



newzoo



NEWZOO'S

GLOBAL ESPORTS MARKET REPORT



This must-read report and accompanying data sets provide esports audience forecasts, revenue streams, movers and shakers, investments, top franchises and events, and key trends shaping the future of entertainment.

DATA COVERAGE



REPORT CONTENT SUMMARY

THE ESPORTS INDUSTRY & DEVELOPMENTS

- › Channels
- › Brands
- › Teams
- › Organizers
- › Game Publishers

KEY TRENDS

- › Ten key global trends shaping the industry

GLOBAL ESPORTS MARKET

- › Esports revenues per stream | 2016-2021
- › Esports audience per type | 2016-2021
- › Demographics of esports audience

REGIONAL MARKET OVERVIEW

- › Esports revenues per stream | 2016-2021
- › Esports audience per type | 2016-2021
- › Key players and developments per region

RANKINGS

- › Top 50 countries/markets by number of Esports Enthusiasts | 2018
- › Top 50 events ranked on hours watched on Twitch | 2016 & 2017
- › Top 25 games based on esports hours watched on Twitch | 2017
- › Top 50 games bases on non-esports hours watched on Twitch | 2017

EVENT CALENDARS

- › Event calendar of major events | LoL, CS:GO, Dota 2, OW, HS | 2017

DELIVERABLES

ANNUAL REPORT
114 PAGES



QUARTERLY UPDATES
~16 PAGES



DASHBOARD
TABLEAU & XLS



CLIENT SUPPORT INCLUDED

USE CASES

UNDERSTAND THE ESPORTS ECOSYSTEM

"The esports market is developing so rapidly with new players entering the space everyday and local esports initiatives growing explosively. Staying on top of and understanding these changes ensures we never miss an opportunity."

PRIORITIZE LOCAL INVESTMENTS

"Knowing which regions, countries, and markets have the most Esports Enthusiasts, and how much they spend on games, hardware merchandise and tickets, helped us decide where to host our main events."

DEVELOP REALISTIC BUSINESS PLANS

"Knowing how much revenue is being generated through online advertising and media rights sales in Europe, and where the market is heading, allowed us to develop a realistic business plan for our video platform."

MATCH ESPORTS TO YOUR BRAND

"Ultimately, we were able to quantify, per market, the number of Esports Enthusiasts that currently do not use our product yet and could potentially be reached through our envisaged esports sponsorship."



GEOGRAPHIC SCOPE

The report provides a global overview as well as insights into individual (sub)regions. Key metrics are presented for the top 50 countries/markets ranked by number of Esports Enthusiasts.



DEFINITIONS

- **ESPORTS.** Competitive gaming at a professional level and in an organized format (a tournament or league) with a specific goal (i.e., winning a champion title or prize money) and a clear distinction between players and teams that are competing against each other.
- **ESPORTS ENTHUSIASTS.** People who watch esports more than once a month.
- **OCCASIONAL VIEWERS.** People who watch esports less than once a month.
- **ESPORTS EVENT.** A competitive gaming tournament or league organized by a third party, where players and/or teams compete against each other with the goal to win.
- **MEDIA RIGHTS REVENUE.** Revenues generated through media property, including all revenues paid to industry stakeholders to secure the rights to show esports content on a channel.
- **MERCHANDISE & TICKETS REVENUE.** Revenues generated by the sales of tickets for live esports events and merchandise.
- **ADVERTISING REVENUE:** Revenues generated by advertisements seen by viewers via esports content, which are paid for per impression.
- **SPONSORSHIP REVENUES.** Revenues generated by teams and organizers through sponsorship deals.
- **GAME PUBLISHER FEES.** Revenues paid by game publishers to independent esports organizers for hosting events. This excludes investments or spending by game publishers on their own events, as we consider that to be part of their regular marketing efforts.

METHODOLOGY

1. PRIMARY RESEARCH & DATA FEEDS

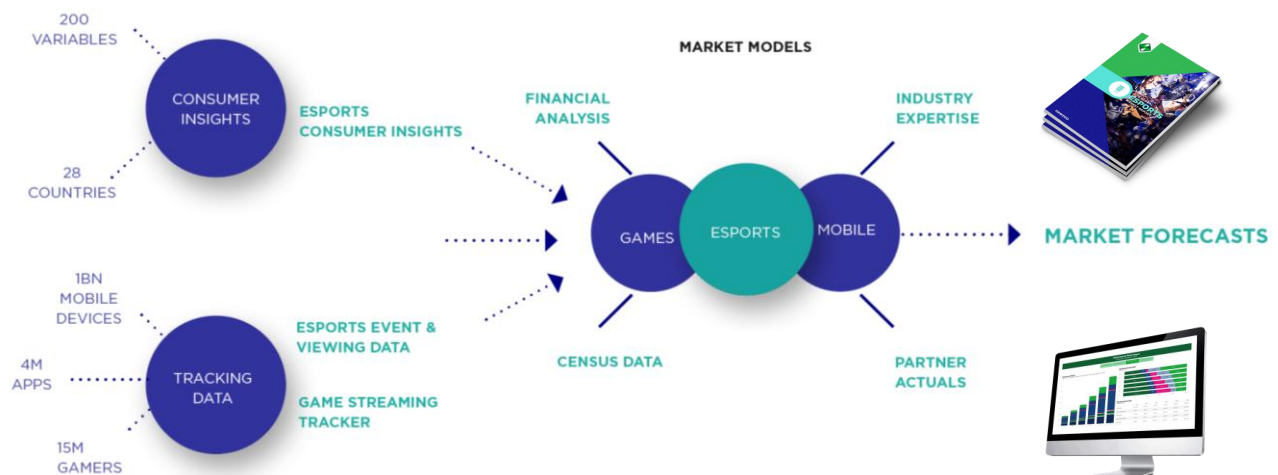
Newzoo performs primary consumer research in 28 countries/markets covering over 60,000 consumers and tracks actual revenues, event data, and viewership through its partners.

2. MODELING & MARKET ANALYSIS

All data is fed into Newzoo's market models and combined with financial analysis, census data, and actuals. Initial forecasts are validated with clients and partners.

3. TREND WATCHING & FORECASTING

Newzoo's market analysts are always on the lookout for new industry and consumer trends shaping the future of a mobile-first world. These are combined with our forecast figures.



RELATED SUBSCRIPTIONS

1. ESPORTS CONSUMER INSIGHTS

(N-DEPTH CONSUMER INSIGHTS ON THE GAMING, ESPORTS, AND MOBILE COMMUNITY)

2. GAME STREAMING TRACKER

MONTHLY VIEWING BEHAVIOR OF LIVE STREAMS ON TWITCH AND YOUTUBE GAMING

3. GAMING PERIPHERAL BRAND TRACKER

ANNUAL RESEARCH INTO THE PERIPHERAL PURCHASE FUNNEL AND GAME BEHAVIOR

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