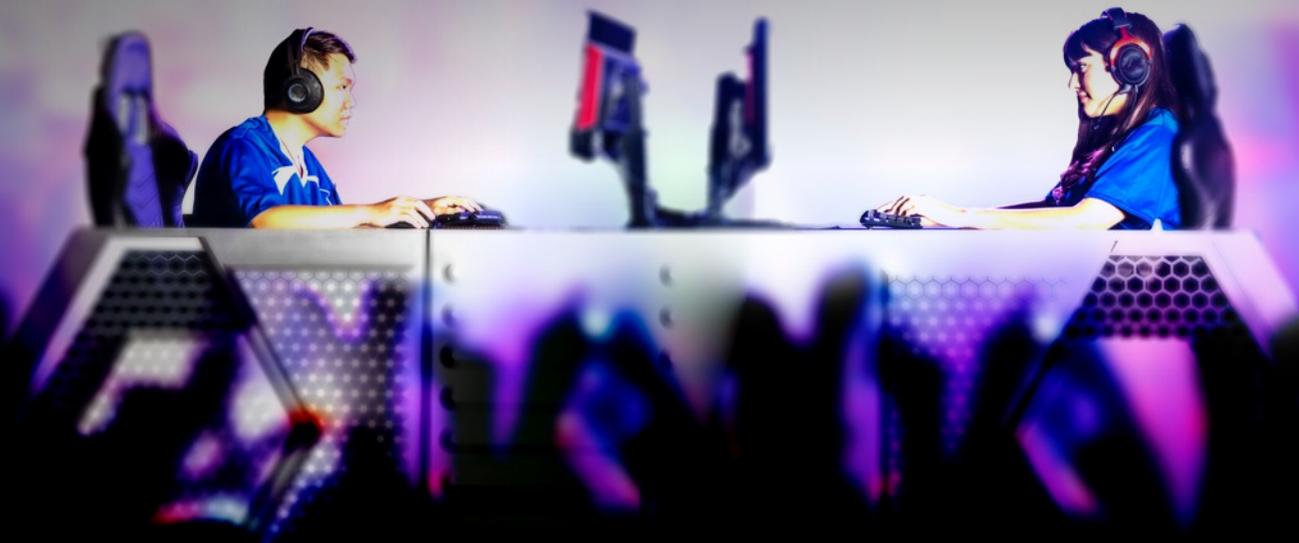


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Insights into Esports Fans

July 2020



Methodology

- The data in this report comes from the MRI-Simmons Sports Fan Study
- Data was collected online between April 10th and May 5th, 2020, and include COVID-19 topics
- 5,020 nationally representative completes among adults age 18+
- Final data was weighted and projected to the US population for tabulation and **fused to MRI-Simmons national datasets for deeper profiling.** Additional details available upon request

47M US adults are esports fans

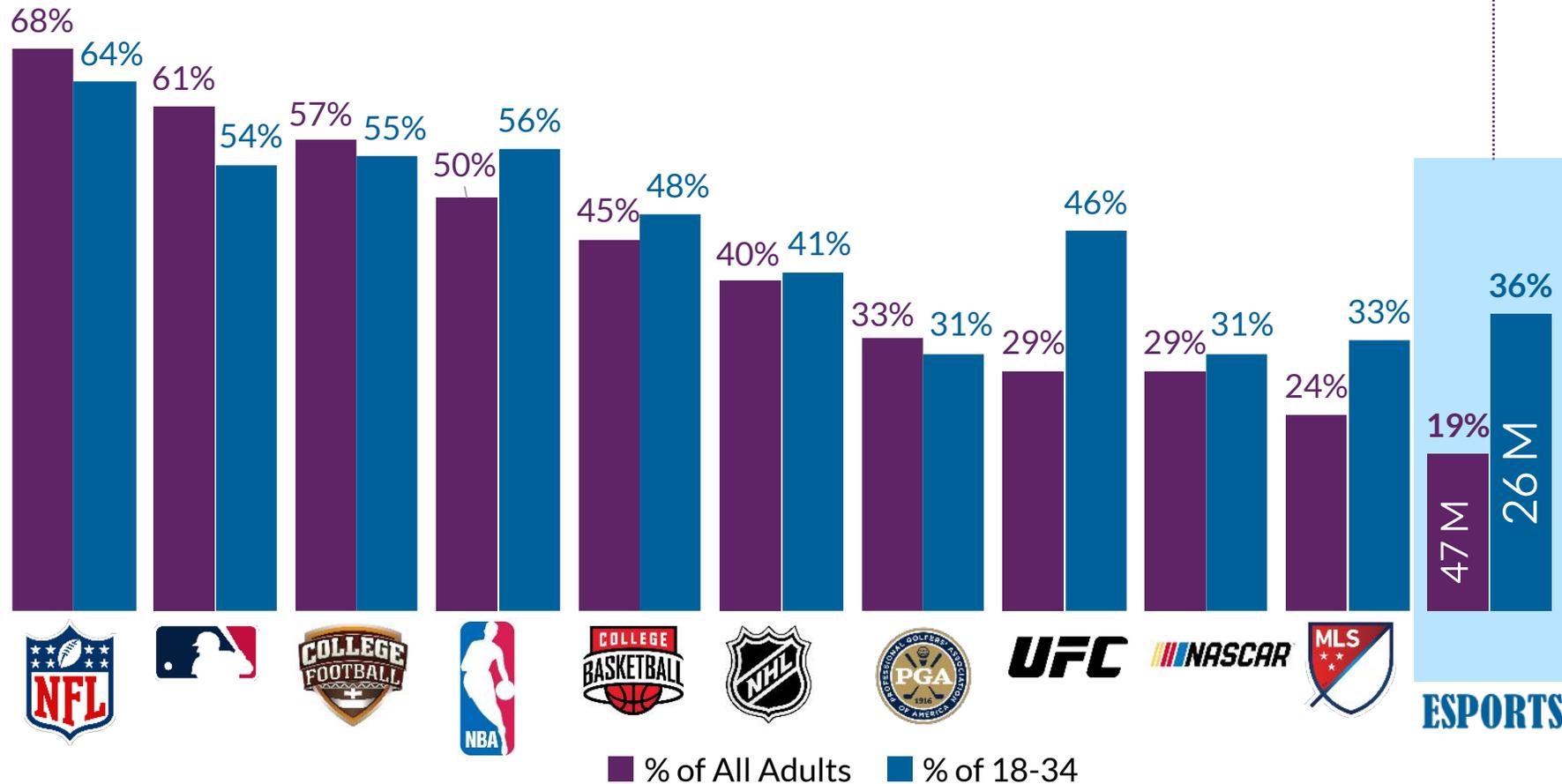
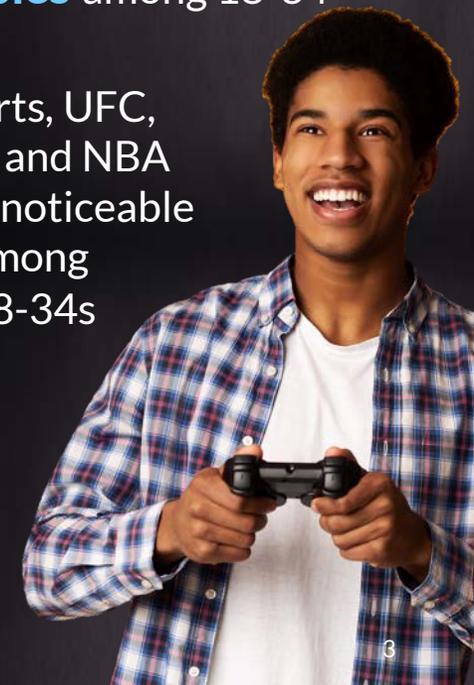
Esports fandom nearly doubles for 18-34s



Over **one-third** of Americans 18-34, are **fans of esports**, comparable to MLS and NHL

As many other sports remain flat or decline, **esports fandom nearly doubles** among 18-34

Esports, UFC, MLS, and NBA have noticeable lift among US 18-34s

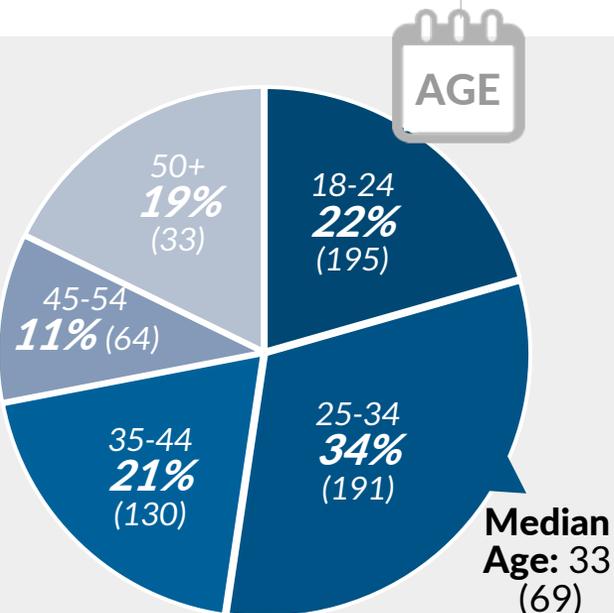
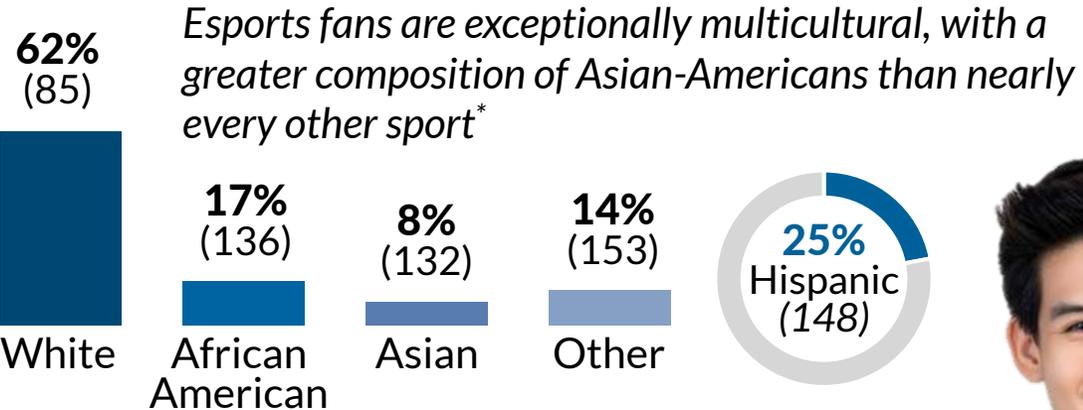
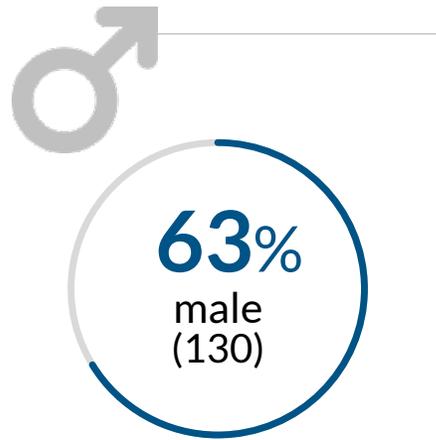


QFANSHIP: How would you describe your level of fandom for each of the following sport?
 Fandom defined as: Super (8-10), Average (4-6) or Light (1-3) Fans; 1-10 on a 10-point scale for each sport/league to create overall fan target

Esports fans are a desirable audience

Young, male, affluent, multicultural

Though most have never been married, they're 30% more likely to be parents of children under 18

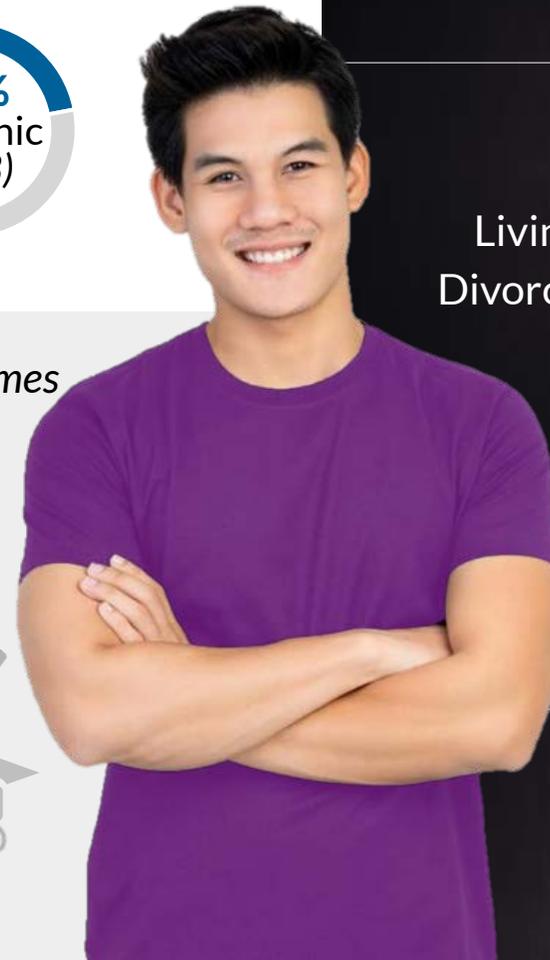


High rates of employment & living in homes with above average incomes

Employed
74% (118)

Median HH Income
\$85k (106)

High school grad 28% (99)
Bachelor's degree 20% (100)
Post-grad degree+ 11% (99)



Indexed against the average Adult Age 18+
*Soccer and Tennis have approximately the same % of Asian-American fans (MLS – 8%, International Soccer – 9%, Tennis – 9%).

Esports fandom is about community & commitment

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63%

I believe esports
is **the next
big thing**

57%

I will be an
esports fan
For life

52% Esports **community** has had
positive impact on my life

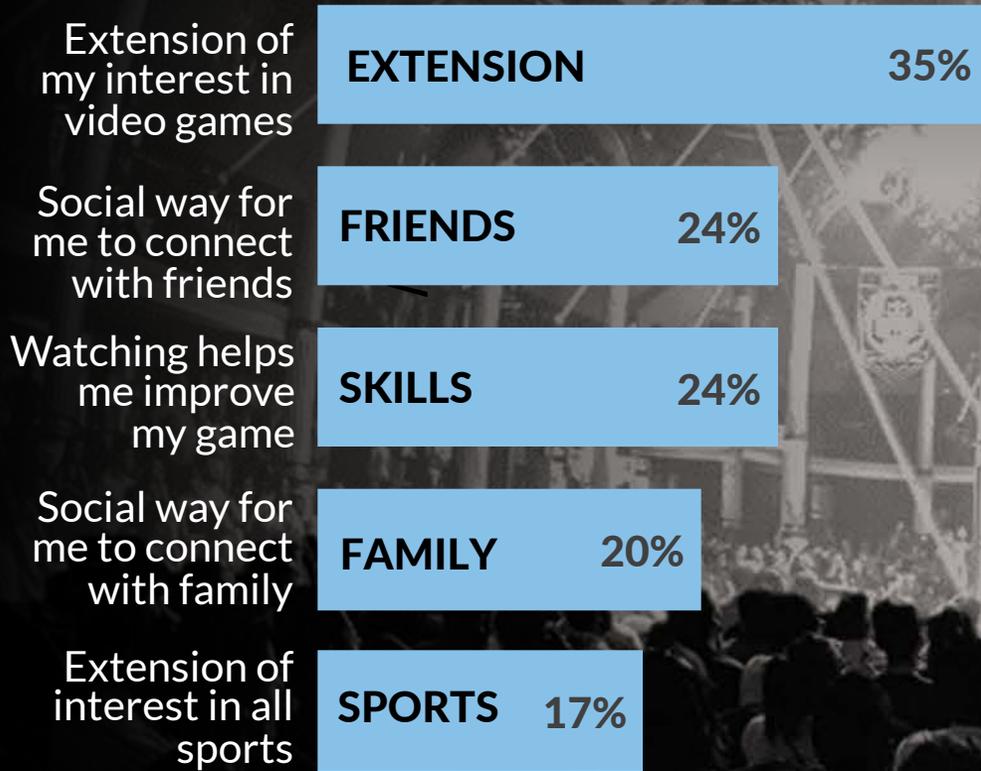
45% I want to **pass my esports
fandom on** to future generations

42% I **enjoy cosplay & have dressed
up** as my favorite character

60%
have watched
a **live esports
tournament**

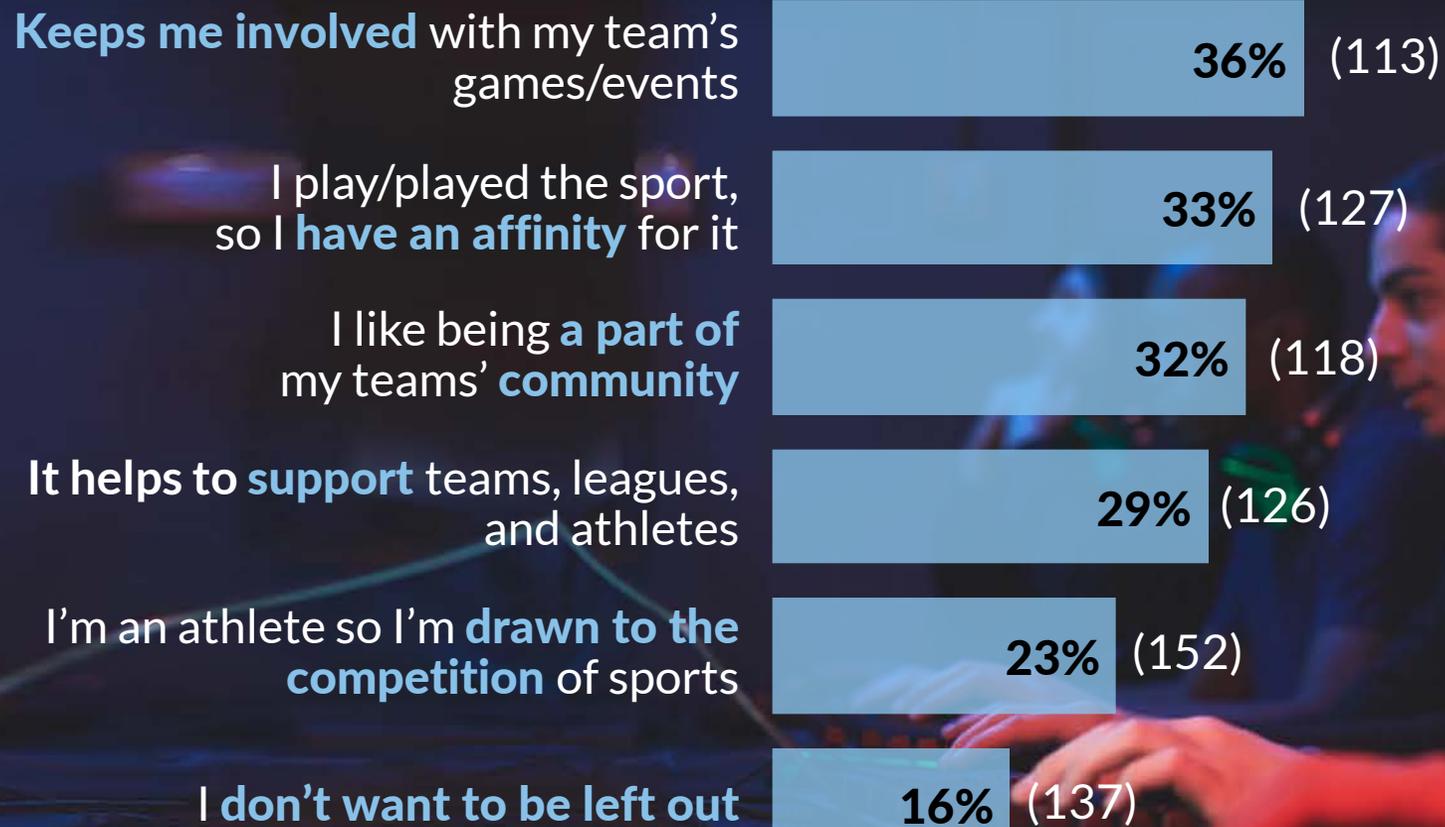
Enthusiasm for esports is both emotional & practical

TOP REASONS FOR FANSHIP



Esports fans are drawn to social and competitive aspects of sports

MOTIVATIONS FOR FANDOM



Esports fans tend to be Unconventional thinkers

With a sense of adventure and curious minds, esports fans are **open to new experiences**

- 48%**
(106) I am **adventurous**
- 46%**
(127) I enjoy **taking risks**
- 42%**
(103) I like to travel the **unbeaten path**
- 33%**
(112) I am often chosen to be **the spokesperson** in my group
- 36%**
(120) I like to **try new things** no one else has
- 23%**
(123) I like to **stand out** in a crowd

They are also influential in **bringing new experiences** to others

- 40%**
(114) I'm good at **convincing others** to try new things
- 35%**
(110) People say that **my enthusiasm is contagious**



Defining characteristics

Esports fans stand out from typical adults (18+)

They are...

Optimistic

Open-minded

Adventurous

Career-oriented

Ambitious

Entrepreneurial

Non-conformists

Novelty-seekers



46%
(139)

I want to get
to the very
top in my
career

43%
(132)

I'd like to set up my
own business
someday

44%
(102)

Work is
a career...
not just a job

27%
(112)

I am a
workaholic

Advertising and sponsorship opportunity

Esports fans:

- Index high on reported influence of sponsorships and ads during sports, in all forms measured
- Are nearly twice as likely as general market to report influence of ads on social media
- Are also highly likely to be influenced by ads in video games

Esports fans report being influenced by

30% (159)	Logos on team uniforms
26% (135)	Ads during TV sports
25% (217)	Ads in Sports video games
24% (147)	Sponsorship mentions during TV broadcast
24% (190)	Ads on team/league social media pages



Esports fans are more aware of and receptive to corporate sponsors

Compared to all sports fans, esports fans are more likely to **notice sponsors** and brands that players wear, and this is more likely to **influence their purchasing decisions**

67%

I'm more likely to **notice brands that teams or athletes use** or wear (134)

25%

I'm more likely to **notice brands that sponsor** a favorite athlete, team, or league (154)



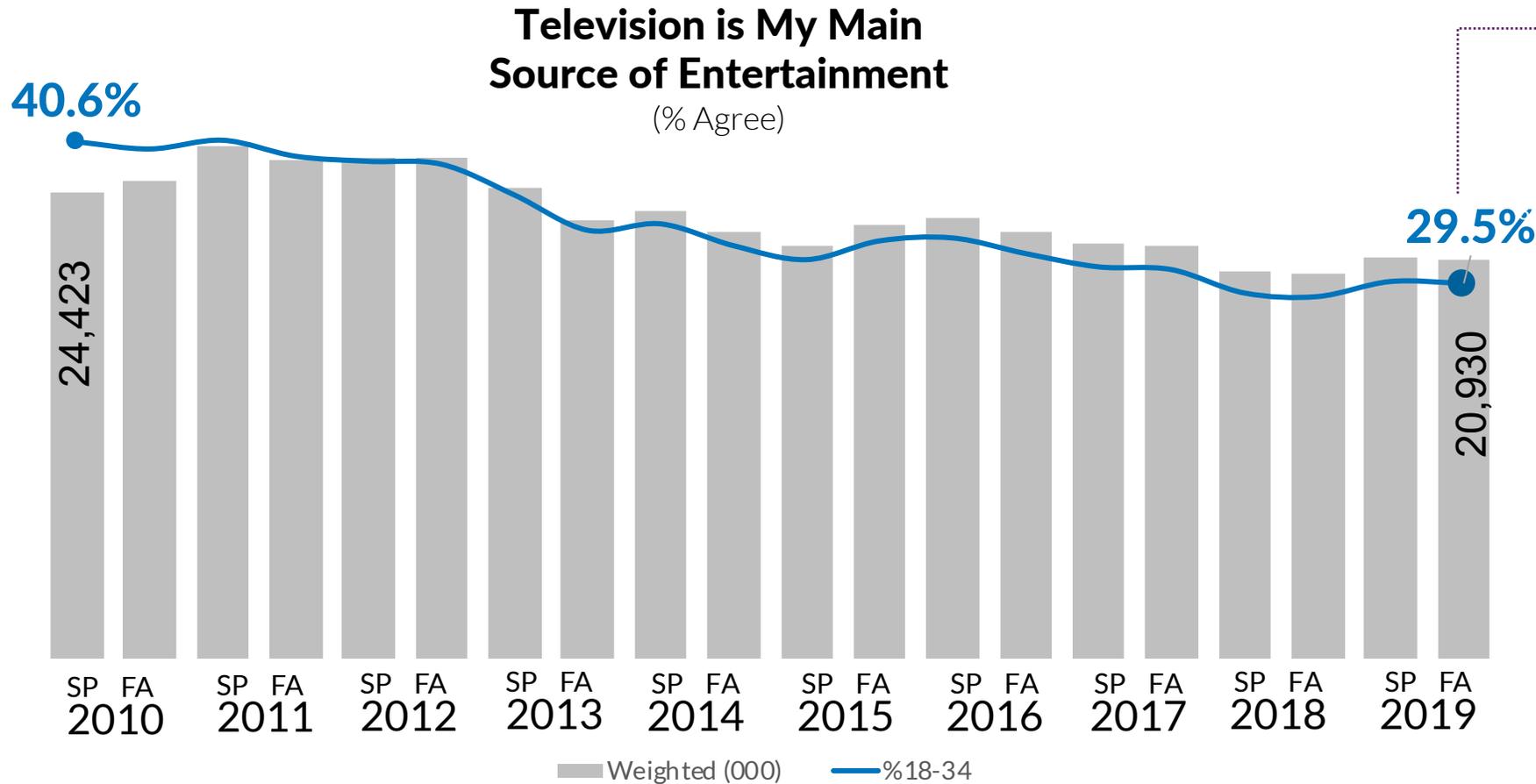
60%
(171)

I'm more likely to **buy brands that teams or athletes use**

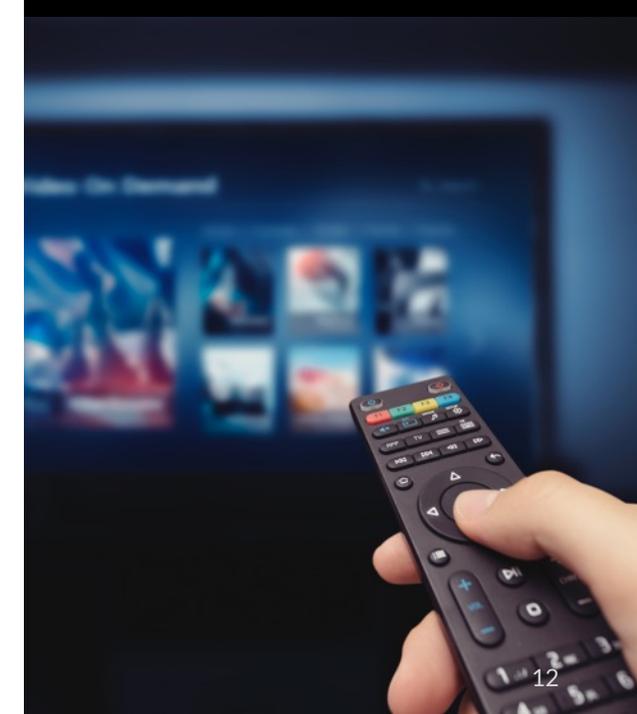
Among 18- to 34-year-olds

Television as main source of entertainment is declining

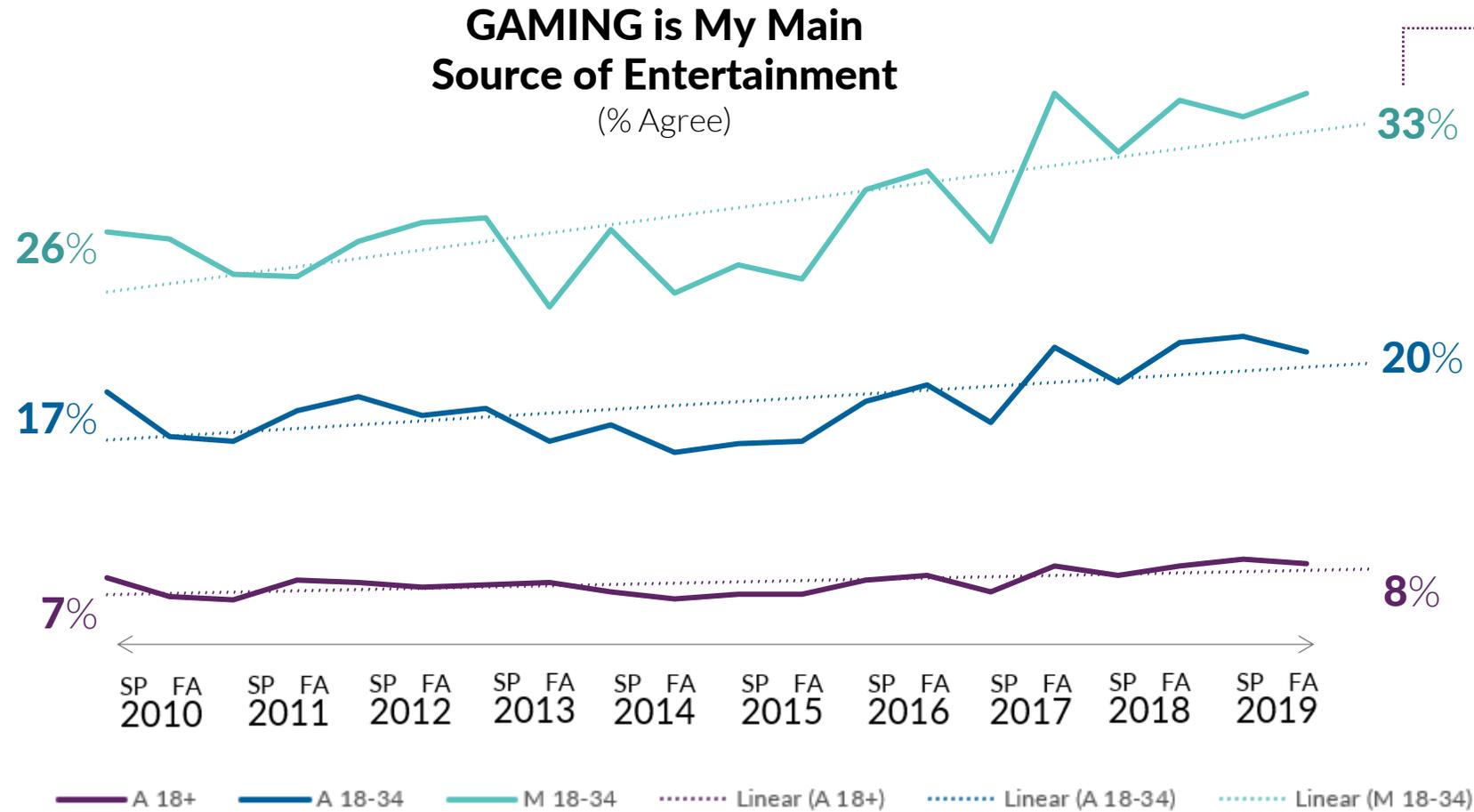
Down 27%
From 2010



Base: All Adults
How much do you agree or disagree with each of the following statements? [NET: Agree a lot or Agree a little]



Gaming as main entertainment source is rising; driven especially by men 18-34



Gaming
Up 26%
from 2010



18- to 34-year-old esports fans

Top indexing media channels by platform



WEBSITES (CONNECT PLUS)

TOP 10

- Reddit.com** 38% (110)
- CBSsports.com** 20% (142)
- ESPN.com** 17% (127)
- CNBC.com** 15% (110)
- iHeart.com** 13% (111)
- GameSpot.com** 12% (112)
- FoodNetwork.com** 9% (110)
- Affirm.com** 9% (111)
- PlayStation.com** 8% (114)
- Kinja.com** 8% (138)



MAGAZINES

TOP 10

- Time** 18% (133)
- National Geographic** 15% (124)
- Sports Illustrated** 13% (164)
- Vogue** 11% (119)
- Game Informer** 10% (146)
- Rolling Stone** 9% (134)
- Men's Health** 9% (136)
- ESPN The Magazine** 9% (160)
- Official Xbox Magazine** 8% (162)
- National Geographic Traveler** 8% (143)



TV NETWORKS

TOP 10

- ESPN** 27% (147)
- HBO** 21% (119)
- ESPN 2** 15% (157)
- FX** 15% (126)
- TBS** 14% (130)
- TNT** 14% (143)
- History** 14% (125)
- Adult Swim** 13% (116)
- Nickelodeon** 13% (121)
- Cartoon Network** 13% (126)

RANKED BY % WITH INDEX 110+

Base: Esports Fans Age 18-34; Indexed against the average Adult Age 18-34; minimum 5%
Websites visited in the past 30 days (excludes productivity, shopping, tech and business sites); magazines read/looked into in past 6 months; TV Networks watched in past 7 days

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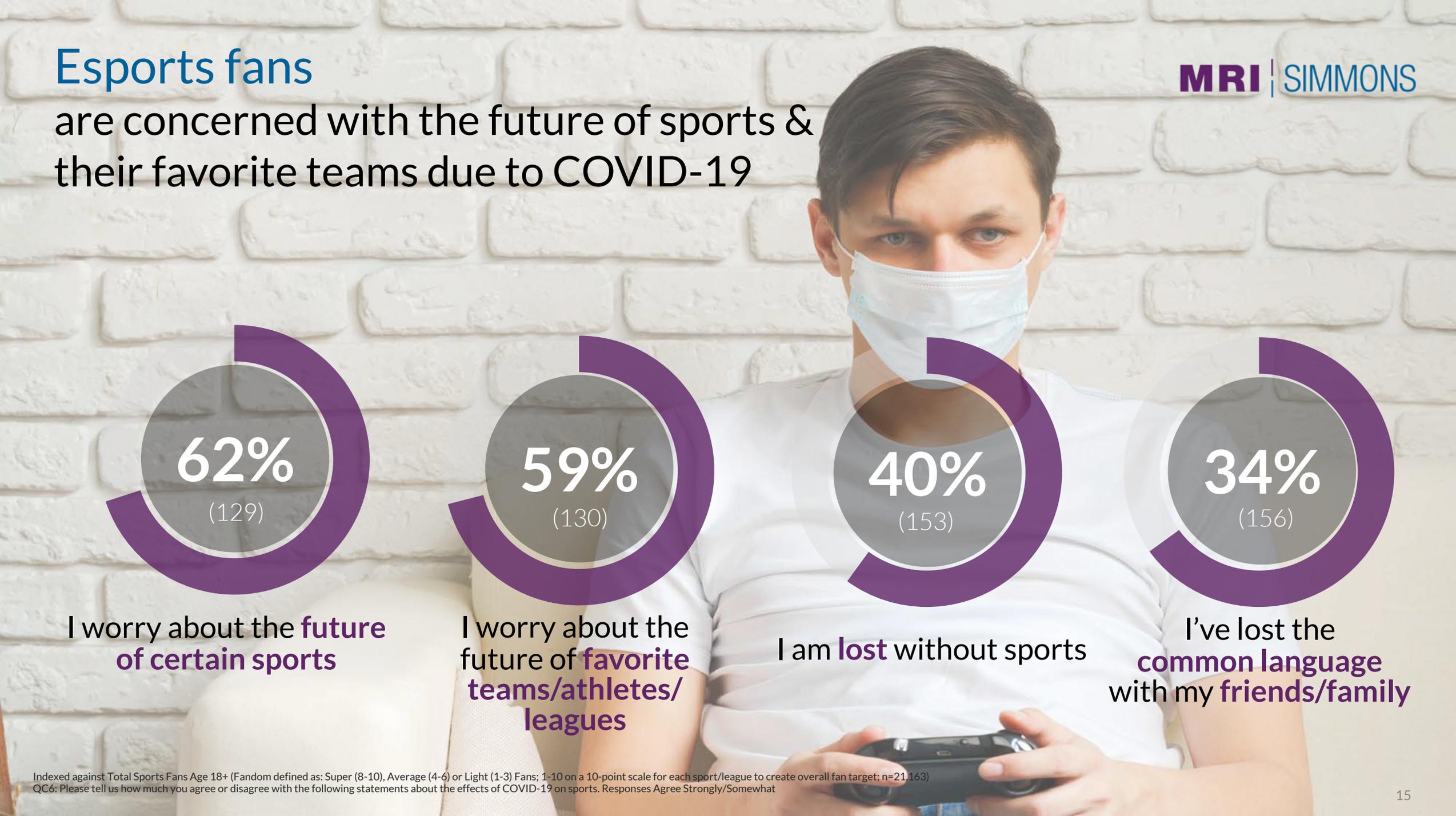


Sports Illustrated

ESPN

Esports fans

are concerned with the future of sports & their favorite teams due to COVID-19



62%
(129)

I worry about the **future** of certain sports

59%
(130)

I worry about the future of **favorite teams/athletes/leagues**

40%
(153)

I am **lost** without sports

34%
(156)

I've lost the **common language** with my friends/family

Esports fans miss the healthy competition of live events and games since COVID-19



Close to half of esports fans have been re-watching **classic games/events from their favorite sports** during COVID-19

Esports fans are also more likely to have started a **full season** from a sport that they **had not previously followed**

Sports documentaries as well as **sports-related movies** have also been popular ways for esports fans to watch sports content during this time

For a deeper dive into esports

Our full esports report goes into depth on esports and the fans that love it, including:

- 🎮 A primer on the esports ecosystem
- 🎮 The state of the esports world
- 🎮 Esports in the media landscape
- 🎮 Esports fandom in context with other sports
- 🎮 Reaching the elusive M18-34 demo via esports
- 🎮 Attitudes and opinions about esports, including
 - 🎮 Fandom and community
 - 🎮 Sponsorships and advertising
- 🎮 A demographic portrait of the esports fan
- 🎮 Leisure activities and streaming habits
- 🎮 Top brands for esports fans
- 🎮 Insight into esports advertising and sponsorship
- 🎮 Media trends, habits, and usage
- 🎮 Social media
- 🎮 Fan segments by game type, including
 - 🎮 Demographics
 - 🎮 Brand usage
- 🎮 The impact of COVID-19 on esports

To learn more about our esports report or the larger Sports Fan Study, contact us today.

MRI-Simmons is the leading provider of insights on the American consumer. With thousands of attitudinal and behavioral data points, gathered through ongoing surveys and passive measurement, MRI-Simmons empowers advertisers, agencies, and media companies with deeper insights into the “why” behind consumer behavior.

MRI-Simmons combines best-practice survey methodologies with an innovative technology platform and advanced data visualizations. MRI’s Survey of the American Consumer® is the industry standard for magazine audience ratings. In parallel, the company has been at the forefront of innovation, significantly accelerating the time to insights for brand builders, strategists, planners, and sales, regardless of their data acumen.

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