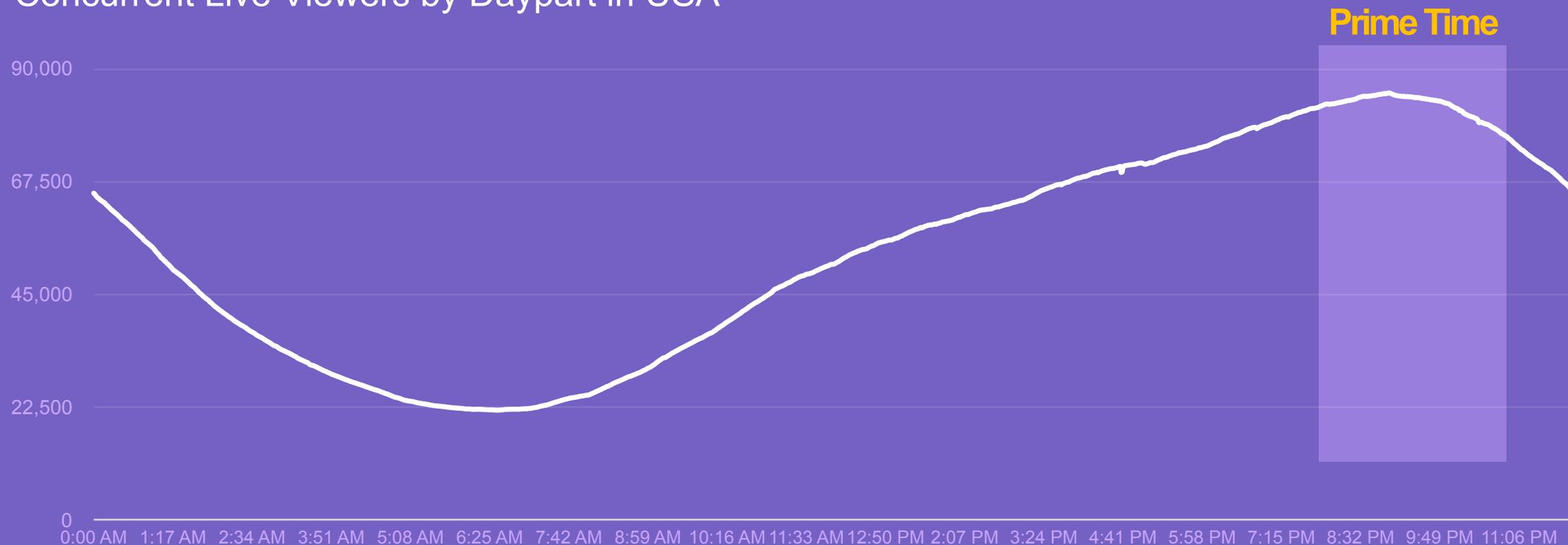
# Twitch: P18-34 Audience in USA is on the Rise



Source: comScore US, Jan 2019.

# Beyond Prime Time, Twitch consistently delivers huge audiences all day long...

Concurrent Live Viewers by Daypart in USA





**Who is using Twitch?**

**/ A new generation of consumers**

“

[Twitch serves] huge audiences of young people who are way more devoted and passionate than any TV show viewer.

AdAge”





# The Twitch Audience is Made of Consumers who are...

Savvy with Technology

**75%**  
P18-34

Focused on Community

**Top Interests**

Gaming: **74%**

Music: **72%**

Technology: **69%**

Food + Drink: **64%**

Television: **60%**

Open to Advertising

Source: TwitchRPG, TV Insights Study, Feb 2019

# The Twitch Audience is Made of Consumers who are...

## Savvy with Technology

Having the latest technological products is very important. 160 Index

I would buy a product / service simply for the experience of being part of the community built around it. 169 Index

Their favorite brands connect them with other fans of the brand. 192 Index

## Focused on Community

Seek expert opinions before purchasing products and services. 134 Index

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

## Open to Advertising

Tend to buy the premium version of products. 129 index

Tend to buy brands they have seen advertised. 139 index



# What's Better than Entertaining Content?

/ The content you can personally affect while watching

A photograph of three men sitting on a white couch, intensely playing a video game. The man on the left is wearing glasses and has his mouth open in a shout, with his right arm raised. The man in the center is bald and also shouting, pointing his right hand towards the screen. The man on the right is laughing with his mouth wide open. They are all wearing blue and purple clothing. The background is a blue wall with 'TwitchCon 2016' logos. A large, semi-transparent blue rectangle is overlaid on the bottom half of the image, containing white text.

# Twitch has changed entertainment.

Twitch is much more than just watching other people. It's multiplayer entertainment: a live, shared, and interactive experience where everyone can play a role.

**[Appendix]**

# How Twitch Ad Products Deliver

/ Live

/ Multiplayer Entertainment

/ Community

/ Live

/ Multiplayer Entertainment

/ Community

# Twitch Difference: Leading Ad Effectiveness



**Branded content on Twitch sees a benchmark of 5-8% lift for two most important metrics: purchase intent and brand affinity.**

Ahead of industry benchmark of 3-5% lift.

**That's 2x the industry standard!**

/ Live

/ Multiplayer Entertainment

/ Community

# Sponsorship and Rights

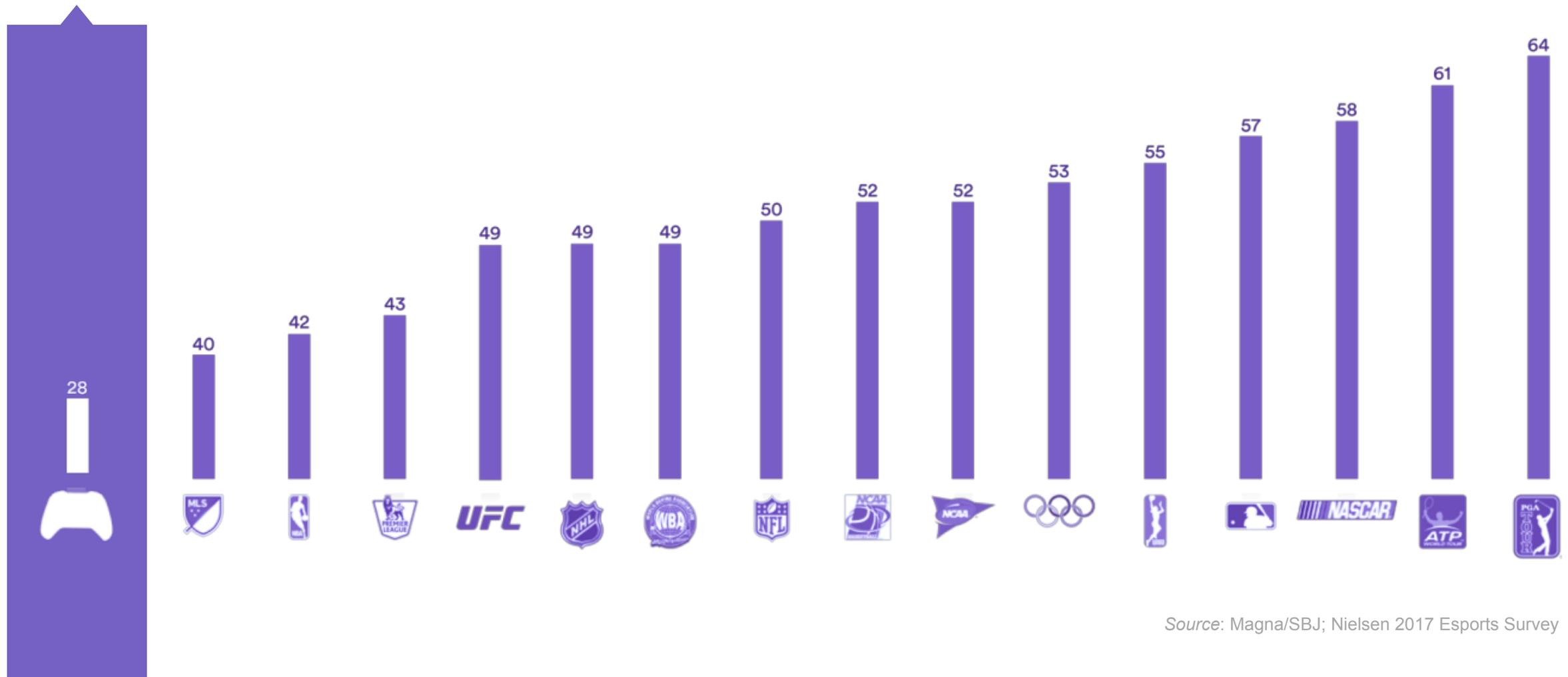
Represented and  
O&O Content



- Team Liquid
- Evil Geniuses
- Twitch Rivals
- Magic: The Gathering
- Tekken World Tour
- Pro Chess League
- US Army Entertainment Esports Championship Series
- PAX Arena (South, East, West)
- Custom Influencer Programs & Brand Ambassadorships
- Custom Tournaments (Physical & Digital)
- Twitch Plays
- Twitch Studios (original content)
- Twitch Presents (licensed content)
- Custom Branded Content

# Twitch is Home to the Esport Viewer

## Esports Fans Median Age Significantly Younger than Traditional Sports



Source: Magna/SBJ; Nielsen 2017 Esports Survey

# Major Gaming and Esports Events



## Q1

-  **Awesome Games Done Quick**  
Speed Running Marathon
-  **PAX South**  
Fan Convention
-  **IEM Katowice**  
Counter-Strike: Global Offensive
-  **OWL Stage 1 Finals**  
Overwatch League
-  **PAX East**  
Fan Convention

## Q2

-  **TwitchCon Europe**  
Twitch Convention
-  **OWL Stage 2 Finals**  
Overwatch League
-  **Mid Season Invitational**  
League of Legends
-  **E3**  
Electronic Entertainment Expo
-  **DreamHack Summer**  
Counter-Strike: Global Offensive

## Q3

-  **ESL One Cologne**  
Counter-Strike: Global Offensive
-  **OWL Stage 3 & 4 Finals**  
Overwatch League
-  **EVO**  
Fighting Game Championship
-  **Call of Duty Championships**  
Call of Duty World League Championship
-  **The International**  
Dota 2 Championship
-  **PAX West**  
Fan Convention
-  **ESL One Cologne**  
Counter-Strike: Global Offensive
-  **Summer Games Done Quick**  
Speed Running Marathon
-  **ComicCon**  
Comic and Entertainment Convention

## Q4

-  **PAX Australia**  
Fan Convention
-  **OWL Playoffs**  
Overwatch League
-  **TwitchCon**  
Twitch Convention
-  **BlizzCon (multiple esports tournaments)**  
Blizzard Fan Convention
-  **Capcom Cup**  
Street Fighter
-  **LoL World Championship**  
League of Legends World Championship
-  **RLCS Season Finals**  
Rocket League Season Finals
-  **DreamHack Winter**  
Counter-Strike: Global Offensive

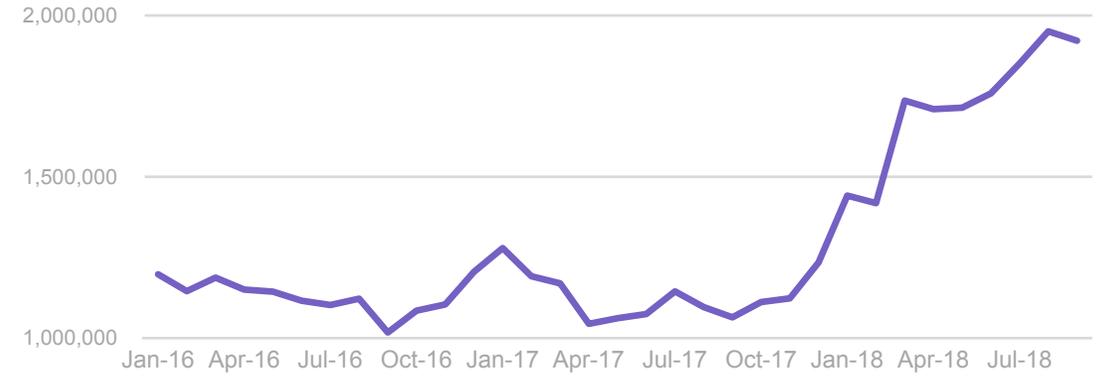
/ Live  
/ Multiplayer Entertainment  
/ Community

# Influencer Programs

Twitch Streamers and Viewers Experiencing Huge Growth



Monthly Active Streamers



Monthly Active Viewers



/ Live

/ **Multiplayer Entertainment**

/ Community

# Influencer Programs

## 2-Hour Influencer Broadcast

The goal of the Twitch Influencer Sponsorship program is to align an advertiser's brand or game with the Influencer who is the most authentic fit.

### Benchmarks

130k-180k Total Views  
4,000-7,000 Max Concurrents  
90k-125k Total Uniques  
300k-500k Total Min Watched  
5,000-9,000 Chat Interactions

## Bounty Board Program

Bounty Board is a turnkey marketplace connecting advertisers with engaged audiences in a brand safe environment via a whitelist of Influencers.

Advertisers can post campaigns as Bounties for interested streamers to opt in and accept. Bounty Board relays all the necessary info, making the go-live process as seamless as possible.

/ Live  
/ Multiplayer Entertainment  
/ **Community**

# Togetherness & Community

Ways to get in  
the game



## Bits & Cheering

To celebrate epic moments on Twitch, users can ‘cheer’ streamers by sending them bits, an animated message in chat that is tied to a monetary value.

## Subs & Sub Gifting

Viewers can support their favorite streamers by paying for or gifting monthly subscriptions which unlock badges, emotes, and other exclusive items.

## Donations

When subscriptions and bits aren’t enough, viewers go above and beyond to donate to their favorite streamers as a way of support.

# Brand Safety on Twitch

Twitch employs a mix of human monitoring, technology solutions and channel management tools to provide a safer space for viewers and brands.



## Filtered Chat

Build custom lists of banned words, block hyperlinks, and set ground rules for channel.

## Automod

Leverage machine learning to automatically moderate your channel to a comfortable level.

## Human Mods

An internal moderation team, along with a group of dedicated community members help monitor and report unacceptable behavior across Twitch.

## Age Gate

All users are required to be 13+ upon sign up and brands can employ specific targeting tactics to ensure demo guarantee.

## Bots are Illegal

Twitch has the means of detecting and removing false viewers. Our moderation, support, and partnership teams regularly investigate and act of allegations of inflated viewer counts.

## Forbid Fraud

Ad Manager 360 filters out invalid traffic from generating ad opportunities. MOAT player integration also tracks IVT.



**Marketing  
Land**

Twitch is one of the next big media destinations, stealing eyeballs and hours of viewing time from more traditional sources. Marketers should be paying attention to Twitch.

**FORTUNE**

There's about 1 million people watching Twitch at any given time, putting it on par with television networks like ESPN and CNN.

**ADWEEK**

The livestreaming service has 15 million daily active users. Twitch's ad-grabbing promise is just getting started.  
*(Winner of AdWeek's 2018 Hottest Platform)*

