BEYOND INFLUENCE

Unraveling the power of connection with livestreaming creators
Live video has never been more popular

169M
Projected number of U.S. live video viewers in 2023

Source: Insider Intelligence | eMarketer February 2023. Live video viewers are internet users of any age who watch real-time live video content through the internet via any device at least once per month.
Live video uniquely fosters connection between the streamer and viewer by offering real-time, genuine interactions.
Our Focus

Q1
Understand how viewers feel about their connections to the content creators they watch across various video services

Q2
Examine how streamers can impact their viewers' purchase decisions

Q3
Uncover whether the dynamic between creators and viewers is unique to livestreaming
LIVESTREAMING VIEWERS
Weekly viewers of livestreaming content across various services

Examples:

NON-LIVE VIDEO VIEWERS
Weekly viewers of non-live video across various social media services

Examples:

etc.

etc.
**Phase One: Qualitative Interviews**

**INDIVIDUAL INTERVIEWS + FOCUS GROUPS**

**WHY**
Conducted a series of interviews to understand how viewers connect with and perceive the content creators they follow across various services

**THE INTERVIEWS**

<table>
<thead>
<tr>
<th>Total:</th>
<th>Individual interviews: n=10</th>
<th>Focus group interviews: 3 Groups, n=16</th>
</tr>
</thead>
<tbody>
<tr>
<td>n=26</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**THEIR VIEWING HABITS**

- Weekly viewers of livestreaming creators and non-live video creators
- Must follow and engage with celebrities, influencers, or content creators
- Must have watched a sponsored livestream within the last 6 months
- Must follow small to mid-sized livestreaming creators
- Must watch at least 3 or more livestreaming creators
## Phase Two: Quantitative Interviews

### Online Survey

**Why**
- Survey to understand livestreaming viewers’ perspectives on their connection with their favorite content creators, as well as identify the main drivers of content creator trust and credibility, and compare across services.

**The Interviewees**
- Total: n= 2,000
  - Twitch viewers: n= 680
  - Livestreaming viewers: n= 660
  - Non-live video viewers: n= 660

**Their Habits**
- Nationally representative online panel
- Weekly viewers of livestreaming and non-live video content

**Demographics**
- **Age:**
  - Adult Gen Z (18-26 years): 36%
  - Millennials (27-42 years): 64%
- **Gender:**
  - Female: 49%
  - Male: 48%
  - Non-Binary/Non-Conforming: 2%
  - All Other Genders: 1%
- **Income:**
  - $50K-$74K: 21%
  - $75K or More: 31%
- **Highest level of education:**
  - High School Diploma or Less: 35%
  - Some College Credit: 23%
  - Associate’s Degree: 11%
  - Bachelor’s Degree or Higher: 31%
THE POWER OF LIVE COMMUNITY
Livestreaming provides an unparalleled sense of community

Unlike non-live video, livestreaming stands out by offering a place where viewers can connect with others in real time.

Compared to non-live video viewers, surveyed livestreaming viewers are...

- 57% more likely to watch for the connection to creators
- 73% more likely to watch for the community
Livestreaming provides a sense of community across genres

“Community” sits in the top 5 reasons why surveyed livestreaming viewers watch across genres.

Question: When it comes to viewing content on online platforms, what categories do you typically watch?

Question: What are your top 3 reasons for viewing livestreaming video on the below platform(s)?

Amazon Ads and IPG Media Trials. Beyond Influence. US. Fielded Q4 2022. Total N = (Livestreaming viewers): 66010

“Community” sits in the top 5 reasons why surveyed livestreaming viewers watch across genres.

Top reasons for watching livestreaming across genres

% Selected among surveyed viewers

1. To be entertained
2. To have new experiences
3. To relax
4. For the community
5. For the specific topic
Livestreaming creators play a role in fostering inclusion among their viewers.

— Livestreaming viewer, A24, He/Him

"...There's a sense of community there as well. Like you start to see regular names, you become a regular name yourself...and so there's also this sense of community that's built up around a streamer that makes you feel a little bit more connected."

— Livestreaming viewer, A34, She/Her

"...I think it's a community feel. Like, I think a few people have mentioned, you know, being a part of something a lot larger than just the content that's being created."
THE NATURE OF CREATOR-VIEWER RELATIONSHIPS IN LIVESTREAMING
Livestreaming creators are easier to communicate and connect with than non-live video creators.

FAVORITE CREATOR IS EASY TO COMMUNICATE WITH

Scale 1-10, % Selected 7-10 among surveyed viewers

Livestreaming viewers: 56%
Non-live video viewers: 41%

Questions: I feel that my favorite (livestreaming/non-live video) content creators are easy to communicate with.
Amazon Ads and IPG Media Trials. Beyond Influence. US. Fielded Q4 2022. Total N = (Livestreaming viewers): 660; (Non-live video social media viewers): 660

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For many, connections with livestreaming creators can be stronger than their IRL connections.

KNOWS HOW TO CONNECT WITH ME BETTER THAN MOST PEOPLE I KNOW

% Selected among surveyed viewers

By generation, Adult Gen Z is more likely to share this sentiment.

67% are more likely to agree that their favorite livestreaming creator knows how to connect with them better than most people they know.

Adult Gen Z: 64%

Millennials: 55%

Question: Please select the sentiments you agree with in relation to the [live stream/non-live video] content creators you follow. My favorite [live stream/non-live video] content creators on... Select all that apply for each option.

Amazon Ads and IPG Media Trials. Beyond Influence. US. Fielded Q4 2022.
Total N = (Livestreaming viewers): 660; (Non-live video social media viewers): 660
Total N = (Adult Gen Z): 699; (Millennials): 1,282
Livestreaming creators and viewers are perceived as benefiting equally from this connection

Question: When thinking about your connection with your favorite [Livestreaming/non-live video] content creators, who do you think is getting more from the following…

Amazon Ads and IPG Media Trials. Beyond Influence. US. Fielded Q4 2022. Total N = [Livestreaming viewers]: 660

BALANCE OF RELATIONSHIP BETWEEN LIVESTREAMING CONTENT CREATORS AND VIEWERS

% Selected of surveyed viewers

The content creator and the viewer are both receiving the same amount

- **53%** Emotional support
- **51%** Friendship
The livestreaming experience is more likely to improve a viewer’s day

“MY DAY IS INSTANTLY BETTER AFTER VIEWING MY FAVORITE CREATOR’S CONTENT”

59% Livestreaming viewers

49% Non-live video viewers

Question: How much do you agree or disagree with the below statements about your favorite (livestreaming/non-live video) content creators?

Amazon Ads and IPG Media Trials. Beyond Influence. US. Fielded Q4 2022. Total N = [Livestreaming viewers]: 660; (Non-live video social media viewers): 660
Viewers value their favorite livestreaming creators and look for ways to give back

ENGAGE IN ACTIVITIES TO SUPPORT THEIR FAVORITE LIVESTREAMING CREATOR

Net score among surveyed viewers

89%

Of livestreaming viewers engage in activities to support their favorite livestreamers

Questions: Do you do any of the following for the livestreaming content creators you watch?
Amazon Ads and IPG Media Trials. Beyond Influence. US. Fielded Q4 2022. Total N = [Livestreaming viewers]: 6600
THE UNIQUE CONNECTION BETWEEN TWITCH VIEWERS & STREAMERS
Twitch streamers go above and beyond in fostering a sense of community with their viewers

Question: You mentioned the [Twitch/livestreaming/non-live video] content creators you follow have had a positive impact on your wellbeing. In what ways have they impacted your wellbeing?

Total N = (Livestreaming viewers): 660; (Non-live video social media viewers): 660

Viewers are **76% more likely to agree** that Twitch streamers provide a sense of community vs. non-Twitch livestreaming creators.

**FAVORITE STREAMER(S) HAVE “GIVEN ME COMMUNITY THAT I CAN TURN TO WHEN I NEED IT”**

<table>
<thead>
<tr>
<th></th>
<th>Twitch viewers</th>
<th>Livestreaming viewers</th>
<th>Non-live video viewers</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Strongly/somewhat agree among surveyed viewers</td>
<td>44%</td>
<td>25%</td>
<td>24%</td>
</tr>
</tbody>
</table>
Livestreaming experiences on Twitch improves the viewer’s well-being

Question: How much do you agree or disagree with the below statements about your favorite [Twitch/livestreaming/non-live video] content creators?

Total N = Livestreaming viewers: 660; (Non-live video social media viewers): 660

- **78%**
  - Twitch viewers
  - Live streaming viewers
  - Non-live video viewers

"MY DAY IS INSTANTLY BETTER AFTER VIEWING MY FAVORITE CREATOR’S CONTENT"

% Strongly/somewhat agree among surveyed viewers

Viewers are **32% more likely to agree** that Twitch streamers improve their day vs. non-Twitch livestreaming creators
Viewers are more likely to experience personal wellbeing through their engagement on Twitch

Surveyed viewers say that watching Twitch streamers helps them relive stress, feel supported, and find connection more so than creators on other services.

WAYS LIVESTREAMING CREATORS HAVE IMPACTED THE WELLBEING OF THEIR VIEWERS
% Selected by surveyed viewers

<table>
<thead>
<tr>
<th>% Selected by surveyed viewers</th>
<th>Twitch streamer</th>
<th>Livestreaming creator</th>
<th>Non-live video creator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Helped me mentally decompress</td>
<td>48%</td>
<td>40%</td>
<td>39%</td>
</tr>
<tr>
<td>Helped me feel less alone in the things I deal with</td>
<td>42%</td>
<td>29%</td>
<td>30%</td>
</tr>
<tr>
<td>Helped me feel less alone in this world</td>
<td>40%</td>
<td>27%</td>
<td>28%</td>
</tr>
<tr>
<td>Understands me better than others in my life</td>
<td>31%</td>
<td>19%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Question: You mentioned the [Twitch/livestreaming/non-live video] content creators you follow have had a positive impact on your wellbeing. In what ways have they impacted your wellbeing? [Twitch/Livestreaming/Non-live video] content creators have...

Amazon Ads and IPG Media Trials. Beyond Influence. US. Fielded Q4 2022. Total N = [Twitch viewers]: 250; [Livestreaming viewers]: 81; [Non-live video viewers]: 247
Twitch streamers’ influence extends to helping viewers make positive changes in their lives

TYPES OF TWITCH VIEWERS’ DECISIONS INSPIRED BY TWITCH STREAMERS
% Strongly/somewhat agree among surveyed viewers

<table>
<thead>
<tr>
<th>Decision</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health decisions</td>
<td>52%</td>
</tr>
<tr>
<td>Self-improvement decisions</td>
<td>47%</td>
</tr>
<tr>
<td>Product purchases</td>
<td>45%</td>
</tr>
<tr>
<td>Seeking professional counseling</td>
<td>43%</td>
</tr>
<tr>
<td>Life-changing decisions (e.g., moving, new job, etc.)</td>
<td>43%</td>
</tr>
<tr>
<td>Improving relationships</td>
<td>43%</td>
</tr>
</tbody>
</table>

Question: You mentioned you look to Twitch content creators you follow when making decisions. What types of decisions are you referring to?
Amazon Ads and IPG Media Trials. Beyond Influence. US. Fielded Q4 2022. Total N = (Twitch viewers): 148
Twitch viewers are highly invested and engaged with their favorite streamers

<table>
<thead>
<tr>
<th>ENGAGEMENT WITH FAVORITE CREATOR’S CONTENT</th>
<th>% Strongly/somewhat agree among surveyed viewers</th>
</tr>
</thead>
<tbody>
<tr>
<td>■ Twitch viewers</td>
<td>■ Livestreaming viewers</td>
</tr>
<tr>
<td>■ Non-live video viewers</td>
<td></td>
</tr>
<tr>
<td>I make sure to stay up-to-date on all their posts/content</td>
<td>73%</td>
</tr>
<tr>
<td>I would be devastated if they stopped making content</td>
<td>69%</td>
</tr>
</tbody>
</table>

Question: How much do you agree or disagree with the below statements about your favorite (Twitch/livestreaming/non-live video) content creators?

Amazon Ads and IPG Media Trials. Beyond Influence. US. Fielded Q4 2022. Total N = [Twitch viewers]: 680; [Livestreaming viewers]: 660; [Non-live video social media viewers]: 660
Twitch viewers make an effort to support their favorite streamers

Engage in activities to support their favorite Twitch streamer

WAYS VIEWERS SUPPORT THEIR FAVORITE TWITCH STREAMERS

- Like, follow or subscribe to a streamer (not paid): 60%
- Pay money to a streamer via paid subscription: 45%
- Pay money to a streamer via donations or cheering: 38%

% Selected among surveyed viewers

Questions: Do you do any of the following for the Twitch content creators you watch? Amazon Ads and IPG Media Trials. Beyond Influence, US. Fielded Q4 2022. Total N = [Twitch viewers]: 680
HOW BRANDS CAN BUILD CLOSER CONNECTIONS WITH LIVESTREAMING VIEWERS
Viewers believe livestreaming creators are more **trustworthy**

**72%**

of surveyed livestreaming viewers agree their favorite livestreaming creators are **trustworthy**

Rating Scale 1-10, % Selected 7-10 among surveyed viewers

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**What are the most important attributes for a trustworthy livestreaming creator?**

**Relative importance among surveyed viewers**

1. Honest
2. Fair in how they treat their viewers
3. Sincere in what they share

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**Question:** I consider my favorite livestreaming content creators to be trustworthy.

Advanced Modelling: Values were modelled using logistic regressions to determine the impact of ad perceptions on brand metrics. All regression coefficients significant at ≥90% confidence. Amazon Ads and IPG Media Trials. Beyond Influence, US. Fielded Q4 2022. Total N = (Livestreaming viewers): 66,026
**Action Item**

**Trust in creators leads to trust in their brand opinions**

If your streamers deliver brand messaging honestly and sincerely, you’ll earn the trust of their communities.

Livestreaming viewers are **29% more likely to trust** the reviews of their favorite livestreaming creators vs. non-live video creators.

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**TRUST IN THE REVIEWS OF THEIR FAVORITE CONTENT CREATORS**

<table>
<thead>
<tr>
<th></th>
<th>% Highly trust among surveyed viewers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twitch viewers</td>
<td>53%</td>
</tr>
<tr>
<td>Livestreaming viewers</td>
<td>37%</td>
</tr>
<tr>
<td>Non-live video viewers</td>
<td>31%</td>
</tr>
</tbody>
</table>

Question: How much do you trust the reviews of your favorite [Twitch/livestreaming/non-live video] content creators?

Viewers believe livestreaming creators are more credible.

What are the most important attributes for a credible livestreaming creator?

Relative importance among surveyed viewers

1. Experience in what they stream/post/talk about
2. Relatable
3. Fair in how they treat their viewers

69% of surveyed livestreaming viewers agree their favorite livestreaming creators are credible.

Rating Scale 1-10, % Selected 7-10 among surveyed viewers.

Question: I consider my favorite livestreaming content creator to be credible.

Advanced Modelling: Values were modelled using logistic regressions to determine the impact of ad perceptions on brand metrics. All regression coefficients significant at ≥90% confidence.

Credible creators mean credible endorsements

Brand endorsements work best when there is sensible alignment between the creator and the product.

Question: I believe that the products that my favorite [Twitch/livestreaming/non-live video] content creators promote, or share are things they truly believe in.


BELIEVE THE PRODUCTS PROMOTED BY THEIR FAVORITE CONTENT CREATORS ARE PRODUCTS THEY BELIEVE IN
Scale 1-10, % Selected 7-10 among surveyed viewers

- Twitch viewers: 72%
- Livestreaming viewers: 62%
- Non-live video viewers: 52%

Livestreaming viewers are 19% more likely to believe the reviews of their favorite livestreaming creators vs. non-live video creators.
Successful endorsements happen when they are authentic to the livestreaming content creator.

Livestreaming viewer, A36, He/Him

…I am totally cool with them [content creators] promoting certain items as long as they stay within their niche. If they're outside of their niche and it doesn't make any sense, then I just don't understand it and it's a turn off for me for sure.

Livestreaming viewer, A20, She/Her

I think it's easier for me to trust them when I know they've used it previously... Like I'm glad they're getting sponsored by a company they've already enjoyed. But if suddenly one day they're like, man, I sure do love these energy drinks, you guys should try 'em, then it's a little sketchy.
Livestreaming viewers’ purchase decisions are fueled by their favorite livestreaming creators across categories.

**CATEGORIES WHERE LIVESTREAMING CREATORS HAVE AIDED SURVEYED VIEWERS’ PURCHASE DECISIONS**

<table>
<thead>
<tr>
<th>Category</th>
<th>Index to Non-live Video Viewers (100)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet service providers</td>
<td>1.83x</td>
</tr>
<tr>
<td>Insurance</td>
<td>1.50x</td>
</tr>
<tr>
<td>Toys</td>
<td>1.46x</td>
</tr>
<tr>
<td>Streaming services</td>
<td>1.29x</td>
</tr>
<tr>
<td>Groceries</td>
<td>1.21x</td>
</tr>
<tr>
<td>Automotive</td>
<td>1.21x</td>
</tr>
<tr>
<td>Financial services</td>
<td>1.21x</td>
</tr>
<tr>
<td>Baby care products</td>
<td>1.20x</td>
</tr>
<tr>
<td>Home furnishings/appliances</td>
<td>1.19x</td>
</tr>
<tr>
<td>Consumer electronics</td>
<td>1.17x</td>
</tr>
<tr>
<td>Restaurants</td>
<td>1.17x</td>
</tr>
<tr>
<td>Video games</td>
<td>1.15x</td>
</tr>
</tbody>
</table>

Question: Have you ever turned to your favorite [livestreaming/non-live video] content creators to help you make a purchase decision in the following categories?

Amazon Ads and IPG Media Trials. Beyond Influence, US. Fielded Q4 2022. Total N = [Livestreaming viewers]: 660; (Non-live video social media viewers): 660
Livestreaming provides an unparalleled sense of community that includes both the viewers and the creators.

Viewers see livestreaming creators as highly trustworthy and credible.

The livestreaming experience builds stronger bonds between viewers and creators than non-live video does.

This dynamic creates the right conditions for livestreaming creators to have outsized influence over their viewers' purchase intent.

This dynamic and its impact are supercharged by the unique livestreaming experience that exists on Twitch.
## Quantitative Sample

<table>
<thead>
<tr>
<th>TWITCH VIEWERS</th>
<th>LIVESTREAMING VIEWERS</th>
<th>NON-LIVE VIDEO VIEWERS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Age</strong></td>
<td><strong>Income</strong></td>
<td><strong>Age</strong></td>
</tr>
<tr>
<td><strong>Millennials</strong></td>
<td>$&gt;75K: 22%$</td>
<td><strong>Millennials</strong></td>
</tr>
<tr>
<td><strong>Adult Gen Z</strong></td>
<td>$50K-$75K: 19%$</td>
<td><strong>Adult Gen Z</strong></td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td><strong>Female: 29%</strong></td>
<td><strong>Gender</strong></td>
</tr>
<tr>
<td>Male: 69%</td>
<td>Other: 2%</td>
<td>Male: 41%</td>
</tr>
<tr>
<td><strong>Watch Content on Twitch</strong></td>
<td><strong>Watch Content on Any Livestreaming Platform</strong></td>
<td><strong>Watch Non-Live Video</strong></td>
</tr>
<tr>
<td>90%</td>
<td>83%</td>
<td>96%</td>
</tr>
</tbody>
</table>