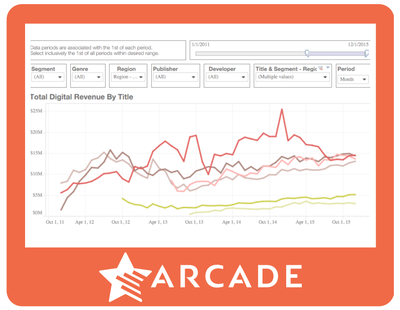
SUPERDATA
GAMES & INTERACTIVE MEDIA INTELLIGENCE

ESPORTS COURTSIDE: PLAYMAKERS OF 2017

ARCADE PLAYER PROFILE

The **SuperData Arcade and Player Profile** are the world's most robust and only cross-platform business intelligence tools on the worldwide games market. The metrics contained here represent the largest and comprehensive view of the vast and growing digital games market.

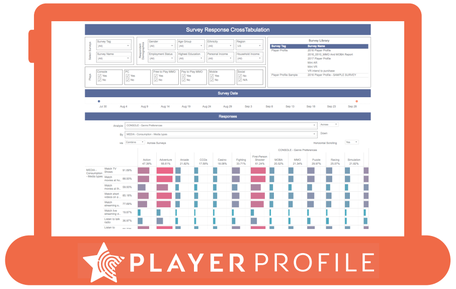
To arrange a demo, contact Sam Barberie at sam@superdataresearch.com.



Access insights of over 500 games and 100 publishers, ranging from high-level trends to granular data.

Create custom queries and segmentation across all data and export to .csv or PDF format for full analytical control and presentations.

Receive automatic custom data pulls and spot opportunities early as soon as updates are available.



Learn detailed consumer data and behavior on Player Profile across all demographies and domains.

See beyond the numbers from quarterly updated Audience Tracker; know your consumer, where to find them, and what they want.

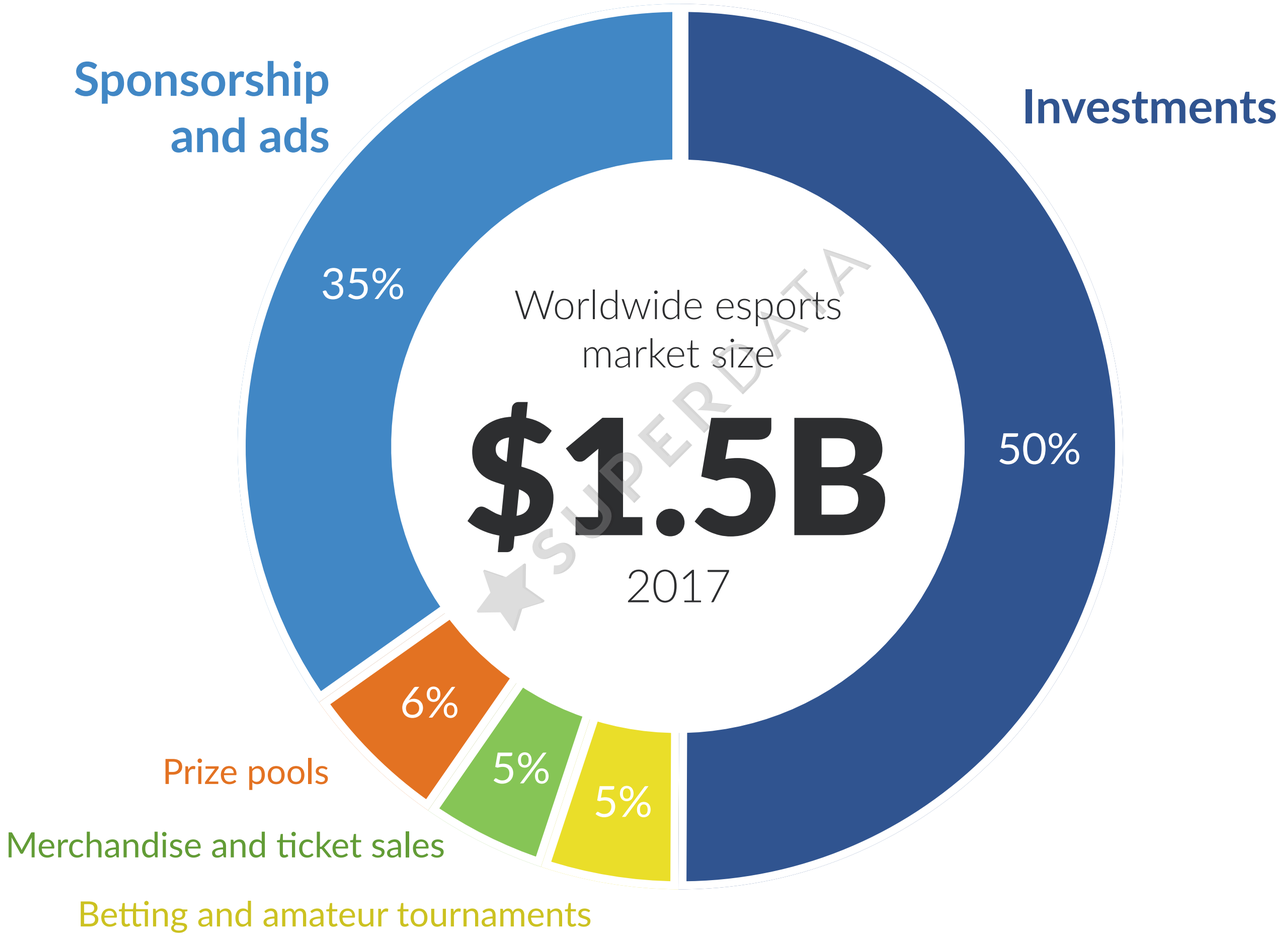
Identify audience inflection points and explain who and what is driving them.

Esports grows to a $1.5B industry this year and shows no signs of slowing down

Global esports revenue will grow 26% by 2020 as it attracts a more mainstream audience.
This increase will be fueled by a viewership projected to grow 12% each year and a swelling number of third-party investments.

In addition to receiving indirect revenue from investments, *Overwatch* and *League of Legends* are projected to grow their direct revenue by selling brand sponsorships, advertisements, ticket sales, and team merchandise.

Investors showed confidence in esports this year by contributing $750M to the market



Advertisers and investors finally take notice of esports' access to key audiences, with contributions accounting for 85% of the worldwide market.

Video game companies like Activision Blizzard, Riot Games and Valve continue to support their flagship esports titles with player franchising agreements and larger prize pools. But a number of high-profile sports organizations and brands invested in the market for the first time, highlighting a growing confidence in its ability to break into the mainstream. Advertisers and brands like the The Kraft Group (owner of New England Patriots) and Mercedes-Benz are among the most notable, with several other sports teams and brands making financial commitments.

League of Legends attracts more players while *Dota 2* draws higher prize pools

	Dota 2	League of Legends	
PRIZE POOLS	$37.1M	$11.4M	PRIZE POOLS
MONTHLY ACTIVE USERS	12.6M	101M	MONTHLY ACTIVE USERS
Hours watched April - Oct	465M	1,665M	Hours watched April - Oct.

Dota 2's crowdfunding strategy pays off as fans are willing to chip in to prize pools.

Dota 2 awards its professional athletes more prize money than *League of Legends*, despite having a smaller player base and viewership. Since 2013, *Dota 2* has crowdfunded its International championship by selling the Battle Pass (formerly called The Compendium). The prize pool for *Dota 2*'s annual finals, The International, broke esports records this year by reaching $25M, up from $21M in 2016. This includes a pack of in-game items and offers rewards for predicting esports match results. *League of Legends* also relies on crowdfunding for the League World Championship prize pool and raised $5M in 2017.

Overwatch League spreads across US cities, laying the groundwork for regional rivalries

Cities hosting *Overwatch* teams, 2017

Cities

Overwatch League bridges the gap between esports and traditional sports by basing teams around cities, opposed to larger regions. This makes *Overwatch* more approachable to traditional sports investors.

Play

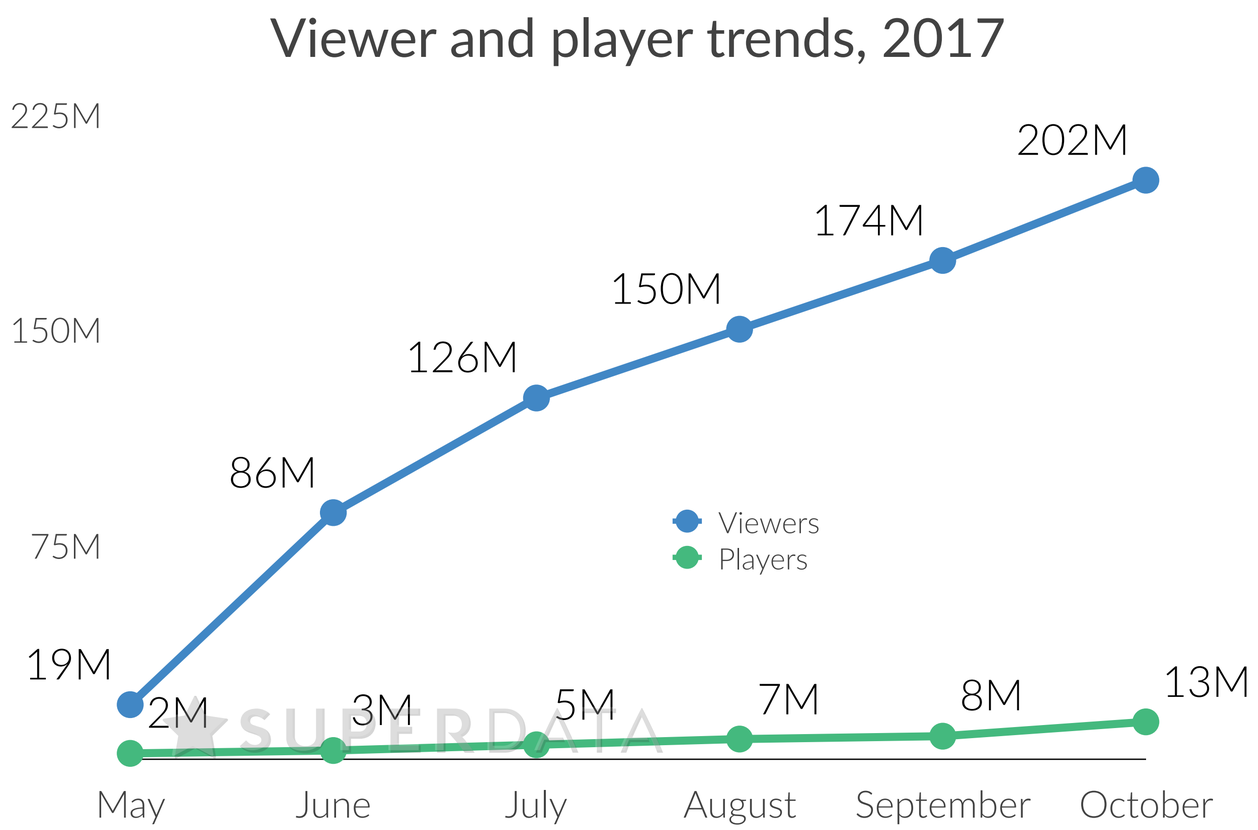
Overwatch is the most played shooter worldwide outside of *Crossfire*, averaging 14.4M monthly users on PC and console this year.

Esports Anticipation

Among US fans of competitive gaming, *Overwatch* is the most anticipated esport title.[1]

1. When asked: what games would you like to see more esports content for in the future?

PlayerUnknown's Battlegrounds has attracted a viewership of 202M in record time



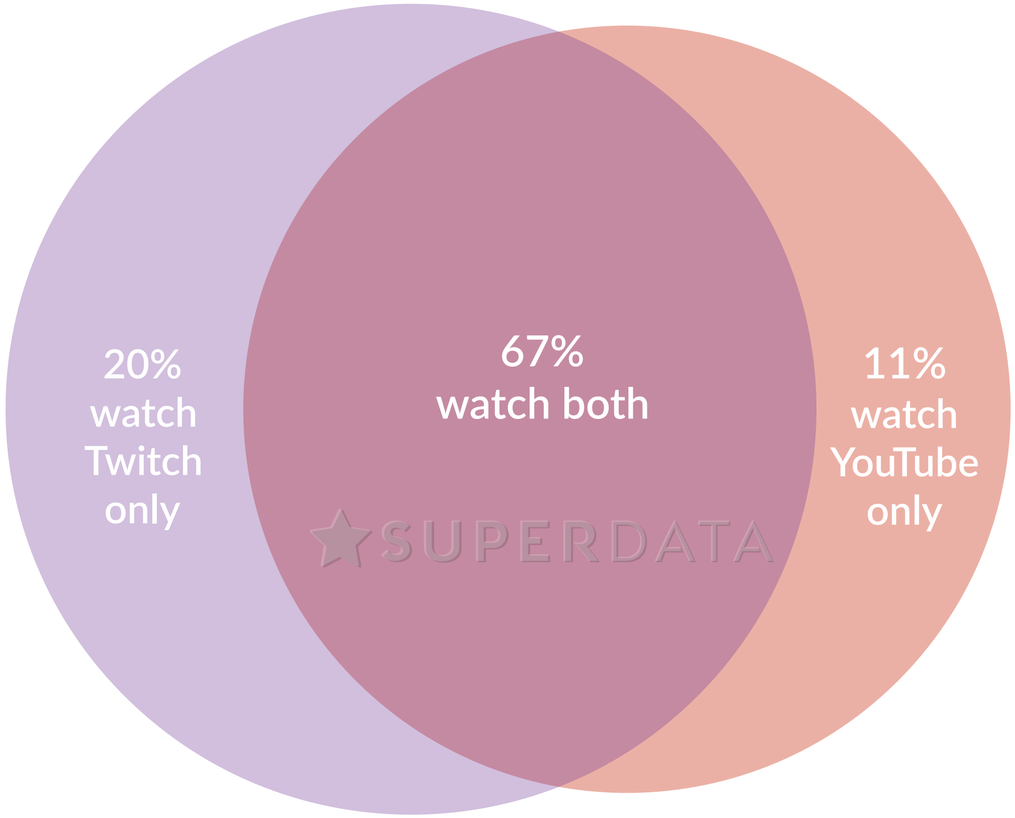
PlayerUnknown's Battlegrounds is on its way to becoming the first Battle Royale esport.

The game has surpassed 200M unique viewers only seven months after its April release. October Twitch viewership moved closer to that of *League of Legends'* 286M unique viewers— the largest audience for a single game. *PUBG*'s unprecedented viewership is now 15 times larger than its player base, indicating a growing popularity among non-players as well.

Twitch and YouTube continue to fight for the same esports audience

Most esports fans use both Twitch and YouTube to consume gaming content.
For now, people go to each platform for different things, turning to YouTube for more curated content and Twitch for live streams. Twitch remains the most popular destination for esports fans; 87% of US esports viewers tune into their live streams while 77% watch esports content on YouTube.

US esports viewership split



DEFINITIONS

Terminology

- **Esports:** Professional or high-level amateur gaming competitions.
- **Live Stream:** Gameplay streamed live online on sites like Twitch.
- **Monthly Average Users (MAU):** The number of users who log in and play a game at least once over the course of a month, including trial and free users. Users can be counted more than once within a particular game if they log in through multiple accounts, or within a particular genre/category if they log into multiple games.

EVERYTHING ELSE

SuperData Research

SuperData provides relevant market data and insight on digital games and playable media. Founded by veteran games industry researchers, SuperData covers the market for free-to-play gaming, digital console, mobile, PC downloadable, gaming video content and eSports.

Monthly analyses and industry reports using digital point-of-sale data. Using digital point-of-sale data received from publishers, developers and payment service providers, we base our analyses on the monthly spending of 78 million paying digital gamers worldwide.

Understand what people play, connect to and spend on. Our research combines transaction-level data with qualitative consumer insight. Our leadership team has experience spanning across major research firms, including NPD, Nielsen, DFC Intelligence, Comscore, Experian, Jupiter and Forrester.

A next gen approach for next gen entertainment. Our customer base includes legacy publishers (e.g. Activision Blizzard, Ubisoft), digital-only publishers (e.g. Nexon, Tencent, Wargaming), media companies (e.g. Google, Coca-Cola) and industry service providers (e.g. PayPal, Visa, GameStop).

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