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FREE VERSION

2019

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INTRODUCTION

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FOREWORD

Esports has always provided an engaging viewing experience to an audience no longer tied to traditional media. This has propelled the massive growth in esports viewership and audience numbers. Now that many leagues and tournaments have established a sizable audience, companies are shifting their focus towards monetizing this audience directly. This transition started in 2018, but this year, the industry will take its early learnings and expand upon them. As a result, 2019 will be esports' first billion-dollar year, and its vigor has attracted brands and companies across every industry.

Non-endemic brands sponsored esports organizations in droves last year, which will continue in 2019. From automotive and fashion to food and even the military, it seems that every industry wants a piece of the esports pie. And for good reason: time and time again, Esports Enthusiasts have proven how fully engaged they are with their favorite pastime and they are willing to spend big to show it. Between merchandise and all-access passes, the industry is finding ways to give them the freedom to do so.

As it looks to grow, esports is using sports as its main inspiration to monetize fans. At the same time, the sports industry is taking cues from esports, hoping to appeal to a younger audience. Esports is striving to drive up revenues from sponsors and media rights. Meanwhile, teams and individual players are doubling down on establishing themselves as brands, developing large and loyal fanbases of their own. Esports has the luxury of space to easily experiment with its monetization options and think of radical new formats. Many of these innovations will trickle into traditional sports in the coming years. In fact, it is already happening. The sports industry is currently adapting direct consumer monetization strategies that spanned from esports and gaming, aiming to shift revenues away from linear media rights into direct digital spending.

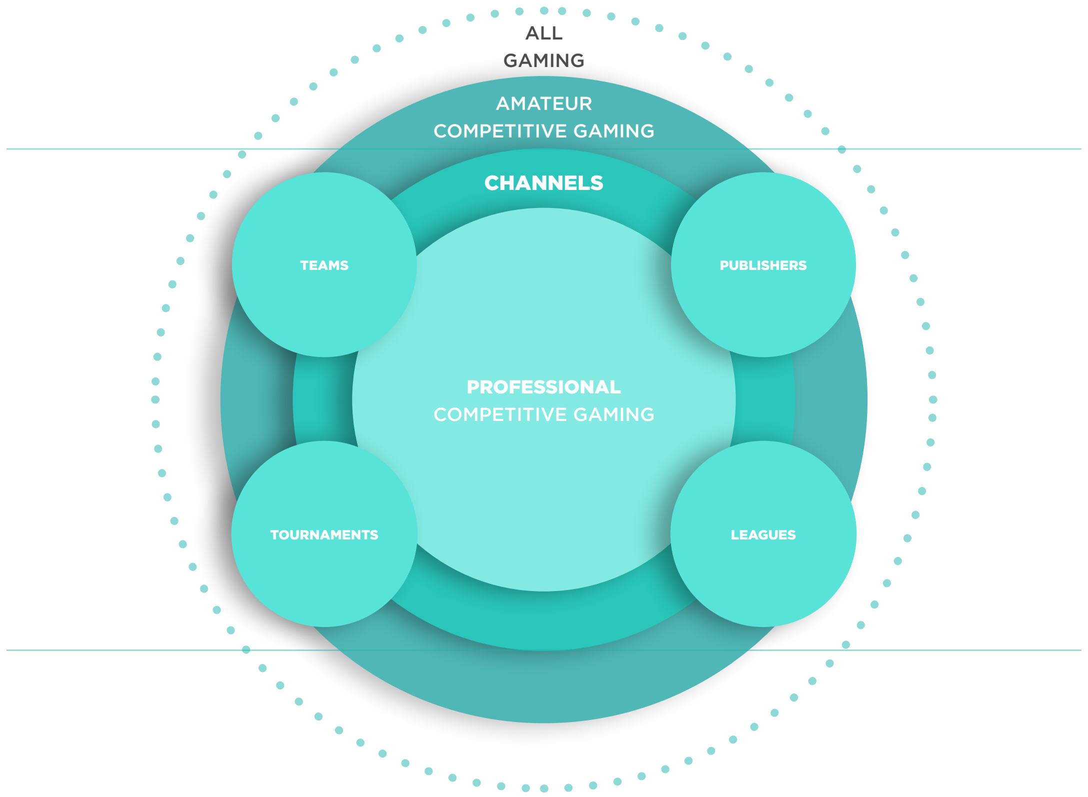
The full report features key insights into 10 different regions. We also discuss the six key trends driving the esports, media, and tech industries forward, and present our latest forecast scenarios for the esports audience and its economy. Together, esports and games have surpassed the yearly revenues generated by the film industry and have equaled revenues from traditional sports. The Golden Age of Esports is well underway and we couldn't be more excited.

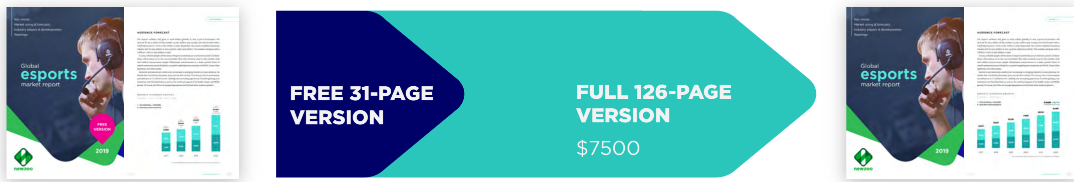
Jurre Pannekeet
SR. MARKET ANALYST

SCOPE OF THE REPORT

AUDIENCE & REVENUE SCOPE

This report aims to give a reliable and realistic overview of the current status and future of the esports market. Multiple data sources were used in shaping the Global Esports Audience and Revenue Model, which is continually updated. Market sizing figures in this report reflect the professional competitive gaming scene and exclude viewership or revenues generated through amateur competitive gaming.





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BOUNDARIES OF ESPORTS

There are various interpretations of what the esports industry actually encompasses. In addition to differing opinions about the market's boundaries, there are disagreements about the term esports itself. We define esports as follows: professional-level competitive gaming in an organized format (tournament or league) with a specific goal/prize, such as winning a championship title or prize money. This is why our esports market sizing includes revenues and viewership from professional competitive gaming content only. We do not include amateur competitions and live streaming around non-organized competitive gaming.

Still, live streaming around non-organized competitive gaming is an exciting industry in itself, full of its own developments. We refer to this industry as the live-streaming market, but it is also commonly known as game streaming. The industry sees a number of gamers live broadcasting themselves online while playing. Some of these streamers have grown to celebrity status, including Ninja and Shroud. The former has grown into a household name over the past year or so. We see the live-streaming market as separate to esports. Although there is a significant audience overlap between both markets, their content and monetization strategies differ—for now. The lines are beginning to blur, owing to the increasing frequency at which esports and live streaming formats are overlapping. For example, popular streamers are competing in pro-level esports more often.

We also make a clear distinction between amateur participation in tournaments, competitive games in general, and esports. Amateur participation in competitive gaming is vastly different from the professional scene. Even if amateur competitions offer prizes, the focus is on participation and not on entertaining viewers. While we do size the market for amateur competitive participants, such as those who compete in online tournaments like ESL, FACEIT, or Toornament and/or in LAN events, they are not a part of our esports audience market sizing.

KEY TAKEAWAYS

GLOBAL ESPORTS REVENUES WILL SURPASS $1 BILLION FOR THE FIRST TIME

1. Global esports revenues will grow to $1.1 billion in 2019, a year-on-year growth of +26.7%. North America will generate $409.1 million of this amount, while China will account for $210.3 million.

2. In 2019, $897.2 million in revenues, or 82% of the total market, will come from brand investments (media rights, advertising, and sponsorship). This will increase to $1.5 billion by 2022, making up 87% of total esports revenues.

3. Globally, the total esports audience will grow to 453.8 million in 2019, a year-on-year growth of +15.0%. Esports Enthusiasts will make up 201.2 million of this number, growing +16.3% year on year.

4. China will have the most Esports Enthusiasts in 2019 with 75.0 million, followed by the U.S. and Brazil. South Korea will have the highest share of Esports Enthusiasts relative to its online population (Esports Density) in 2019 with 12%.

5. The global average revenue per Esports Enthusiast will be $5.45 this year, up +8.9% from $5.00 in 2018.

6. In 2018, there were 737 major events. Together, they generated for $54.7 million in ticket revenues, down from $58.9 million in 2017.

7. The total prize money in 2018 reached $150.8 million, a significant increase from 2017's $112.1 million.

8. The League of Legends World Championship was 2018's biggest tournament by live viewership hours on Twitch, with 53.8 million hours. It also produced $1.9 million in ticket revenues. The Overwatch League was the most-watched league by live viewership hours on Twitch, generating 79.5 million hours.

2.

METHODOLOGY & TERMINOLOGY

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METHODOLOGY & TERMINOLOGY

METHODOLOGY

SIZING THE MARKET WITH A VARIETY OF DATA

Newzoo aims to provide its clients with the best possible assessment of the size of the overall esports market and its future potential. By synthesizing many data points, we provide estimates on a regional and individual country/market level. Below, we describe our approach in detail to explain what underpins our forecasts, facilitating comparisons with other data sources.

At the highest level, Newzoo focuses on three key metrics for every market: Esports Enthusiasts, Occasional Viewers, and revenues. We define a market as a country, region, or other geographic territory.

The data on Esports Enthusiasts and Occasional Viewers is largely based on our proprietary primary consumer research (Consumer Insights), which continues to form the basis of our detailed understanding of consumers, esports, and games. In 2019, we will carry out research in more than 30 countries/markets, covering more than 60,000 consumers. Starting in 2009 with six countries/markets, this is now the largest games-related consumer research program in the world.

The Esports Enthusiast and Occasional Viewer ratios resulting from this consumer research are projected against the online population, using population, internet penetration, and urbanization metrics. The urban online population is an important driver of the number of potential esports viewers and an indicator of how much more structural growth a country or market can expect in the relevant population of potential esports viewers.

The revenue forecasts are based on our predictive esports market model, which incorporates data from multiple sources: macroeconomic and census data, primary consumer research, data provided by our official industry data partners, public event data in terms of viewership and attendees, media reports, and third-party research. We also receive valuable input from clients, including leaders in the esports industry.

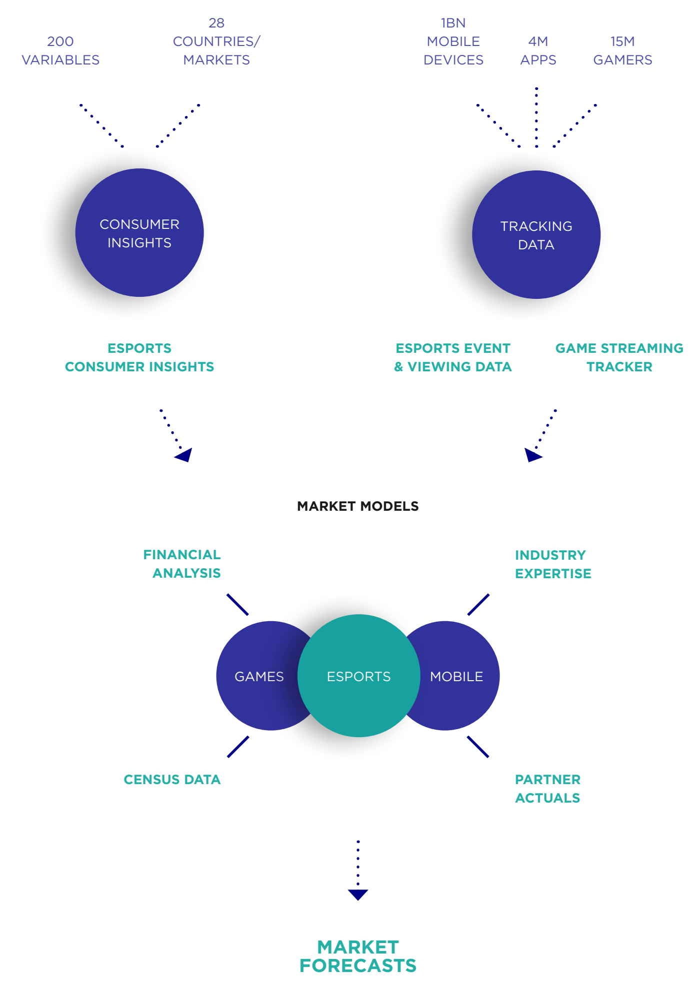
Market size estimates and growth forecasts for individual countries/markets and in aggregate for the total industry are validated against our analysis of various contextual metrics. For instance, our market model calculates the average revenue generated per Esports Enthusiast, which is then compared with historic numbers, other regions, GDP per capita, and traditional sports spending. Overall, our forecasts are always the outcome of an iterative process, reviewing the implications of our assumptions on a very granular level.

We define industry revenues as the amount the industry generates through the sale of sponsorship, media rights, advertising, publisher fees, and tickets and merchandising. Our revenue numbers exclude prize pools and player salaries, which we consider to be cost items at an industry level, as well as fan contributions to prize pools, which we consider in-game revenues. We also exclude revenues from online gambling and betting related to esports (e.g., via BWIN, Unikrn). Finally, we do not include capital investments in esports organizations, as we think it is important to distinguish between revenues and investments. To clarify, capital investment is the activity of investing funds in a firm or enterprise to further its business objectives. The term brand investment used throughout this report refers to deals made by companies around brand sponsorships, marketing activations, and content licensing deals.

Our historical revenues and growth rates reflect the year-end US$ exchange rate. Our projected growth rates assume steady exchange rates going forward, but we take into consideration historic growth rates in local currency rather than US$, as this gives a better picture of underlying growth.

In terms of countries, markets, and regions, we define the market size as the amount generated by consumers in that specific territory.

The methodology and various inputs are visualized by the illustration below.



METHODOLOGY & TERMINOLOGY

TERMINOLOGY

DEFINITIONS OF OFTEN-USED TERMS

Esports: Competitive gaming at a professional level and in an organized format (a tournament or league) with a specific goal (i.e., winning a champion title or prize money) and a clear distinction between players and teams that are competing against each other.

Esports Enthusiasts: People who watch professional esports content more than once a month.

Occasional Viewers: People who watch professional esports content less than once a month.

Esports Audience: All people who watch professional esports content at least once per year: Esports Enthusiasts and Occasional Viewers combined.

Esports Awareness: People who have heard of esports, including the group of people who are aware of esports but are not participants or viewers.

Amateur Competitive Gaming Enthusiast: People who participate in (online) competitive gaming leagues at a pro or amateur level e.g., through FACEIT, Toornament, and ESL Play.

Streaming: This is when one person, or sometimes a group of people, streams live video of him/herself via a streaming platform, allowing viewers to see what he/she is playing at that moment in time.

Esports Event: A competitive gaming tournament or league in which players and/or teams compete against each other with the goal to win.

League: An event featuring regular matches played over several months following a planned schedule. Teams typically play at least one game against every other competing team.

Tournament: An event that typically happens over a short period of time. Its format frequently includes a group stage, from which teams can advance to a knock-out phase. As some teams are eliminated before the final, not all teams will play directly against one another.

Independent/Third-Party Organizer: An organization that hosts esports events but does not own or publish the game(s) played at the event.

Online Population: People within a country or region who have access to the Internet via a computer or mobile device.

Esports Density: The share of Esports Enthusiast in the online population.

Players or Gamers: People who play games on a PC, console, or mobile device.

Gaming Peripherals: Gaming-related hardware products that are used, such as mice, keyboards, headsets, controllers, or monitors.

Media Rights Revenues: Revenues generated through media property, including all revenues paid to industry stakeholders to secure the rights to show esports content on a channel. This includes payments from online streaming platforms to organizers to broadcast their content, foreign broadcasters securing rights to show content in their country, or copyright costs to show video content or photos of an esports competition.

Merchandise and Ticket Revenues: Revenues generated by the sale of tickets for live esports events and of merchandise. Merchandise sold by esports teams and event organizers is included, as well as merchandise sold by publishers.

Advertising Revenues: Revenues generated by advertisements served to viewers of esports content. This includes ads shown during live streams on online platforms before or in between games, ads shown on VOD content of esports matches, or advertising on TV around esports content.

Sponsorship Revenues: Revenues generated by teams and organizers through sponsorship deals. This includes all deals relating to sponsoring an event, including product placement, sponsoring teams, and payments by brands for the use of team, event, or game-specific IP rights in their marketing communications. Any advertisements sold as part of a sponsorship package are also included in sponsorship revenues.

Game Publisher Fees: Revenues paid by game publishers to independent esports organizers for hosting events. This excludes investments or spending by game publishers on their own events, as we consider that to be part of their regular marketing efforts.

Revenue per Enthusiast: Average annual revenue generated per Esports Enthusiast (Esports revenues/Esports Enthusiasts).

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3.

KEY GLOBAL TRENDS

BATTLE OF THE BRANDS

ESPORTS BRANDS ARE DEVELOPING UNIQUE BRAND IDENTITIES

Doubling down on what makes teams and leagues unique

A battle to earn the loyalty of Esports Enthusiasts is underway. As a result, increasing brand value is now a main priority for esports organizations and this will remain the case in the coming years. As esports continues to mature, we will see a bigger focus on individual branding of esports teams and leagues. This is a result of lower-than-expected revenue growth caused by difficulties finding large pools of sponsors willing to invest heavily in esports. Big investments will come eventually, but many non-endemic brands are only beginning to invest in esports and want more experience in the industry before investing further.

For esports organizations to become attractive for brands and position themselves for the future, they must solidify bonds with fans. This entails doubling down on developing unique stories and powerful content around their teams, leagues, and tournaments. Teams, in particular, need to focus on clearly communicating what they stand for and what makes them stand out, essentially showcasing their unique selling points to brands. Just like in traditional sports, longer multi-year player contracts will give team members time to naturally develop their personalities and play styles within their respective teams.

In addition, teams must select specific brands for different games, mirroring what Astralis did with CS:GO and Origin did with League of Legends under the RFRESH banner. Existing organizations with multiple teams will increase branding efforts around their individual teams, helping them develop a diverse roster of team brands within the organization.

Organizations branch out and contract out players

Events are making their presence known

KEY GLOBAL TRENDS

THE SHIFTING CONTENT PARADIGM

CONTENT IS STILL KING BUT CONTENT PACKAGES CHANGE ITS REIGN

THE ESPORTS PLATFORM WAR

NEW LIVE-STREAMING PLATFORMS WILL CONTINUE TO ENTER THE FRAY

EXPERIMENTATION IN ESPORTS BROADCASTING

MID-TIER EVENTS WILL DRIVE INNOVATION

ALL SIX TRENDS COVERED IN THE FULL REPORT

FROM ONLINE TO OFFLINE

ESPORTS VIEWERSHIP RETURNS TO THE COMMUNITY

Local esports resurfaces

The history of esports can be traced back to arcades, grassroots fighting-game events, and LAN parties. The rise of digital brought esports viewership to the online masses. Recent times, however, have seen many local esports initiatives again bringing esports fans together in local physical locations. This trend is only due to surge in 2019 and beyond and is already taking place worldwide in esports arenas, local esports bars, and more. Among the best-known esports bar franchises is Meltdown Esports Bar. The company has 29 franchised bars across eight countries worldwide, which highlights the growing appetite for such a place.

Home venues: establishing a local connection and visibility

The majority of local esports initiatives revolve around physical venues at which people can view esports matches, sometimes combined with opportunities for fans to play. One thing driving the increase of local esports venues is the number of leagues requiring competing teams to have a home stadium. The Overwatch League and League of Legends Pro League have stated that this will be a requirement for their respective competitions in the future. These initiatives will mainly increase the number of small esports venues (locations with 1,000 seats or fewer). The largest tournaments will still be held in current large stadiums, while newer venues will focus on smaller competitions, bringing fans closer to the action.

Local places of esports competition will also strengthen Esports Enthusiasts' bonds with their favorite teams and esports stars, which will directly strengthen their brand. Additionally, several teams are in the process of building training centers for their players to practice and prepare, giving fans the chance to see their favorite pros honing their skills. Fans can also play in the facilities themselves and meet the pros. All these factors will increase esports' visibility in the public space, increasing the general population's esports exposure. This will positively affect esports engagement and participation alike and will drive fans' brand loyalty to teams, players, leagues, and events.

Cities are competing for esports dominance in China

Even more notable developments are happening in China, a market that is leading the charge for local, community-based esports. In fact, six cities in the country—Hangzhou, Chongqing, Shanghai, Xi'an, Sanya, and Haikou—are each vying to become China's main esports hub. To achieve this, all six of these cities are trying to incentivize esports organizations to set up shop in their respective city.

LGD Gaming has already established an office and stadium in Hangzhou. The city also features an esports academy, esports-themed hotel, theme park, business center, and even a hospital designed for esports players. Meanwhile, Chongqing signed a deal with Alisports, resulting in the company relocating its business unit to the city. The sports affiliate of Alibaba Group will also work with Chongqing HighTech Zone to build an international esports street in Jiulongpo District. In Q3 2018, Shanghai hosted a signing session with multiple companies active in esports. This resulted in high-profile deals with companies such as Tencent, NetEase, PandaTV, and ShihouTV, which each signed partnership deals with the Xi'an government, focusing on tournaments, education, and property. In recent years, Sanya has successfully held a number of international esport events, such as the World University Cyber Games. Supported by local government, the WESG Grand Final was held in Haikou (Hainan Island's capital) by Alisport in 2018. Hainan is also the first province to pilot China's new game approval mechanism.

China is consistently showing its willingness to invest in esports activities, hoping to draw residents from their homes and out into the community. Other physical esports initiatives currently under construction in China include the country's first esports hotel, following a recent build in Taiwan.

PLACE YOUR BETS

BETTING IS BECOMING AN INTEGRAL PART OF ESPORTS

Esports betting begins to echo traditional sports

The betting scene around esports has been developing in recent years, with more key players entering the scene. Esports betting is increasingly resembling traditional sports betting, which has long been a fundamental part of that industry. In particular, esports betting in the United States is on track to grow significantly. The main catalyst for this took place in 2018, when laws around betting within the region became more lenient, allowing states to opt into legalizing betting for certain sports, including esports.

There are already several betting companies with a stake in esports, including Betway and gg.bet, which both sponsor several esports teams. Esports will be a prominent part of many esports fans' viewership experience in the near feature and many companies are already planting the seeds to make this happen.

Fantasy drafting is a popular feature with fans, with Riot Games offering it for free around its major leagues and World Championship event. We expect esports organizations to incentivize fantasy drafting more by offering rewards, such as in-game currency and cosmetics. In addition, betting operators will continue to expand their sponsorship presence and will offer more forms of esports betting, such as live-action betting on results (bookmaking).

We predict fans' collective spending on esports betting will soon surpass their spending on merchandise and tickets.

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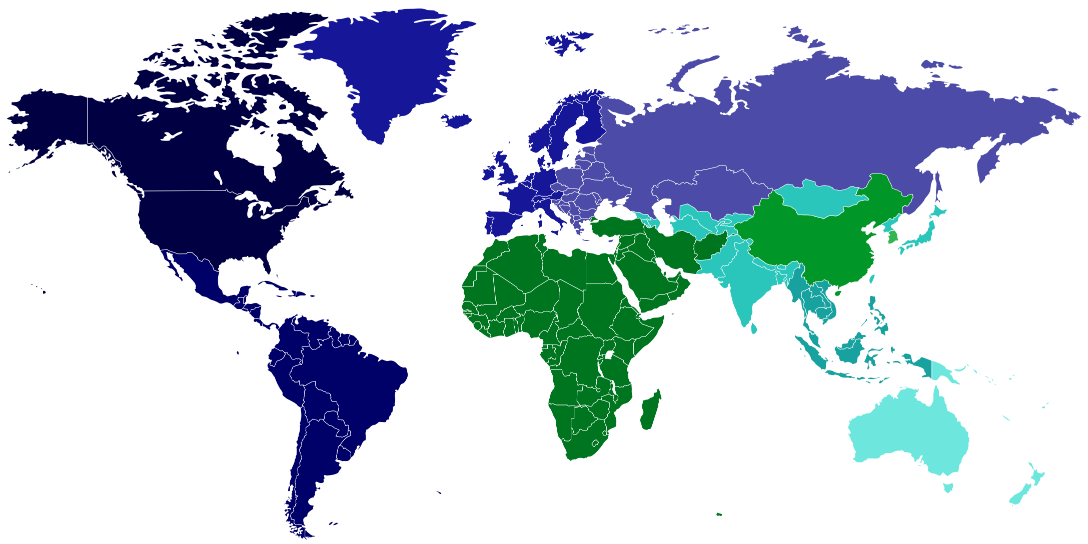
4.

GLOBAL OVERVIEW

GLOBAL



2019

Population	7,672.2M
Online Population	4,120.7M
Esports Awareness	1,757.5M
Esports Enthusiasts	201.2M
Esports Revenues	$1,096.1M
Annual Revenue per Enthusiast	$5.45

TOTAL GAME-VIDEO-CONTENT AUDIENCE

The overall game-video-content audience, like esports, will continue to grow at a rapid pace, increasing from 750 million people in 2018 to more than a billion by 2022.

The lines between forms of game video content—including esports, live streaming, podcasts, and reviews—are blurring. New content that combines/adapts older formats is on the rise and is becoming more and more popular among the esports audience. Much of this innovation has so far been driven by mid-tier esports events. Competitions such as the Fortnite Summer Skirmish, for instance, feature top streamers, pro players, and top-level amateurs competing against one another.

This overlap between traditional game video content presents many benefits to the esports market. Many viewers of non-esports game content will be exposed to esports, opening the market to a whole new demographic—one with an inherent interest in games. This pool of potential new esports fans is massive. When it comes to live game video content, esports currently makes up 12% of viewership hours on Twitch and YouTube, compared to non-esports game content's 88%.

New monetization options are also a big opportunity. The audience for game video content includes a segment of Devoted Viewers. These weekly viewers actively follow and make donations to their favorite streamers. As mentioned, these streamers are now beginning to participate in esports, bringing many Devoted Viewers who are willing to spend big on content with them.

Some mid-tier tournaments and teams have struggled to increase their revenues. Leveraging the wider games market's audience, as well as other forms of game video content, may help them achieve the growth they want.

FULL REPORT INCLUDES DATA FOR 10 SUBREGIONS

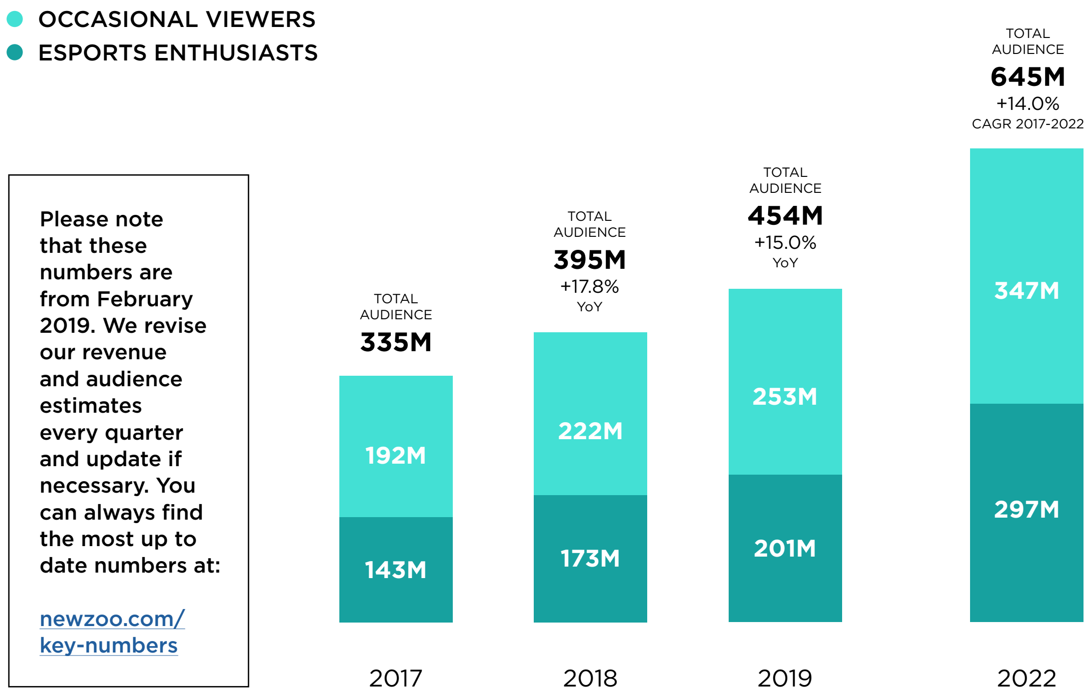
AUDIENCE FORECAST

The esports audience will grow to 453.8 million globally in 2019. Esports Enthusiasts will account for 201.2 million of this number, up 28.2 million year on year, and will increase with a CAGR (2017-2022) of +15.7% to 297.1 million in 2022. Meanwhile, the number of global Occasional Viewers will hit 252.6 million in 2019, up from 2018's 221.6 million. This number will grow with a CAGR of +12.6% to 347.5 million in 2022.

In 2019, 1.8 billion people will be aware of esports worldwide, an increase from 2018's 1.6 billion. China will continue to be the country/market that will contribute most to this number, with 500.2 million esports-aware people. Mainstream entertainment is a major growth driver of esports awareness across the globe, as esports is getting more exposure on Netflix, linear video platforms, and other media.

Audience and awareness numbers are increasing in emerging markets in Latin America, the Middle East and Africa, Southeast Asia, and the Rest of Asia. This is mostly due to urbanization and advances in IT infrastructure. Globally, the increasing popularity of mobile gaming is an important contributing factor, as well as the continued appeal of the battle royale and MOBA genres. Of course, the influx of younger generations will further drive audience growth.

ESPORTS AUDIENCE GROWTH
GLOBAL | 2017, 2018, 2019, 2022



Please note that these numbers are from February 2019. We revise our revenue and audience estimates every quarter and update if necessary. You can always find the most up to date numbers at:

newzoo.com/key-numbers

Due to rounding, Esports Enthusiasts and Occasional Viewers do not always add up to the total audience.

REVENUE FORECAST

The year 2019 will be a landmark for the global esports market, which will for the first time exceed the billion-dollar revenue mark. In fact, total esports revenues will reach $1.1 billion in 2019, an increase of more than 230 million compared to 2018. North America will again account for the most revenues, generating 37.3% of the global total.

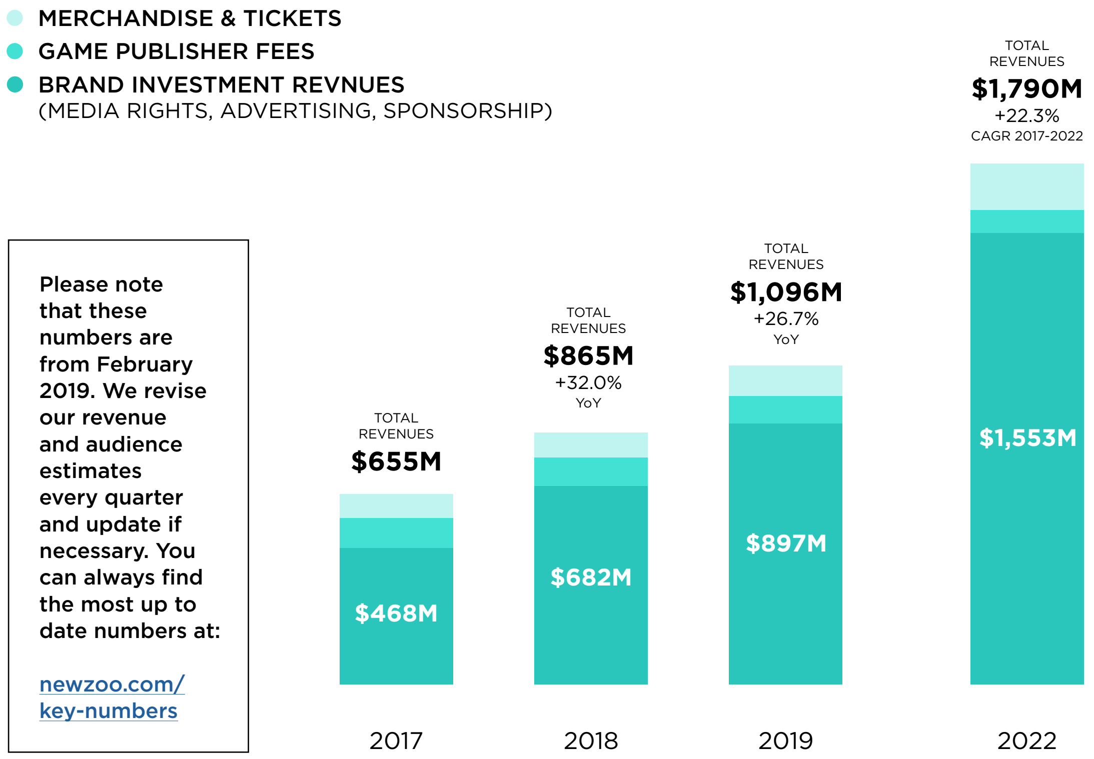
The highest-grossing esports revenue stream worldwide is sponsorship, which will generate $456.7 million in 2019, up from $340.2 million in 2018. The world's fastest-growing esports revenue stream by far is media rights with a CAGR (2017-2022) of +39.6%, compared to sponsorship's +28.4%.

In 2019, revenues from merchandise and tickets will exceed those from game publisher fees, which will become the industry's smallest revenue stream and decline with a CAGR (2017-2022) of -5.5%.

More details on our esports revenue model and the individual revenue streams can be found in Chapter 2: Methodology and Terminology.

ESPORTS REVENUE GROWTH

GLOBAL | 2017, 2018, 2019, 2022



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newzoo.com/key-numbers

2019 REVENUE STREAMS

This year marks a major milestone for the global esports market, which will for the first time exceed the billion-dollar revenue mark. In fact, revenues will hit $1.1 billion in 2019, a year-on-year growth of +26.7%. Around 82% of the total market ($897.2 million), will come from endemic and non-endemic brand investments (media rights, advertising, and sponsorship). The highest-grossing individual esports revenue stream worldwide is sponsorship, accounting for $456.7 million in 2019—up +34.3% from 2018. The fastest-growing esports revenue stream by far is media rights, which will generate $251.3 million in 2019, a year-on-year growth of +41.8%. Consumer spending on merchandise and tickets will total $103.7 million, while game publishers will invest a further $95.2 million through partnership deals with white-label organizers.

ESPORTS REVENUE STREAMS

GLOBAL | 2019

Please note that these numbers are from February 2019. We revise our revenue and audience estimates every quarter and update if necessary. You can always find the most up to date numbers at:

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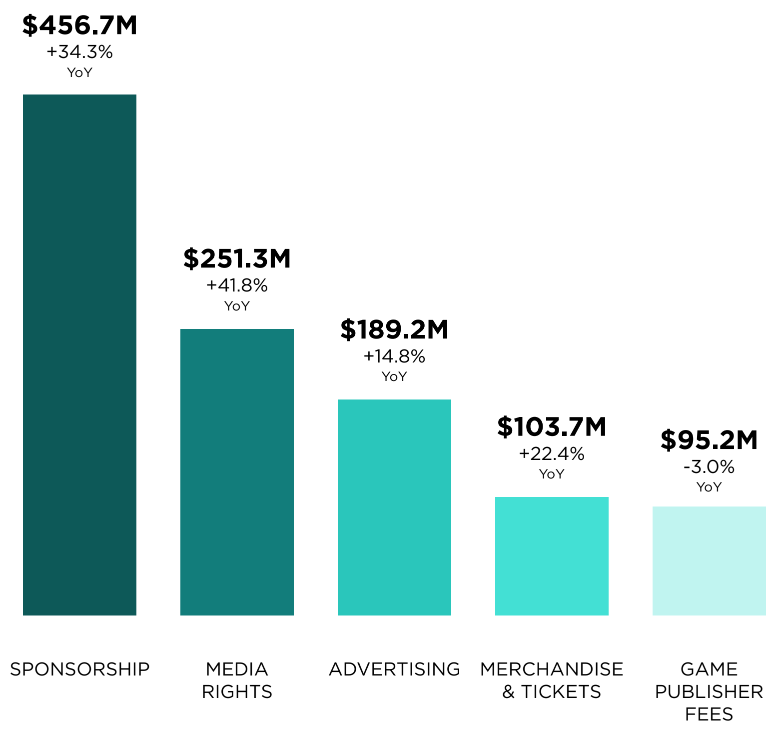

5. RANKINGS

MOST-WATCHED GAMES

The tables below show 2018's most-watched games on Twitch and YouTube Gaming worldwide by live esports hours and non-esports hours. Esports content includes live professional gaming matches and pre- and post-game analysis. Non-esports content includes streamers, influencers, and talk shows. League of Legends was 2018's most-watched game on Twitch and YouTube Gaming by live esports hours. The title was #2 by live non-esports hours, overtaken by battle royale phenomenon Fortnite, which was viewed live for more than twice as many hours.

Dragon Ball FighterZ was the most-watched new title by live esports hours. Call of Duty: Black Ops 4 was the most-watched new title by live non-esports hours, rounding off the top 10. This is particularly impressive, given that the game was released in Q4.

Like in previous years, FIFA was the only franchise with two different titles in the non-esports ranking. This year, however, the newer game generated more viewership; FIFA 19 was watched for 77.0 million live non-esports hours, compared to FIFA 18's 60.6 million.

TOP 25 GAMES BY LIVE ESPORTS HOURS WATCHED ON TWITCH AND YOUTUBE GAMING | 2018

GAME	MAIN DEVICE COMPETED ON	HOURS WATCHED
LEAGUE OF LEGENDS	PC	347.4M
COUNTER-STRIKE: GLOBAL OFFENSIVE	PC	274.9M
DOTA 2	PC	250.4M
OVERWATCH	PC	101.3M
HEARTHSTONE	PC	54.1M
STARCRAFT II	PC	26.2M
PLAYERUNKNOWN'S BATTLEGROUNDS	PC	24.1M
FORTNITE	PC	23.0M
ROCKET LEAGUE	PC	22.5M
HEROES OF THE STORM	PC	20.3M
TOM CLANCY'S RAINBOW SIX: SIEGE	PC	15.7M
MAGIC: THE GATHERING	PC	15.1M
STREET FIGHTER V	CONSOLE	13.8M
CALL OF DUTY: WWII	CONSOLE	11.7M
WORLD OF WARCRAFT	PC	10.9M
FIFA 18	CONSOLE	8.5M
SUPER SMASH BROS. MELEE	CONSOLE	8.4M
ARENA OF VALOR	MOBILE	5.9M
TEKKEN 7	CONSOLE	5.7M
CLASH ROYALE	MOBILE	5.1M
DRAGON BALL FIGHTERZ	CONSOLE	4.7M
SMITE	PC	4.7M
FIFA 19	CONSOLE	4.5M
CALL OF DUTY: BLACK OPS 4	CONSOLE	3.4M
SUPER SMASH BROS. FOR WII U	CONSOLE	3.3M
TOTAL TOP 25		**1,265.8M**

TOP 50 GAMES BY LIVE NON-ESPORTS HOURS WATCHED ON TWITCH AND YOUTUBE GAMING | 2018

GAME	HOURS WATCHED
FORTNITE	1,636.8M
LEAGUE OF LEGENDS	816.1M
PLAYERUNKNOWN'S BATTLEGROUNDS	617.7M
HEARTHSTONE	306.2M
DOTA 2	296.9M
WORLD OF WARCRAFT	252.1M
COUNTER-STRIKE: GLOBAL OFFENSIVE	213.0M
OVERWATCH	202.7M
GRAND THEFT AUTO V	179.5M
CALL OF DUTY: BLACK OPS 4	154.0M
CASINO	136.9M
DEAD BY DAYLIGHT	115.4M
TOM CLANCY'S RAINBOW SIX: SIEGE	112.6M
MINECRAFT	107.4M
WORLD OF TANKS	106.9M
FIFA 19	77.0M
DESTINY 2	71.7M
PATH OF EXILE	69.6M
MONSTER HUNTER WORLD	68.1M
FIFA 18	60.6M
MOBILE LEGENDS: BANG BANG	57.6M
SEA OF THIEVES	56.2M
ESCAPE FROM TARKOV	52.1M
POKER	47.6M
WARFRAME	44.9M
HEROES OF THE STORM	44.0M
RED DEAD REDEMPTION 2	42.7M
GARENA FREE FIRE	37.4M
CLASH ROYALE	37.1M
BLACK DESERT ONLINE	36.8M
RUNESCAPE	35.7M
STARCRAFT II	35.6M
MAGIC: THE GATHERING	35.6M
RUST	35.3M
ARK	33.8M
ARENA OF VALOR	29.4M
GOD OF WAR	29.2M
POKEMON: LET'S GO, PIKACHU!/EEVEE!	28.0M
OLD SCHOOL RUNESCAPE	27.9M
ROCKET LEAGUE	27.5M
SUPER SMASH BROS. ULTIMATE	27.4M
REALM ROYALE	25.8M
SLAY THE SPIRE	25.7M
ROBLOX	23.0M
DARK SOULS	22.6M
WARCRAFT III: THE FROZEN THRONE	22.5M
BATTLEFIELD V	22.2M
SMITE	21.2M
LOST ARK ONLINE	20.8M
FALLOUT 76	20.4M
TOTAL TOP 50	**6,607.3M**

FULL REPORT INCLUDES TOP 50 TOURNAMENTS BY VIEWERSHIP HOURS ON TWITCH, TOP LEAGUES, TOP LANGUAGES, AND TOP COUNTRIES/MAREKTS BY ESPORTS ENTHUSIASTS.

GET THE REAL DEAL

THE FULL GLOBAL ESPORTS MARKET REPORT

KEY TOPICS & DATA POINTS

- SIX KEY TRENDS SHAPING THE MARKET
- THE ESPORTS INDUSTRY: KEY PLAYERS, ORGANIZATIONS, AND DEVELOPMENTS
- THE ESPORTS MARKET (2017-2022)
- RANKINGS: TOP COUNTRIES, EVENTS, AND BROADCASTING LANGUAGES
- EVENT CALENDARS PER TITLE
- SPECIAL FOCUS TOPICS
- THIRD-PARTY RESEARCH
- METHODOLOGY & TERMINOLOGY

REGION SCOPE

- NORTH AMERICA
- LATIN AMERICA
- EASTERN EUROPE
- WESTERN EUROPE
- MIDDLE EAST & AFRICA
- CHINA
- SOUTH KOREA
- SOUTHEAST ASIA
- REST OF ASIA
- OCEANIA

10 SUBREGIONS

ANALYSIS SUPPORT

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Market Analyst

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RICHARD HORDIJK
Client Director

ONLINE DASHBOARD & DATASETS

tableau

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