

Sizing & Profiling eSports' Popularity

Free Data Report Featuring High-level Results of Newzoo's Consumer Research

APRIL 2014



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Sizing & Profiling eSports' Popularity in the West

Introduction

Long established in Asia, eSports and free-to-play, have now broken out of their niche and into Western markets. Does this prove there is a direct relationship between the two phenomena? At Newzoo, we believe so. It is not surprising that it is free-to-play titles such as League of Legends, Dota2 and World of Tanks that are currently leading the West in eSports. Time spend has now become an equally important KPI as money spend for game companies, and that is essentially what eSports does. It gives gamers the opportunity to spend even more time on their favourite game franchise and ultimately... money.

But just how big is the eSports boom in the West? And who are the eSports viewers and active participants? What is the ROI for game companies investing in this space? It is our responsibility at Newzoo to make sure we can answer these questions, for our clients and for any other company interested in this space. We are happy to be able to share some first high-level results with you in this document.

Andrei Yarantsau, VP of Publishing at Wargaming:
"eSports is an integral part of our strategy. In 2013, over 200,000 gamers registered for our World of Tanks eSports tournaments. We invested \$8M dollar in 2013 and expect to invest over \$10M this year...."



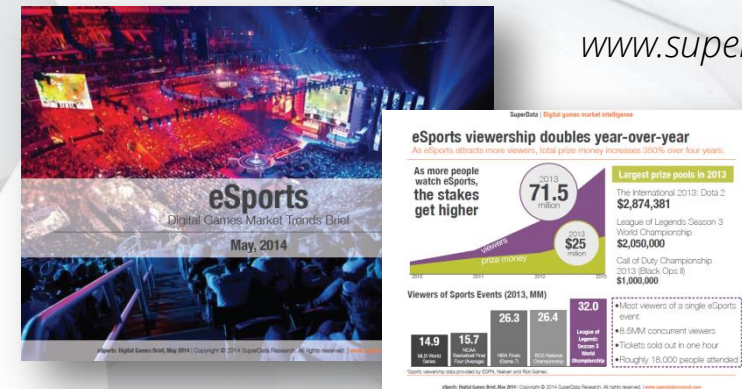
Relevant Free Trend Reports

PC Gaming. Power to the People. (Newzoo)



www.newzoo.com/pcreport

eSports. Digital Games Market Trends Brief. (SuperData)



www.superdataresearch.com

eSports Viewership & Prize Money Explodes

SuperData reports on trends, viewership and prize money trends

eSports viewers are dedicated viewers.

An average eSports viewer watches over 10 times a month, with a session length of 2.2 hours.

eSports is a key marketing vehicle and revenue driver for online game publishers.

Companies like Riot Games, Wargaming, Valve and Ubisoft are all placing bets on competitive gaming in 2014.

Major brands are experimenting with eSports.

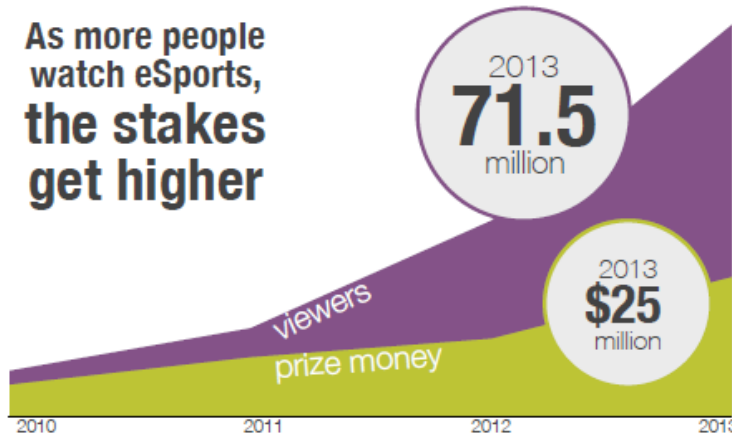
Companies Intel, RedBull and Coca-Cola are looking to reconnect with affluent young males (18-34 years old) via competitive gaming.

Source: SuperData, eSports Games Market Trends Brief

eSports viewership doubles year-over-year

As eSports attracts more viewers, total prize money increases 350% over four years.

As more people watch eSports, the stakes get higher



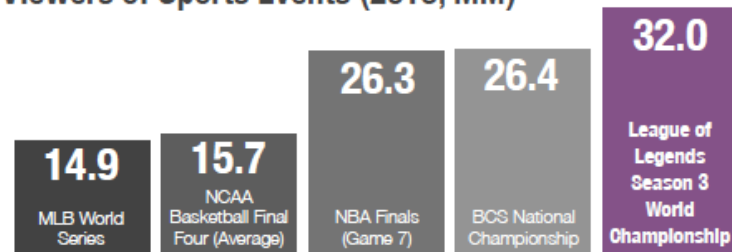
Largest prize pools in 2013

The International 2013: Dota 2
\$2,874,381

League of Legends Season 3
World Championship
\$2,050,000

Call of Duty Championship
2013 (Black Ops II)
\$1,000,000

Viewers of Sports Events (2013, MM)



- Most viewers of a single eSports event
- 8.5MM concurrent viewers
- Tickets sold out in one hour
- Roughly 18,000 people attended

*Sports viewership data provided by ESPN, Nielsen and Riot Games.

eSports: Digital Games Brief, May 2014 | Copyright © 2014 SuperData Research. All rights reserved. | www.superdataresearch.com

Sizing eSports' Popularity in the West

Level of eSports interest and participation in the US and Western Europe*



AWARE

56%

off all gamers aged 10-50
is aware of eSports

50%

ACTIVE

21%

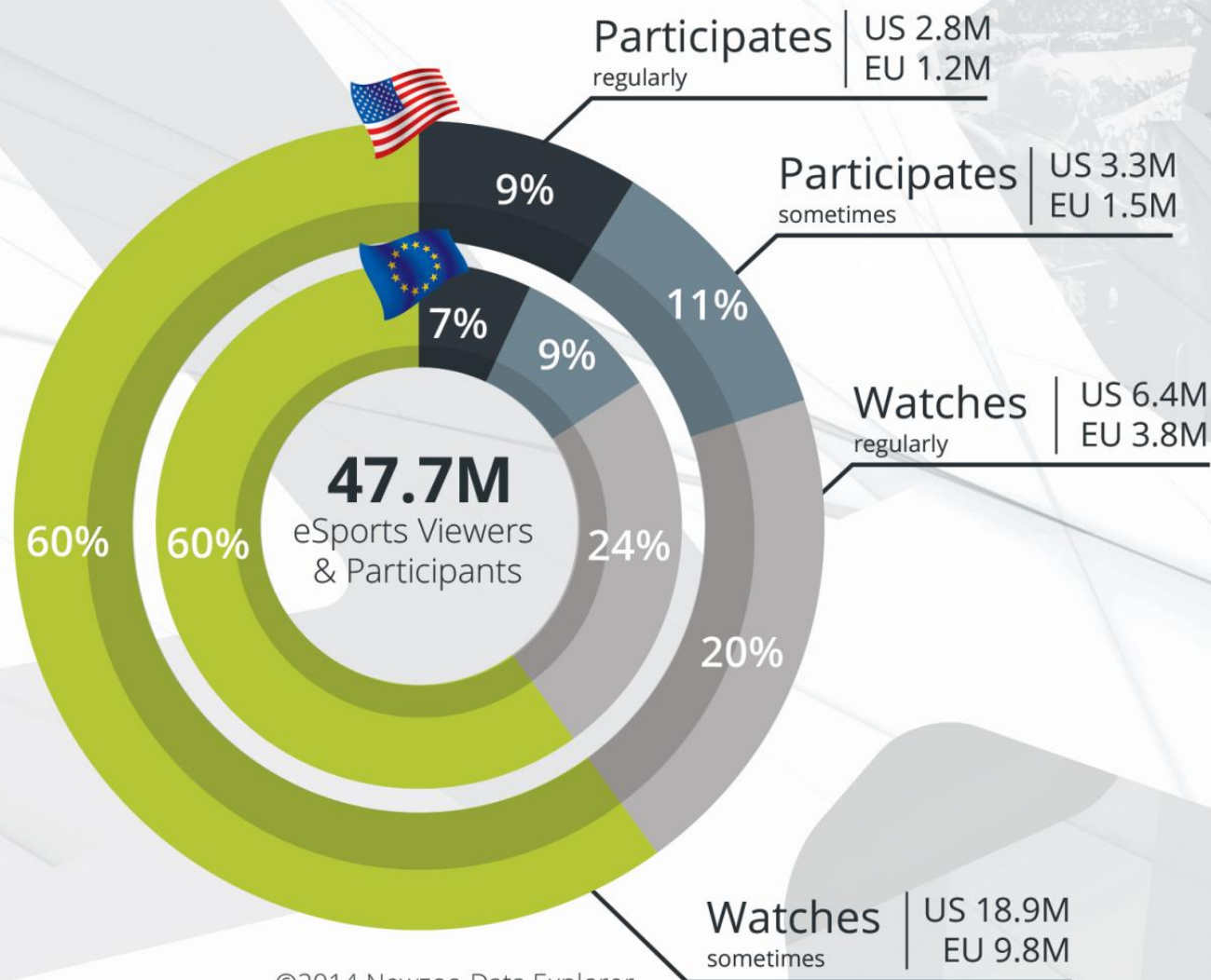
off all gamers aged 10-50
watches eSports or participates in
(amateur) eSports

16%

31.4M
Americans

16.3M
West-Europeans*

*Aggregate of UK, GER, FR, NL, BE



Fresh eSports Data

Newzoo's Data Explorer allows you to profile various levels of eSports enthusiasts across more than 100 variables, including

- Demographics
- Media behaviour
- Game Franchises
- Game Behaviour and Spending
- Devices used to play
- Hardware peripherals

All topics: www.newzoo.com/topic-list



Countries

Fresh market data including eSports is available for 12 key countries: US, UK, FR, GER, NL, BE, TUR, POL, KOR, JP, CN and VN.

Contact: Wybe Schutte
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www.newzoo.com

Profiling eSports' Popularity in the West

Age/Gender of Active eSports Enthusiasts** in the US and Western Europe*



DEMOGRAPHICS

52%

of eSports enthusiasts is married

SPENDING

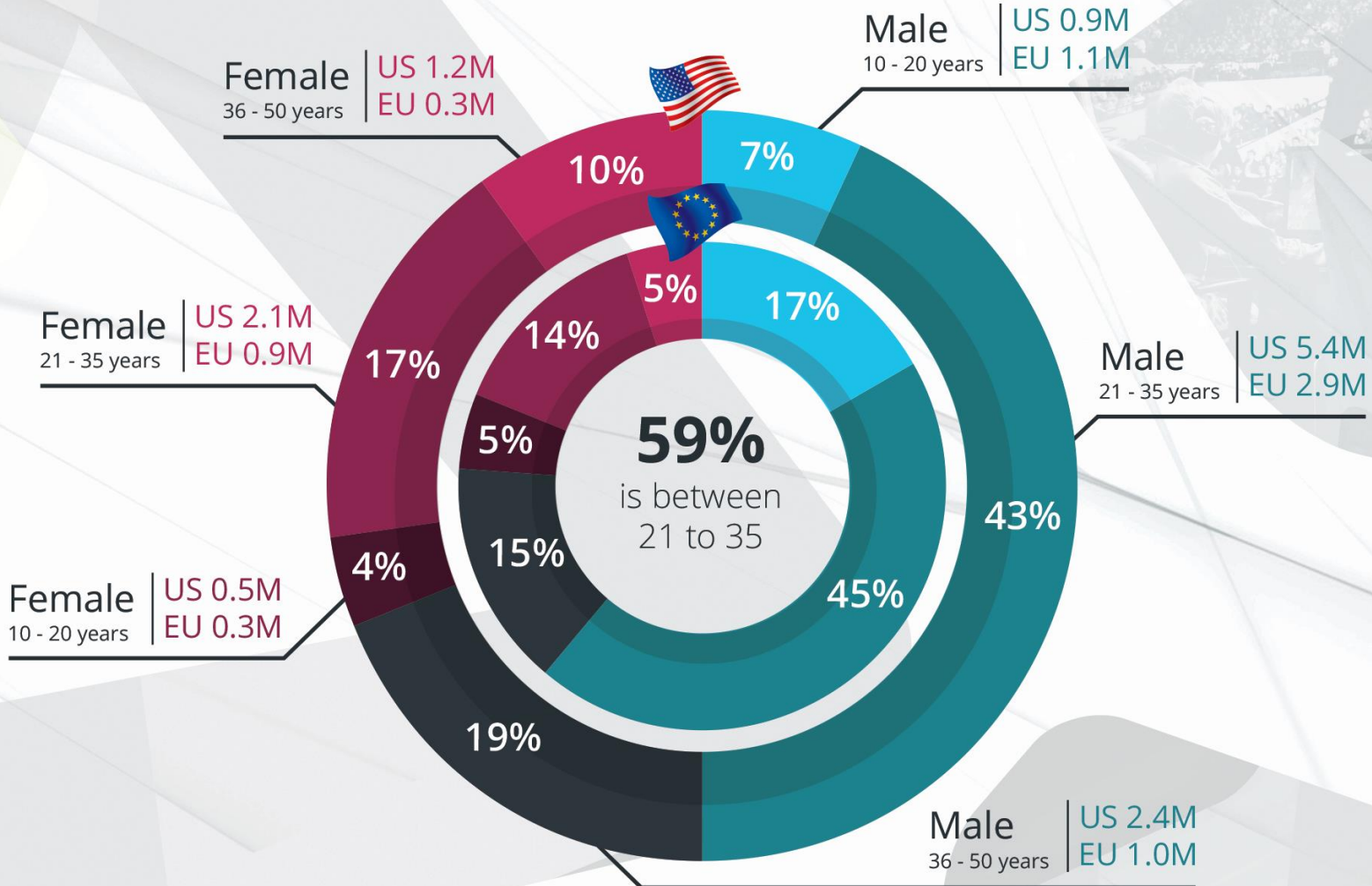
22%

of eSports enthusiasts are big spenders on games, versus 8% for all gamers

NEXTGEN

20%

of eSports enthusiasts plays on a Xbox One



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Sizing & Profiling eSports' Popularity

Examples of eSports analyses performed in the Newzoo Data Explorer

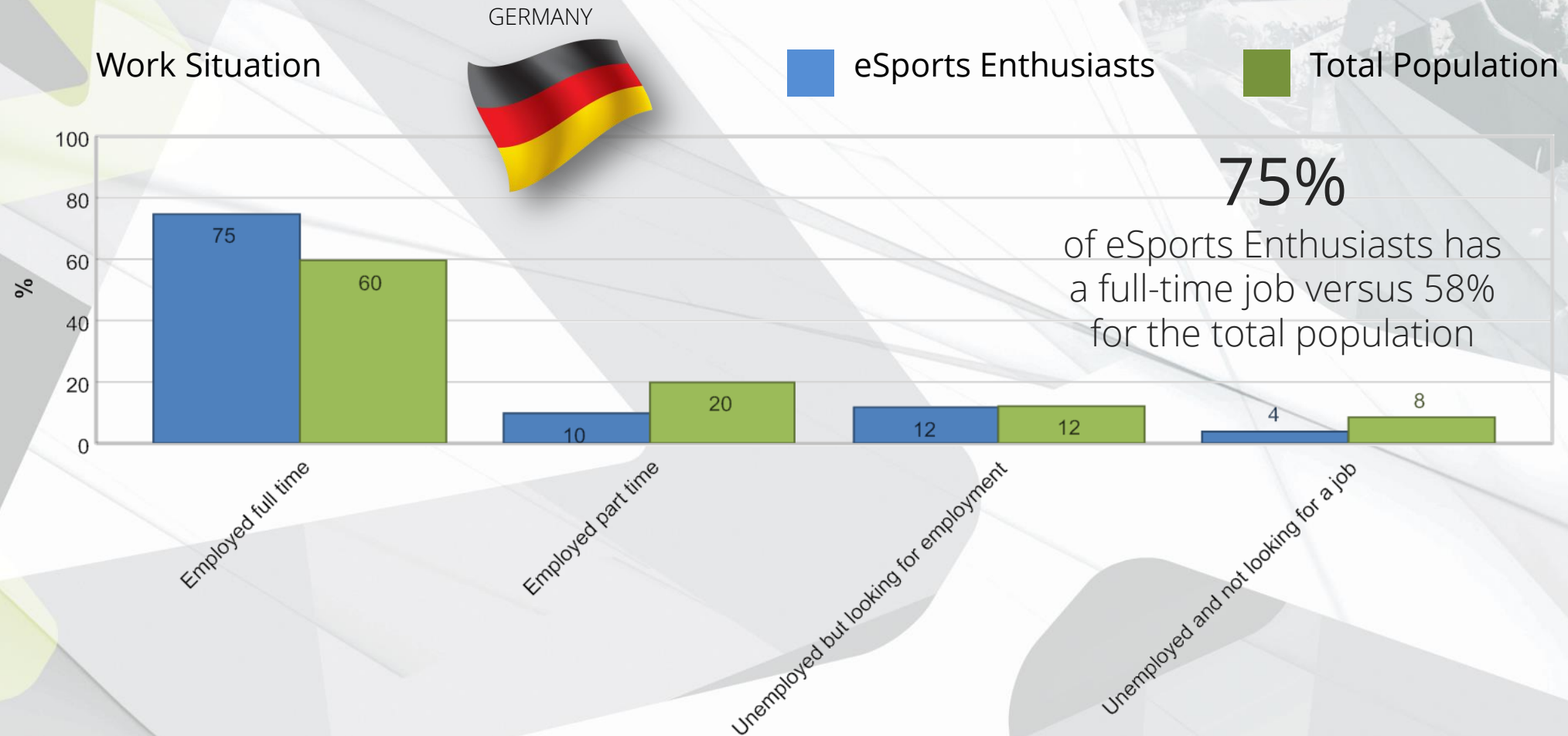
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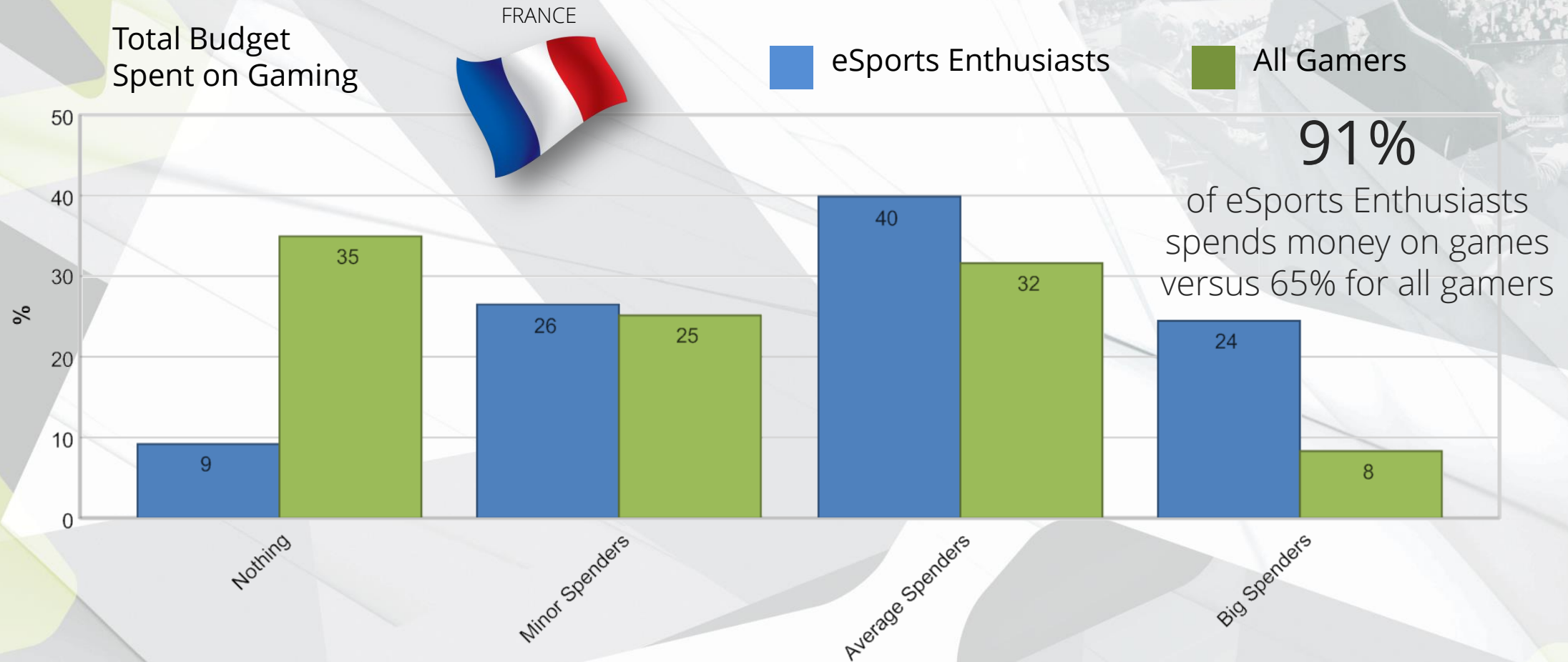
Work Situation of eSports Enthusiasts

Compared to the total population, age 10 to 50, Germany



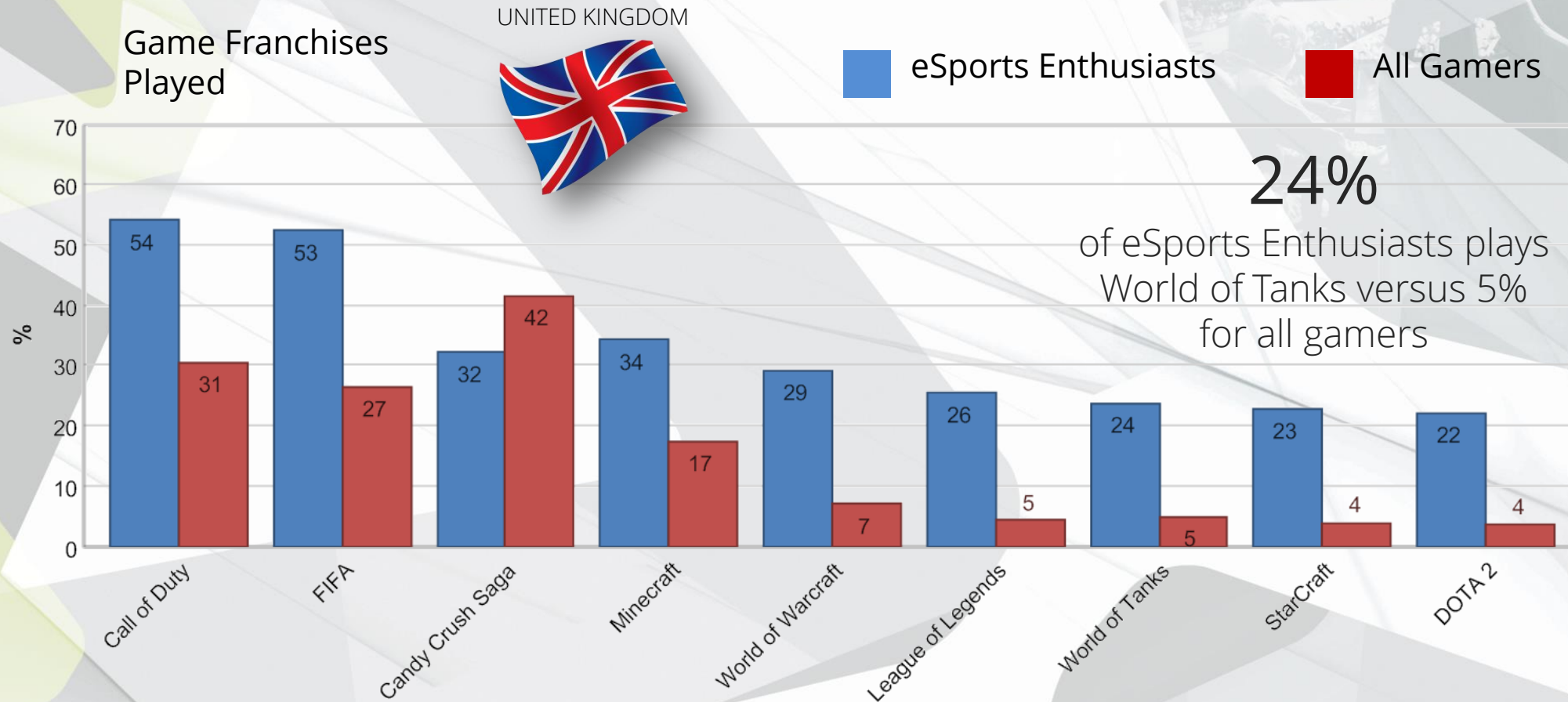
Game Spending of eSports Enthusiasts

Compared to all gamers, age 10 to 50, France



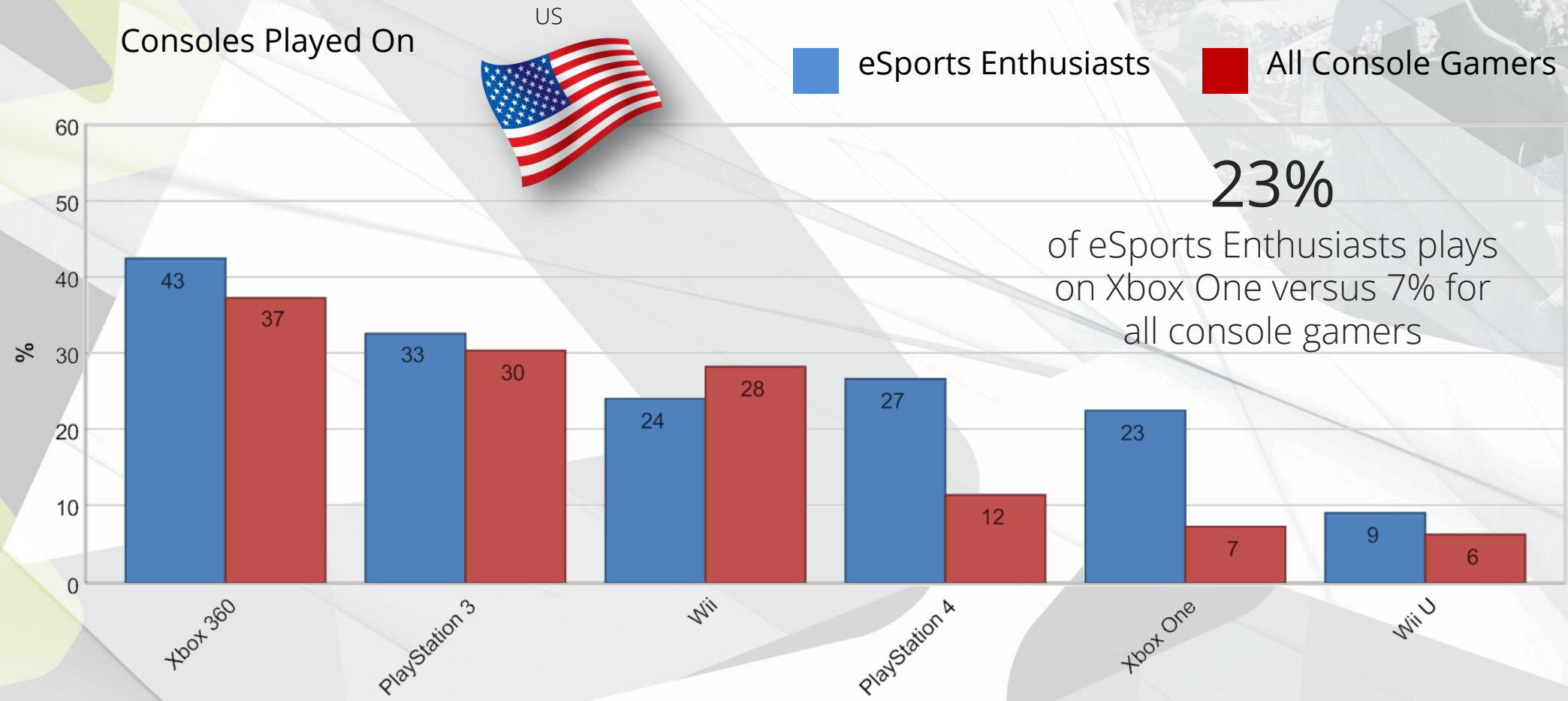
Franchise Popularity amongst eSports Enthusiasts

Compared to all gamers, age 10 to 50, UK



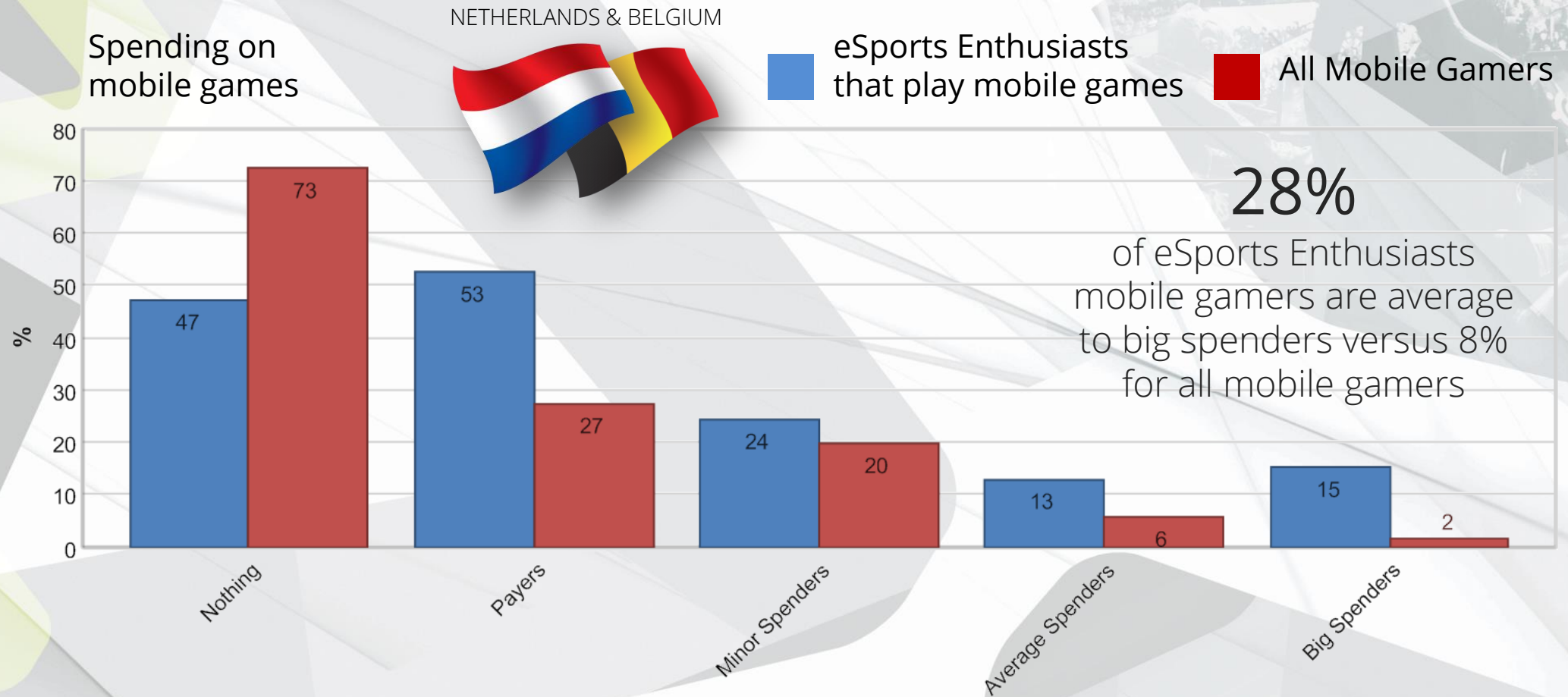
Console Use amongst eSports Enthusiasts

Compared to all console gamers, age 10 to 50, US



Mobile Game Spending of eSports Enthusiasts

Compared to all mobile gamers, age 10 to 50, Netherlands and Belgium



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Research topics and Newzoo products and services

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Fresh Market Data Available on 12 countries*

Over 200 variables to cross-analyze in our Newzoo Data Explorer

The full topic list can be found here: www.newzoo.com/topic-list

Fresh new topics included in our latest batch of primary consumer research include:

- **eSports interest and participation:** e.g. video, competitions, events, franchises
- **In-depth media behavior across screens:** e.g. music & video streaming, ebooks, on-demand & pay TV
- **Social / Chat applications:** e.g. Instagram, Twitter, Vine, Pinterest, Snapchat, Whatsapp, Kakao
- **Subscriptions:** e.g. Xbox Live Gold, PlayStation Plus, Steam, Spotify, Netflix, HBO
- **Global payment brands:** e.g. Visa, MasterCard, PayPal, PaySafe Card
- **Hardware peripheral brands:** e.g. Plantronics, Razer, Kingston, Roccat, Madcatz, Steel series
- **Hardware peripheral outlets:** e.g. e-tail versus retail, store brands
- **Headsets:** e.g. use, buying intention, desired features, brand, budget, e-tail vs retail, platform
- **Source to discover new games:** e.g. friends or family, magazines, rankings in app store
- **Customer journey:** e.g. reason to start playing games, start spending, reasons to stop

Get access to our latest (eSports) market data

Cross-analyze over 200 topics yourself or use our custom analysis support



In-Depth Country Insights Data Explorer Subscriptions

Select topics & variables



Export to powerpoint or excel

Select or compare countries Filters to cross analyze



Relative and absolute



Available now



Available later
this year



Fresh data available on countries:

- US, UK, Germany, France, Netherlands, Belgium, Poland, Turkey, China, Japan, Korea, Vietnam

Market segment scope

- 200+ topics, all segments: General, MMO, Mobile, Casual/Social, PC/Mac, Console

- www.newzoo.com/topic-list

Includes

- 12 months online access (Data Explorer)
- Unlimited number of users
- Continuous custom analysis support
- Tool training

Pricing

1

COUNTRY
12 MONTHS ACCESS

€4,000

\$5,500USD

6

COUNTRIES
12 MONTHS ACCESS

€18,000

\$24,800USD

12

COUNTRIES
12 MONTHS ACCESS

€29,000

\$40,000USD

Other Products & Services



Global / Regional Revenues
Global Games Market Data

www.newzoo.com/global-games-service



Benchmarking Franchises
In-depth Franchise Dashboards

www.newzoo.com/franchises



AppStore Revenues & Downloads
Monthly AppStore Reports

www.newzoo.com/appstore-reports



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Quantitative & Qualitative

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Contact Wybe Schutte, wybe@newzoo.com

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