

*e*Sports Ad Bureau

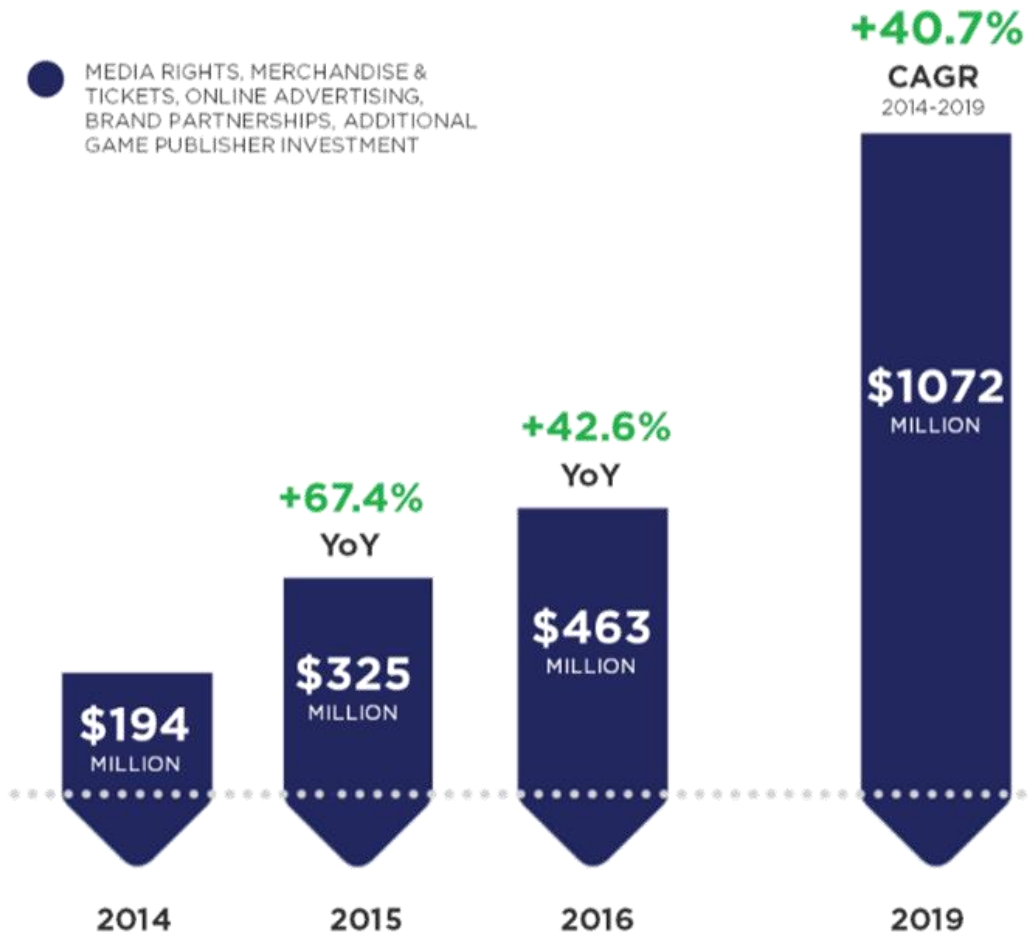
eSports U.S. Based Premium Landscape

eSports Ad Bureau

- ▶ Dedicated to accelerating ad spending on eSports opportunities by U.S. based marketers, by reducing risk and providing confidence in the category and Ad Bureau Member offerings
 - ▶ Facilitates **value proposition** messaging common to all Members
 - ▶ Coordinates the publishing of **common metrics**
 - ▶ Provides eSports **ad landscape education** and guidance to agencies and brands
 - ▶ Promotes **best practices**

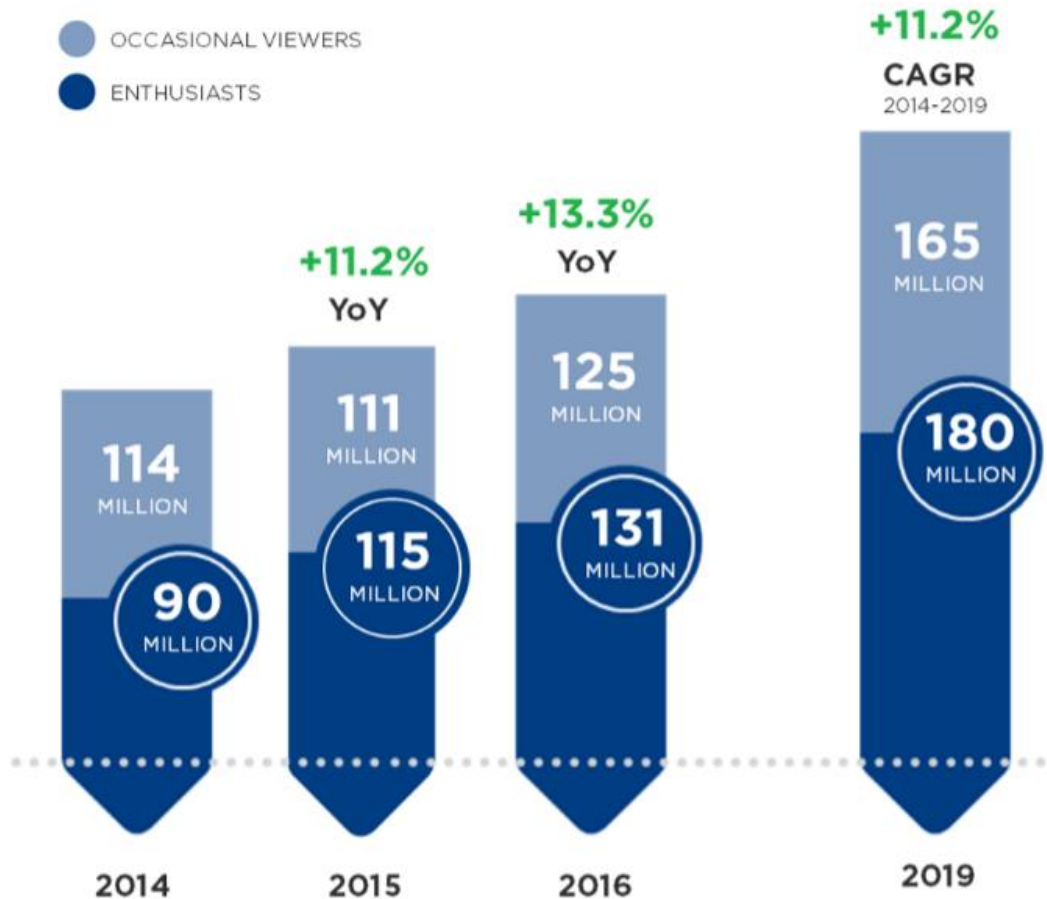
eSports Revenue Growth

► Global



eSports Audience Growth

► Global



eSports Viewing

- ▶ Viewed by more than 1 in 5 US HHs

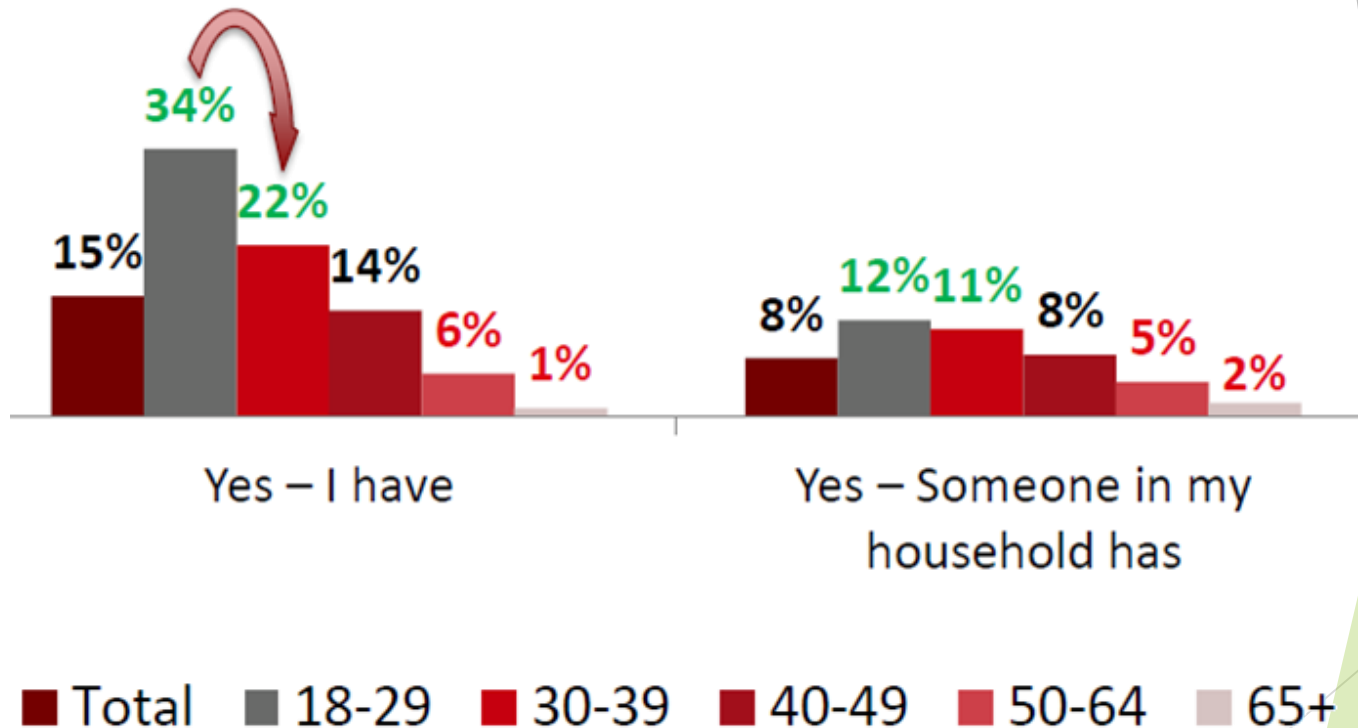


Overall, 22% of US HHs have someone who watched an eSports event....

...with 4 in 5 eSport viewers open to watching a future event in the next 6 months.

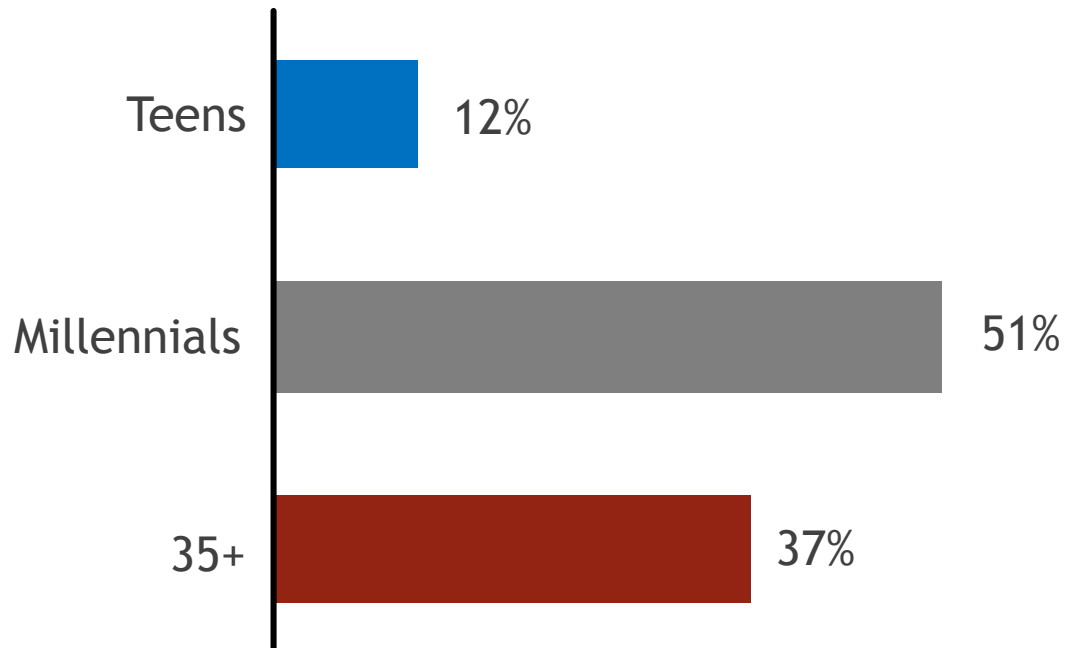
eSports Age

- ▶ US HHs, Have Viewed, Skews 18-29



eSports Age

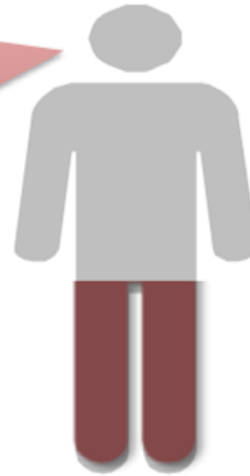
- ▶ US HHs, Are Fans, Skews Millennials



eSports Gender

► US HH, Have Watched, Skews Male

...however, it may be surprising to see one in ten **WOMEN** have watched an eSports/competitive gaming event!



Household Net:

25%

18%

I have:

20%

11%

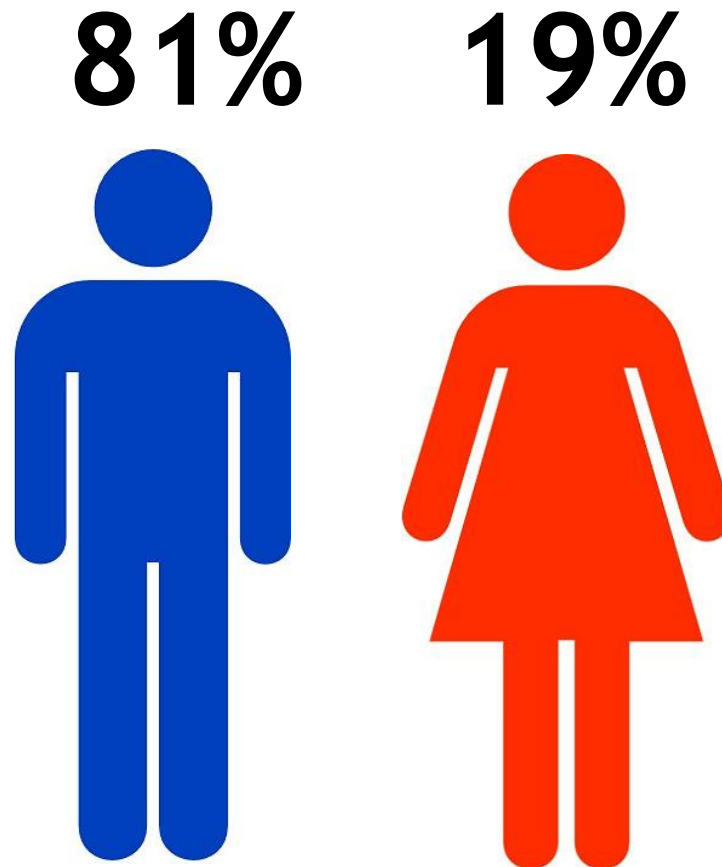
Someone else in HH:

7%

8%

eSports Gender

- ▶ US HH, Are Fans, Skews Male



eSports Ethnicity

► US HHs are Diverse

- ➔ A higher proportion of non-white HHs report viewership of eSports than white HHs.
- ➔ This is true for either “having watched themselves,” or “someone else in HH watched.”



Household Net:	30%	19%
I have:	21%	14%
Someone else in HH:	12%	6%



Appendix

► Nielsen Methodology



Annual data for the Nielsen 360° Gaming Report is collected via consumer online surveys in Q4 of each year using Nielsen's proprietary, high-quality ePanel in the United States.

An additional post-holiday wave of the survey is fielded in January of the following year to assess adoption of gaming devices during the crucial holiday period.



Groups surveyed:

- Teens/Adults Aged 13+: 2000+ interviews among 50% Male / 50% Female sample
- Kids Aged 6–12: 400 interviews (paired with parents, Q4 wave only) among 50% Male / 50% Female sample



Post-survey, raw data is weighted to ensure representation of the US General Population based on US Census data.

Appendix

► Leger Methodology

- ✓ The survey was conducted by **Léger**, via an online survey with 1,003 respondents, 18 years of age or older, among the U.S. population from May 24th through May 29th, 2016.
- ✓ Data was balanced and weighted to statistically represent the country by age, gender, ethnicity, and region based on the U.S. Census.
- ✓ Based on this sample size, the results carry a margin of error of approximately $\pm 3.1\%$ at the 95% confidence level, and $\pm 2.6\%$ at the 90% confidence level.

Appendix

► NewZoo Methodology

The methodology for Newzoo's esports data consists of three levels: 1) *Data Input*, 2) *Predictive Modeling* and 3) *Result Validation*. For *Data Input*, extensive primary consumer research across the globe sizes and profiles esports awareness and engagement. Newzoo also continuously tracks and analyses company revenues, live event audience figures, prize money, and video content viewer data. *Predictive Modeling* uses parts of Newzoo's Global Games Market predictive model, which consists of several complex databases combining numerous data streams, financial analysis, primary research, as well as population and economic census data. *Result Validation* is done in two ways: through additional research and by discussing findings with companies including game publishers, esports teams, global streaming companies and local media companies