

Esports Data Analytics

How can media companies align with esports?

From our data analysis, we have determined that:

Based on common viewership demographics soccer is the sport that is currently best aligned with the esports audience.

Brands need to engage on the viewers terms; utilizing integrated advertising and social media story-telling, as well as shifting brand presence toward digital platforms will prove to be crucial in captivating this new audience.

A strong focus on connecting brands that offer utility and authentic alignment with the esports community.

What are esports?

esports turns online gaming into a spectator sport. It mimics the experience of watching a more traditional sporting event, where rather than focus on displays of physical prowess, spectators watch as professional gamers face off in a series of organized, highly competitive events.

Competitive esports events have enjoyed momentous growth as the audience increases year over year

Part 1

THE SHIFT IN MEDIA LANDSCAPE

As esports gain popularity

When compared to traditional sports, esports are booming. Between 2014 and 2017 esports events saw a 64% increase in viewership

Sport League Viewership (Live Broadcast)	Total Audience Change (2014-2017)	Percentage Change (2014-2017)
National Football League	- 8.55 Million	▼ 6.57%
Major League Baseball	+ 0.76 Million	▲ 0.78%
National Basketball Association	- 0.94 Million	▼ 1.34%
Major League Soccer (US)	- 5.80 Million	▼ 25.6%
International Soccer	- 9.36 million	▼ 20.6%

Esport Viewership (Millions)

+ 19.3 % (year over year)	2016	281
+ 13.8 % (year over year)	2017	335
	2018 *	380
	2021 *	557

* Projections

Total Change (2014-2017)
+176 Million

How can NBC Sports Group adapt and remain a leading delivery and engagement platform?

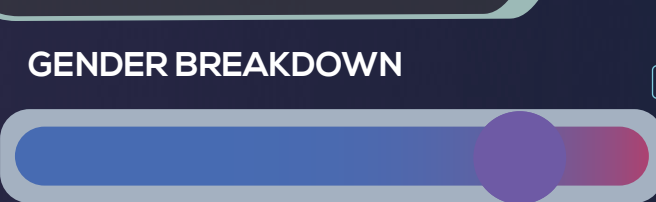
Media platforms should be looking to engage the esports community on their own terms. Understanding the audience and adapting to their needs and interests is a crucial step in creating an authentic connection and delivering a more successful advertising experience

Part 2

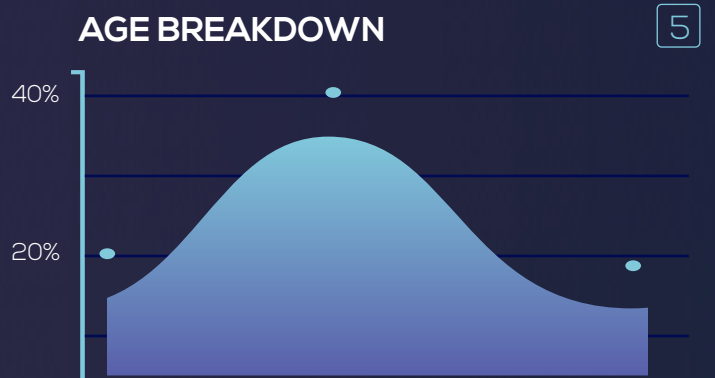
UNDERSTANDING THE AUDIENCE

And where to reach them

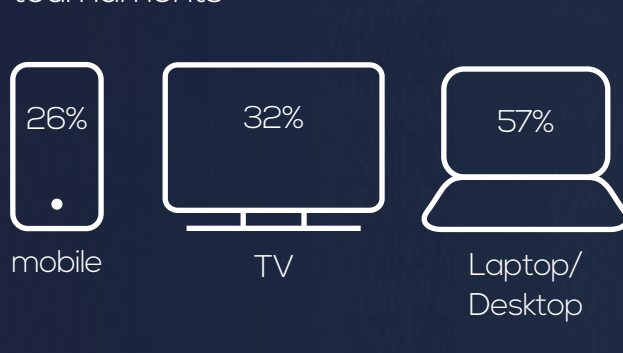
GENDER BREAKDOWN



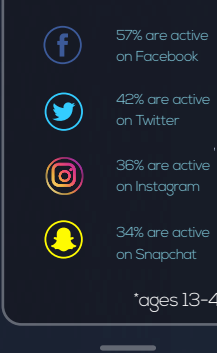
AGE BREAKDOWN



How viewers watch Esport tournaments



Esport Fans And Social Media*

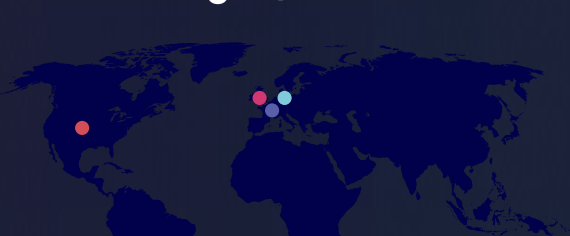


ESPORTS & SOCCER

Identifying common ground

With widespread global popularity, general overlap of interests, and the highest concentration of young fans, soccer's international audience aligns best with the Esports viewership demographics.

Interest in Soccer Among Esport Fans*



- US- 39% overlap
- France- 57% overlap
- UK- 59% overlap
- Germany- 66% overlap

EA Sports' FIFA Game Series is the fourth most followed cross-platform videogame in the US.

In 2018, the FIFA E-World Cup had 1,119,000 hours of online viewership. Online Viewership increased six times over when the esports tournament was tied to the actual FIFA World Cup

Based on this data...

It becomes evident a major factor in accommodating these new viewing habits is about adapting the format for live sports competition offered and integrating by offering them primarily on digital media, as opposed to trying to adhere to traditional television broadcast formats.

Part 3

ADAPTING TO THE AUDIENCE

and how to market to them

Current of Esport Sponsorships per industry (2016-2017)



Contrary to popular belief...

The esports and gaming audience is not as closed off to brand involvement as first impressions might suggest, the challenge becomes about reaching the audience on their own terms and creating an authentic alignment with the esports community

Advertising Opportunities

upon being surveyed, esports viewers showed a strong preference toward specific categories that would be best to align with an esports tournament

82% of Twitch users view player sponsorship as beneficial to the community

77%

Gaming Equipment

76%

Videogames/ Consoles

74%

Energy Drinks

60%

Movies

57%

Chain Restaurants

53%

Cars

Based on our findings, we feel as though action items NBCUniversal should take moving forward are as follows:

Disseminate esports highlights through social media platforms to engage the audience

Focus on connecting endemic brands and semi-endemic brands that offer products or services with a tangible benefit to the esports audience.

Create an E-Sports gold pass on the NBC Sports Standalone streaming service offering exclusive content and community sentiment for fans

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- Newzoo Global E-sports Market Report
- Newzoo Understanding Media Rights in Esports
- SBRnet
- Magna Global
- Provided data (NBC)
- Nielson E-Sports Playbook [13-40 year old population]
- PWC Consumer Intelligence Report
- eSports Ad Bureau
- <https://twitchadvertising.tv/>