

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



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

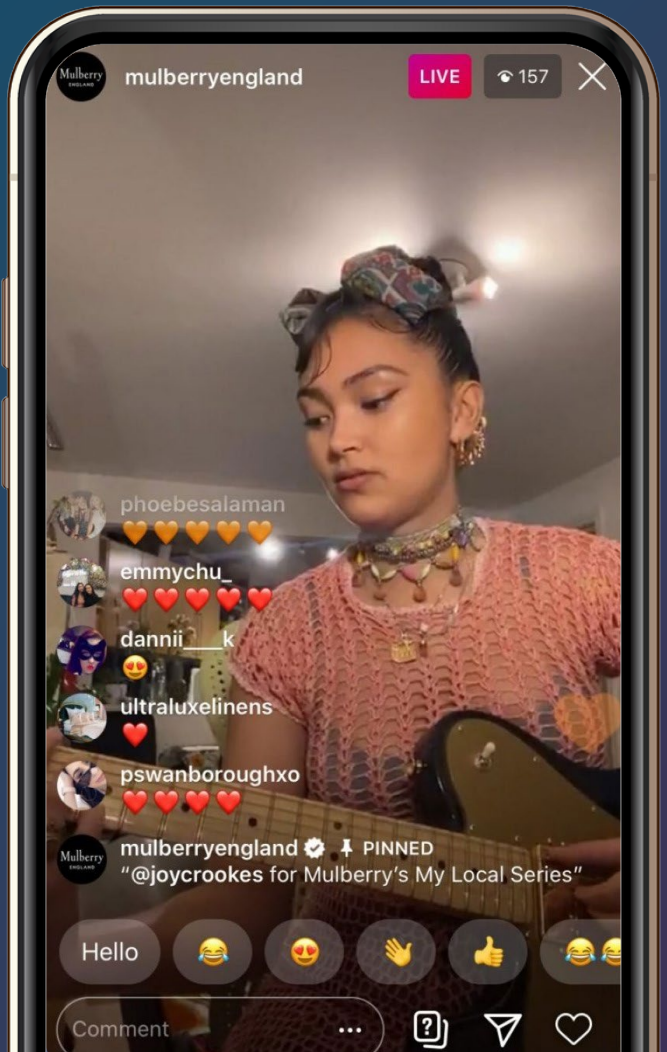
Examine how streamers can impact their viewers' purchase decisions

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:

- 
- 
- 

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

Total:



n=26

Individual
interviews:
n=10



Focus group
interviews:
3 Groups,
n=16



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

LIVE

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)



Millennials (27-42 years)



Income:

\$50K-\$74K



\$75K or More



Gender:

Female



Male



Non-Binary/Non-Conforming



All Other Genders



Highest level of education:

High School Diploma or Less



Some College Credit



Associate's Degree



Bachelor's Degree or Higher





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

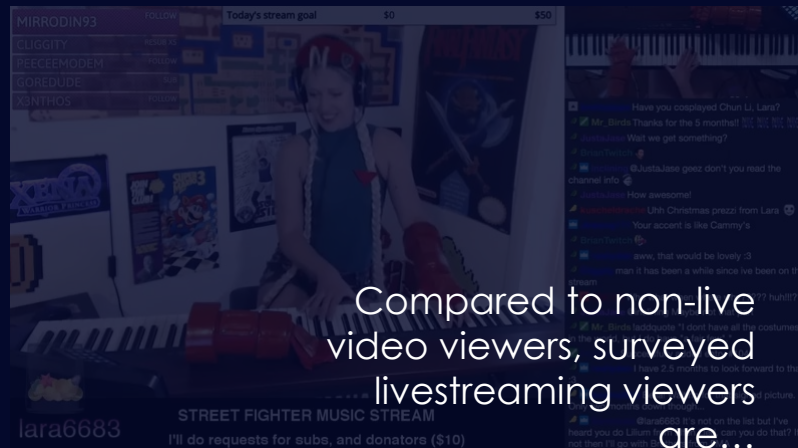


73%

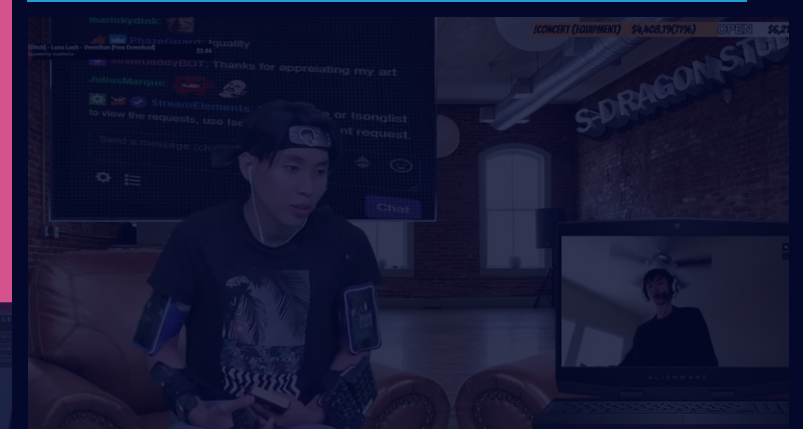
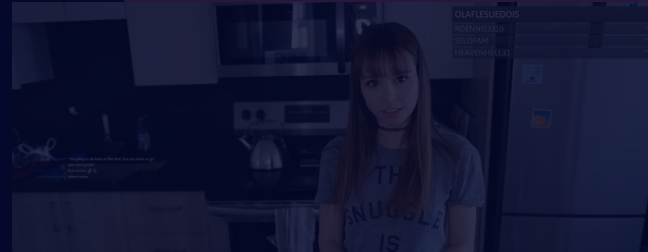
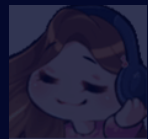
more likely to watch for the community

57%

more likely to watch for the connection to creators



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



Livestreaming provides a sense of community across genres

“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

28 Age ✓ Employed C\$48k HHI		47 Age ✓ Employed C\$120k HHI		25 Age ✓ Employed C\$35k HHI		17 Age ✗ Employed C\$0 HHI		33 Age ✓ Employed C\$150k HHI	
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36 Age ✓ Employed C\$85k HHI		42 Age ✓ Employed C\$20k HHI		27 Age ✓ Employed C\$70k HHI		22 Age ✓ Employed C\$60k HHI		56 Age ✓ Employed C\$185k HHI	
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28 Age ✓ Employed C\$120k HHI		24 Age ✗ Employed C\$120k HHI		42 Age ✓ Employed C\$54k HHI		36 Age ✓ Employed C\$75k HHI		34 Age ✓ Employed C\$83k HHI	
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32 Age ✓ Employed C\$100k HHI		32 Age ✓ Employed C\$36k HHI		32 Age ✓ Employed C\$80k HHI		52 Age ✓ Employed C\$140k HHI		15 Age ✗ Employed C\$0 HHI	
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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



41%
Non-live video viewers

VS

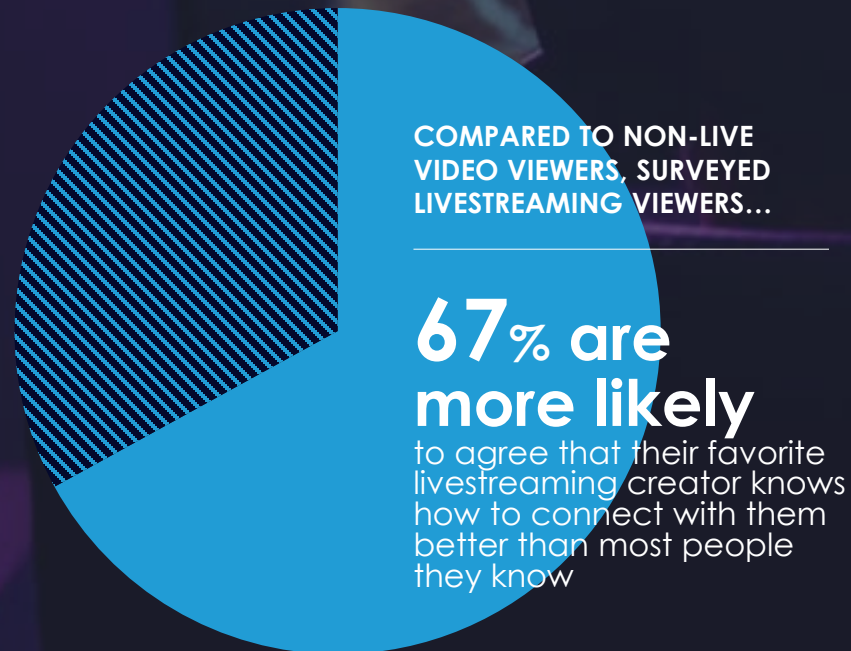


56%
Livestreaming viewers

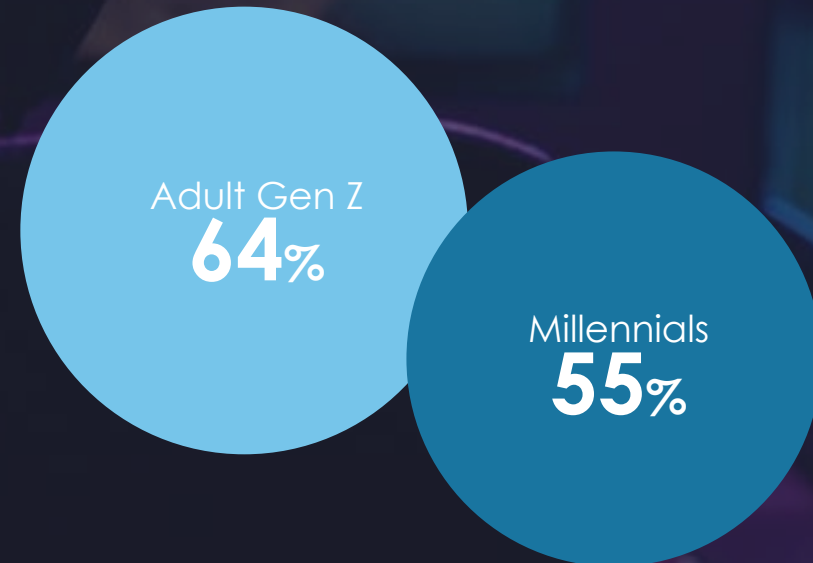
For many, connections with livestreaming creators can be stronger than their IRL connections

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



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.

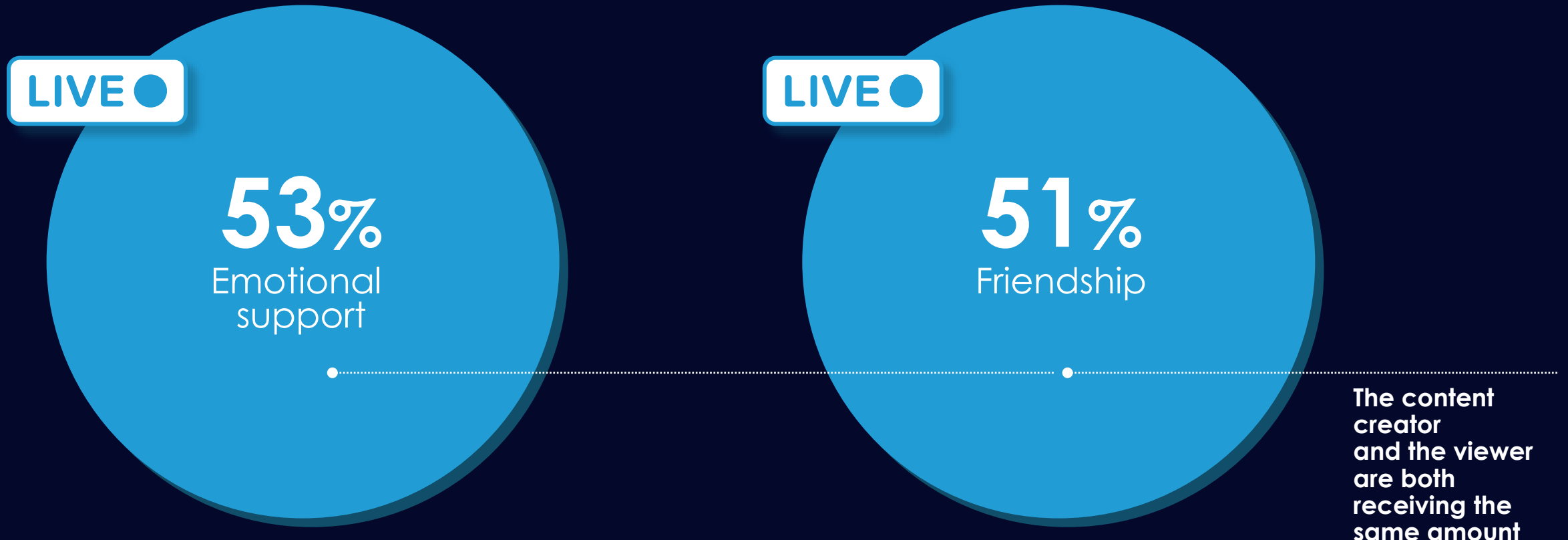
Total N = (Livestreaming viewers): 660; (Non-live video social media viewers): 660

Total N = (Adult Gen Z): 699; (Millennials): 1,282

Livestreaming creators and viewers are perceived as benefiting equally from this connection

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

The livestreaming experience is more likely to improve a viewer's day

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

% Strongly/somewhat agree among surveyed viewers

49%

Non-live video viewers

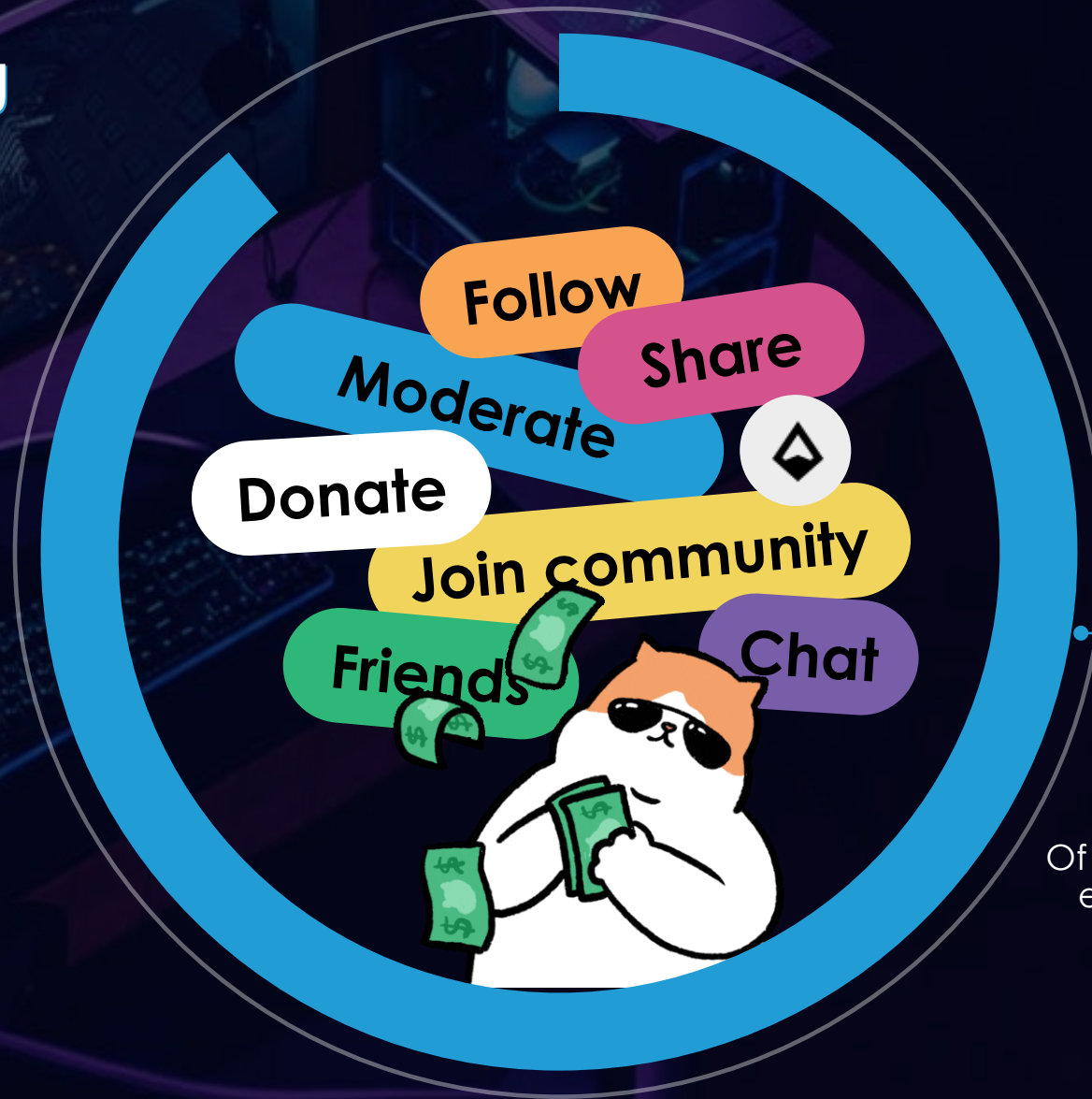
59%
Livestreaming viewers



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%

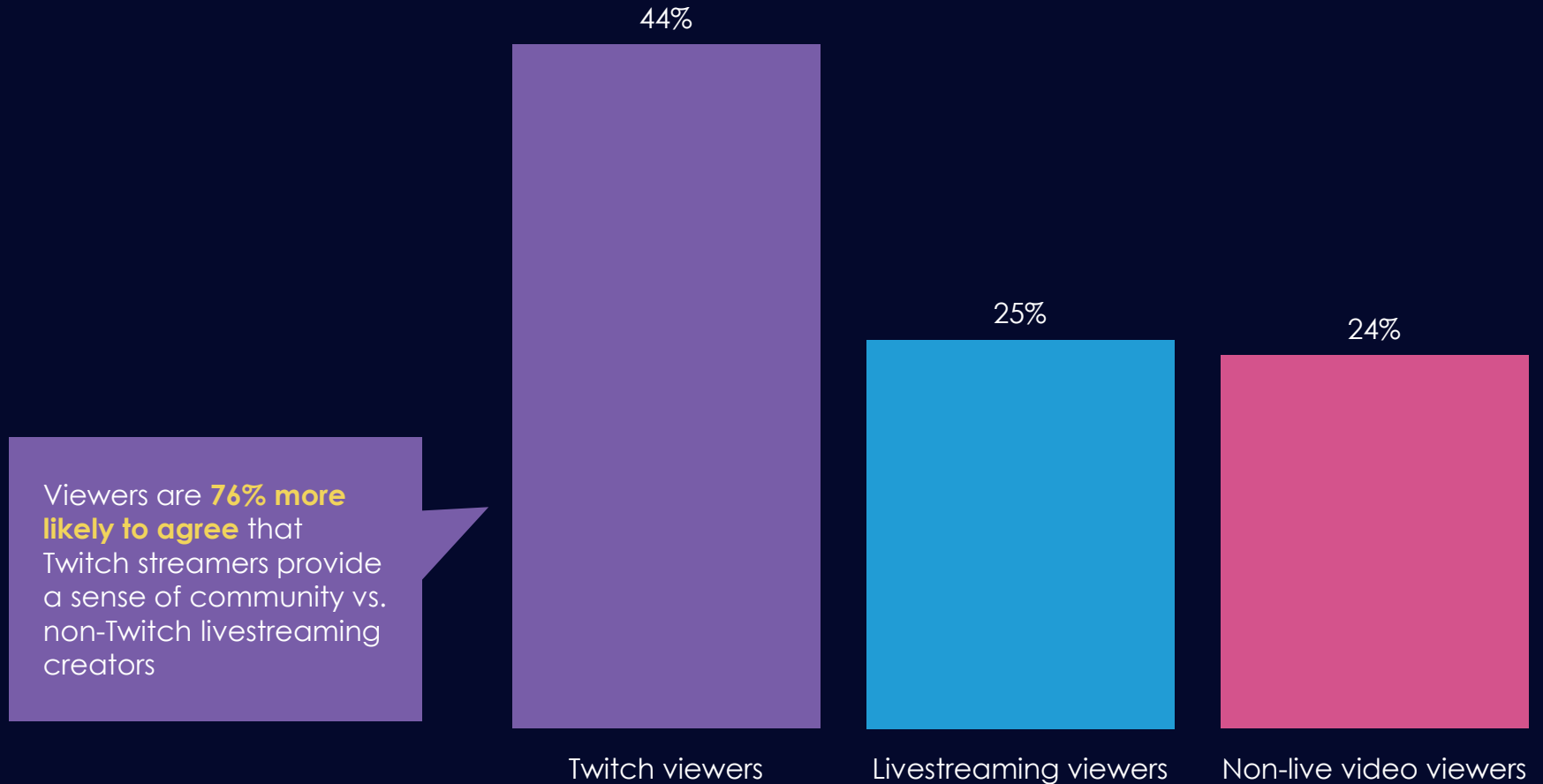
Of livestreaming viewers engage in activities to support their favorite livestreamers

THE UNIQUE CONNECTION BETWEEN TWITCH VIEWERS & STREAMERS



Twitch streamers go above and beyond in fostering a sense of community with their viewers

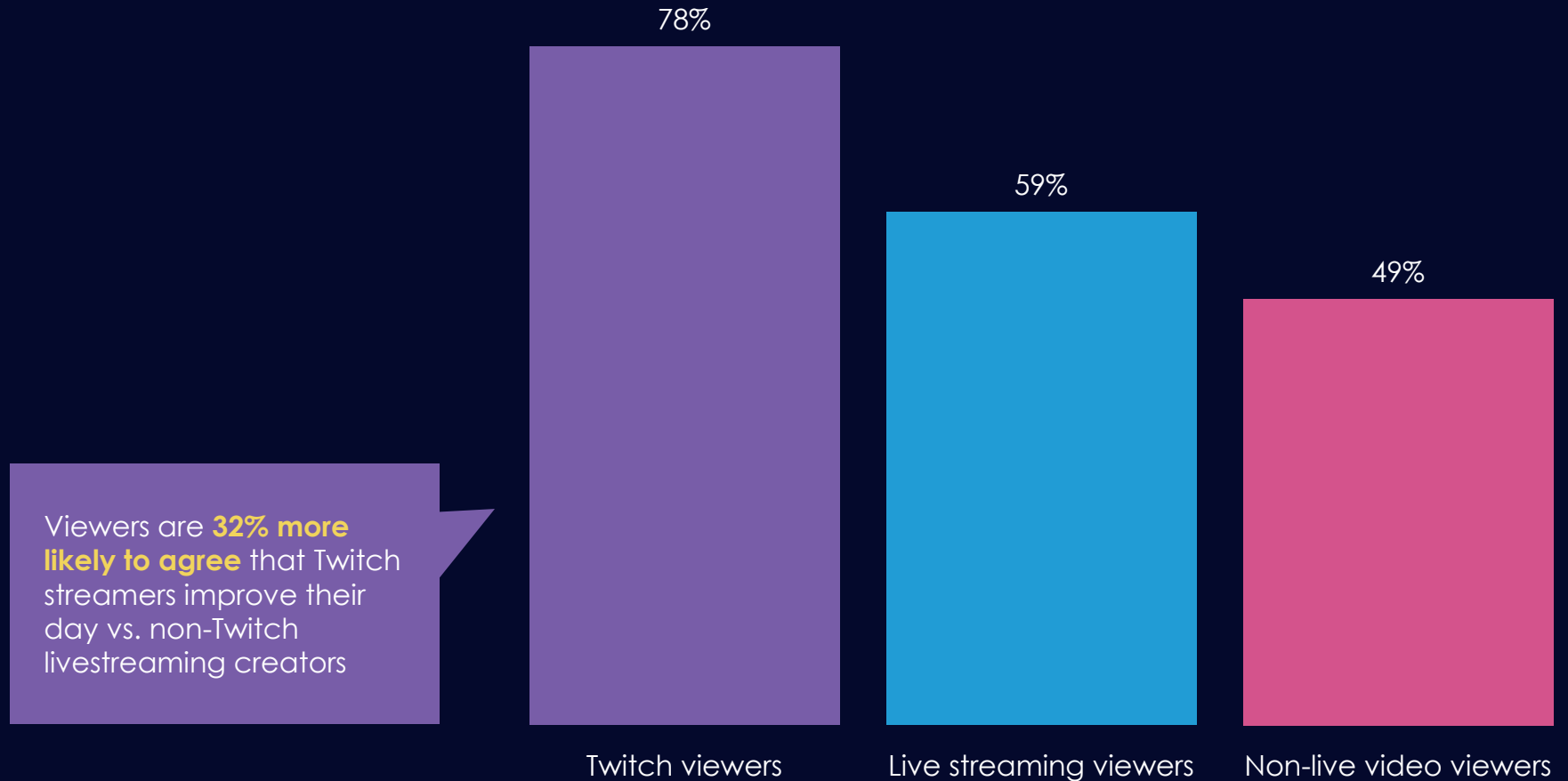
FAVORITE STREAMER(S) HAVE
"GIVEN ME COMMUNITY THAT I CAN TURN TO WHEN I NEED IT"
% Strongly/somewhat agree among surveyed viewers



Livestreaming experiences on Twitch improves the viewer's well-being

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

% Strongly/somewhat agree among surveyed viewers

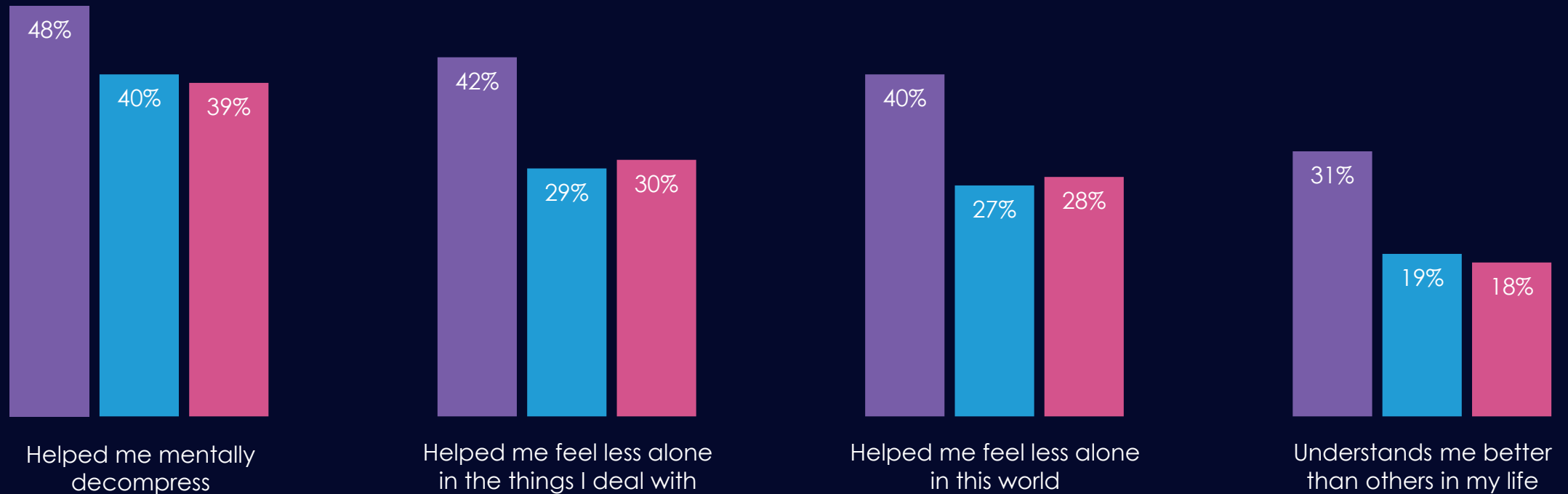


Viewers are more likely to experience personal wellbeing through their engagement on Twitch

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 | Twitch streamer Livestreaming creator Non-live video creator



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



Twitch viewers are highly invested and engaged with their favorite streamers

ENGAGEMENT WITH FAVORITE CREATOR'S CONTENT

% Strongly/somewhat agree among surveyed viewers

■ Twitch viewers ■ Livestreaming viewers ■ Non-live video viewers

I make sure to stay up-to-date on all their posts/content



I would be devastated if they stopped making content



Twitch viewers make an effort to support their favorite streamers

Engage in activities to support their favorite Twitch streamer

% Selected among surveyed viewers



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%

A man with a beard and a young child are sitting at a desk, looking at a laptop. The laptop screen displays a 3D wireframe character with large pigtails. The scene is dimly lit, suggesting an evening or indoor setting with artificial light. The man is on the left, and the child is in the center, both looking towards the laptop on the right. The background shows a desk with a coffee cup and some papers.

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

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

Action Item

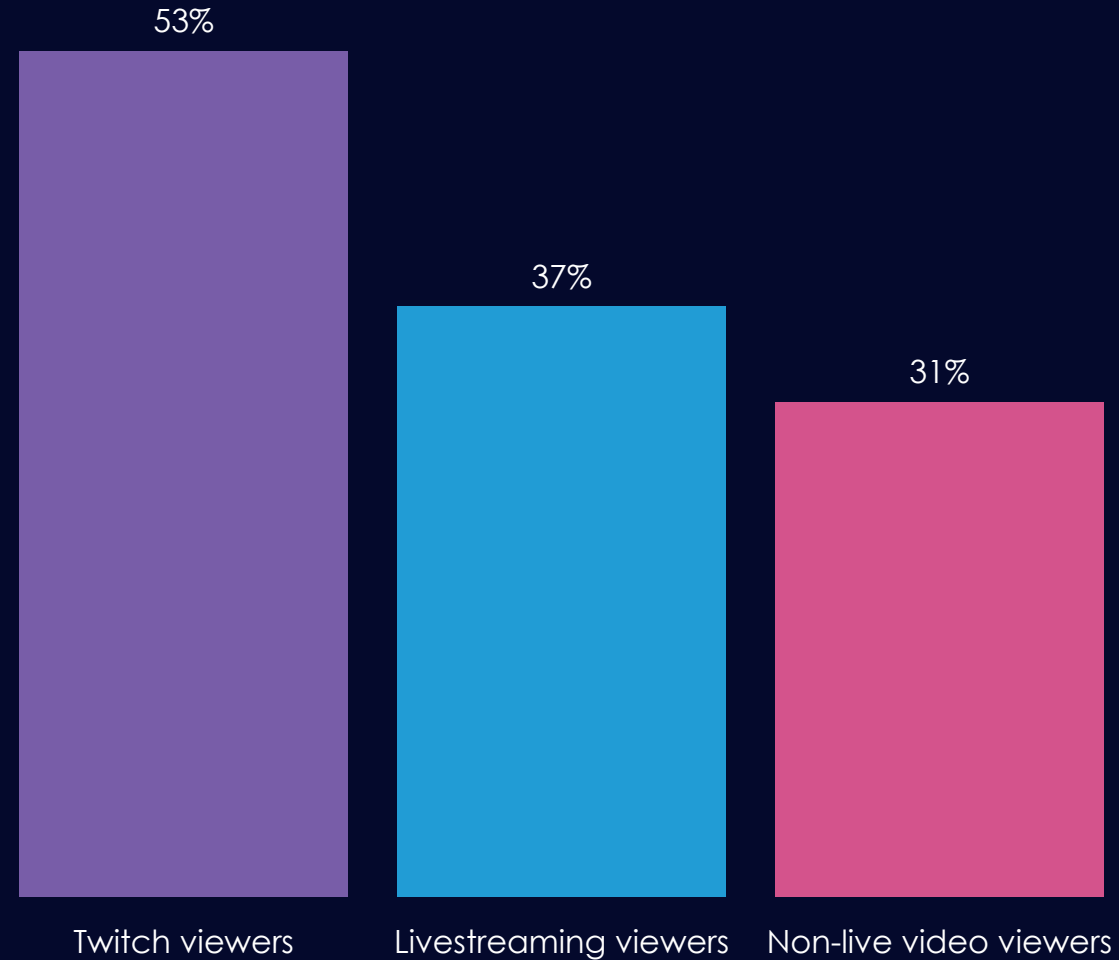
Trust in creators leads to trust in their brand opinions

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

TRUST IN THE REVIEWS OF THEIR FAVORITE CONTENT CREATORS

% Highly trust among surveyed viewers



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**

69%

of surveyed
livestreaming viewers
agree their favorite
livestreaming creators
are credible

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

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

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.

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

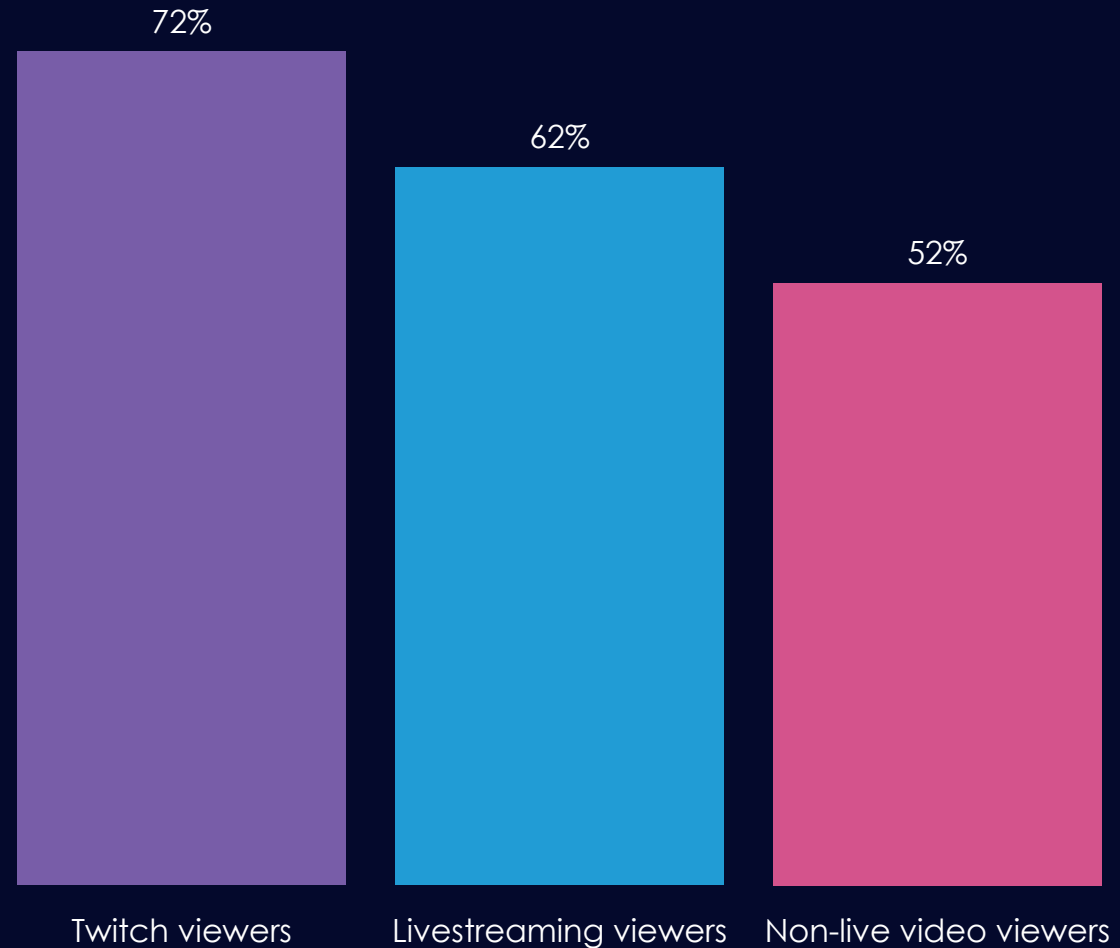
Action Item

Credible creators mean credible endorsements

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

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

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, 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.



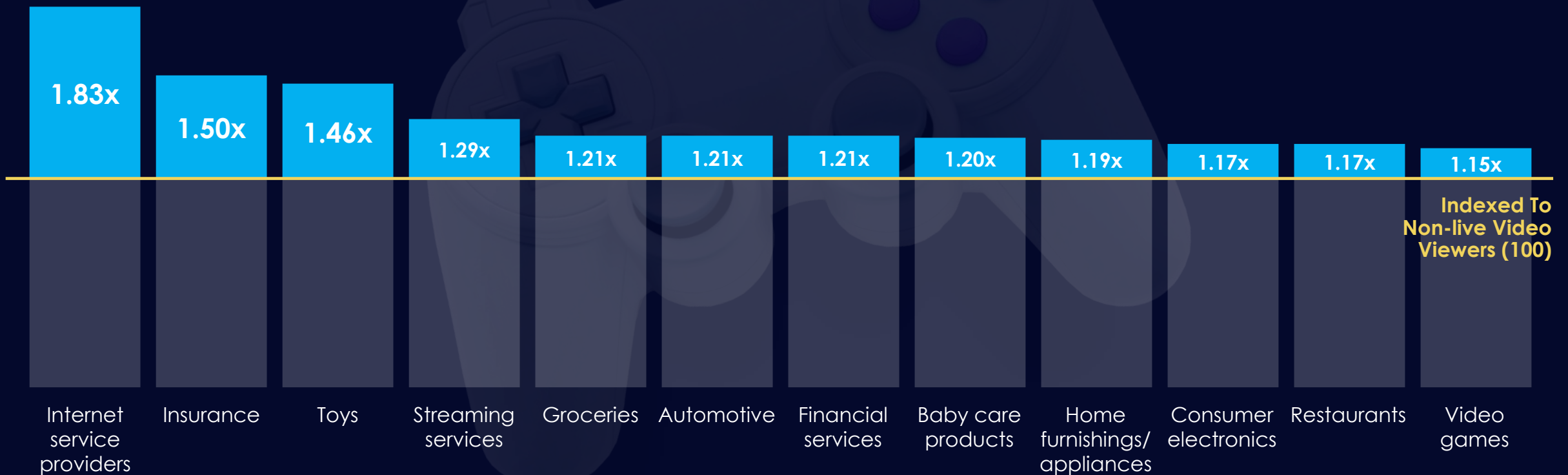
Livestreaming viewer, A36, He/Him



...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 viewers' purchase decisions are fueled by their favorite livestreaming creators across categories

CATEGORIES WHERE LIVESTREAMING CREATORS HAVE AIDED SURVEYED VIEWERS' PURCHASE DECISIONS



Key Takeaways

1

Livestreaming provides an unparalleled sense of community that includes both the viewers *and* the creators

2

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

4

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

3

Viewers see livestreaming creators as highly trustworthy and credible

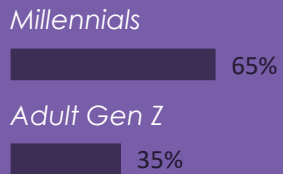
5

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

Quantitative Sample

TWITCH VIEWERS

Age



Income



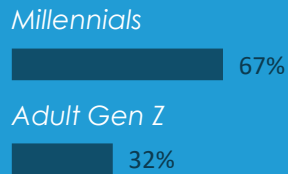
Gender



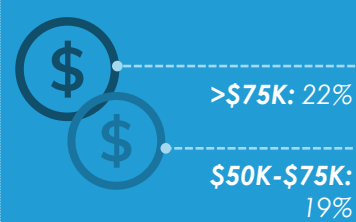
90% watch content on twitch more than 1x a week

LIVESTREAMING VIEWERS

Age



Income



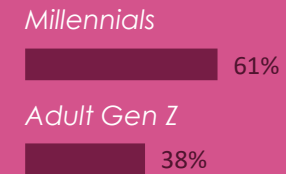
Gender



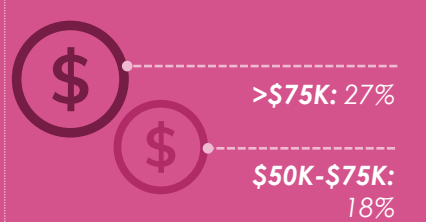
83% watch content on any livestreaming platform more than 1x a week

NON-LIVE VIDEO VIEWERS

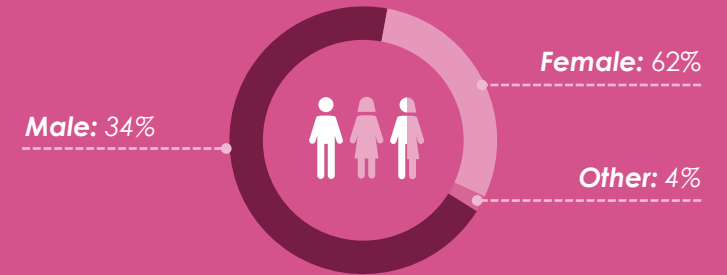
Age



Income



Gender



96% watch non-live video more than 1x a week