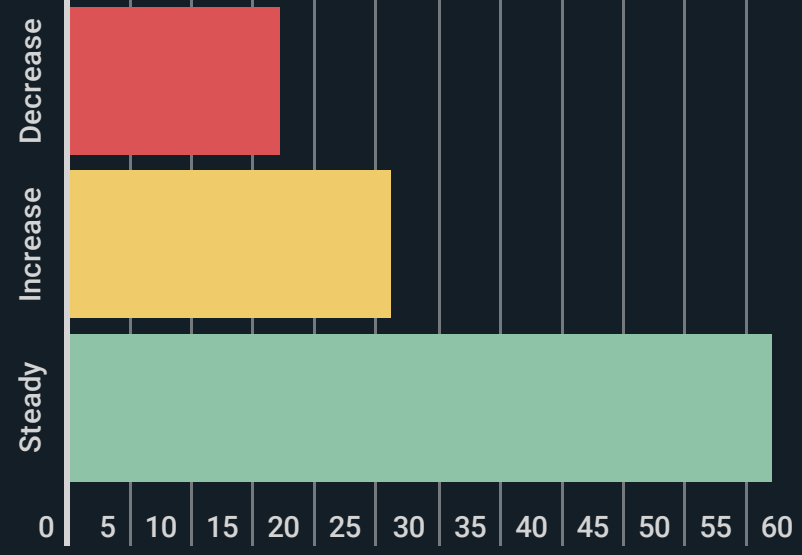


# The Rise of eSports: Where it is & Where it's Headed

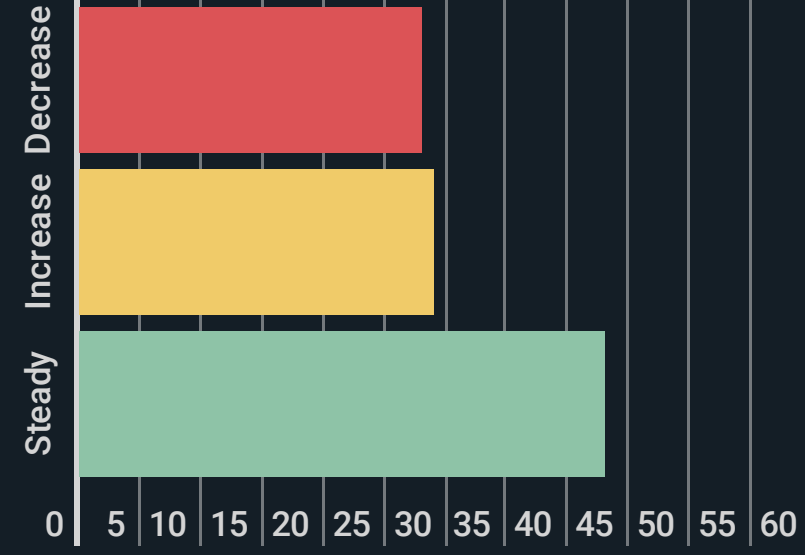
Thomas Norris TUID:915515668  
John Chionchio TUID:915523303

## The Growth of eSports

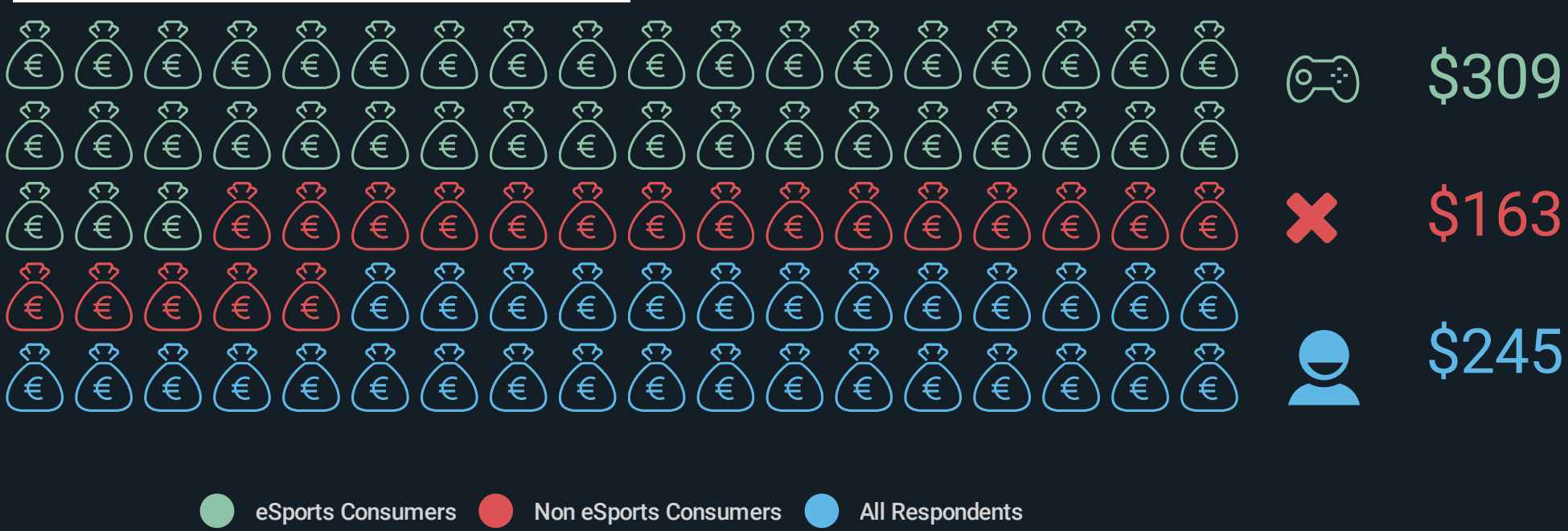
Change in Watcher Interest



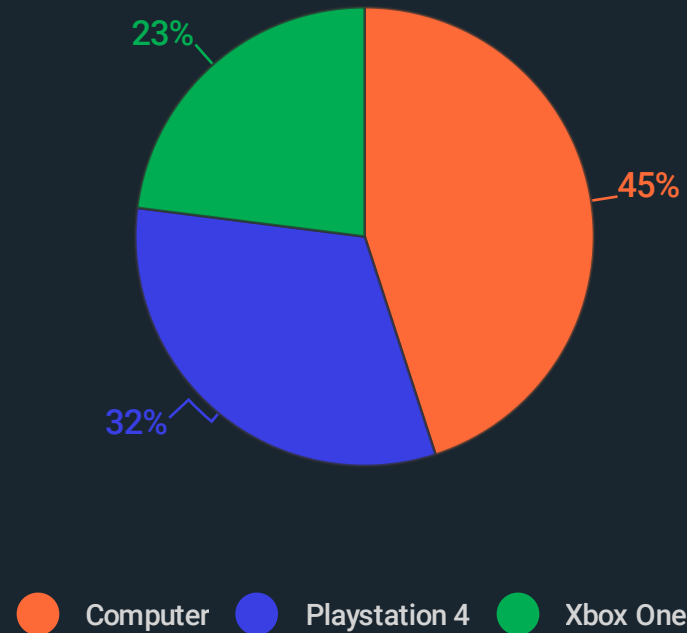
Change in Player Interest



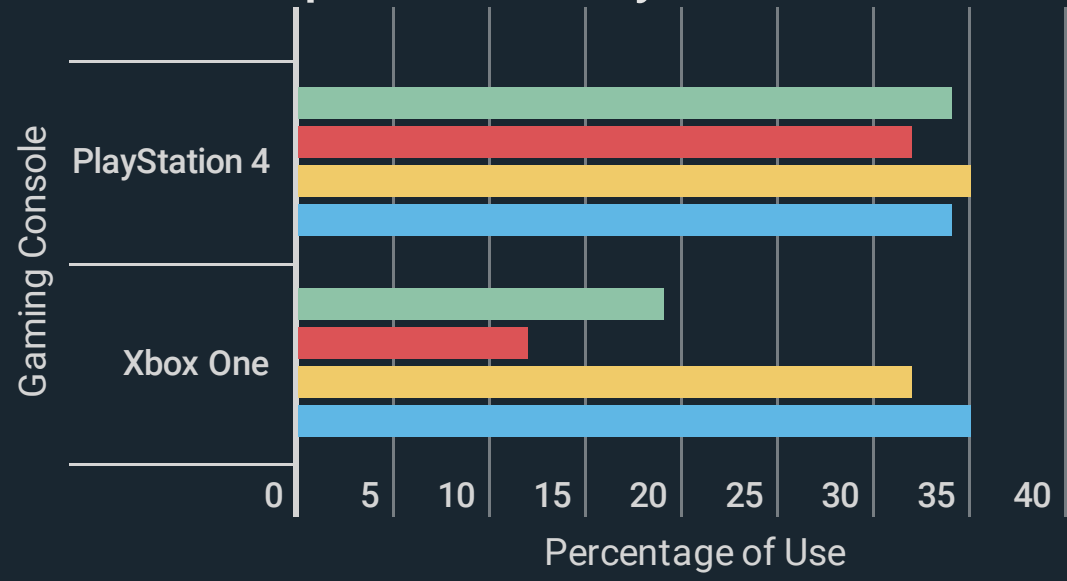
Average Annual Budget for Gaming Content (Games, Equipment, Subscriptions)



Share of Device Market (GER, FR, UK, US)



Devices E-sports Fans Play Games On



Computer Playstation 4 Xbox One

France Germany UK US

### Playstation 4

According to Business Insider the Playstation 4 was built to be the best gaming console on the market ever. This helped the PS4 to have much more success than the Xbox 1 had.

### Computer

The Computer is by far the most popular way of watching E-sports. It is the leading device to play E-sports games. 50% of the sample use a computer to play E-sports in all countries except the U.K.

### Xbox

According to Business Insider, the Xbox 1 was built to serve as the main entertainment hub. This paired with its opening price (\$499 compared to \$399 for the PS4) likely led to the drastic difference in usage in France and Germany. Xbox and PS4's share of the US market is much more competitive

Top 5 PC exclusive games played through e-sports

#### United States

1)	Counter-Strike
2)	League of Legends
3)	Dota 2
4)	StarCraft
5)	Heroes of Storm

#### UK

1)	Counter-Strike
2)	League of Legends
3)	Dota 2
4)	H1Z1
5)	StarCraft

#### France

1)	League of Legends
2)	Counter-Strike
3)	H1Z1
4)	StarCraft
5)	Heroes of the Storm

#### Germany

1)	Counter-Strike
2)	League of Legends
3)	StarCraft
4)	Dota 2
5)	H1Z1

Top Cross-Platform Games

#### United States

1)	Call of Duty
2)	Halo
3)	Overwatch
4)	FIFA
5)	Street Fighter

#### UK

1)	Call of Duty
2)	FIFA
3)	Halo
4)	Overwatch
5)	Street Fighter

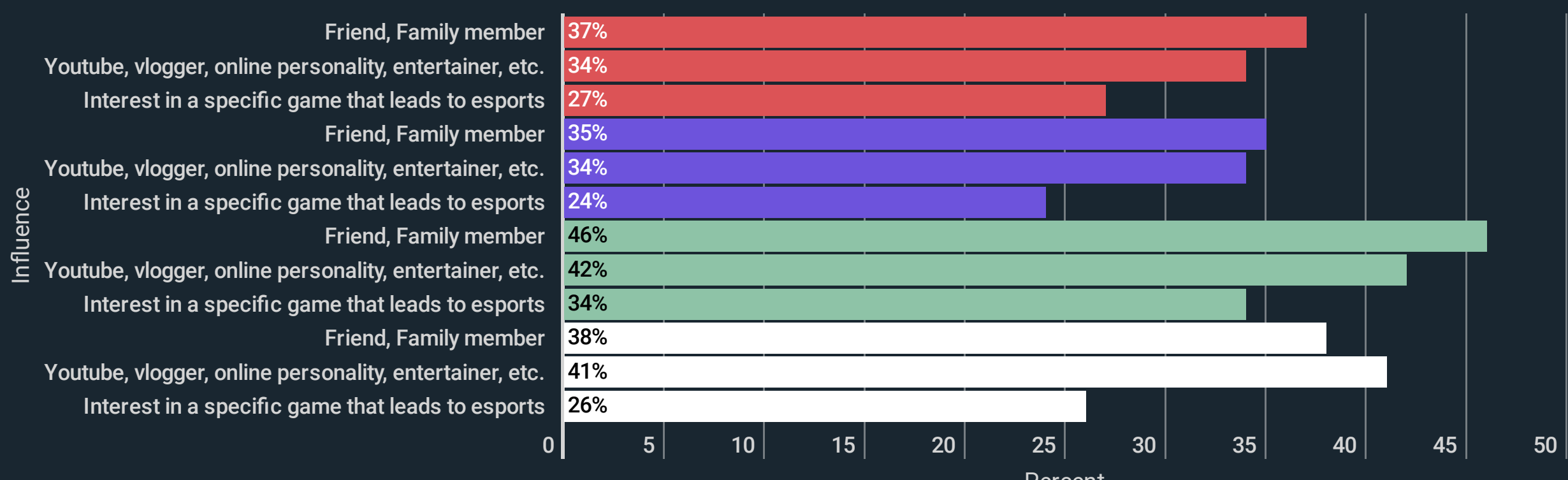
#### France

1)	Call of Duty
2)	FIFA
3)	Overwatch
4)	Hearthstone: Heroes of Warcraft
5)	Rocket League

#### Germany

1)	FIFA
2)	Call of Duty
3)	Overwatch
4)	Hearthstone: Heroes of Warcraft
5)	Rocket League

# Why they started following E-sports



## Most Influenced

France and Germany have had the most external influence on them to become an e-sports fan.

## Friends & Family

Have had the most influence in every country except Germany where the largest influence was an online personality



39%

Average percent of influence by Friends or Family across the 4 countries

37%

Online Personalities are most popular in France



33%

Average number of fans who follow an online personality



38%

Average percent of influence by an Online Personality across the 4 countries

26%/25%

Pro Players and Pro teams are most popular in the US.



22%

Average number of fans who follow a professional Player/Gamer



28%

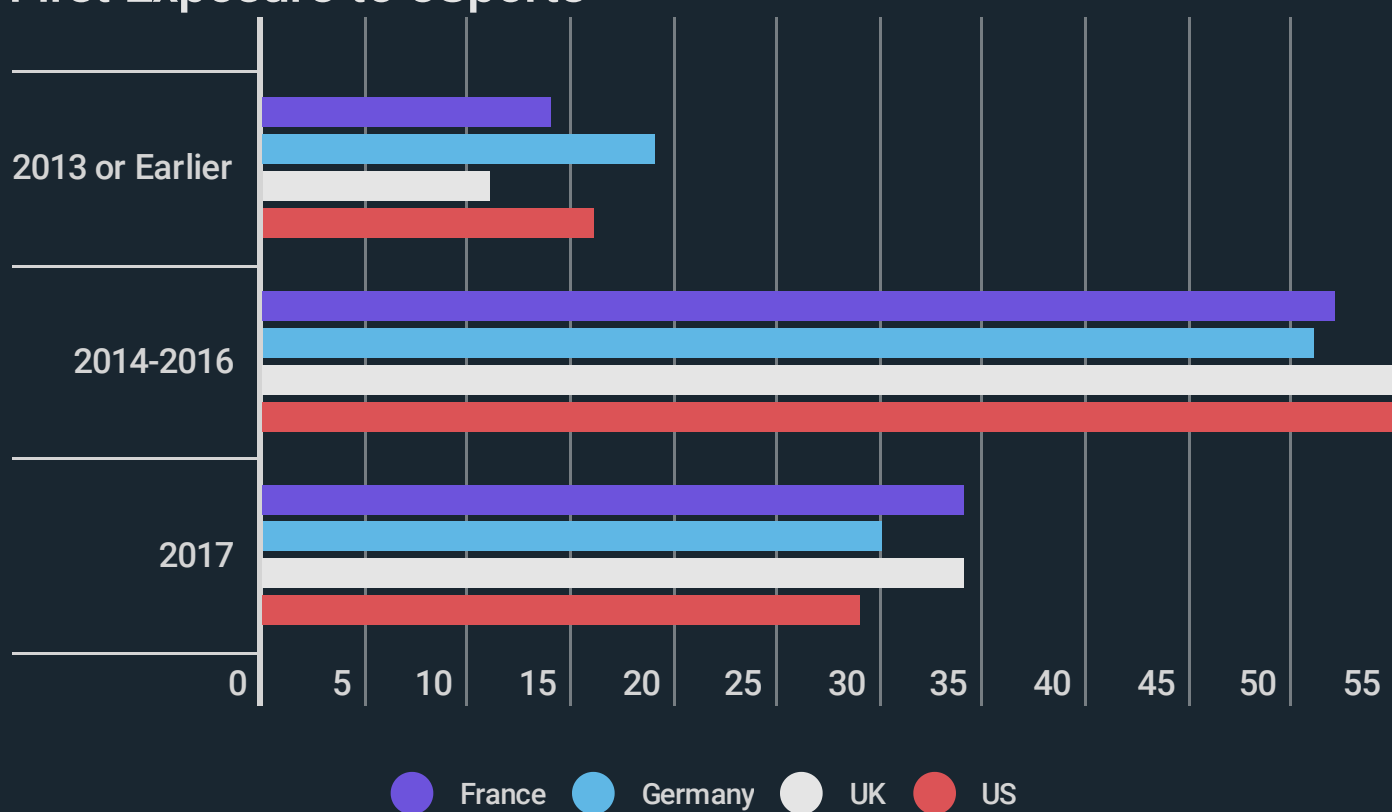
Average percent of influence by a Certain Game across the 4 countries



20%

Average number of fans who follow a professional team

## First Exposure to eSports



85%

of participants began to follow e-sports from 2014-2017.



53%

The amount of players to start following E-sports 1 to 3 years ago



37%

: Of that 4 year total, the number of people to start following E-sports over the past year was 37%

## Most commonly followed E-sports teams by Country

1

Team Fnatic's ranking in Germany

1

Team Cloud 9's ranking in the US

1

Team Fnatic's ranking in France

1

Team Cloud 9's ranking in the US

2

Team Fnatic's ranking in the UK

2

Team Cloud 9's ranking in France

4

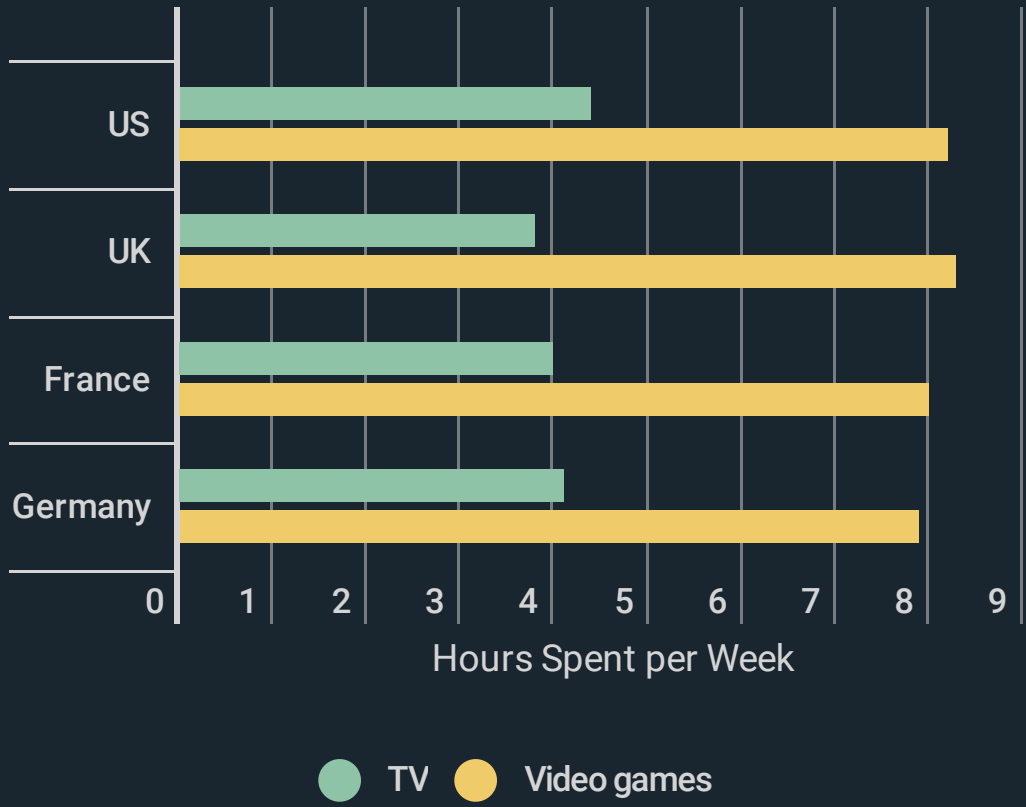
Team Fnatic's ranking in the US

3

Team Cloud 9's ranking in Germany

# Viewership Trends

## Average hours spent playing Video Games and watching TV per week



### The United States

Has the highest total of hours spent watching TV & playing Video games with 12.6 hours

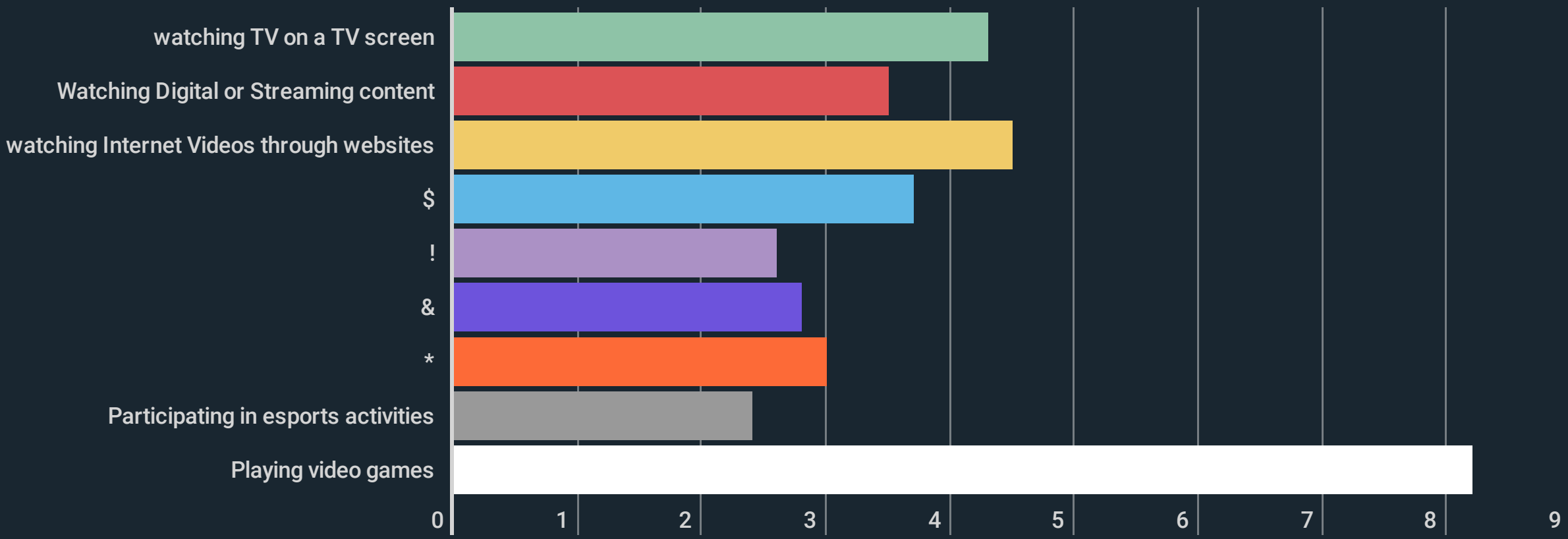
### The UK

Spends the most time playing Video games at 8.3 hours per week



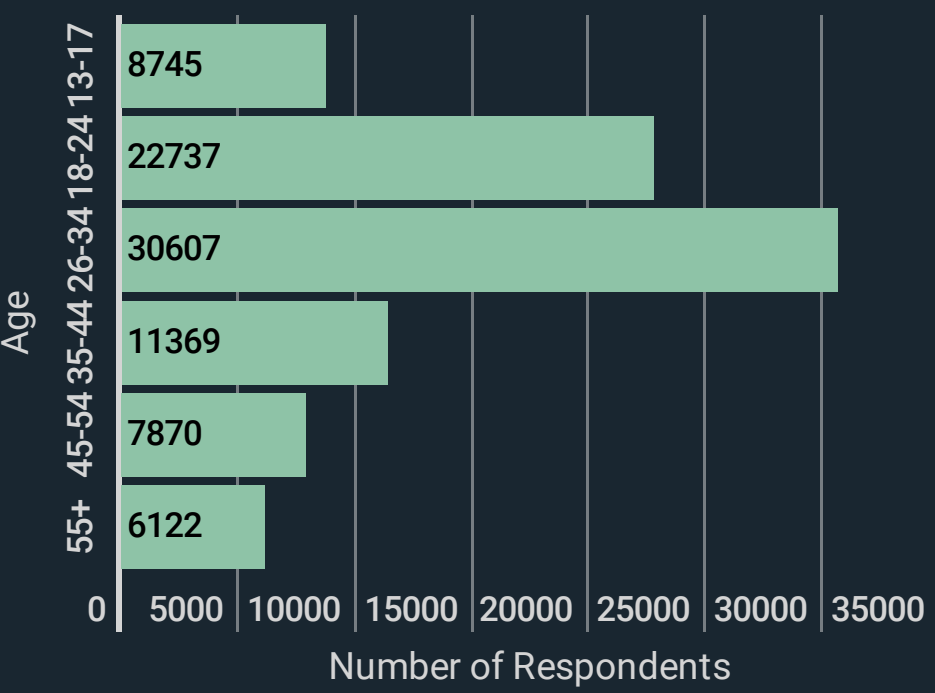
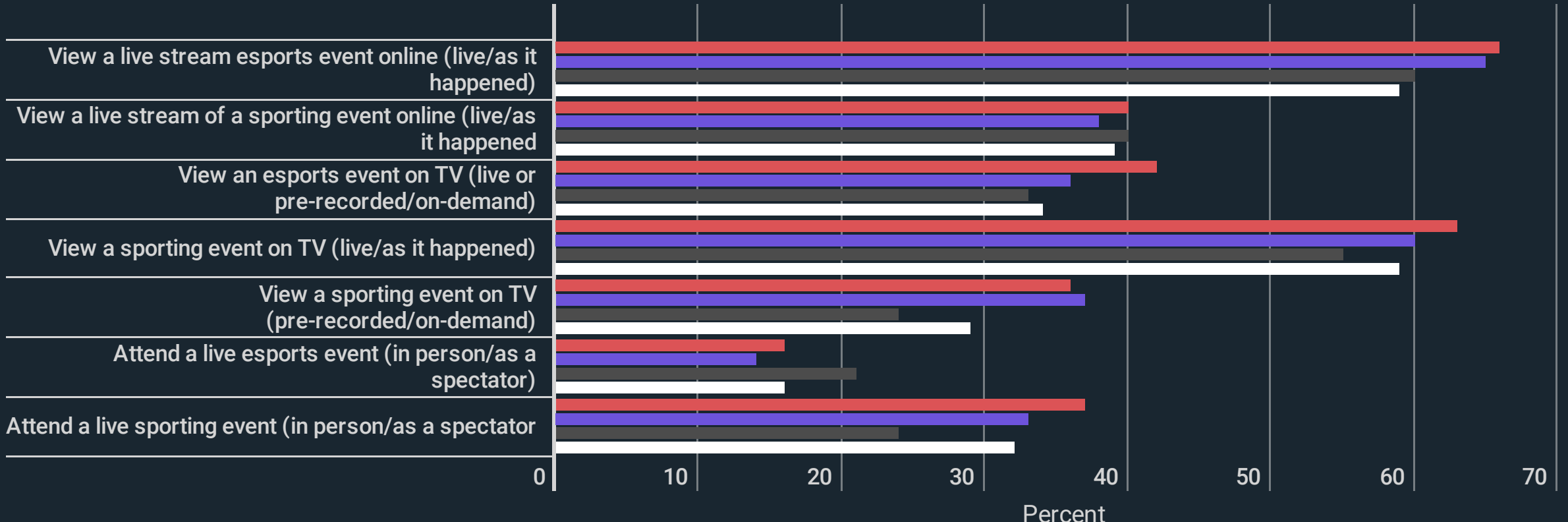
2x

The average hours spent per week playing Video Games is about double the amount of TV per week

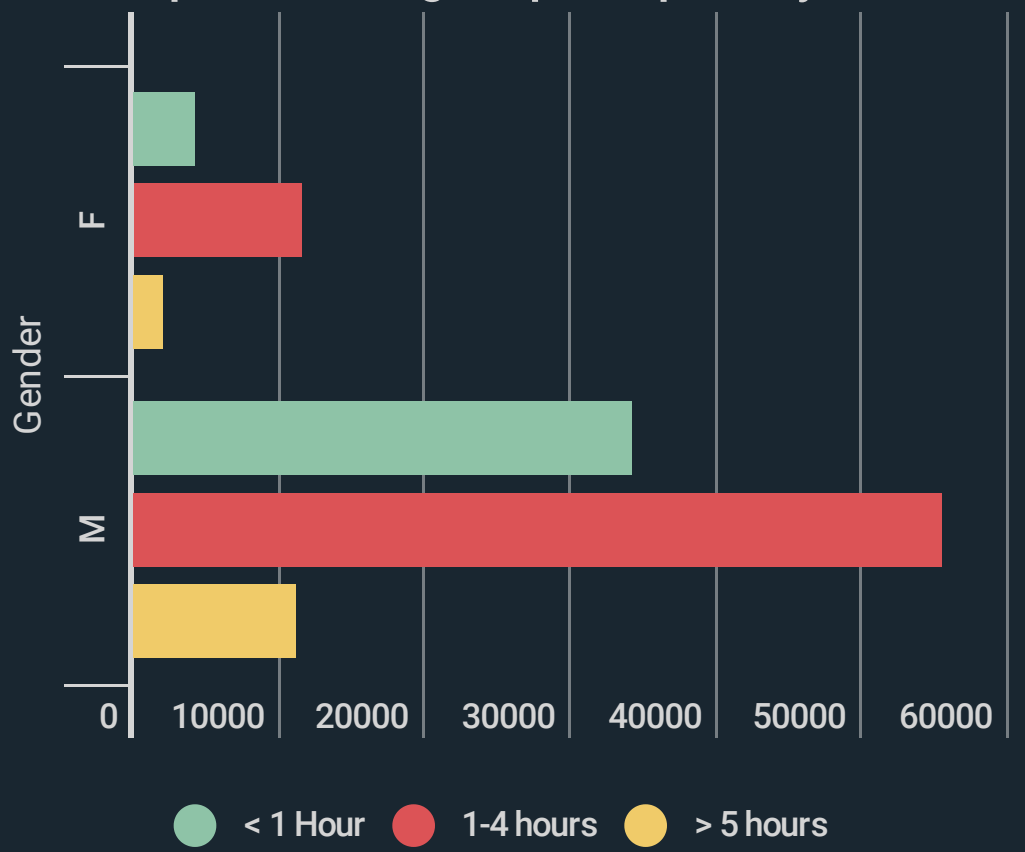


\$ = Using the internet on a computer for general use but not video games  
 ! = Using the internet on a computer for social networking but not video games  
 & = Using the internet on a mobile phone for General use but not video games  
 \* = Using the internet on a mobile phone for social networking but not video games

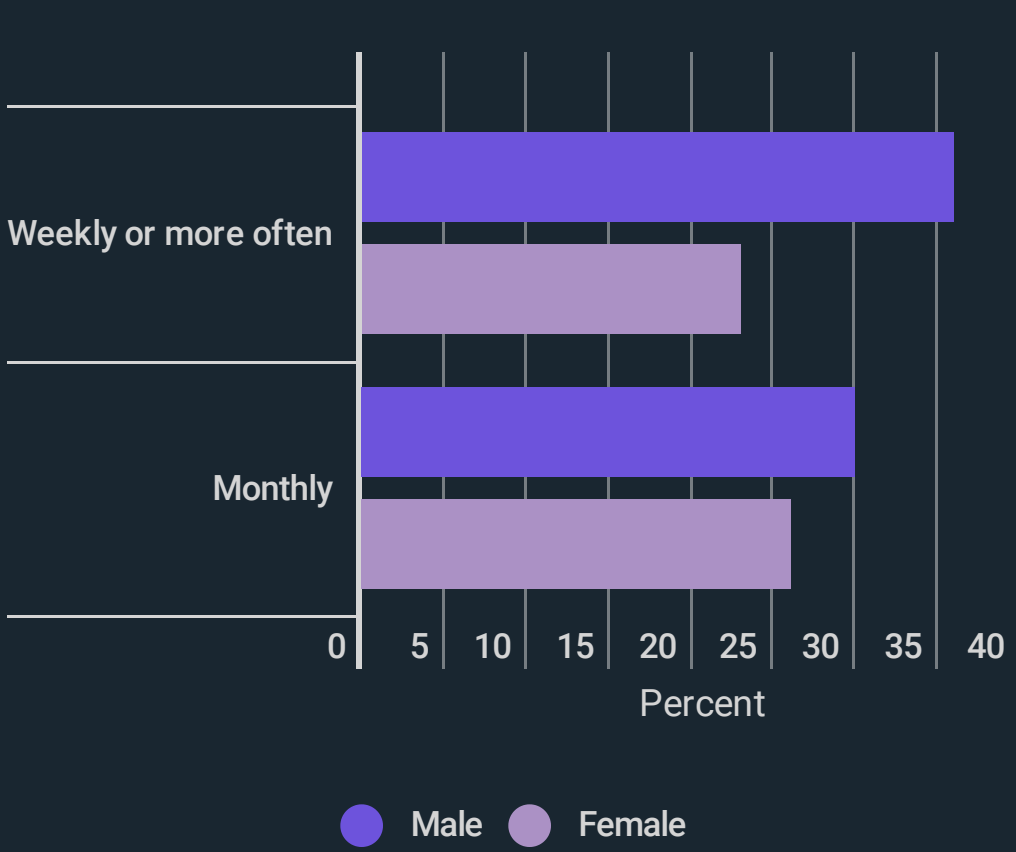
## Consumption of traditional sports vs E-sports



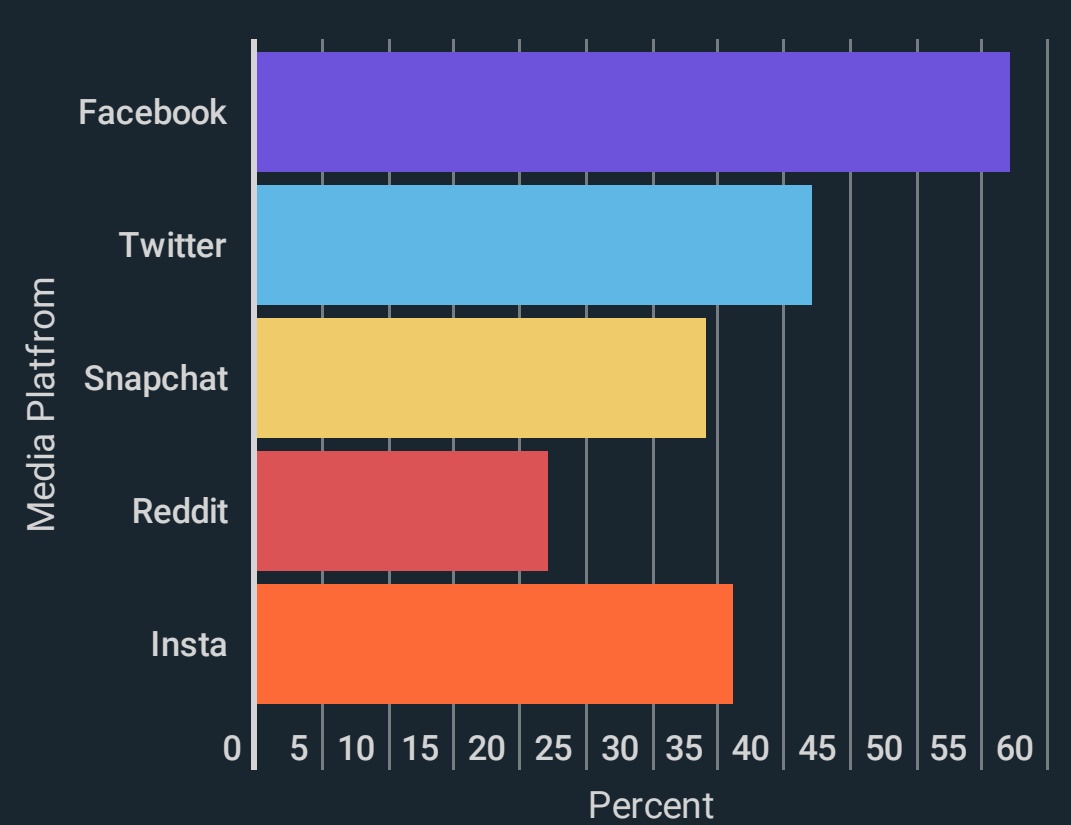
## Time Spent viewing E-sports per day



## Viewing a live stream



## Social Media platforms Esports fans use most



## How E-sports fans follow Players/Teams

	Players	Teams
1)	Youtube	Youtube
2)	Live Video Streaming	Twitter
3)	Twitter	Facebook
4)	Facebook	Live Video Streaming
5)	Instagram	Through other media
6)	Through other media	Instagram



## Sources

PWC Consumer Intelligence Series- "The  
Burgeoning Evolution of eSports"  
Neilson E-sports- "The Esports playbook"  
Business Insider-  
<https://www.businessinsider.com/playstation-4-ps4-xbox-one-sales-2017-6>  
"esports\_viewers\_gender\_duration"

# How E-sports fans watch E-sports

