

Presented By:



Twitch Users Got Game

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In our previous report, *The New Face of Gamers*, we examined the soaring popularity of gaming and its transformation into an entertainment staple over the past 15 years. We later reexamined stereotypes of gamers and found that many, if not all, of the negative characterizations so prevalent in pop culture are flat-out wrong. New data show that gamers actually lead more social lives and are closer to their families than non-gamers. They're also more educated, more optimistic, and more socially conscious. Furthermore, gamers are leading a new wave of behaviors that is redefining the way Americans watch and consume media: They're more likely to use mobile devices for a wide variety of activities as well as watch and produce livestreaming content.¹

Perhaps the most prominent testament to gamers' cutting-edge tastes is Twitch.tv—the gameplay streaming site that has gained 45 million monthly users and 1 million active streamers since launching in 2011. The site is a celebration of all things gaming and thrives on user-generated content produced by both casual and serious players, with the average user watching an impressive 106 minutes of streams daily.² It's been dubbed the “ESPN of video games.”

The site's meteoric growth has outstripped that of many other brand-name Web properties. From 2012 to 2013 alone, the number of visitors to Twitch surged 874%, rising from 38 million visits to 371 million. Over the same period, traffic to BuzzFeed, ESPN, YouTube, and Facebook grew 351%, 52%, 48%, and 17%, respectively.³ Since then, Twitch has barely slowed down, growing another 539% in the year ending February 2014. By some measures, Twitch is already the fourth most-trafficked Web property in the U.S.—behind Netflix, Apple, and Google, but ahead of Facebook, Amazon, and Hulu.⁴ Page views have followed suit: From 2012 to 2013, Twitch's page views soared 926% to 1.4 billion.⁵ In comparison, page views for BuzzFeed, ESPN, and YouTube grew 471%, 32%, 27%, respectively, while Facebook's fell 6%. While Twitch trails the latter three sites in overall traffic and page views, its growth trajectory so far suggests that it may only be a matter of time before it catches up.

¹ LifeCourse online survey of 1,227 U.S. persons ages 13-64. March 12-30, 2014.

² Todd Spangler. “[Why Google Wants to Hitch Twitch and YouTube.](#)” *Variety*. May 21, 2014.

³ Experian Marketing Services. “Twitch: Custom Profile & Online Competitive Landscape.” March 19, 2014.

⁴ Drew Fitzgerald. “[Apple Quietly Builds New Networks.](#)” *The Wall Street Journal*. February 3, 2014.

⁵ Experian

Last month, Twitch made headlines after rumors surfaced that Google plans to acquire the site for \$1 billion⁶—spurring heated speculation among gamers and curiosity among non-gamers wondering what all the fuss is about. Many of these discussions centered on Google’s desire to boost YouTube and tap into Twitch’s advertising potential, highlighting the site’s meteoric growth and intensely engaged userbase. Yet missing from the conversation was a deeper understanding of who Twitch users are—and how they might present an attractive opportunity to advertisers that goes beyond sheer numbers.

Indeed, new data show that Twitch users are a valuable audience in more ways than one. Many of the positive differences that we found between non-gamers and gamers are even more pronounced when comparing gamers who use Twitch to gamers who do not.

Meet the Twitch Gamer

According to a recent survey⁷:

- **Gamers who use Twitch are generally young and most likely to be Millennials.** Fully 52% of Millennial gamers said that they had visited the Twitch website in the past 60 days, compared to 34% of Xer gamers and only 16% of Boomer gamers. This confirms other data that suggest that Twitch’s userbase is largely dominated by young adults. According to Nielsen, 49% of Twitch site traffic comes from 18- to 34-year-olds. This profile means that the site is more successful at delivering on this demographic than Facebook, YouTube, or ESPN (where Millennials make up only about 27% of visitors) and on par with Reddit.⁸ Meanwhile, Quantcast estimates that 76% of Twitch users are under the age of 35;⁹ other surveys place the average user age anywhere from 21 to 26. The site’s audience, in other words, is the much-coveted demographic that advertisers spend millions of dollars trying to reach on traditional platforms each year.
- **They’re closer to their friends.** Twitch users (defined as “anyone who has visited the Twitch.tv website in the past 60 days”) are far more likely than non-Twitch gamers to agree with the statement “My friends are the most important thing in my life” (72% vs. 46%). A greater share of Twitch users prefers to play video games with their friends in the same location (61% vs. 43%), in other locations (47% vs. 24%), and even with friends in the room who aren’t playing (12% vs. 5%). In summary, 84% of Twitch users say they play games with their friends—compared to 63% of non-Twitch gamers. They’re also

⁶ Douglas McMillan, et al. “Google in Talks About Possible Acquisition of Twitch.” *The Wall Street Journal*. May 18, 2014.

⁷ LifeCourse online survey

⁸ Nielsen. “Twitch TV Media Engagement Analysis: 2011-2014 Online and TV Viewing Trends.” February 2014.

⁹ Quantcast. [Demographic summary of Twitch.tv](#). April 26, 2013.

more likely to typically watch TV with their friends (23% vs. 8%) *and* to prefer to watch this way (26% vs. 12%).

- **They view gaming as a more social experience.** Twitch users aren't just more likely to game with their friends; they also generally see gaming through a more social lens. Fully 80% believe that playing video games is a way to meet new people (versus 46% of non-Twitch gamers), and 77% see it as a way to make new friends (versus 45%). Similarly, 28% of Twitch users say that on an average day, they encounter 6 or more people while playing video games (versus 11%). Overall, 78% of Twitch users agree that the site allows them to be part of a larger community. As one Twitch partner recently explained, "The thing I love most about streaming is being able to interact immediately with people that are as passionate about gaming as I am."¹⁰
- **They're more educated.** Twitch users are more likely than non-Twitch gamers to hold a college degree or higher (53% vs. 37%). The same is also true for Twitch users' parents (60% vs. 46%).
- **They're more optimistic.** Twitch users express far more confidence about their abilities and prospects for future success. Fully 71% agree that they are "a natural leader," compared to 53% of non-Twitch gamers. Similarly, 77% say they are "more creative than most people," compared to 56% of non-Twitch gamers. Twitch users are also much more upbeat about their career aspirations: Though a healthy 58% of non-Twitch gamers feel "very positive" or "positive" in this regard, a far higher percentage—82%—of Twitch users say the same.
- **They're more conventionally successful.** Twitch users are more likely to be employed full-time than non-Twitch gamers (57% vs. 32%). They're almost twice as likely to say that they are working in the career that they want to be in (63% vs. 33%). Similarly, they're also slightly more likely to say that they're "employed in [a career] and happy with where I am" (25% vs. 21%) and "employed in [a career] related to what I want to do" (18% vs. 10%). In addition, 66% of Twitch users have begun saving for retirement—compared to only 35% of non-Twitch gamers.
- **They're more socially conscious.** Fully 82% of Twitch users agree that "having a positive impact on society is important to me"—which falls to 72% among non-Twitch gamers. Twitch users are also more likely to prioritize socially conscious business practices. A greater share of them agrees that it's important that the companies they buy products from support social causes and that companies treat their customers fairly. Further-

¹⁰ Brandon Bailey. "[Twitch, a reported target for Google, rides wave of gamers' interest.](#)" *San Jose Mercury News*. May 20, 2014.

more, they're more likely to feel better about companies that have ethical business practices and would rather buy from those "that [have] nothing to hide."

How Twitch Users Engage with Media

Many of these behavioral differences are evident when comparing Twitch users' media behavior to that of non-Twitch gamers. In many cases, the hunger that gamers display for the latest technology is even more exaggerated among Twitch users. Perhaps unsurprisingly, this group is the most likely (86%) to have an Internet-capable device for streaming content to their television, compared to 57% of non-Twitch gamers.

Twitch users with smartphones are more likely than non-Twitch gamers to be engaging in a long list of activities involving both the consumption and production of content. They're more likely than non-Twitch gamers to "often" text (77% vs. 67%), take pictures (51% vs. 52%), film videos (37% vs. 22%), visit social media sites (58% vs. 49%), and listen to music (59% vs. 49%). Fully 88% of Twitch users, meanwhile, watch videos "often" or "sometimes" on their smartphones—versus 67% of non-Twitch gamers. In addition, 71% of Twitch users have livestreamed an event on their phones—an astonishing 47 percentage points higher than non-Twitch gamers (24%).

Of course, Twitch users' inclination towards livestreaming isn't just limited to those with smartphones. Plenty of them livestream content—much of it originating from Twitch—on their computers, tablets, and consoles as well. Overall, they're more than twice as likely as non-Twitch gamers (85% vs. 42%) to agree that they watch more livestreaming content now than they did than last year.

Overall, Twitch users consider livestreaming their preferred way to consume media. An impressive 71% agree that they "usually have more fun on Twitch compared to watching TV." And a majority—56%—say that they would rather livestream television than watch it conventionally, compared to 22% of non-Twitch gamers. Moreover, nearly a third (28%) of this group strongly agrees with the statement "I prefer not to have cable at all and watch all the shows I want for free on broadband"—compared to 11% of non-Twitch gamers and only 6% of non-gamers. In the words of a 29-year-old Twitch fan: "It's like watching sports on your TV or your iPad, but you can watch for free. And you can watch anytime."¹¹

These behaviors place Twitch users at the forefront of the broader movement away from traditional television. Rather than stay tethered to broadcast or cable, consumers are increasingly opting to consume "new media" content on broadband. According to Nielsen, the total 18- to 34-year-old primetime television audience declined 9% from 2011 to 2014, driven

¹¹ *San Jose Mercury News*

by a decline in broadcast viewers. Average tune-in frequency also fell, with broadcast declining by 12% and cable by 5%. Over the same period, young adults ramped up their online media activity: The number of minutes per month they spent on online gaming sites grew from 247 to 276, while minutes spent on online video websites grew from 153 to 169.

Twitch users' preference for livestreaming, combined with the site's young userbase, suggests that Twitch is both following and writing the rules that will guide the next generation of entertainment. Millennials will define the future of content—and they're gravitating towards media that is interactive, on-demand, and able to be streamed. They grew up gaming and have watched their friends compete in rec rooms and living rooms from a young age. Twitch meets this generation where it lives while also blazing a path for new forms of entertainment. Much like YouTube made "vlogging" into its own media category, Twitch is doing the same for video game streaming.

The site has created an entire ecosystem surrounding broadcasted gaming. It's turned eSports tournaments into must-see events and allowed video game players to become paid professionals. As CEO Emmett Shear told NPR: "There's now people who spend their whole life broadcasting these video games. You have big tournaments. You have people who run special events with their most dedicated fans. It's really that new profession, which is video game entertainer."¹² What was once considered a fringe activity has taken off into a multimillion-dollar business—and if its current demographics are any indication, it's only going to get bigger.

¹² Laura Sydell. "[Twitch Boosts A New Pro Category: Video Game Player.](#)" NPR. April 4, 2014.

METHODOLOGY

Survey Sampling International (SSI) conducted an online panel survey on behalf of LifeCourse Associates from March 13-30, 2014 with 1,227 persons between the ages of 13-64. All respondents are based in the United States. Quota segments were used in screening criteria to identify gamers vs. non-gamers. Gamers are defined as those that have played a game on a PC, console, tablet, or mobile device in the last 60 days. 63% of the sample met these criteria. Additionally, respondents were asked if they had been on the Twitch.tv website in the last 60 days, yielding a positive response rate of n=313. SSI is one of the leading survey companies in the world, with over 37 years of sampling and data collection experience.

All data has been weighted to U.S. Census criteria by age and gender.

In this survey, Millennials were as defined as ages 13-34, Gen Xers as ages 35-54, and Boomers as ages 55-64.

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APPENDIX







