



**FREE
VERSION**

2020

Global Esports Market Report

Key Trends | Market Sizing & Forecasts
Special Focus Topics | Rankings



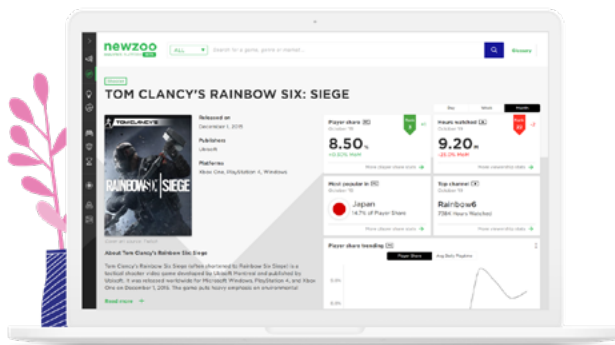
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Executive Summary

In the coming year, the global esports economy will generate revenues of \$1.1 billion, a year-on-year growth of +15.7%. Most of these revenues (74.8%) will come from sponsorships and media rights, which will total \$822.4 million, a +17.2% increase from last year. Consumer spending on tickets and merchandise will total \$121.7 million, while another \$116.3 million will come from game publishers' investments into the esports space, via supporting tournaments through partnerships or as white-label projects with professional tournament organizers.

The global esports audience will reach 495.0 million this year, made up of 222.9 million Esports Enthusiasts and a further 272.2 million Occasional Viewers. In 2020, the average revenue per Esports Enthusiast will be \$4.94, up +2.8% from 2019. As the esports market matures, new monetization methods will be implemented and improved upon. Likewise, the number of local events, leagues, and media rights deals will increase; therefore, we anticipate the average revenue per fan to grow to \$5.27 by 2023.

Mobile has unlocked esports for emerging markets—a trend that we have seen reflected in our data. Aside from growing interest in traditional esports titles in some markets, including Vietnam, games like PUBG Mobile and Garena Free Fire have exploded in popularity. As such, emerging esports markets will show the highest CAGR (2018-2023), with regions such as Southeast Asia (+24.0% CAGR), Japan (+20.4%), and Latin America (+17.9%) accelerating to close the gaps between themselves and older, more developed esports markets. Brand-building will prove crucial in the coming years, with the strongest brands attracting the most fans and, in turn, gathering the most power in the business. New monetization methods, content formats, and competitors, as well as changing content packages and broadcasting rights, are also due to shake up the esports business.

China will remain the largest esports market in 2020, with revenues of \$385.1 million. These revenues will grow with a CAGR (2018-2023) of +17.0% to reach \$540.0 million by 2023. Most of these revenues will come from sponsorships, which will grow from \$187.1 million in 2019 to \$222.4 million in 2020. Digital goods will be the fastest-growing revenue stream toward 2023, growing from \$7.1 million in 2020 to \$17.2 million by 2023. North America will be the second-largest region in terms of revenues with \$252.5 million, followed by Western Europe as the third-most revenue-generating region with \$201.2 million in 2020. China will be host to the largest esports audience with 162.6 million in 2020, followed by North America with an audience of 57.2 million.



1. Introduction



Foreword

A dynamic market demands a dynamic approach—these words have been at the forefront of our esports strategy since the beginning. It has already been seven years since Newzoo began diving into the esports business, and the landscape has changed dramatically. The audience has grown multiple times over, and the revenues have followed suit. Today, esports regularly makes headlines in the mainstream press, but it's also on the minds of the business world—not only within gaming but across everything from automotive to apparel. However, as the market has evolved and flourished, it has also grown more sophisticated and complex.

Our data highlights that 2019 was a seminal year for many teams, with tremendous growth in traditional revenue streams such as sponsorship. Meanwhile, leagues have been moving toward a “homestand” system in which teams play at their own venues. This potentially opens the door to increased matchday revenues for teams, including returns from ticketing and concessions, as well as larger merchandise revenues.

The market is also maturing in entirely new ways, with innovative revenue streams starting to develop, such as streaming and digital goods. These are new ways to monetize that are not available to traditional sports; they also demonstrate a growing understanding of the competitive advantages esports has over sports. These revenue streams have become pioneering ways for teams, organizers, and publishers to grow the business.

As the esports business has evolved, we've also seen its individual markets take different trajectories, each taking its own form and flavor. Different platforms, games, and market conditions create unique individual markets. Needless to say, it's important for anyone who works within the space—or who wants to enter it—to understand these differences.

With all the above in consideration, we also acknowledge the need to keep our model fresh. To that end, we've leveraged our continuous and extensive market analysis to work on a revenue model revamp, utilizing new partners and internal expertise to ensure that our model stays up to date with the business. We're happy to finally present to you the results.

Aside from a refreshed model, the full report features key insights into five different regions and an additional eight submarkets, as well as our latest forecast scenarios for the esports audience and its economy. We also discuss the explosion of mobile esports, the state of collegiate, the latest developments from Japan, and more. 2020 is already on track to be a milestone year for the esports business, and we're looking forward to watching it unfold together.



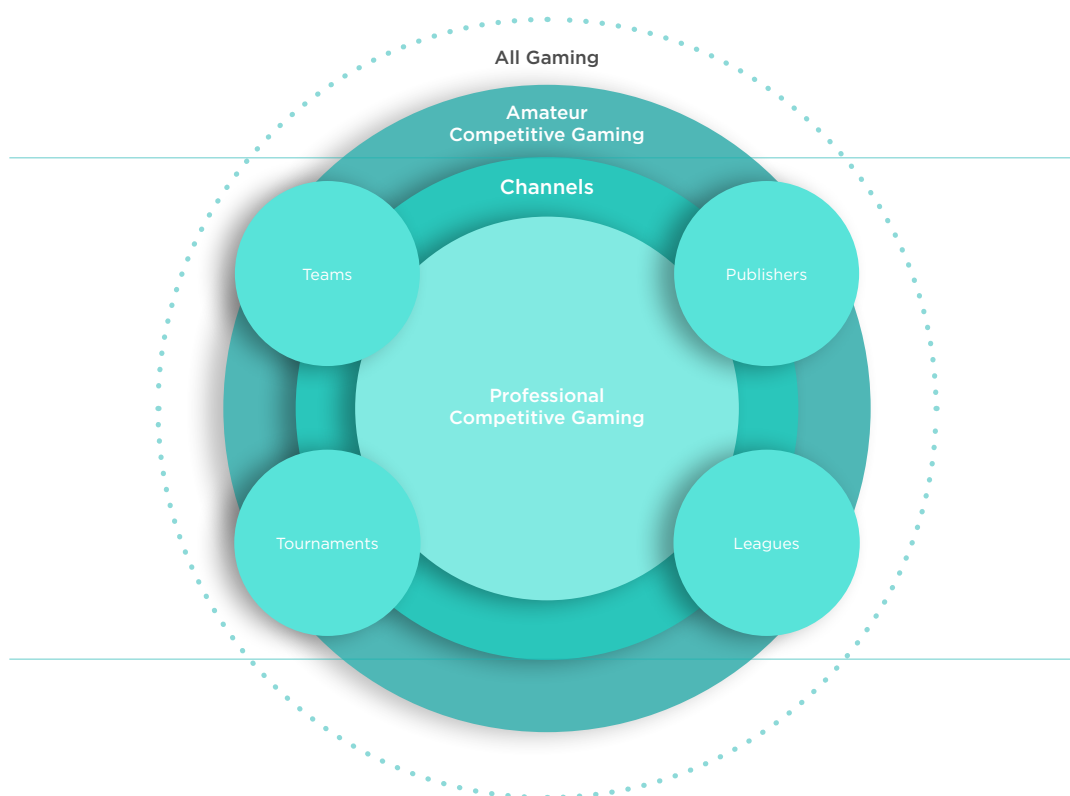
Remer Rietkerk

Head of Esports

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 or semi-professional 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 gamers live broadcasting themselves playing online. Some of these streamers have grown to celebrity status, including Ninja and Shroud. We consider the live-streaming market as separate from 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, and some tournaments are allowing their competitors to livestream themselves competing.

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 Without Platform Revenues for the First Time

- 1 Global esports revenues will grow to \$1.1 billion in 2020, a year-on-year growth of +15.7%, up from \$950.6 million in 2019.
- 2 In 2020, \$822.4 million in revenues—or three-quarters of the total market—will come from media rights and sponsorship. This will increase to \$1.2 billion by 2023, making up 76% of total esports revenues.
- 3 Globally, the total esports audience will grow to 495.0 million people in 2020, a year-on-year growth of +11.7%. Esports Enthusiasts will make up 222.9 million of this number, growing +10.8% year on year.
- 4 China is the largest market by revenues, with total revenues of \$385.1 million in 2020. This is up +18.0% from 2019's total of \$326.2 million. It is followed by North America, with total revenues of \$252.8 million, and Western Europe, with total revenues of \$201.2 million.
- 5 The global average revenue per Esports Enthusiast will be \$4.94 this year, up +2.8% from \$4.80 in 2019.
- 6 In 2019, there were 885 major events. Together, they generated \$56.3 million in ticket revenues, up from \$54.7 million in 2018.
- 7 Total prize money in 2019 reached \$167.4 million, a slight increase from 2018's \$150.8 million.
- 8 The League of Legends World Championship was 2019's biggest tournament by live viewership hours on Twitch and YouTube, with 105.5 million hours. The Overwatch League was the most-watched league by live viewership hours on Twitch and YouTube, generating 104.1 million hours.



2.

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.

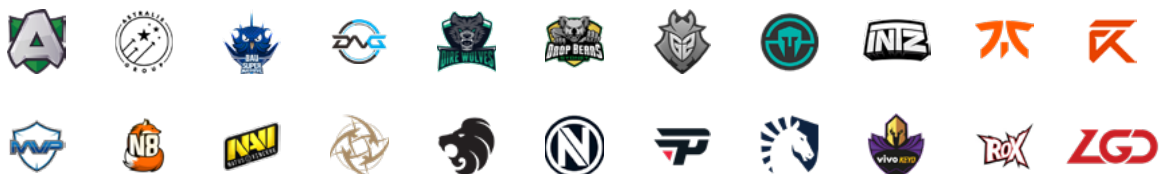
The data on Esports Enthusiasts and Occasional Viewers is largely based on our proprietary primary consumer research (Consumer Insights), which continues to form the basis of our detailed understanding of consumers, esports, and games. In 2020, we will carry out research in more than 30 countries/markets, 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. These include revenue actuals from leading teams and companies in the industry. 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 historical 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.

Newzoo's Esports Teams Partners



We define industry revenues as the amount the industry generates through the sale of sponsorship deals, media rights, digital, streaming, tickets and merchandising, and publisher fees. Currently, only teams account for digital revenues. We are committed to ongoing research so that we can continue to accurately model and project digital esports revenues from publishers.

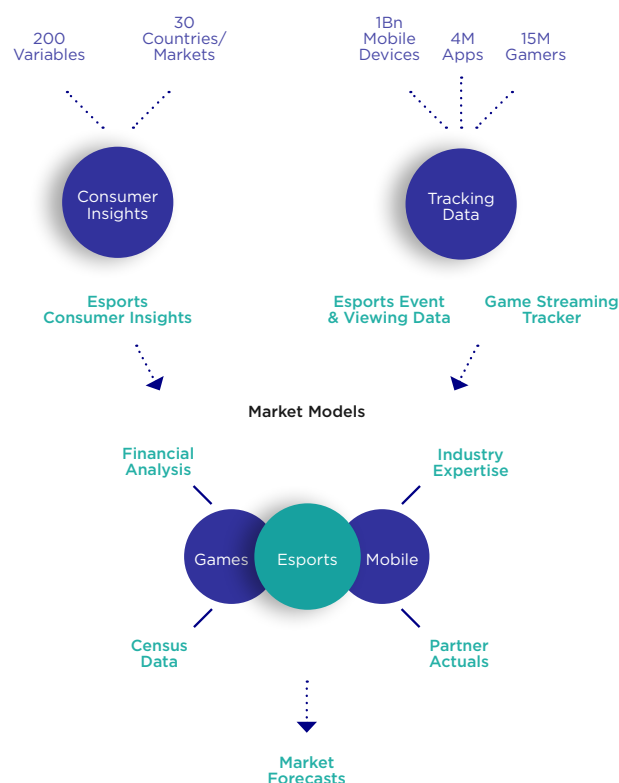
Our revenue numbers exclude prize pools and player salaries, which we consider to be cost items at an industry level. The revenue numbers also exclude fan contributions to prize pools, which we consider in-game revenues.

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 or targeting consumers in that specific territory.

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



Revenue Model Revamp

This edition of our Global Esports Market Report features a significant refresh to our revenue model, influencing the different revenue streams and players involved. We regularly evaluate our model to ensure it is in line with the latest dynamics in this ever-evolving market. Using internal and external analysis, we applied several changes to make sure it stays up to date with the market.

Firstly, it is important to highlight the changes in the different revenue streams, which impact the total revenues for the esports market. Our new revenue streams do not include advertising, which was previously one of the major revenue streams in our model. Advertising revenues are generated by broadcasting platforms, including Twitch, YouTube, and Mixer, and are often not separated from general streaming content. When modeling the industry, we see the media rights revenues paid to organizers as part of the industry, but the margins earned by broadcasting platforms as out of the scope. This better reflects the methodology most sports industry evaluations use. The majority of esports-specific advertising comes from team and organizer sponsorships.

We have also added two new revenue streams: digital and streaming. We believe they are important revenue drivers for the future. It has become common for teams to sign content creators and make content themselves, leveraging their reach to create a broader range of content outside of competing in events. Digital, on the other hand, is a revenue stream relevant to teams and first-party organizers. In most top-tier esports titles, team-specific skins or other in-game items that are sold have become common. Fans and other players of the game can then purchase these skins while simultaneously funding the esports business.

Another important change to our methodology is in how we see and account for different sizes and geographical reaches of events. We made some revisions in how we evaluate the impact of organizers and their events. We use a broader scope and range of underlying revenue inputs, which account for the different types of organizers.

It is also important to highlight the differences between large and smaller events. Large events can monetize their audience more effectively than smaller leagues and tournaments. Larger fan and viewer bases are more attractive for sponsors and give these events more leverage when negotiating with broadcasting platforms. These same dynamics apply to teams. Smaller teams have more difficulties monetizing fans efficiently, but this is easier for teams with large followings. Reflecting this in our model ensures the high number of teams does not inflate the market. To better understand how differences in team sizes affect revenues, we also brought in many new partners of all sizes. As with organizers, we now account for the different team sizes, as well as their ability to monetize their fans.

Additionally, to better represent the value drivers in the market, we allocate revenues based on geographical scope and where the value comes from rather than purely the location of the event. A large international tournament or league held in the U.S. will often have a global audience. Therefore, we no longer attribute these revenues to just one region but assign them according to the event's audience. This influences the underlying revenue distribution across regions and individual countries/markets.

In addition to the underlying adjustments for both teams and organizers, we also consider regional macro-economic or local esports market factors for the different revenue streams, enabling us to correct for any external factors. These changes to how we approach esports revenues—specifically, how organizers and teams monetize events and their fans—impact overall revenues. More importantly, the changes affect the distribution of revenues across geographical regions. The removal of some revenue streams, combined with the addition of new ones, changes the scope of total revenues.

The overall set of changes represents a necessary evolution of our model. While the fundamental methodology remains intact, these additional layers of sophistication help reflect the more complex industry esports becomes every year it grows.

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 independent of frequency: 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, Tournament, 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.

Digital Revenues: Revenues generated from digital sales of in-game items that utilize Team IP or signed player likeness. These are currently limited to the revenues that teams earn. Publisher cuts of these revenues will arrive in a future update.

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.

Streaming Revenues: Revenues generated through professional players or signed streamers streaming—either on their own channels or on team channels. Also include revenues generated through online video platforms from esports teams' own content broadcast on those platforms.

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

A person wearing a yellow and black racing suit is seated in a racing simulator. They are holding a steering wheel and looking at a large monitor. The background is blurred, showing other simulators and people. The text "3. Key Global Trends" is overlaid on the image.

3. Key Global Trends



Mobile

A New Pillar of the Esports Business?

In the past 12 months, mobile esports has enjoyed a huge spike, and we expect this popularity to increase even further in the coming months. Markets like Southeast Asia, India, and Brazil are at the forefront of this growth. The prevalence of lite apps—combined with the success of games like PUBG Mobile and Garena Free Fire—has solidified competitive mobile gaming as a popular pastime in these emerging markets. Naturally, competitive scenes in these games have also exploded in popularity across growth markets, contributing to a huge jump in live viewership numbers for mobile esports. In fact, viewership jumped from 15.3 million hours in 2018 to 98.5 million in 2019—an increase of more than 600%.

YouTube Is the Main Platform for Mobile Esports

PUBG Mobile and Garena Free Fire Lead the Charge

What Does YouTube's Dominance Mean?



Innovation in Digital and Other Direct-to-Consumer Esports Products



Esports Cities vs. Host City Programs



Franchises and Leagues Broaden Their Horizons



Alcohol Makes High-Profile Foray into Esports Sponsorship



Five complete trends are covered in the full report



4

Global Overview

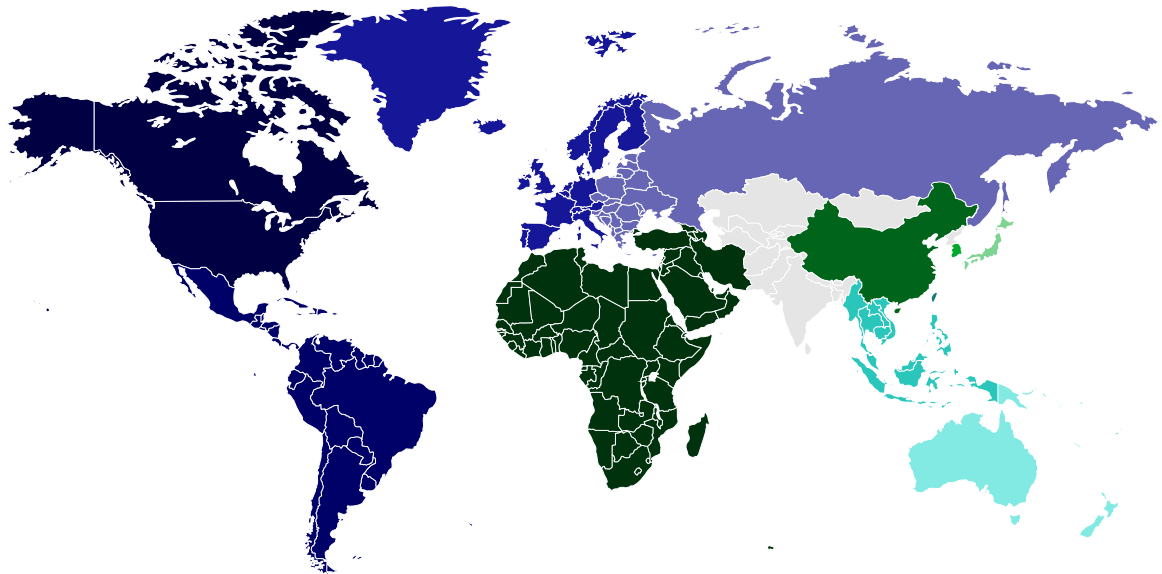


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2018

Global Overview



2020

Population	7,794.8M
Online Population	4,397.1M
Esports Awareness	1,955.5M
Esports Enthusiasts	222.9M
Esports Revenues	\$1,100.1M
Annual Revenue per Enthusiast	\$4.94

Data for 5 regions and 8 submarkets in the full report



Audience Forecast

The esports audience will grow to 495.0 million globally in 2020. Esports Enthusiasts will account for 222.9 million of this number, up 25 million year on year, and will increase with a CAGR (2018-2023) of +11.3% to 295.4 million in 2023. Meanwhile, the number of global Occasional Viewers will hit 272.2 million in 2020, up from 2019's 245.2 million. This number will grow with a CAGR (2018-2023) of +9.6% to 351.1 million in 2023.

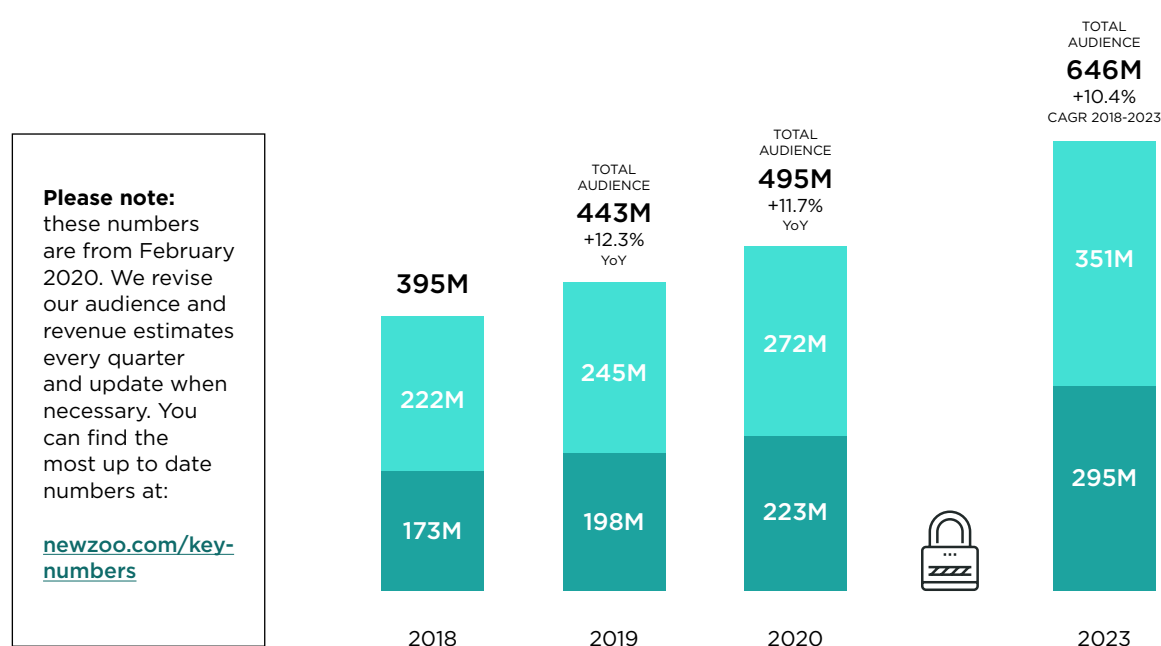
In 2020, 2.0 billion people will be aware of esports worldwide, an increase from 2019's 1.8 billion. China will continue to be the country/market that will contribute most to this number, with 530.4 million esports-aware people.

Audience and awareness numbers are increasing in emerging markets in Latin America, the Middle East and Africa, and Southeast Asia. This mostly due to urbanization and advances in IT infrastructure, coupled with explosive mobile titles like PUBG Mobile and Garena Free Fire. Globally, the increasing popularity of mobile gaming is an important contributing factor, as well as the continued appeal of the first-person shooter, battle royale, and MOBA genres. Furthermore, younger generations that have grown up with gaming and watching video game content continue to age into the market, further driving audience growth.

Esports Audience Growth

Global | 2018, 2019, 2020, 2023

- Occasional Viewers
- Esports Enthusiasts



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

Revenue Forecast

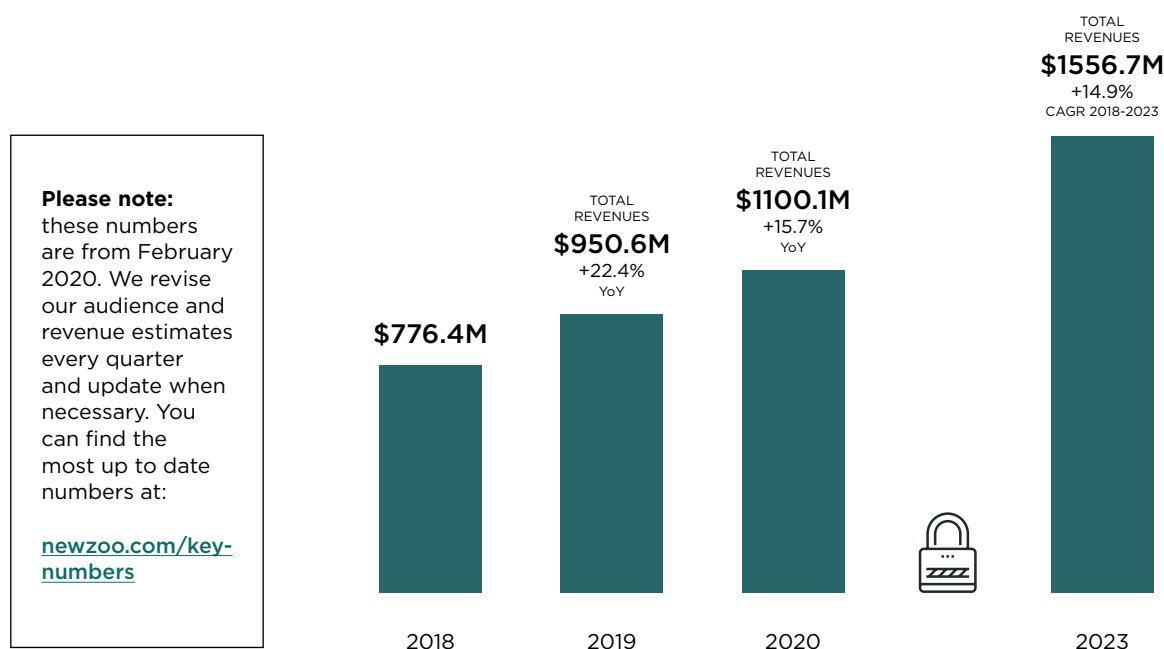
The year 2020 will be a landmark for the esports market, which will, for the first time, exceed the billion-dollar revenue mark without advertising platform revenues. Total esports revenues will reach \$1.1 billion in 2020, an increase of almost \$150 million compared to 2019. With the changes to the model this year, China now accounts for the largest share of the revenues, generating 35.0% of the global total.

The highest-grossing esports revenue stream worldwide is sponsorship, which will generate \$636.9 million in 2020, up from \$543.5 million in 2019. The world's fastest-growing esports revenue stream by far is our new revenue stream, digital, with a CAGR (2018-2023) of +72.4%, compared to sponsorship's +16.6%. We've also introduced streaming as a revenue stream, which will generate \$18.2 million in 2020 and grow to \$31.6 million in 2023.

In 2020, revenues from merchandise and tickets will exceed those from game publisher fees, which will remain fairly stable over the coming years with a CAGR (2018-2023) of +0.5%.

Esports Revenue Growth

Global | 2018, 2019, 2020, 2023



2020 Revenue Streams

Of the \$1.1 billion esports revenues that will be generated this year, an impressive 57.9% (\$636.9 million) will come from sponsorships. Despite holding such a high share of all esports revenues, sponsorship will grow +17.2% year on year and is on track for even further growth toward 2023.

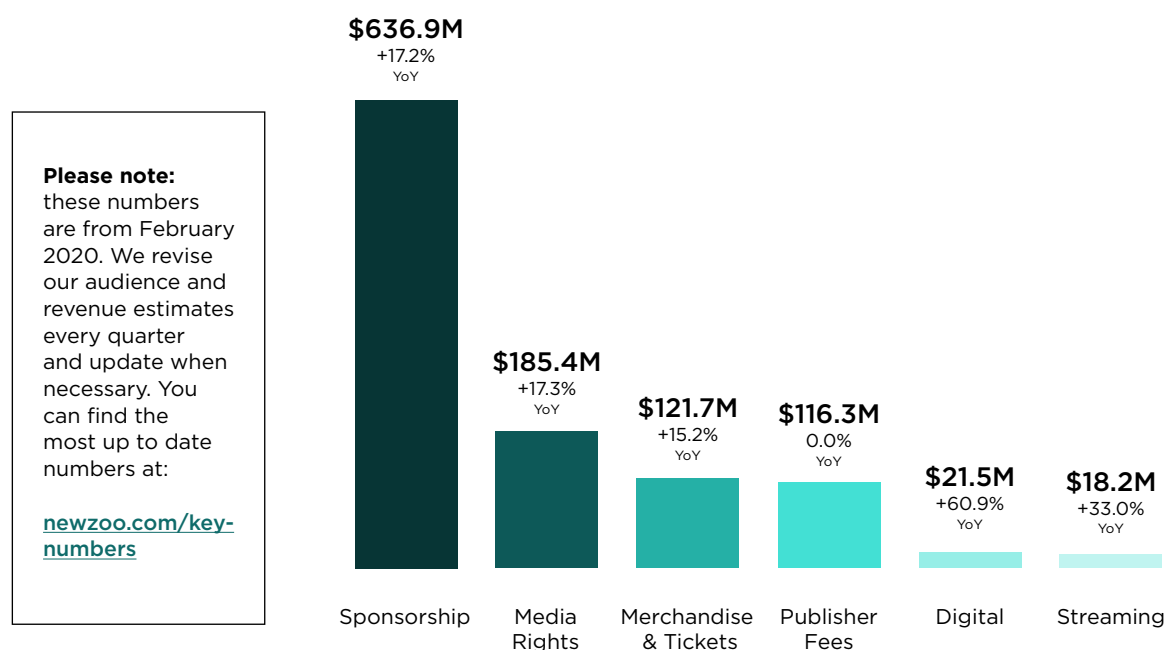
The second-largest revenue stream in 2020 will be media rights, making up 16.9% of the global market (\$185.4 million) and representing a year-on-year growth of +17.3%. While media rights revenues will grow slightly faster than sponsorship revenues this year, sponsorship's future growth prospects are somewhat better.

Merchandise and tickets will be the third-biggest stream, taking 11.1% of the esports market (\$121.7 million)—an increase of +15.2% year on year. Remaining relatively static over last year, publisher fees will generate 10.6% of revenues this year. The two new revenue streams for this year's report, digital and streaming, will be the smallest but fastest-growing revenue streams, respectively growing +60.9% and +33.0% year on year.

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

Esports Revenue Streams

Global | 2020





5. Rankings



Most-Watched Games

The tables below show 2019's most-watched games on Twitch, YouTube, and Mixer 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 once again 2019's most-watched game on Twitch and YouTube by live esports hours. The title was #2 by live non-esports hours, owing to the continued strong performance of battle royale phenomenon Fortnite, which was viewed live for more than 1.3 billion hours.

Riot Games' Teamfight Tactics was the most-watched new title by live esports hours, taking #12 by non-esports hours. The titles PUBG Mobile, Garena Free Fire, and Mobile Legends Bang Bang all entered 2019's top 25 ranking (by live esports hours). World of Warcraft was ranked #5 for non-esports hours, with an increase of more than 50% compared to the previous year. This jump was mostly due to the release of World of Warcraft Classic, which initially brought back numerous players and streamers. Grand Theft Auto V's live non-esports hours have rocketed from 180 million hours in 2018 to 635 million hours during 2019. The release of the popular FiveM's Role Playing (GTA RP) mod in Q1 sparked this rise.

Game	Main Device Competed on	Hours Watched
League of Legends	PC	348.8M
Counter-Strike: Global Offensive	PC	215.0M
Dota 2	PC	198.9M
Overwatch	PC	109.9M
Hearthstone	PC	37.0M
Tom Clancy's Rainbow Six: Siege	PC	32.4M
Arena of Valor	Mobile	31.6M
PUBG Mobile	Mobile	27.9M
Fortnite	PC	27.5M
PLAYERUNKNOWN'S BATTLEGROUNDS	PC	26.8M
Starcraft II	PC	22.8M
Rocket League	PC	20.4M
Super Smash Bros. Ultimate	Console	18.6M
Garena Free Fire	Mobile	17.8M
Call of Duty: Black Ops 4	Console	13.3M
Magic: The Gathering	PC	12.9M
World of Warcraft	PC	10.3M
FIFA 19	Console	7.7M
Street Fighter V	Console	7.0M
Super Smash Bros. Melee	Console	5.2M
Mobile Legends: Bang Bang	Mobile	4.0M
Tekken 7	Console	3.8M
Clash Royale	Mobile	3.8M
Teamfight Tactics	PC	3.4M
FIFA 20	Console	3.0M
Total Top 25		1209.6M

Top 25 Games

by Live Esports Hours
Watched on Twitch,
YouTube, and Mixer | 2019

Top 50 Games

by Live Non-Esports
Hours Watched on Twitch,
YouTube, and Mixer | 2019



Full report includes:
Top 50 Tournaments
and Top 10 Leagues by
Live Hours Watched
on Twitch & YouTube,
Top 25 Languages, Top
Countries/Markets by
Esports Enthusiasts.

Game	Hours Watched
Fortnite	1327.9M
League of Legends	895.4M
Grand Theft Auto V	634.5M
Apex Legends	394.6M
World of Warcraft	381.9M
Minecraft	347.8M
PLAYERUNKNOWN'S BATTLEGROUNDS	341.5M
Dota 2	317.1M
Counter-Strike: Global Offensive	292.9M
PUBG Mobile	243.2M
Hearthstone	189.5M
Teamfight Tactics	163.6M
Garena Free Fire	161.1M
Overwatch	150.6M
Dead by Daylight	121.9M
Escape From Tarkov	117.5M
FIFA 20	111.1M
World Of Tanks	99.8M
FIFA 19	94.9M
Call of Duty: Modern Warfare	93.7M
Tom Clancy's Rainbow Six: Siege	91.3M
Slots	88.3M
Path of Exile	84.4M
Call of Duty: Black Ops 4	79.3M
Destiny 2	69.7M
Old School RuneScape	56.0M
Magic: The Gathering	55.4M
Sekiro: Shadows Die Twice	53.7M
Sea of Thieves	48.8M
Super Mario Maker 2	47.3M
Mobile Legends: Bang Bang	46.1M
Poker	44.3M
Rust	42.9M
Resident Evil 2	40.8M
Super Smash Bros. Ultimate	39.4M
Pokémon Sword/Shield	37.2M
Rocket League	37.0M
Auto Chess	35.9M
Smite	34.8M
Black Desert Online	34.6M
Paladins: Champions of the Realm	34.5M
Starcraft II	30.1M
WWE Supercard	30.0M
Final Fantasy XIV Online	30.0M
Tom Clancy's The Division 2	29.9M
Monster Hunter World	29.2M
Brawl Stars	26.6M
Standoff 2	25.2M
Games + Demos	25.0M
The Elder Scrolls Online	24.7M
Total Top 50	7833.2M

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KEY TOPICS & DATA POINTS

- FIVE KEY TRENDS SHAPING THE MARKET
- THE ESPORTS INDUSTRY: KEY PLAYERS, ORGANIZATIONS, AND DEVELOPMENTS
- THE ESPORTS MARKET (2018-2023)
- 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
- EUROPE
 - EASTERN EUROPE
 - WESTERN EUROPE
- MIDDLE EAST & AFRICA
- ASIA-PACIFIC
 - CHINA
 - SOUTH KOREA
 - JAPAN
 - EASTERN ASIA
 - SOUTHEAST ASIA
 - OCEANIA



ANALYSIS SUPPORT



Remer Rietkerk

Head of Esports



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Market Analyst

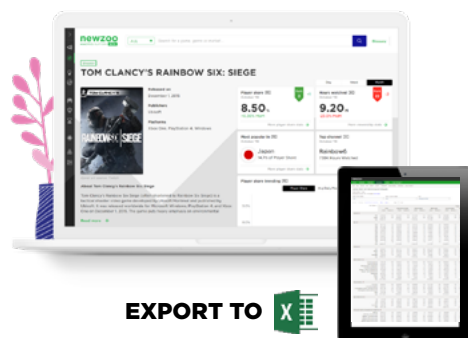


Richard Hordijk

Sr. Client Success Manager

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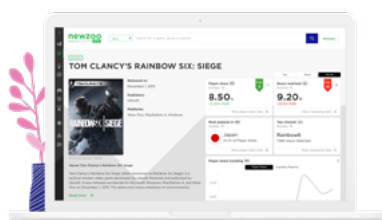
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Questions?

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