



STATE OF THE MARKET: UNDERSTANDING THE ESPORTS REVOLUTION

*Nicole Pike – Managing Director, Nielsen Esports
SVG Esports Production Forum, November 2018*

WHY ESPORTS MATTERS TO NIELSEN

- Be where the audience is (and will continue to be!)
- Learn about tomorrow's trends, today
- Help provide context & comparisons to enable smart decisions
- **Add tangible value for the industry**



ESPORTS: TODAY'S STATE OF PLAY

ESPORTS: THE STATE OF PLAY IN 2018

From this....

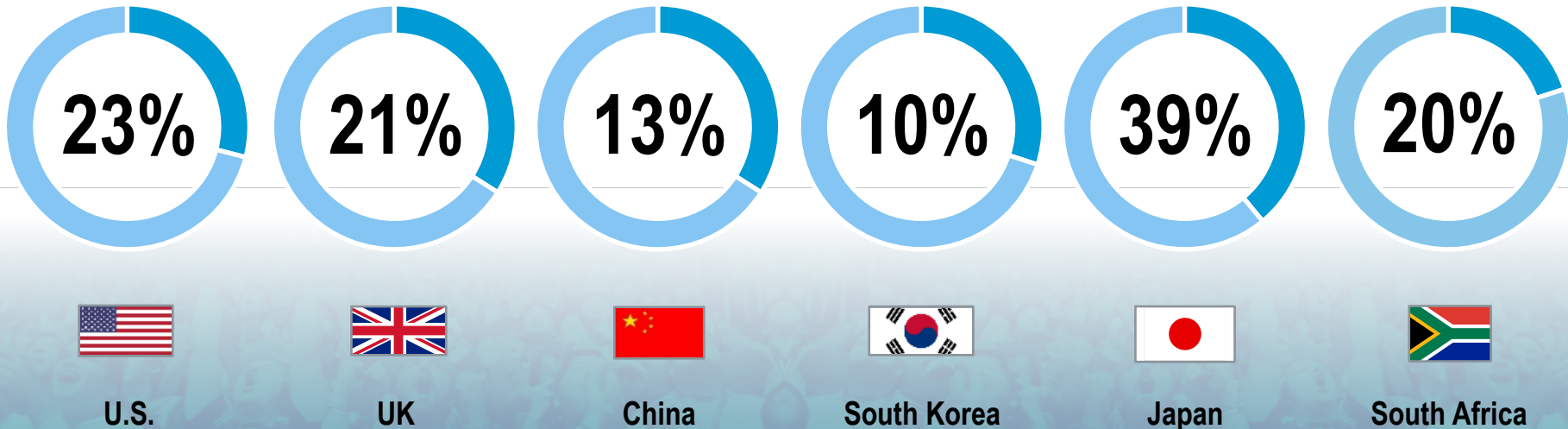


To this....

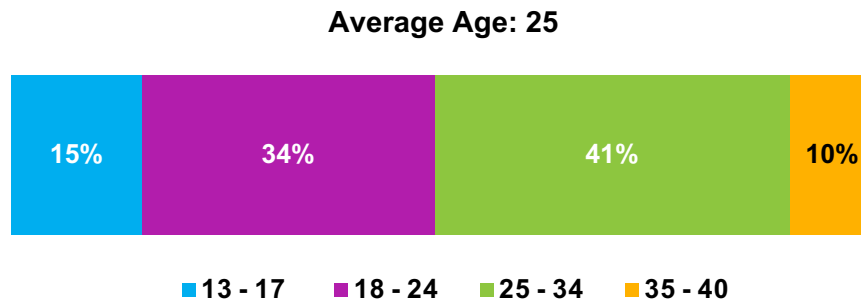
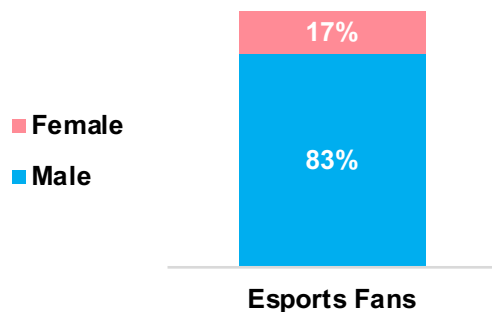


GLOBAL ESPORTS FANBASE IS GROWING QUICKLY...

Percentage of fans that started following esports **within the past year**:



...AND THE AUDIENCE IS HIGHLY DESIRABLE



Average Annual Household Income

Esports Fans



\$69,900

General
Population



\$61,400

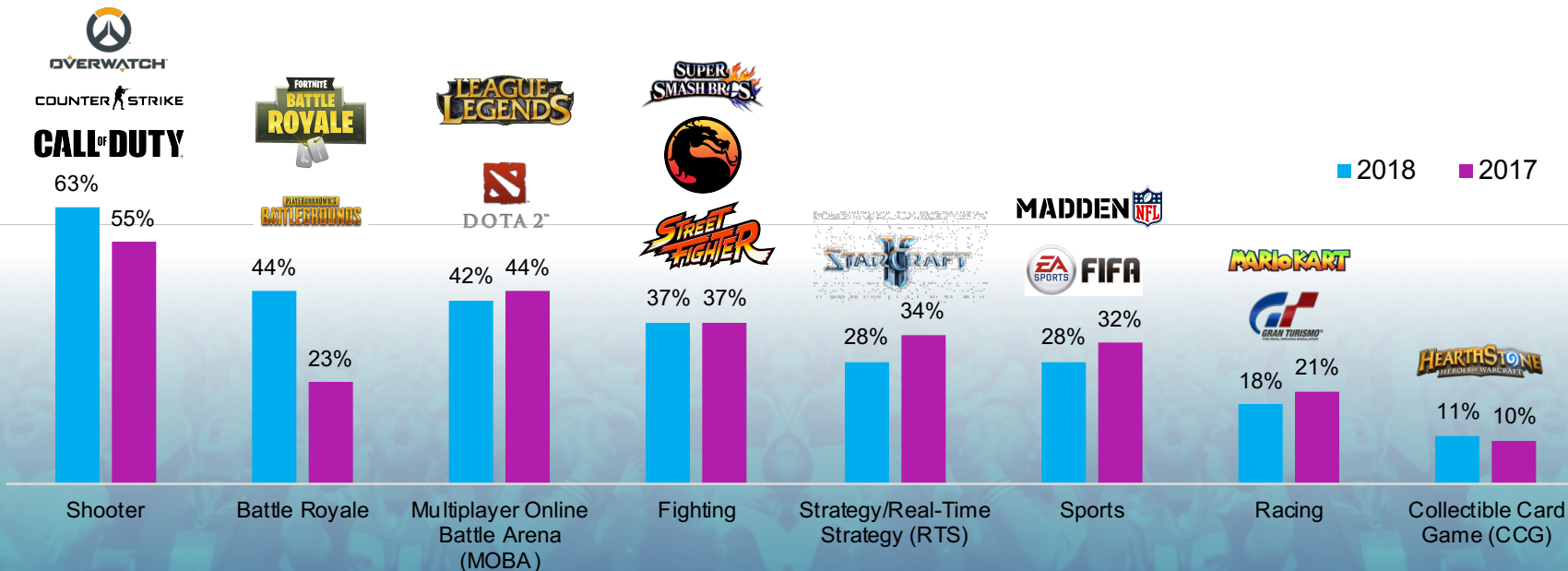


Additional Demographics

College Graduate	42%
White	72%
Non-White	28%
Married	36%
Household Size	3.2

SHOOTER, BATTLE ROYALE, AND MOBA TITLES LEAD IN THE U.S.

Top Genres Followed

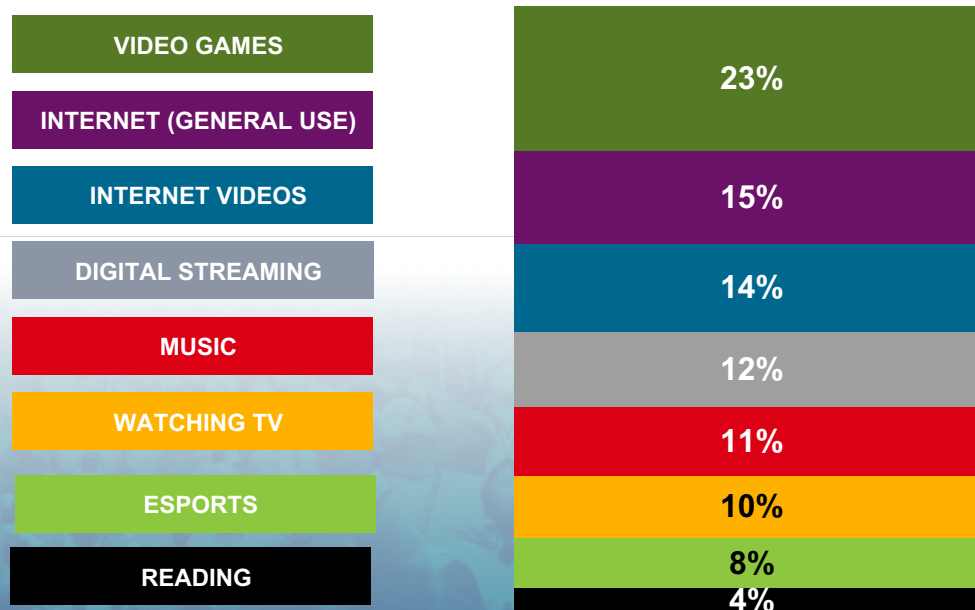




ESPORTS: THE NEXT FRONTIER OF ENTERTAINMENT

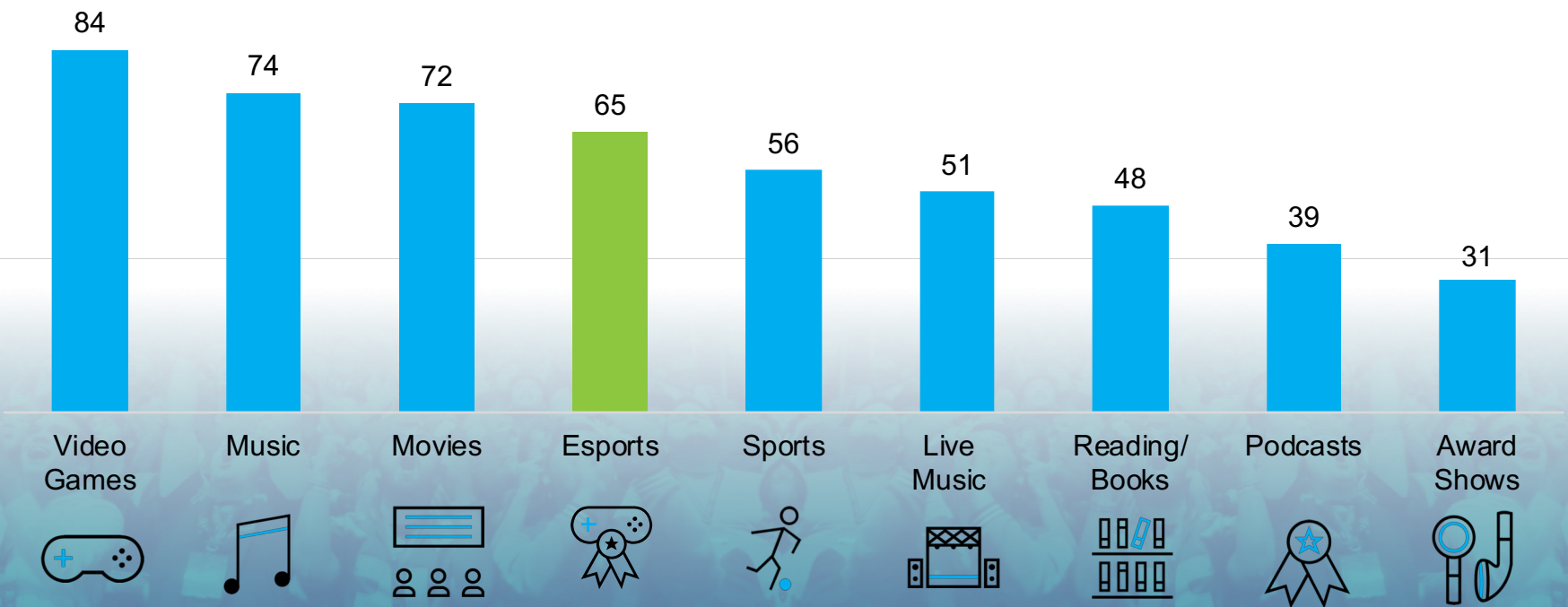
ESPORTS FANS ARE DIGITAL NATIVES – AND STILL TURN ON THEIR TVS A BIT, TOO

Claimed Weekly Leisure Time (% of Leisure Hours)



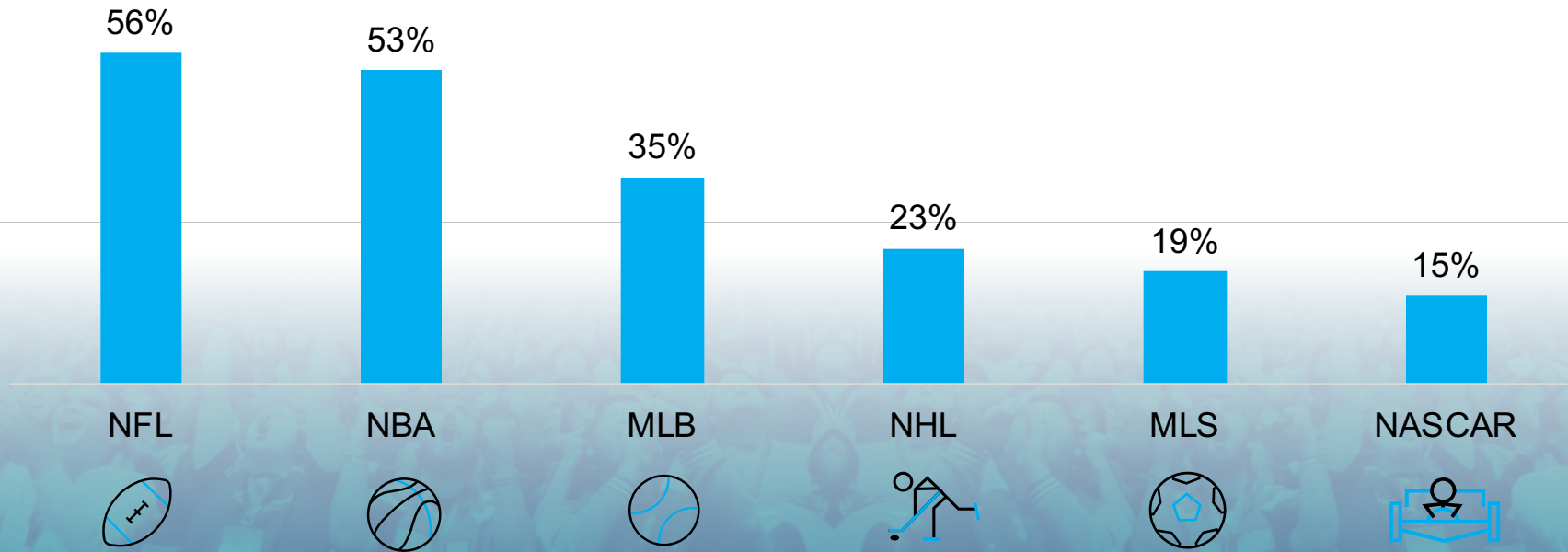
GAMING IS ESPORTS FANS' GREATEST PASSION – AND ESPORTS IS AN IMPORTANT COMPLEMENT TO THIS

Interest in Leisure Activities & Content Types (0-100 Rating Scale)



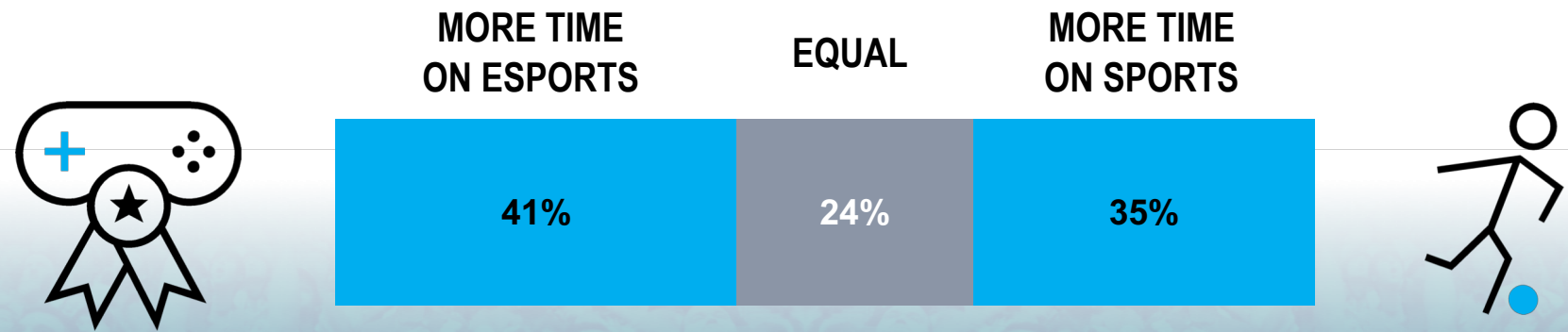
THE CROSSOVER IS STRONG BETWEEN FANS OF ESPORTS AND (SOME) TRADITIONAL SPORTS

Traditional Sports Leagues Followed



ESPORTS ARE SOURCING TIME FROM TRADITIONAL SPORTS – BUT BOTH CAN COEXIST

Time Spent Engaging with Esports vs. Traditional Sports

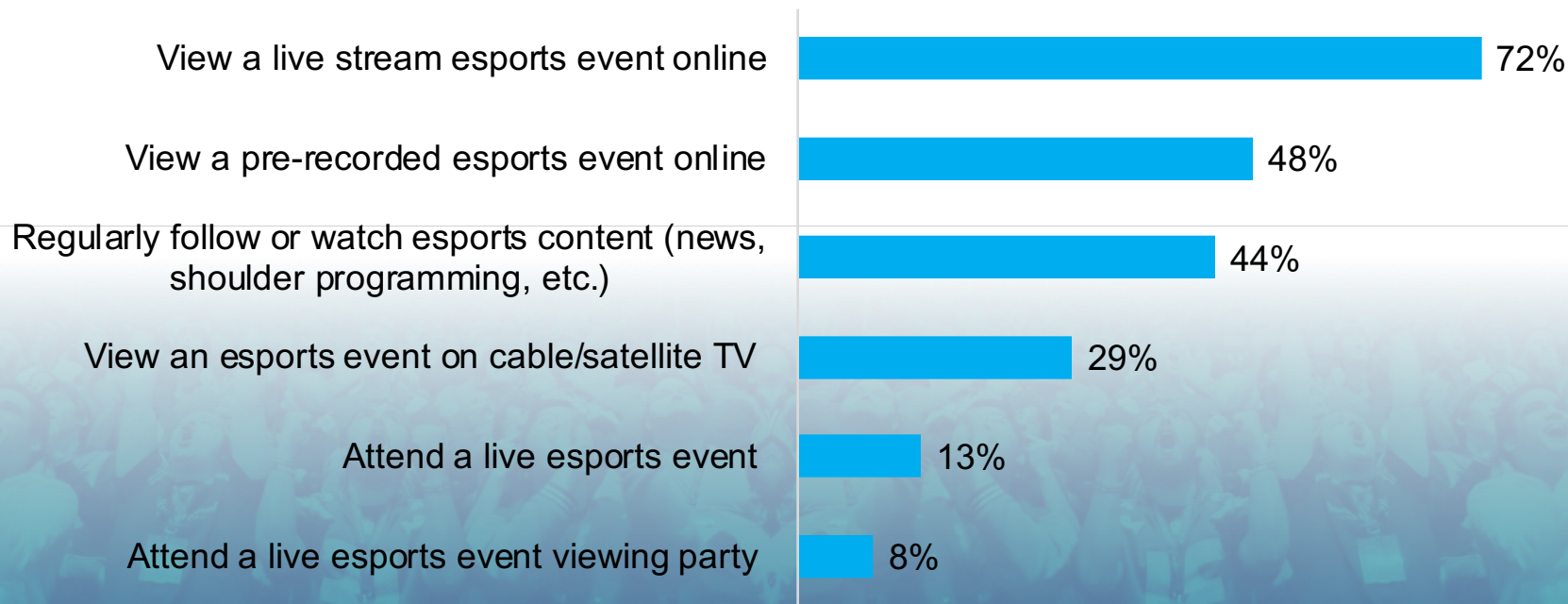




CONTENT CONSUMPTION: KEEPING UP WITH ESPORTS FANS' APPETITES

STREAMING – PRIMARILY LIVE – DOMINATES ESPORTS BROADCAST CONSUMPTION

Past 12 Month Esports Activity Involvement



YOUTUBE AND TWITCH DOMINATE U.S. VIEWERSHIP, WITH TWITCH FAVORED FOR LIVE STREAMS

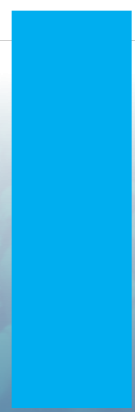
Top Claimed Sources for Esports Content/Programming



94%



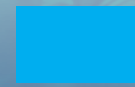
84%



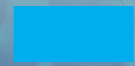
TWITCH IS THE TOP PLATFORM FOR LIVE ESPORTS VIEWING, WHILE VOD IS MOST COMMONLY ACCESSED ON **YOUTUBE**



16%

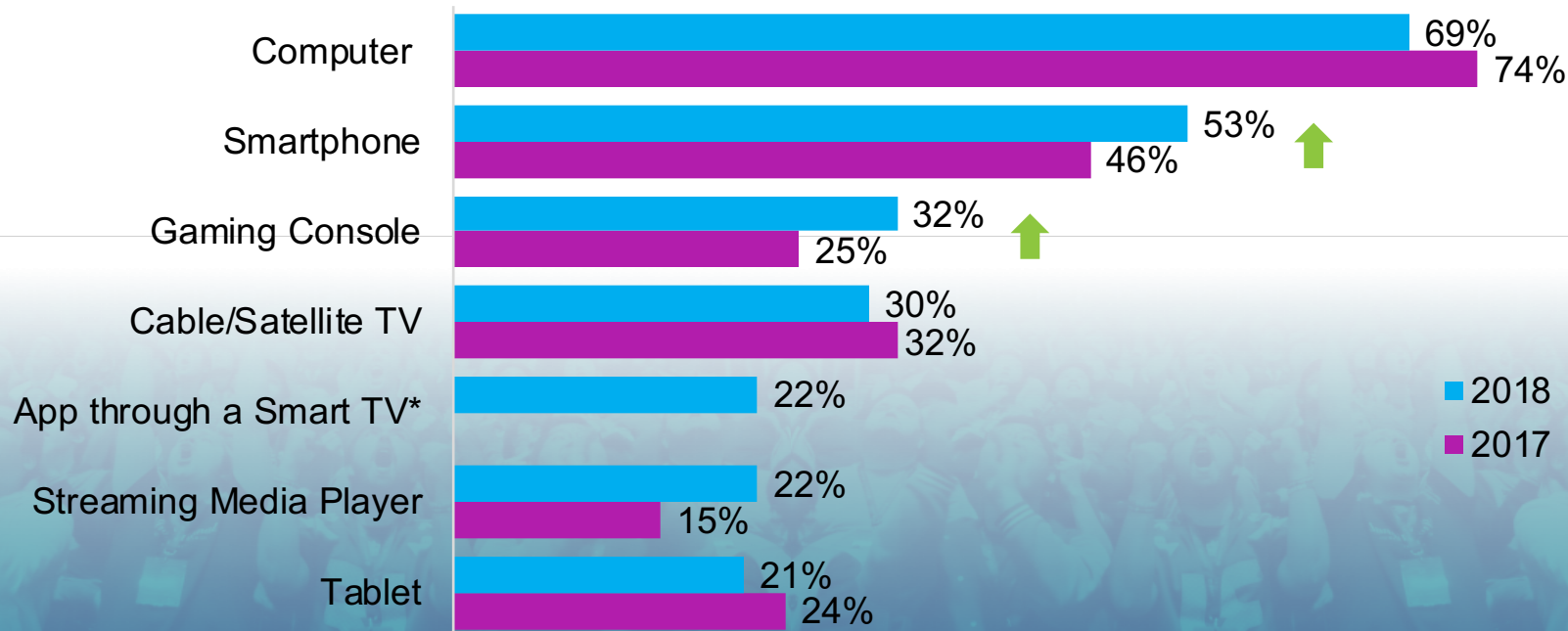


12%



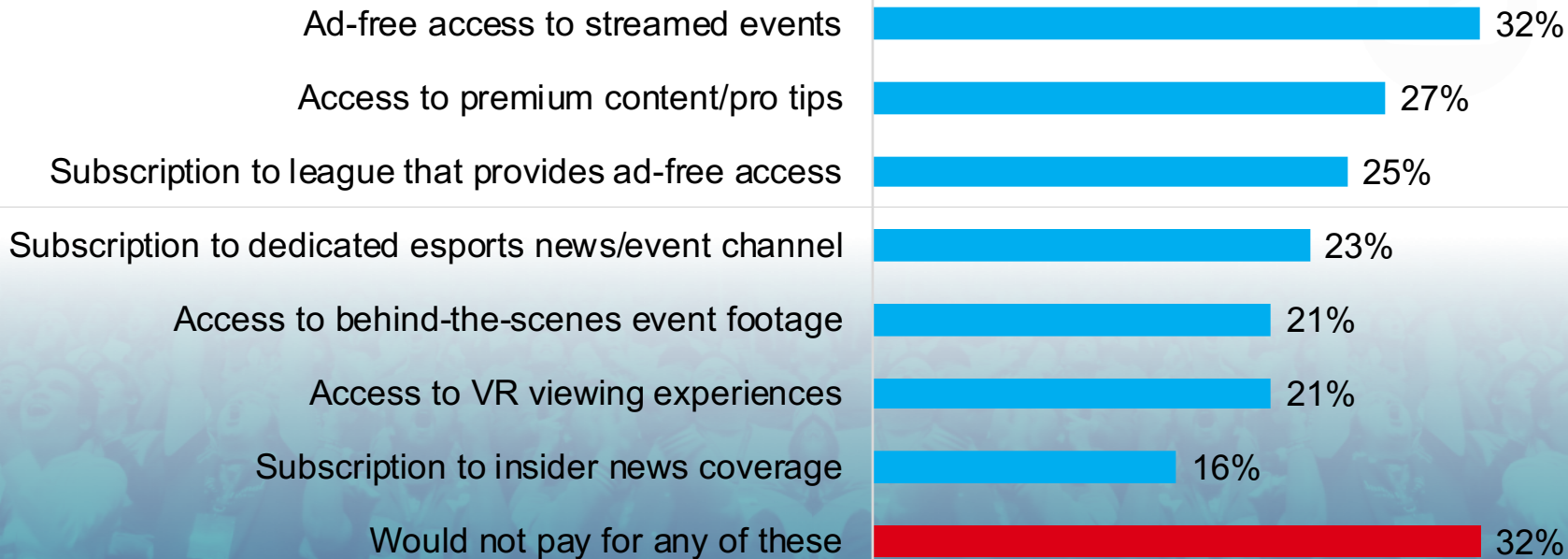
PC VIEWERSHIP IS MOST COMMON, BUT MOBILE DEVICES & CONSOLES ARE ON THE RISE

Platforms Used to Follow Esports



ESPORTS FANS EXPECT FREE CONTENT, WHICH HAS BEEN KEY TO ITS RAPID GROWTH

Interest in Paying for Enhanced Esports Experiences





QUESTIONS?

THANK YOU!

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