



NEWZOO AND ESPORTS BAR:

KEY INSIGHTS INTO ESPORTS IN THE AMERICAS

SPORTS, SPANISH, AND SPENDING

newzoo

THIS REPORT IS BROUGHT
TO YOU BY ESPORTS BAR





TABLE OF CONTENTS

1. Foreword	4
2. Economy vs. Community	5
3. Language Popularity	7
4. Most Popular PC Titles	10
5. The Opportunities for Sports	14
6. Social Network Usage	19
7. Using Consumer Insights	23



NORTH AND SOUTH AMERICA COMBINED

SPENDING, SPANISH, AND SPORTS



ACCOUNTED FOR
40%
OF THE WORLD'S \$660
MILLION ESPORTS
REVENUES IN 2017



HAVE
26M
SPANISH SPEAKERS IN
THE ESPORTS
AUDIENCE



HAVE SEEN
21
INVESTMENTS BY
SPORTS CLUBS INTO
ESPORTS

FOREWORD

ESPORTS IN THE AMERICAS

The Americas are a key region for esports, representing 25% of the global esports audience and 40% of revenues generated within the esports industry. North America has seen large investments from game publishers, venture capitalists, and traditional media in its esports scene. With the Overwatch League and franchised NA LCS leagues, investment and growth is expected to continue in the coming years. In Latin America, esports has quickly risen in popularity, with its fans known for their passion and dedication to games and teams. Latin America has developed some of the most talented players in the world, especially in League of Legends and Counter-Strike: Global Offensive.

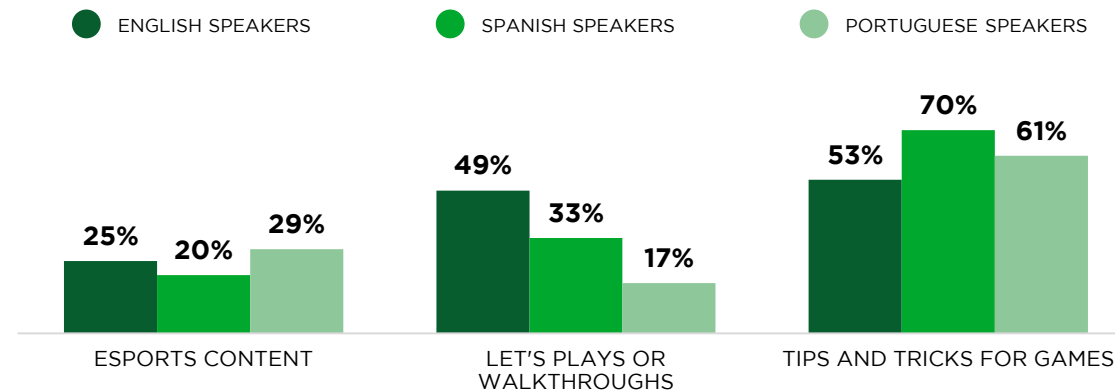
To effectively reach the esports community in the Americas, it is vital to understand the differences that come with the various cultures and languages in the region. There are three main cultures and languages to consider when creating an esports strategy for the Americas. A one-size-fits-all approach will not work as there are dramatic differences in the preferences and habits of the gaming and esports audience in each country.

NEXT EDITION:
February 12th-14th
Cannes



Jurre Pannekeet
Senior Market Analyst

TYPE OF GAME CONTENT WATCHED | SPLIT PER LANGUAGE

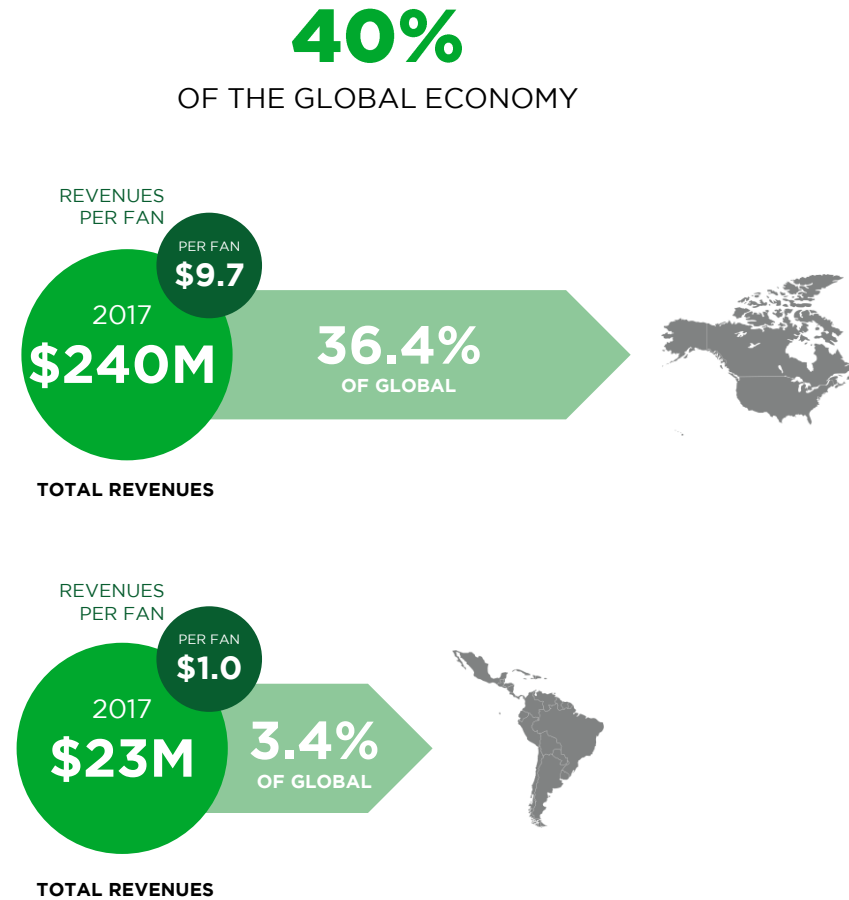
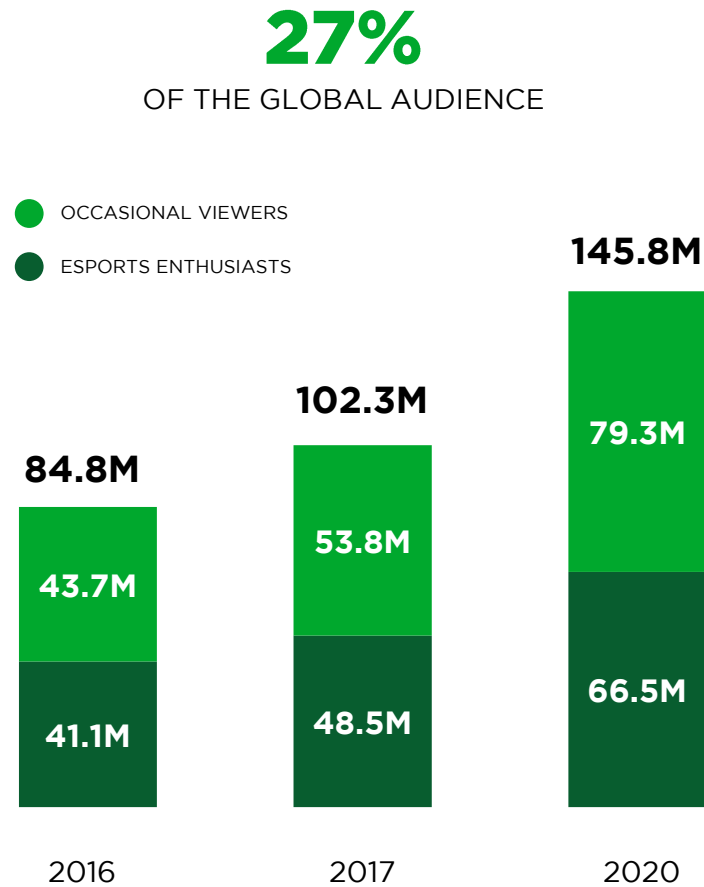




IN 2017, THE AMERICAS
ACCOUNT FOR
40%
OF THE WORLD'S
ESPORTS ECONOMY

THE ECONOMY IS EVEN LARGER THAN THE COMMUNITY

ESPORTS AUDIENCE IN THE AMERICAS | NORTH AMERICA & LATIN AMERICA | 2016, 2017, AND 2020





IN THE U.S.,
10%
OF THE ESPORTS
AUDIENCE IS HISPANIC
OR LATINO

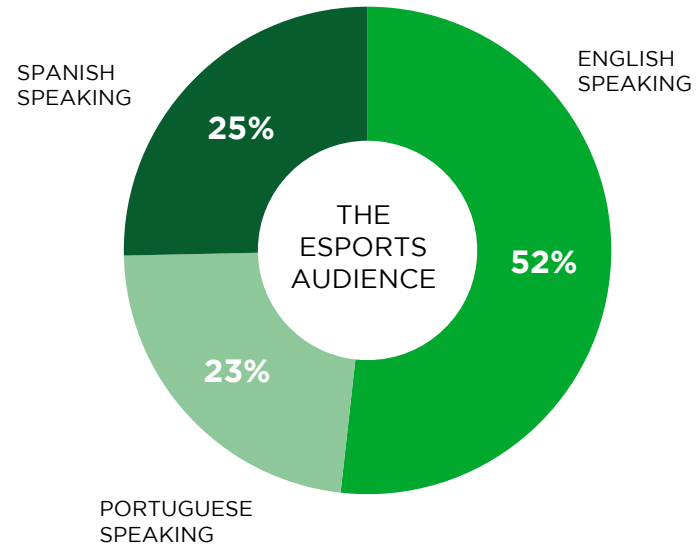


48% OF AUDIENCE SPEAKS SPANISH OR PORTUGUESE

ESPORTS IS MORE POPULAR WITH HISPANICS AND LATINOS IN THE U.S. THAN THE GENERAL POPULATION

ESPORTS AUDIENCE IN THE AMERICAS

SPLIT BY LANGUAGE | 2017



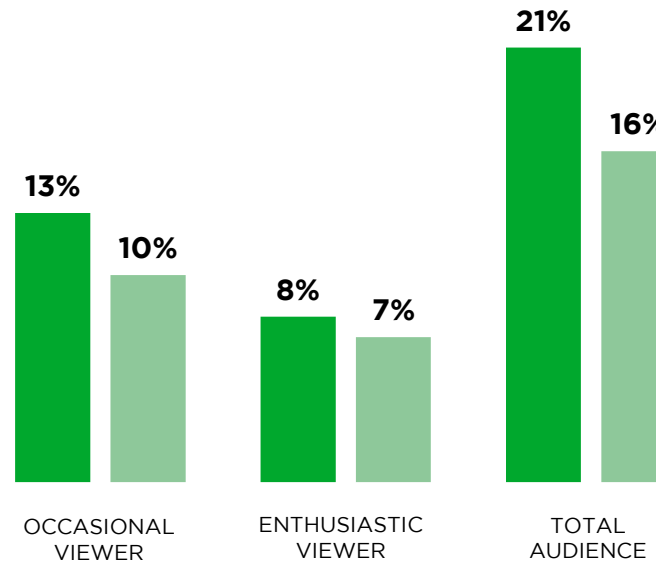
Source: Newzoo 2017 Global Esports Market Report



SHARE OF PEOPLE IN ESPORTS AUDIENCE

SPLIT BY AUDIENCE TYPE | U.S. 2017

● LATINO OR HISPANIC ● ONLINE POPULATION



Based on the online population aged 10-65

Source: Newzoo 2017 Esports Consumer Insights



In the U.S.,

10%

Of the esports audience is Hispanic or Latino



Of the global esports audience,

33.2M

are from Spanish speaking countries

41% OF LVP VIEWERS ARE FROM THE AMERICAS

THE SPANISH ONLINE GAMING COMPETITION CONTINUES TO GROW IN POPULARITY



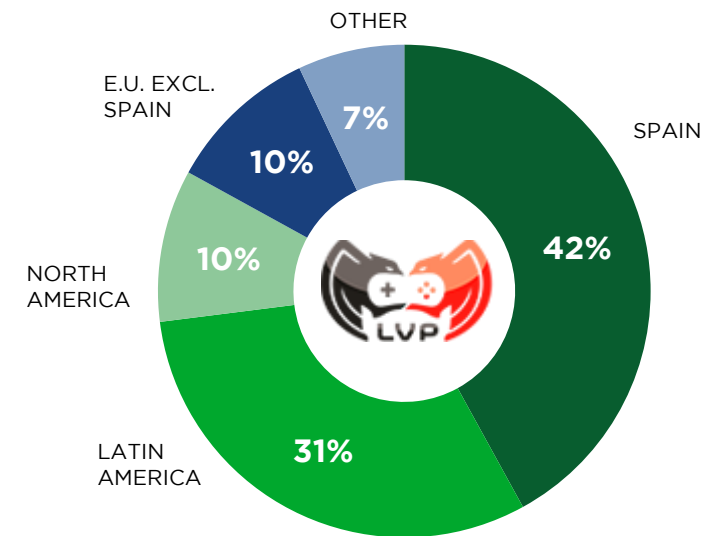
LIGA DE VIDEOJUEGOS PROFESIONAL
OWNER: FANDROID
FOUNDED: 2011
LANGUAGE: SPANISH



With over 250,000 registered players, the LVP is the biggest esports organization in Spain. It manages the most prestigious professional competitions (LVP Superliga), the biggest esports event in the country (Gamergy), two online competition platforms (ArenaGG and LigaPlaystation) and it regularly broadcasts many international tournaments in Spanish, such as the League of Legends © Championship Series, Call of Duty © World League, and the Rocket League © Championship Series.

LIGA DE VIDEOJUEGOS PROFESSIONAL AUDIENCE IN 2016

SPLIT BY LOCATION OF VIEWERS



LVP's Twitch audience
(Unique viewers):

9.7M

in 2017 (Q1+Q2), up **57%** YoY

LVP's VOD audience
(YouTube video views)

37.5M

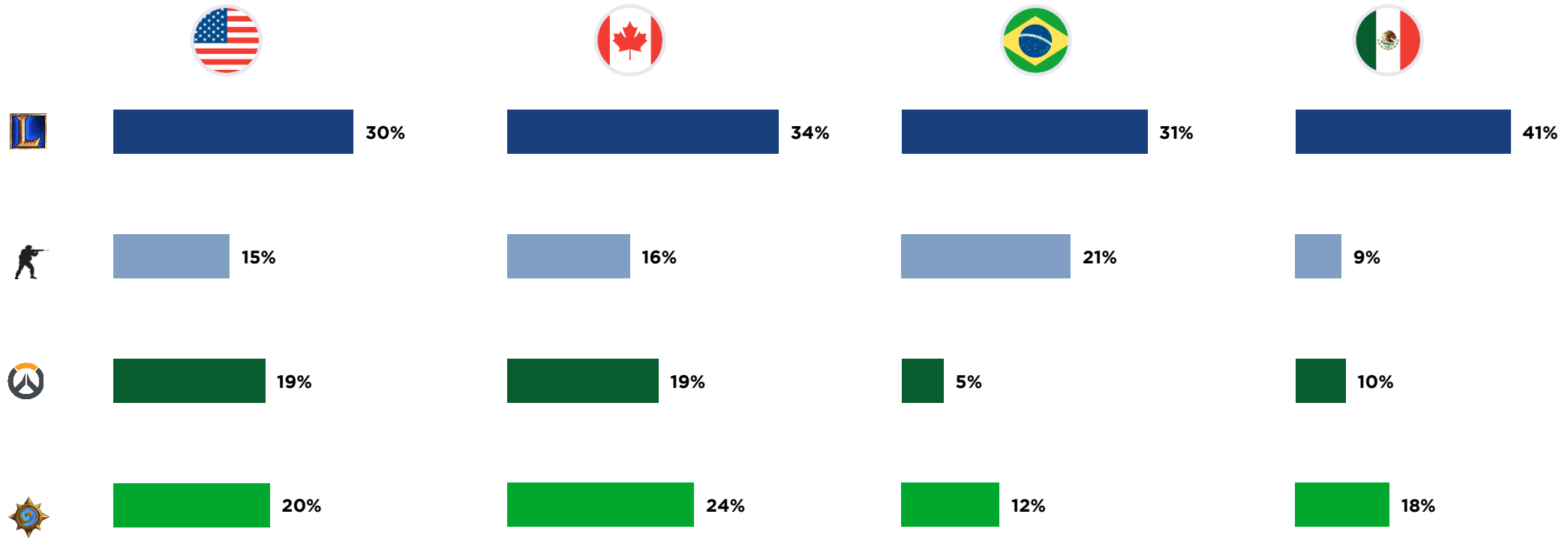
in 2016. Expected to grow **16%** in 2017.




OVERWATCH IS
3X
MORE POPULAR IN
NORTH AMERICA THAN
SOUTH AMERICA


EACH COUNTRY HAS UNIQUE POPULAR TITLES

SHARE OF PC GAMERS* THAT PLAYS POPULAR ESPORTS FRANCHISES | US, CA, BR, MX | JUNE 2017



Local Outliers  **6%** **Garry's Mod** vs. **3%** average

 **7%** **Heroes of the Storm** vs. **5%** average

 **8%** **Crossfire** vs. **1%** average

 **4%** **Tibia** vs. **1%** average

OUTLIERS IN THE U.S. AND CANADA

GARRY'S MOD AND HEROES OF THE STORM



GARRY'S MOD
PLATFORMS: PC
LAUNCH DATE: 2006 (STANDALONE)
PUBLISHER: VALVE
HQ: WALSALL, UNITED KINGDOM



Garry's Mod, developed by Facepunch Studios, was originally a mod for Valve's Half-Life 2. It was released as a standalone title in 2006. The physics sandbox game gives players unlimited options to be creative, as there are no predefined goals or objectives. Garry's Mod is one of the most downloaded games on Steam and there is a large internet community based around the title.

#10

Most popular PC game
in the U.S. in June



HEROES OF THE STORM
PLATFORMS: PC
LAUNCH DATE: JUNE 2015
PUBLISHER: BLIZZARD ENTERTAINMENT
HQ: SANTA MONICA, UNITED STATES



Heroes of the Storm (HotS) is Blizzard's answer to a 5-on-5 multiplayer online battle arena game. The objective is to destroy your opponent's base before they destroy yours. HotS has had great success in several countries, especially Canada, ranking higher than the likes of Dota and Rocket League. Compared to other esports titles, HotS has an active collegiate scene with Heroes of the Dorm.

#8

Most popular PC game
in Canada in June

OUTLIERS IN BRAZIL AND MEXICO

CROSSFIRE AND TIBIA



CROSSFIRE
PLATFORMS: PC
LAUNCH DATE: MAY 2007
PUBLISHER: Z8GAMES
HQ: TORONTO, CANADA



Crossfire is a first-person-shooter with different game modes, such as deathmatch, and search and destroy. It is no secret that Crossfire is a smash in South Korea and China, but since Z8Games published Crossfire in LATAM, it has become one of the most popular games in Brazil.

#7

Most popular PC game
in Brazil in June



TIBIA
PLATFORMS: PC
LAUNCH DATE: JANUARY 1997
PUBLISHER: CIPSOFT
HQ: REGENSBURG, GERMANY



Tibia is a free massively multiplayer online role-playing game. The opportunity to explore the Tibia world, go on quests, and gather treasures has attracted thousands of gamers all over the world through the years. Although Tibia is an old game, it has remained a top title because of its tricky riddles.

#10

Most popular PC game
in Mexico in June



39%

**OF ESPORTS
ENTHUSIASTS DO NOT
WATCH THE MOST
POPULAR SPORT IN
THEIR COUNTRY**

ESPORTS BRINGS SPONSORSHIP OPPORTUNITIES



OVERLAP BETWEEN FOOTBALL FANS AND ENTHUSIASTIC ESPORTS VIEWERS | NORTH AMERICA | 2017

ALL FOOTBALL FANS

ALL FREQUENT NORTH AMERICAN FOOTBALL VIEWERS



103.3M



ESPORTS & FOOTBALL FANS

NORTH AMERICAN ENTHUSIASTIC ESPORTS VIEWERS WHO **ALSO** WATCH FOOTBALL

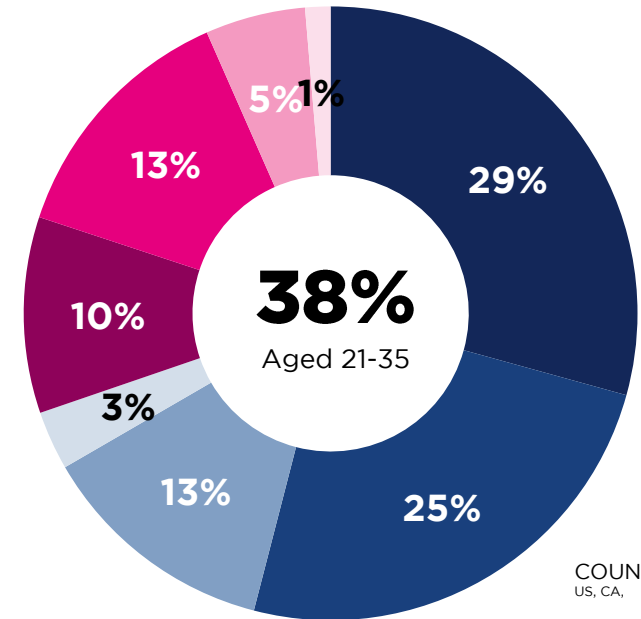
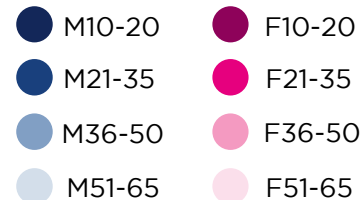
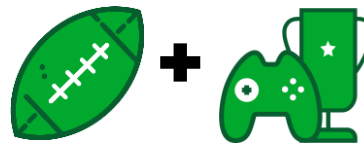
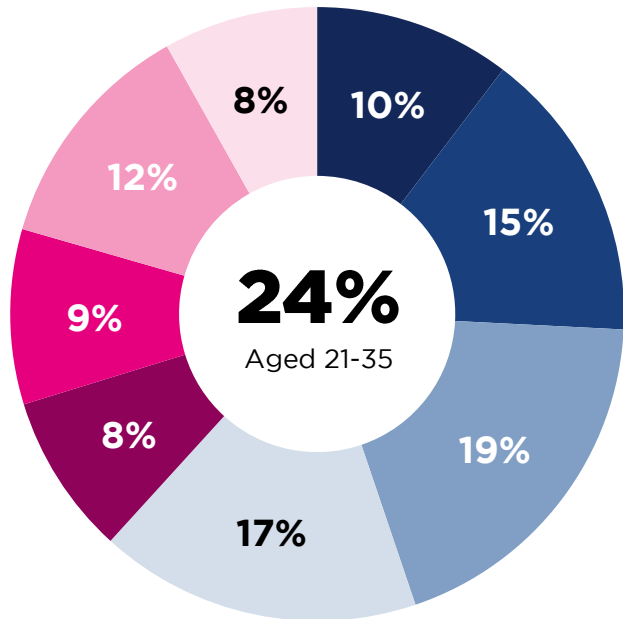
9.0M



ESPORTS ONLY FANS

NORTH AMERICAN ENTHUSIASTIC ESPORTS VIEWERS WHO DO **NOT** WATCH FOOTBALL

7.3M



COUNTRY SCOPE
US, CA

SPORTS CLUBS STEPPING INTO ESPORTS | NA

POPULARITY OF PROFESSIONAL GAMING DRIVES TRADITIONAL SPORTS CLUBS TO ENTER ESPORTS



BOSTON BRUINS
MAIN TEAMS: LOL AND CSGO
FOUNDED: 1924
CLUB'S MAIN SPORT: ICE HOCKEY



Delaware North, the parent company of hockey team Boston Bruins, invested in North American esports organization Splyce in early 2017. Apart from the main teams, Splyce also houses teams in games such as Call of Duty, Starcraft 2, and Hearthstone. TD Garden serves as the home facility for Splyce and is where the NA LCS Summer 2017 Finals will take place in September.



PHILADELPHIA 76'ERS
MAIN TEAMS: LOL AND CSGO
FOUNDED: 1946
CLUB'S MAIN SPORT: BASKETBALL



Philadelphia 76'ers became the first North American sports team to own an esports organization when it acquired one of the oldest and most respected teams in esports, Dignitas, last year. Dignitas has had a lot of success over the last decade in top-tier esports franchises, such as League of Legends and Counter-Strike: Global Offensive.



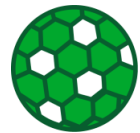
AND A CHANCE TO REACH A YOUNGER AUDIENCE

OVERLAP BETWEEN SOCCER FANS AND ENTHUSIASTIC ESPORTS VIEWERS | LATIN AMERICA | 2017



ALL SOCCER FANS

ALL FREQUENT LATIN AMERICAN SOCCER VIEWERS



70.2M



ESPORTS & SOCCER FANS

LATIN AMERICAN ENTHUSIASTIC ESPORTS VIEWERS THAT **ALSO** WATCH SOCCER

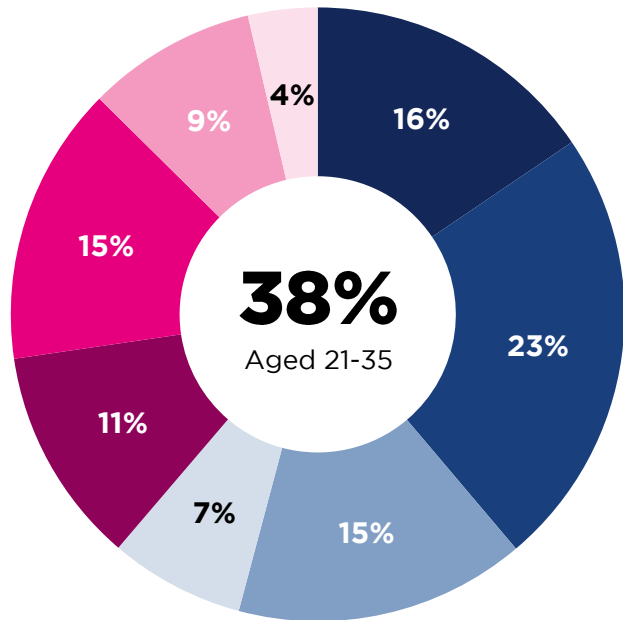
4.8M



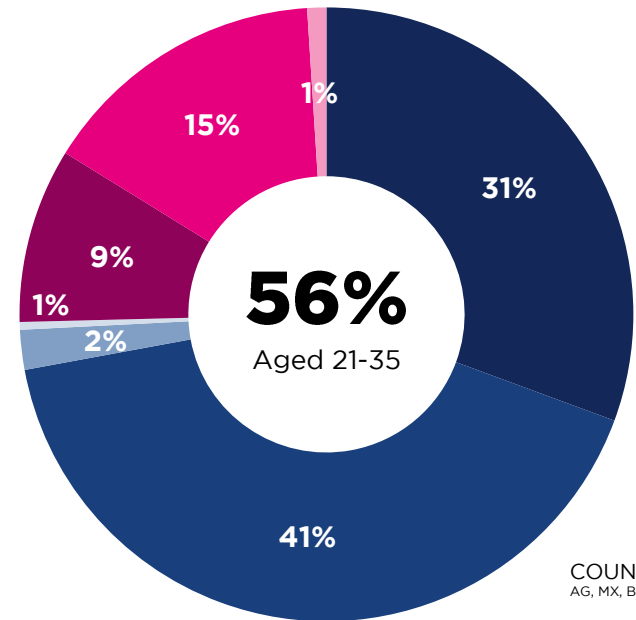
ESPORTS ONLY FANS

LATIN AMERICAN ENTHUSIASTIC ESPORTS VIEWERS THAT DO **NOT** WATCH SOCCER

1.4M



- M10-20
- M21-35
- M36-50
- M51-65
- F10-20
- F21-35
- F36-50
- F51-65



COUNTRY SCOPE
AG, MX, BR

SPORTS CLUBS STEPPING INTO ESPORTS | LATAM

POPULARITY OF PROFESSIONAL GAMING DRIVES TRADITIONAL SPORTS CLUBS TO ENTER ESPORTS



RIVER PLATE
TEAMS: FIFA
FOUNDED: 2016
CLUB'S MAIN SPORT: SOCCER



The rise of esports in Argentina convinced Argentinian sports organization River Plate to enter the space in 2016. The club signed FIFA player Franco Colagrossi for its newly established River Play division and organized a FIFA tournament where it signed its second FIFA player, Elias Vargas.



CLUB AMERICA
TEAMS: FIFA
FOUNDED: 2017
CLUB'S MAIN SPORT: SOCCER



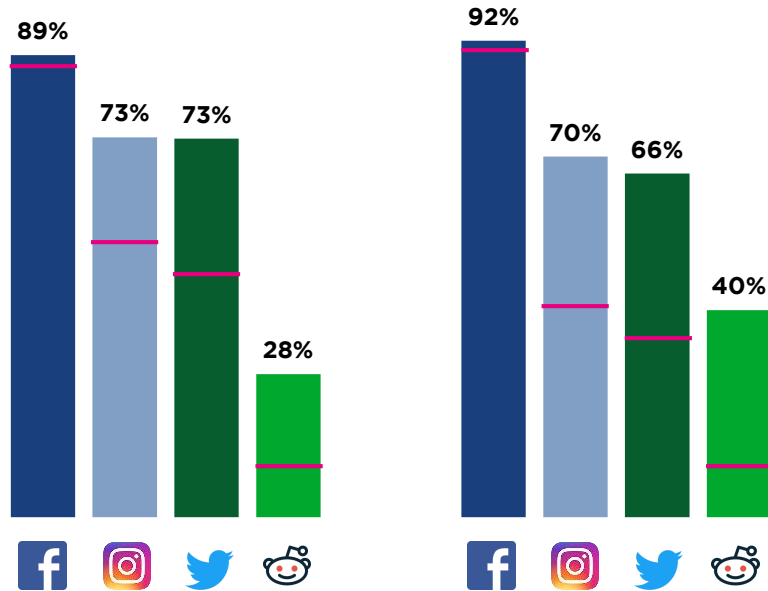
Mexican soccer organization Club America announced its entry into esports in May 2017. The upcoming Virtual Football Organization (VFO), which will be hosted by EA Sports for its FIFA 18 game, drove the club to enter into FIFA esports. Club America will be the first Mexican team to enter the VFO.



40%
OF CANADA'S ESPORTS
ENTHUSIASTS USE
REDDIT VS. 10% OF THE
ONLINE POPULATION

ESPORTS ENTHUSIASTS LOVE TO USE REDDIT

POPULARITY OF SOCIAL NETWORK AND CHAT APPS | ESPORTS ENTHUSIASTS | NORTH AMERICA | 2017



— Online population



Profile of North American Reddit users

37% of Reddit users have a high income vs. 32% of all gamers



34% of Reddit users have a Spotify subscription vs. 19% of all gamers



78% of Reddit users have a Netflix subscription vs. 64% of all gamers



59% of Reddit users watch more than 6 hours of TV/video content online vs. 55% of users watching more than 6 hours on a traditional TV set.

TEAMS GOING BIG ON SOCIAL MEDIA

NORTH AMERICA



Team SoloMid
TEAMS: League of Legends, Hearthstone, Player Unknown's
Battleground, Super Smash Bros, Vainglory
FOUNDED: 2009
LOCATED: USA



0.5M

Facebook likes



1.4M

Twitter followers



Optic Gaming
TEAMS: Call of Duty, CS:GO, Halo, Gears of War
FOUNDED: 2006
LOCATED: USA



0.2M

Facebook likes



3.0M

Twitter followers

TEAMS GOING BIG ON SOCIAL MEDIA

LATIN AMERICA



Pain Gaming
TEAMS: LEAGUE OF LEGENDS
FOUNDED: 2012
HQ: BRAZIL



Luminosity
TEAMS: CS:GO
FOUNDED: 2012
HQ: LOS ANGELES, CALIFORNIA, USA



586k

Facebook likes



332k

Twitter followers



173k

Facebook likes



266k

Twitter followers

IN-DEPTH CONSUMER PROFILING

TO MATCH YOUR TARGET GROUP AND OPPORTUNITIES IN ESPORTS

200+ VARIABLES



Newzoo's esports consumer insights allows you to profile your audience on 200+ variables including demographics, media behavior, esports participation and viewership, favorite franchises, spending habits, and brand attitude. Find a factsheet with topic list [here](#).

28 COUNTRIES

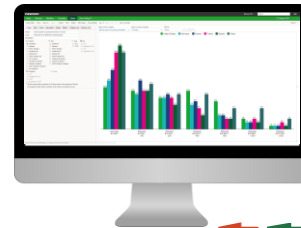


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QUANTIFY POTENTIAL REACH

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



FOCUS MARKETING SPEND

“Understanding the demographic profile and complete media behavior of the community around the major esports franchise allowed us to define our own target audience and spend our sponsorship money most effectively.”

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Reed MIDEM's Esports BAR is the first-of-its-kind networking event dedicated to bringing together esports professionals and commercial partners in one place to develop esports into the entertainment of the future. The sold-out inaugural edition took place 15-17 February 2017 in Cannes. It was followed by the second in Miami during 18-20 September, when over 100 pre-selected leading executives from esports teams, leagues and tournaments, game publishers, brands, advertising agencies and related television and online platforms met to do business. The second Cannes event will take place 12-14 February, 2018.

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