

The background image is a vibrant, high-angle shot of an esports event stage. Two large LED screens on either side of the stage show a person in a suit holding a trophy. The stage is illuminated with bright blue and white spotlights that create a starburst effect across the scene. In the center, there are large vertical banners for 'Intel Extreme Masters' and 'BenQ'. A large audience is visible in the foreground, seated and facing the stage. The overall atmosphere is energetic and professional.

ESPORTS SURVEY ANALYSIS

An Assessment of The In-Person Event Industry's Current and Future Viability

Presented November 2020





INTRODUCTION

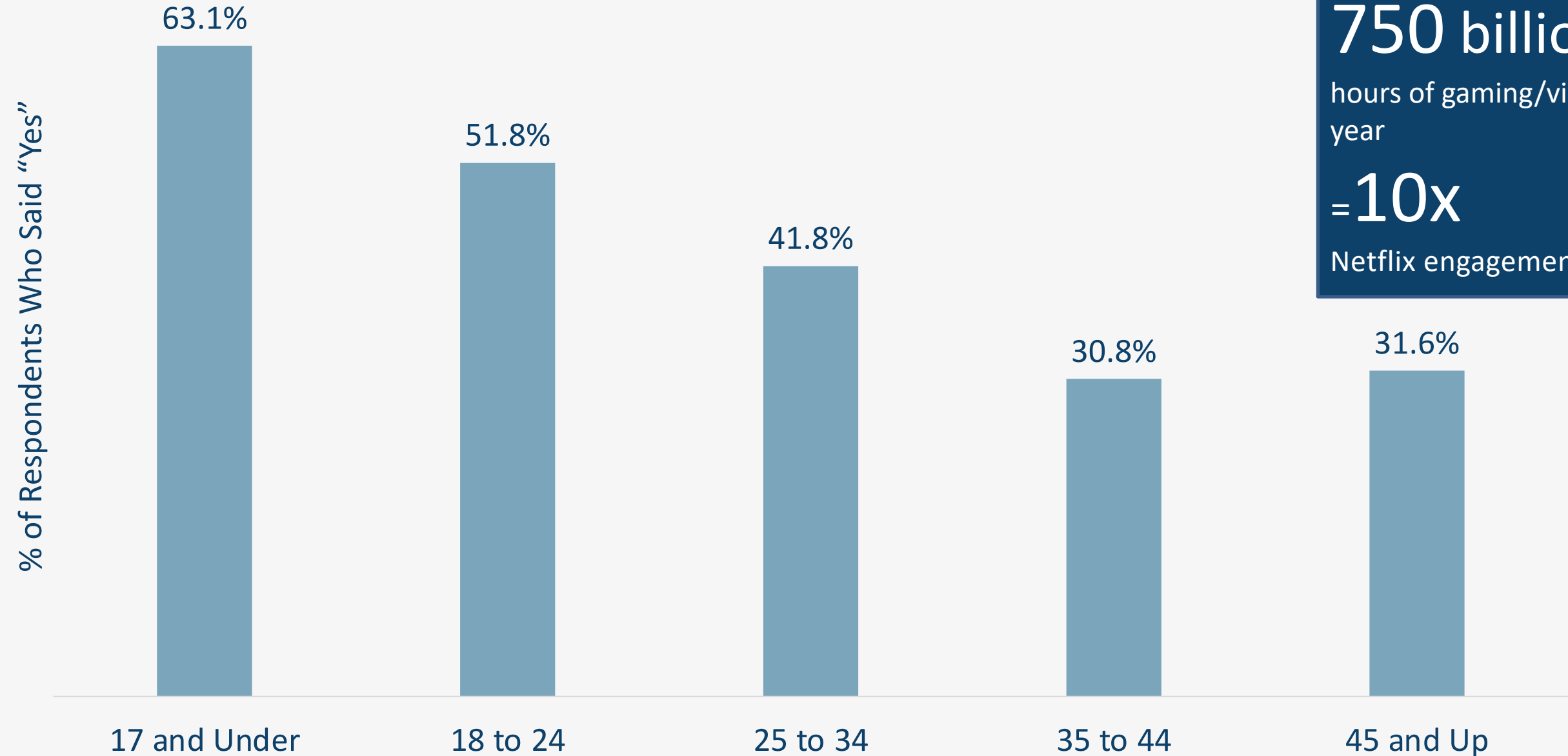
- 1. Esports Fan Survey Analysis** – summary of over 1,300 gamers and esports fans that responded to an in-depth survey regarding interest in attending, paying for, and traveling to esports events.
- 2. Host Destination and Event Venue Survey Analysis** – summary of feedback regarding interest in hosting esports events and experiences with hosting esports events provided by over 35 DMO's and over 25 event venues throughout the United States.



Esports Fan Survey Analysis

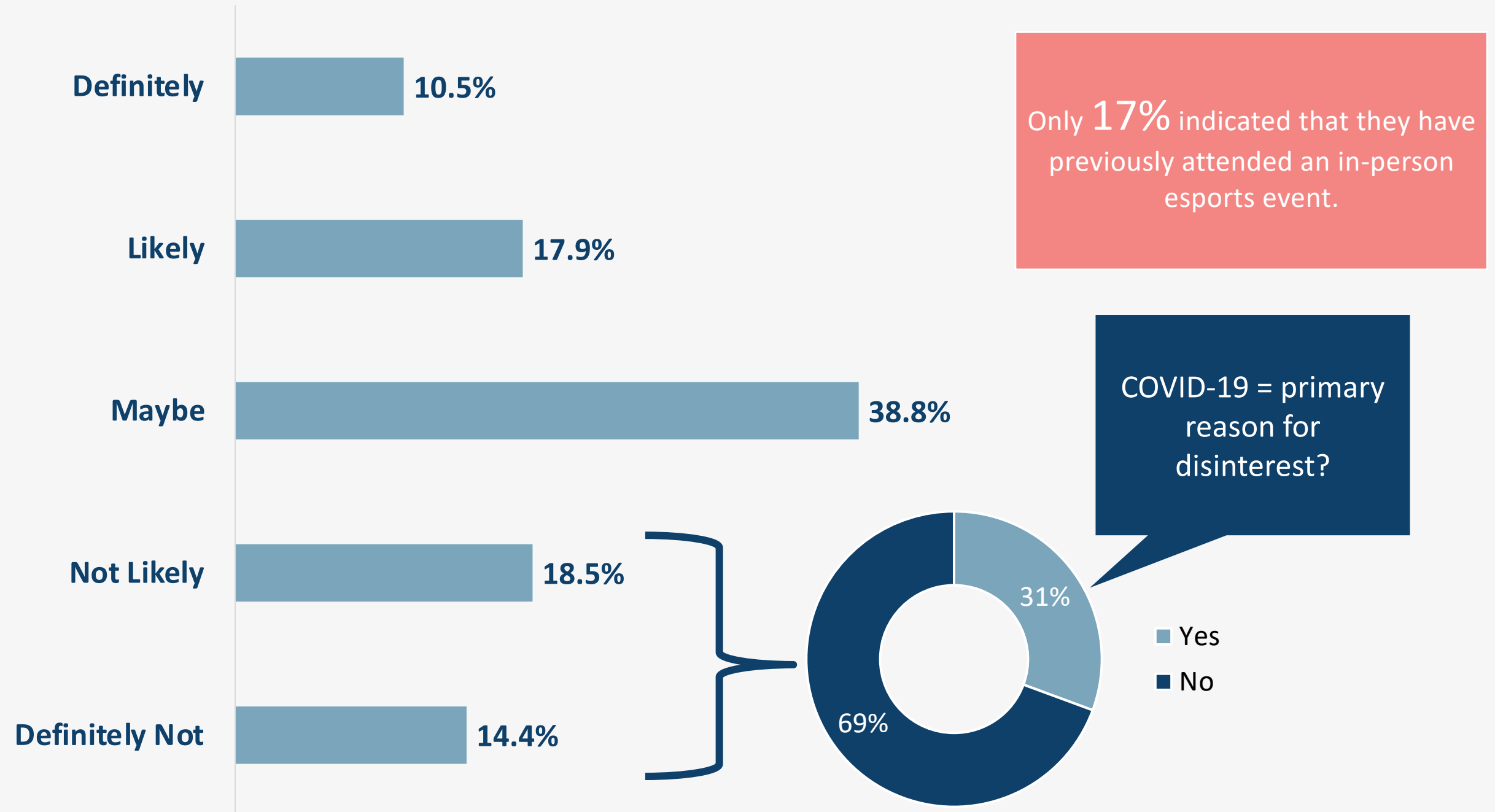
More than 3,400 in-depth responses from esports fans around the world and more than 1,300 responses from those in the United States.

"MY INTEREST IN ESPORTS HAS INCREASED SINCE THE START OF THE PANDEMIC."

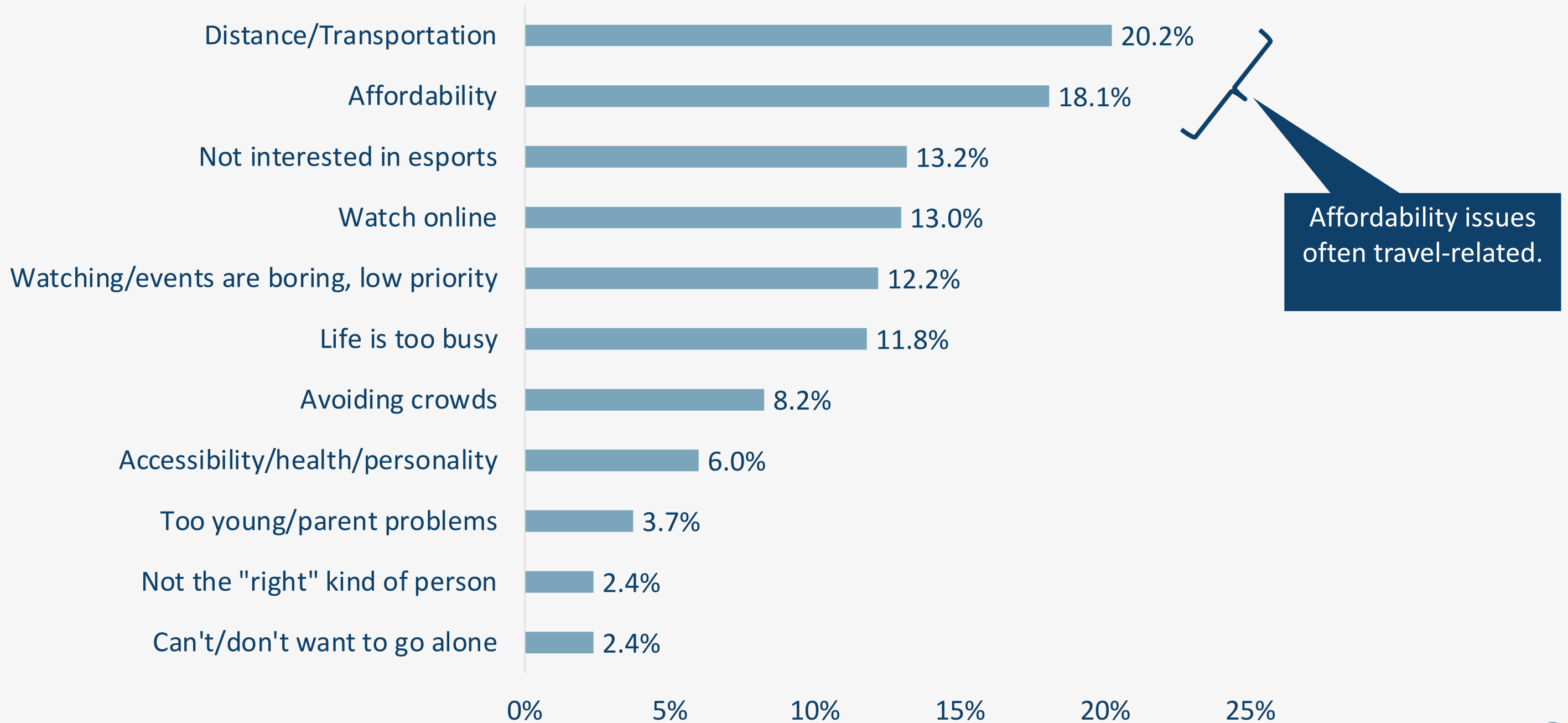


750 billion
hours of gaming/viewing this
year
=10x
Netflix engagement

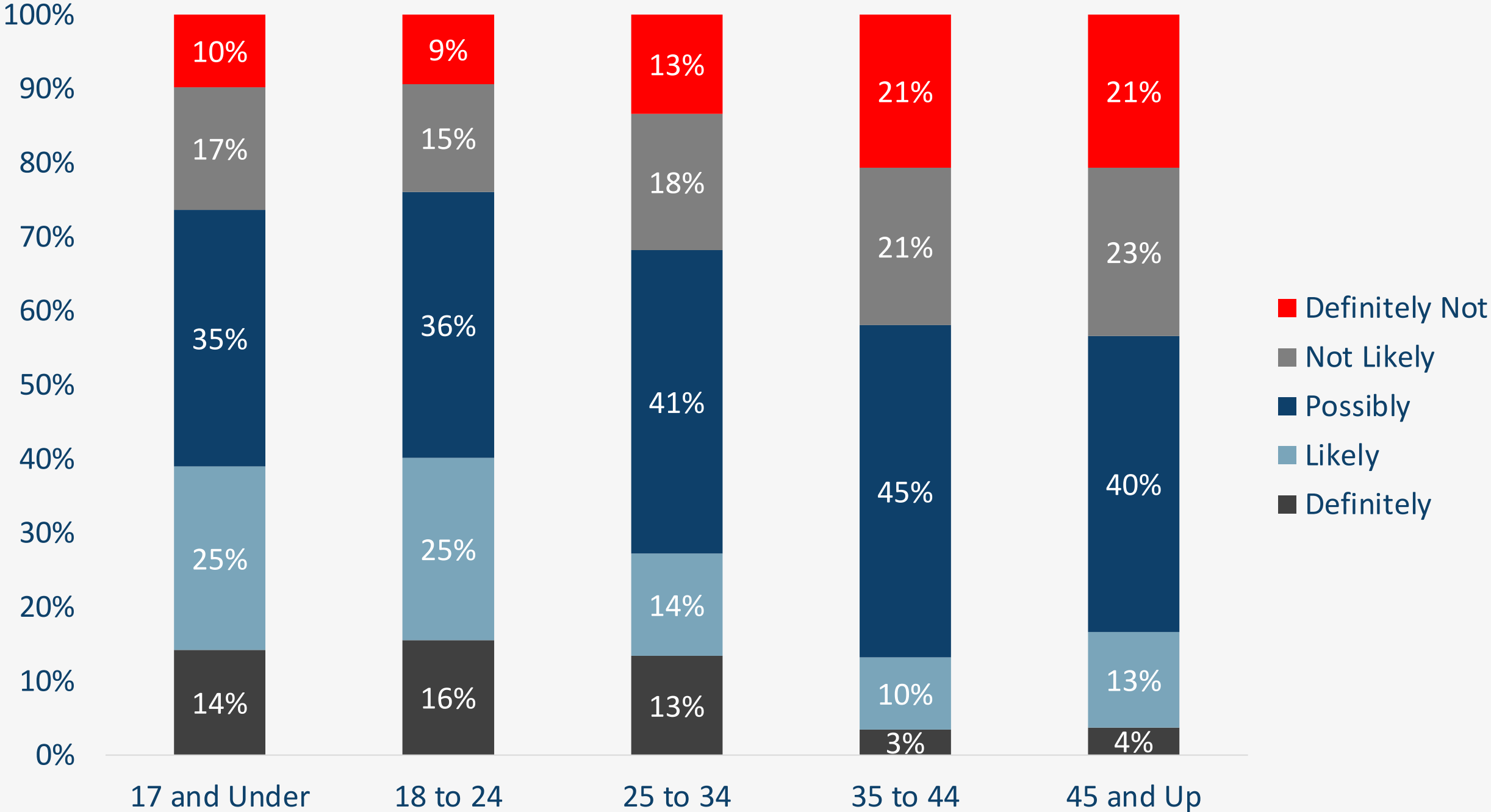
LIKELIHOOD OF ATTENDING AN IN-PERSON ESPORTS EVENT IN 2021



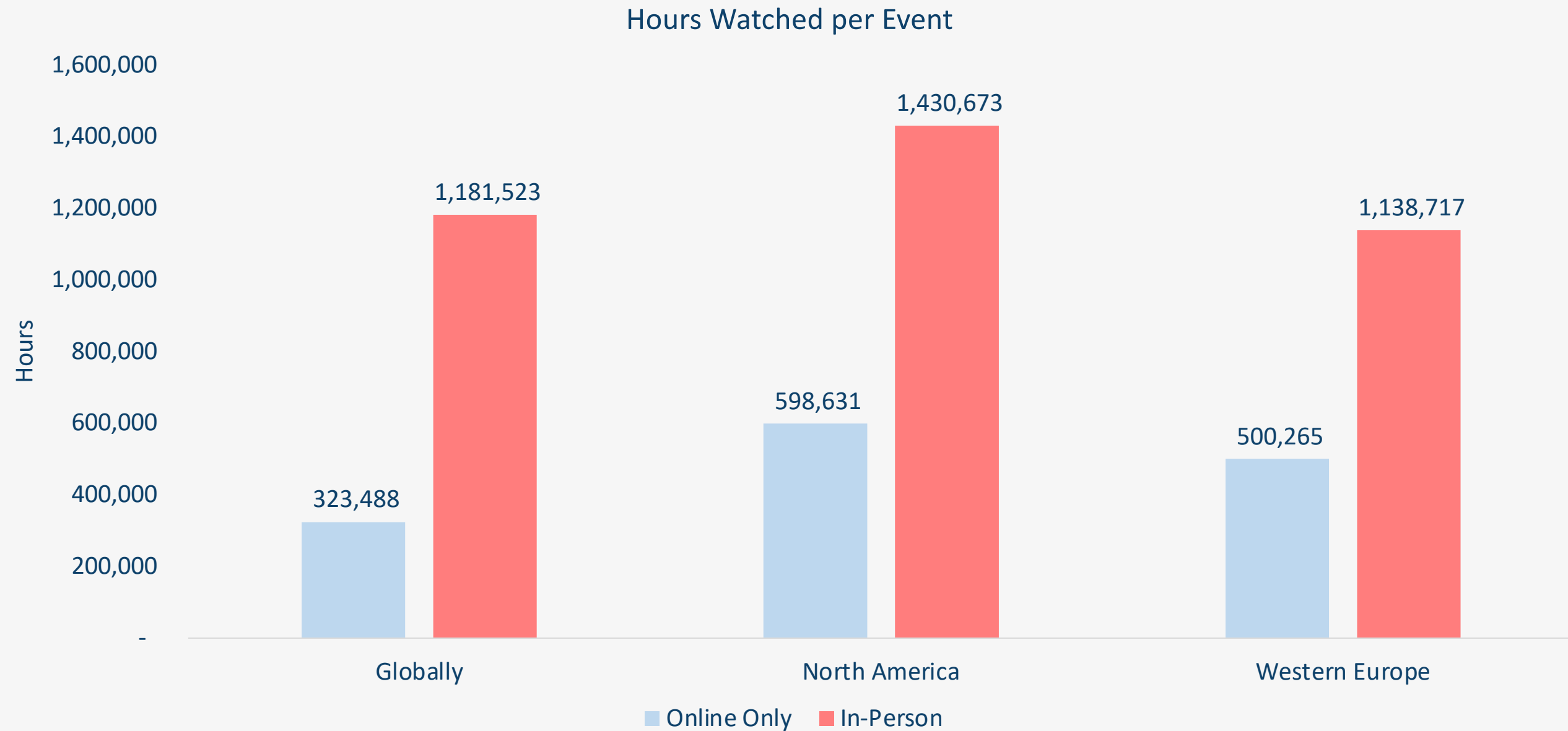
REASONS FOR LACK OF INTEREST IN ATTENDING AN ESPORTS EVENT



IN-PERSON EVENT INTEREST – BY AGE

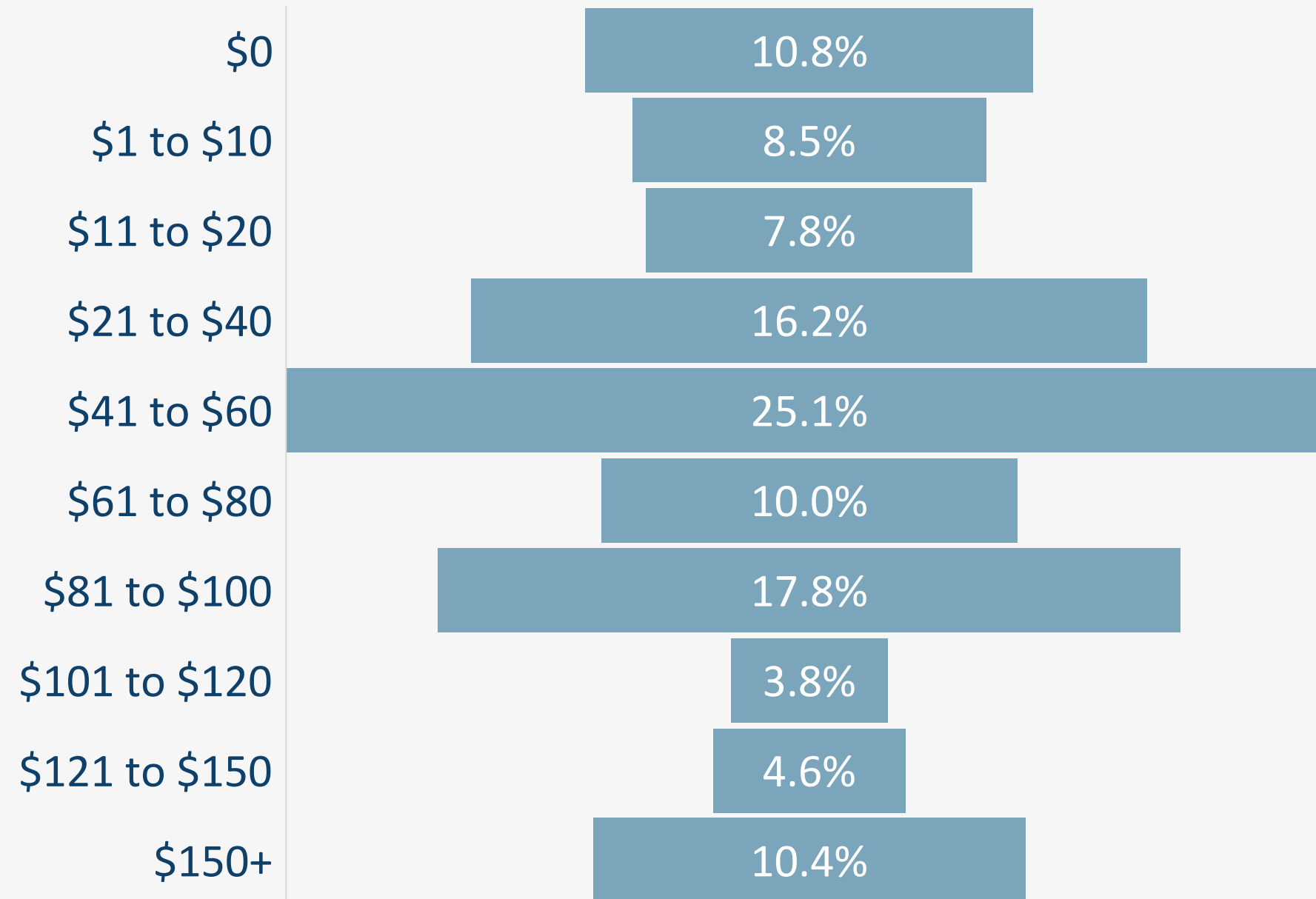


THE ARGUMENT FOR IN PERSON EVENTS

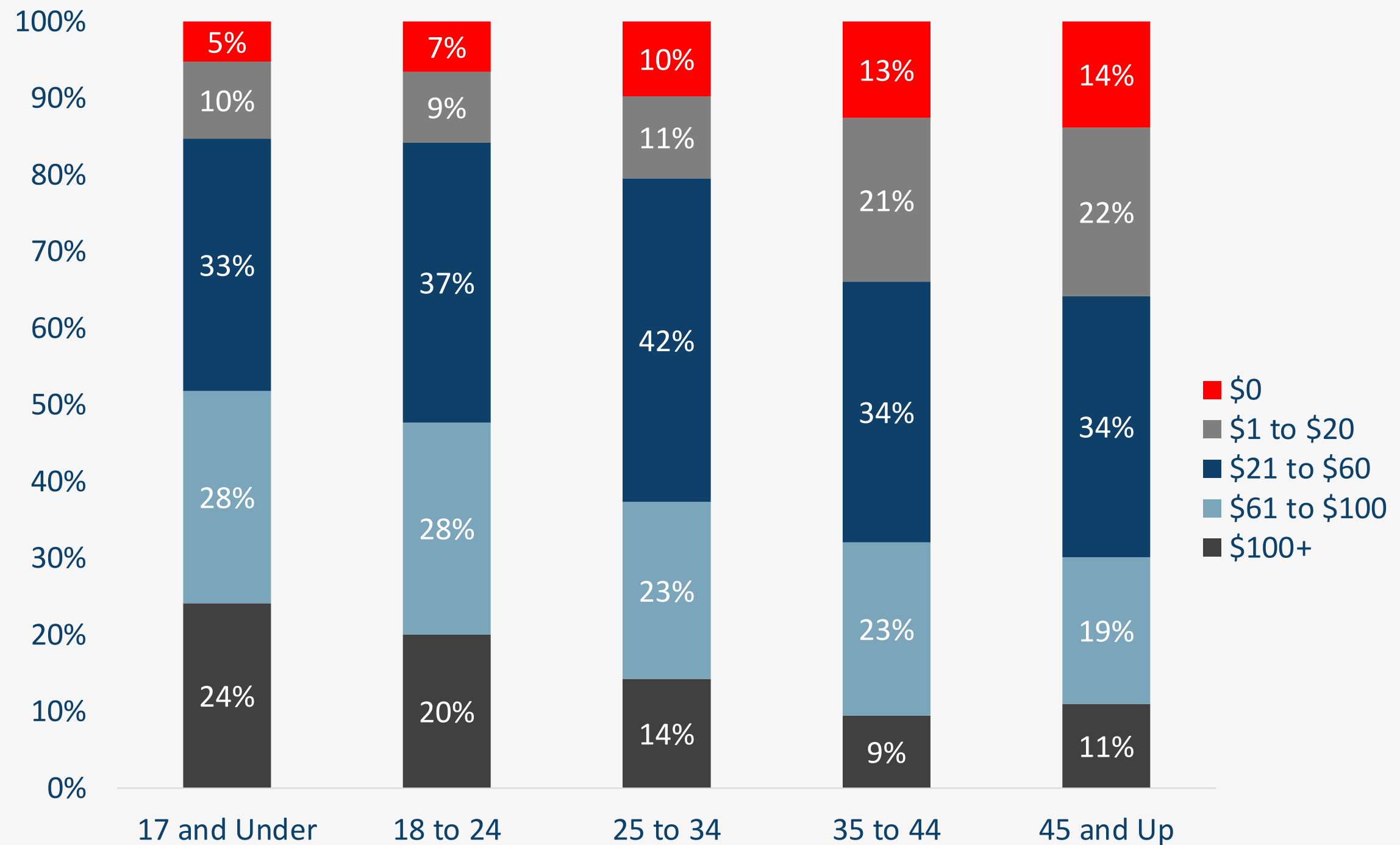


Source: Newzoo, CSL/EEA, 2020.

MAX TICKET PRICE WILLING TO PAY TO ATTEND IN-PERSON ESPORTS EVENT

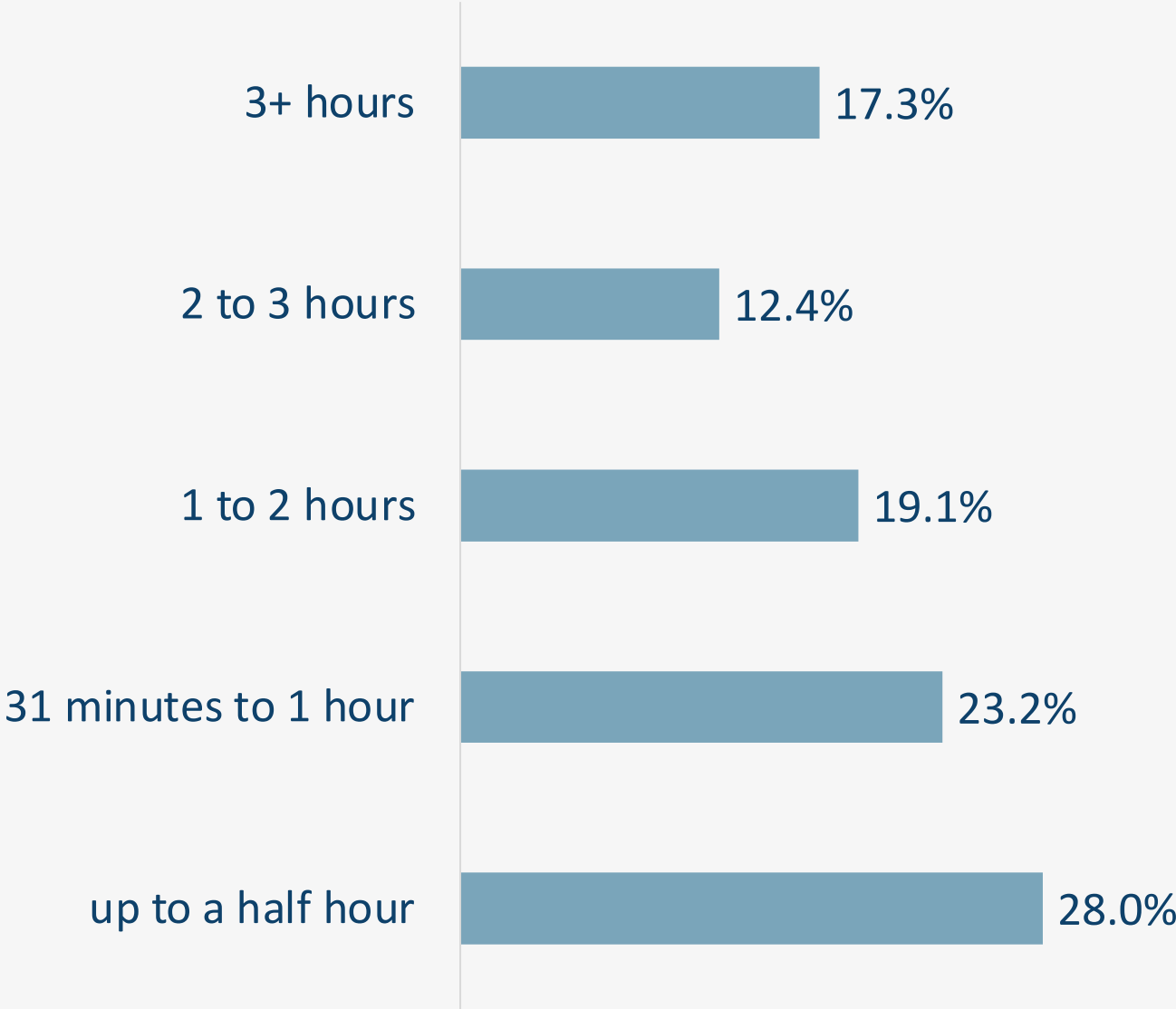


TICKET PRICE SENSITIVITY BY AGE GROUP

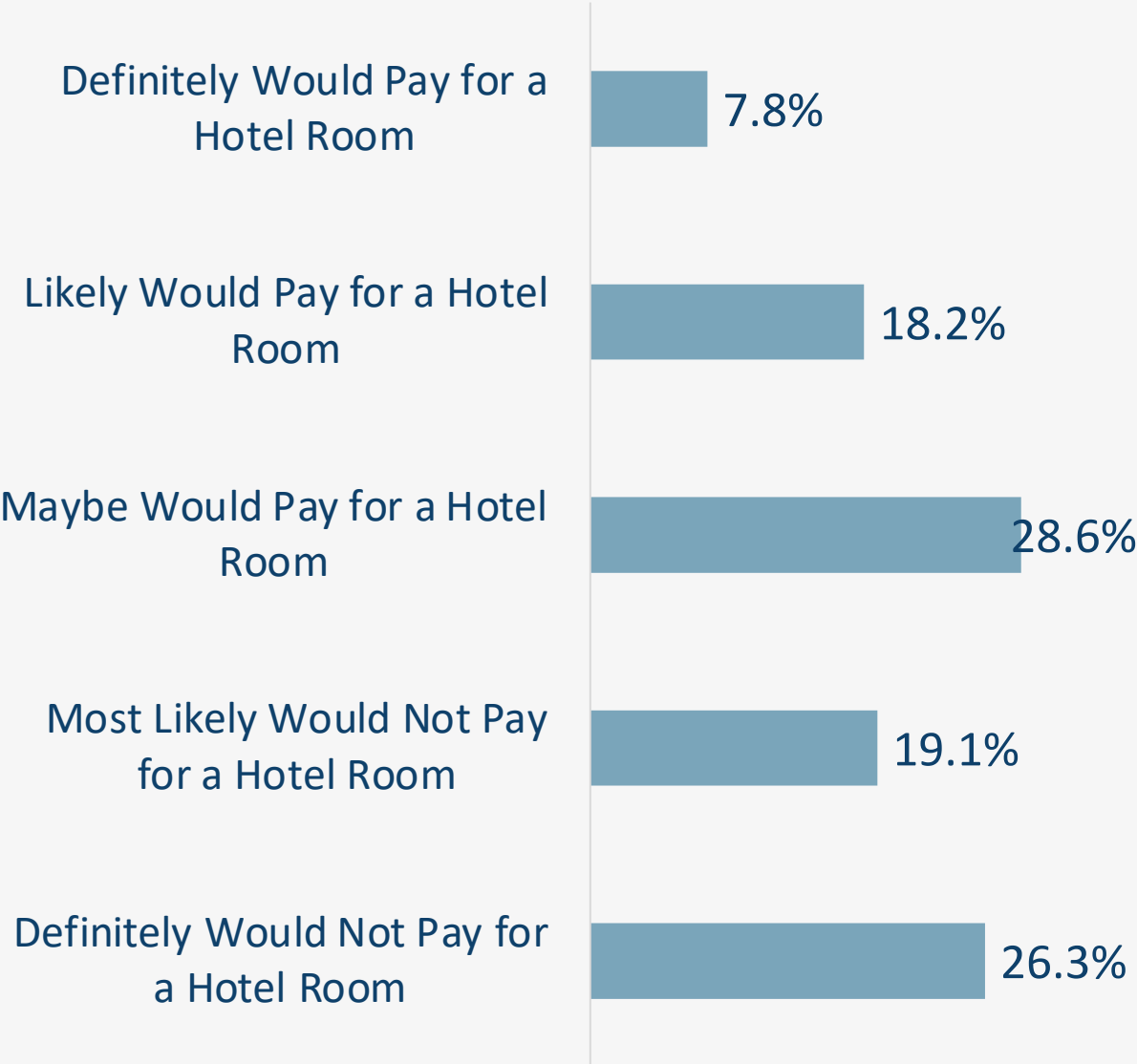


KEY TRAVEL DECISIONS

DISTANCE WILLING TO TRAVEL TO AN ESPORTS
EVENT



LIKELIHOOD OF STAYING IN A HOTEL ROOM
FOR AN EVENT



SUMMARY OF FINDINGS

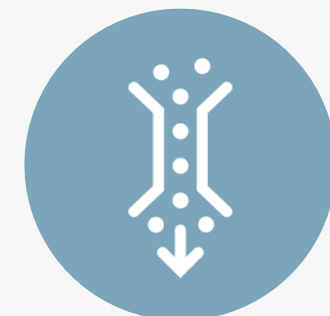
ESPORTS FANS AND GAMERS



MARKET DEMAND SUGGESTS
THE ECONOMIC VALUE AND
GROWTH POTENTIAL OF
ESPORTS



YOUNG, UP AND COMING
CUSTOMER BASE NOT YET
FULLY REALIZED



BARRIERS PREVENTING IN-
PERSON INDUSTRY FROM
MEETING ITS POTENTIAL



WIDESPREAD, EVENLY
DISTRIBUTED POPULARITY



GROWTH IN ESPORTS
INTEREST DURING PANDEMIC



SURVEYED EVENT FACILITIES

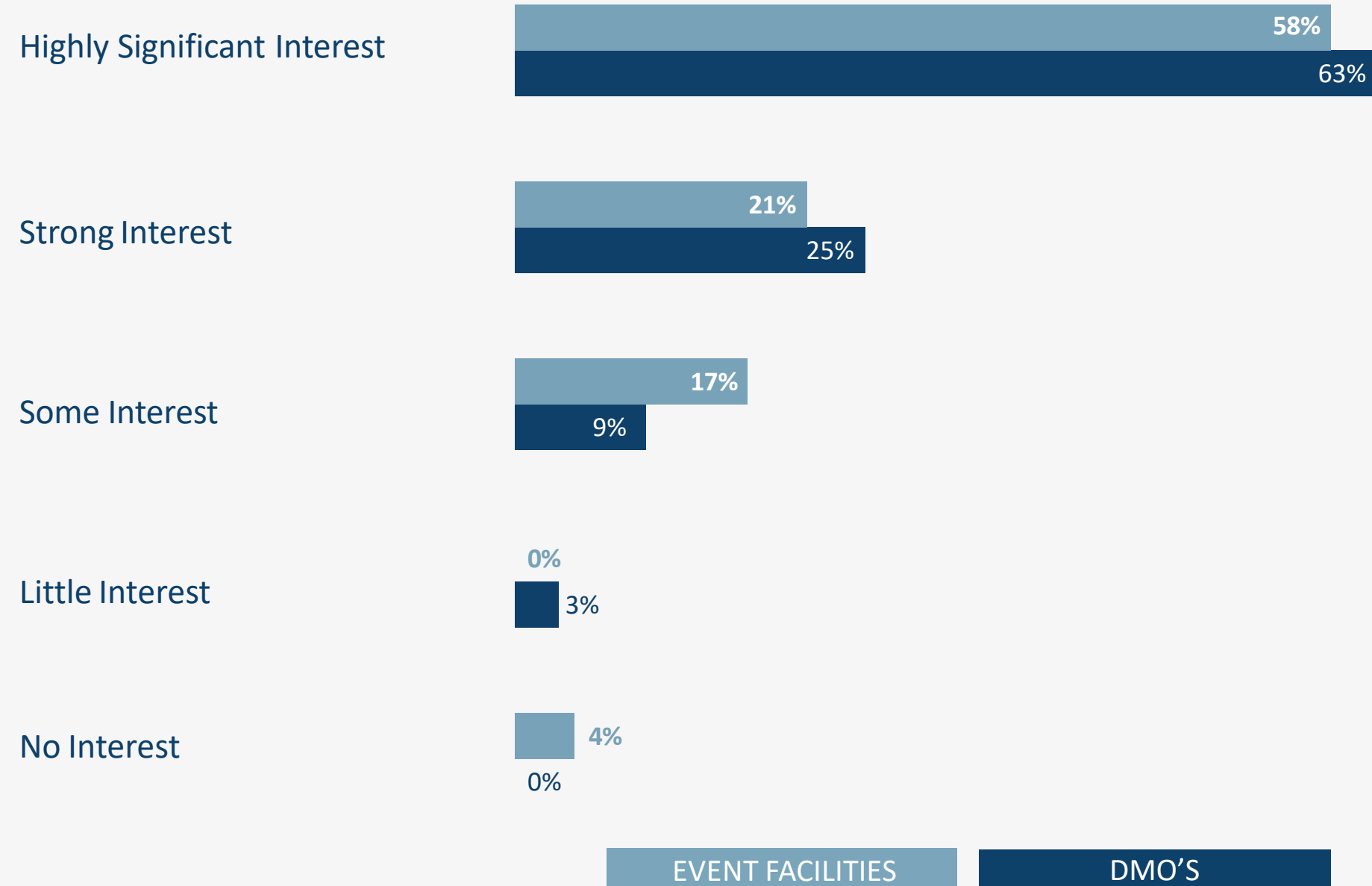
- 25 responding event facilities
- Mix of convention centers, performing arts centers, and arenas
- Markets ranging from Mobile, Dallas, Las Vegas.



SURVEYED DESTINATION MARKETING ORGANIZATIONS

- Over 35 responding destinations
- Ranging from Provo, UT and Atlanta, GA.

HOW INTERESTED ARE YOU IN HOSTING AN ESPORTS EVENT IN YOUR DESTINATION/FACILITY?



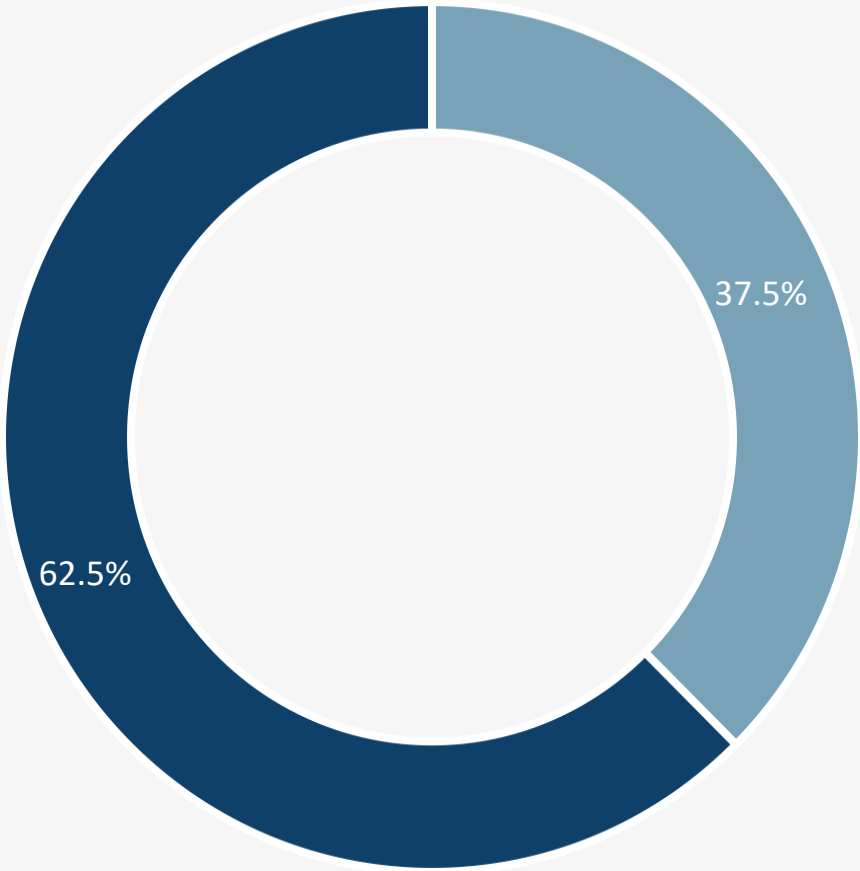
"WE ARE INTERESTED...IT'S MOVING TOWARD THE FUTURE WITH GREAT THINGS TO COME."

"TERRIFIC EVENTS, ESPECIALLY ON SHORTER BOOKING CYCLES."

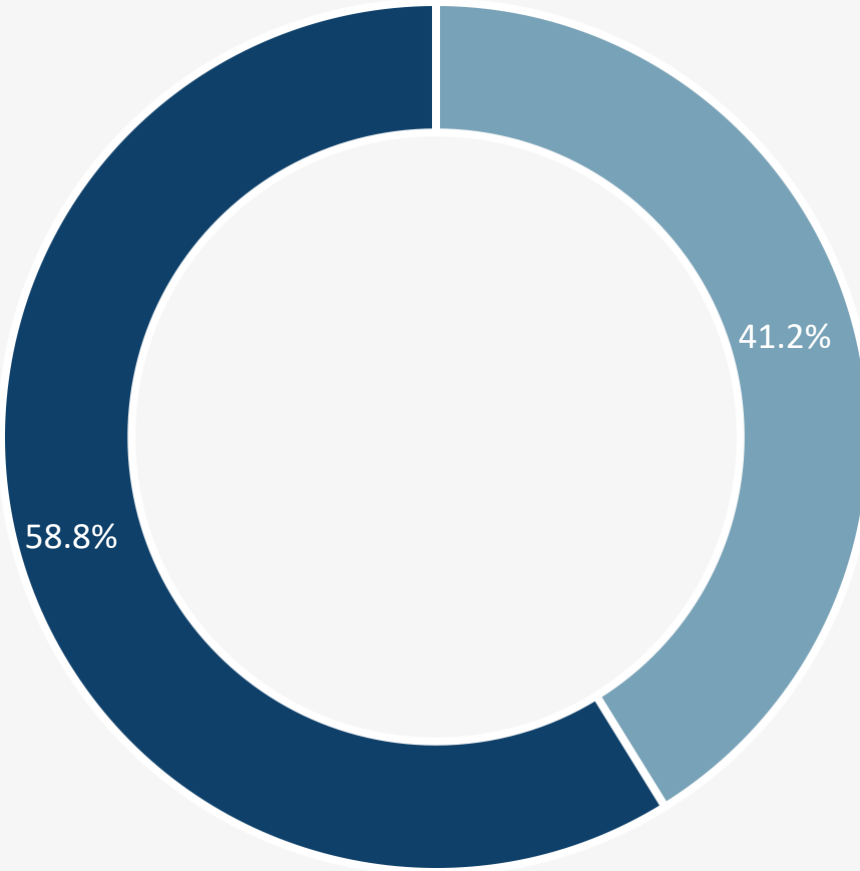
"EMERGING MARKET THAT IS VIABLE IN TIMES LIKE THESE AS IT DOES NOT REQUIRE PHYSICAL TOUCH BETWEEN PLAYERS."

FACILITY EXPERIENCE WITH ESPORTS EVENTS

Have you held an esports event in your facility?



Have you held an esports event in your destination?



INTEREST IN HOSTING MORE ESPORTS EVENTS

85%

DMO's

Very interested
in hosting more
esports events

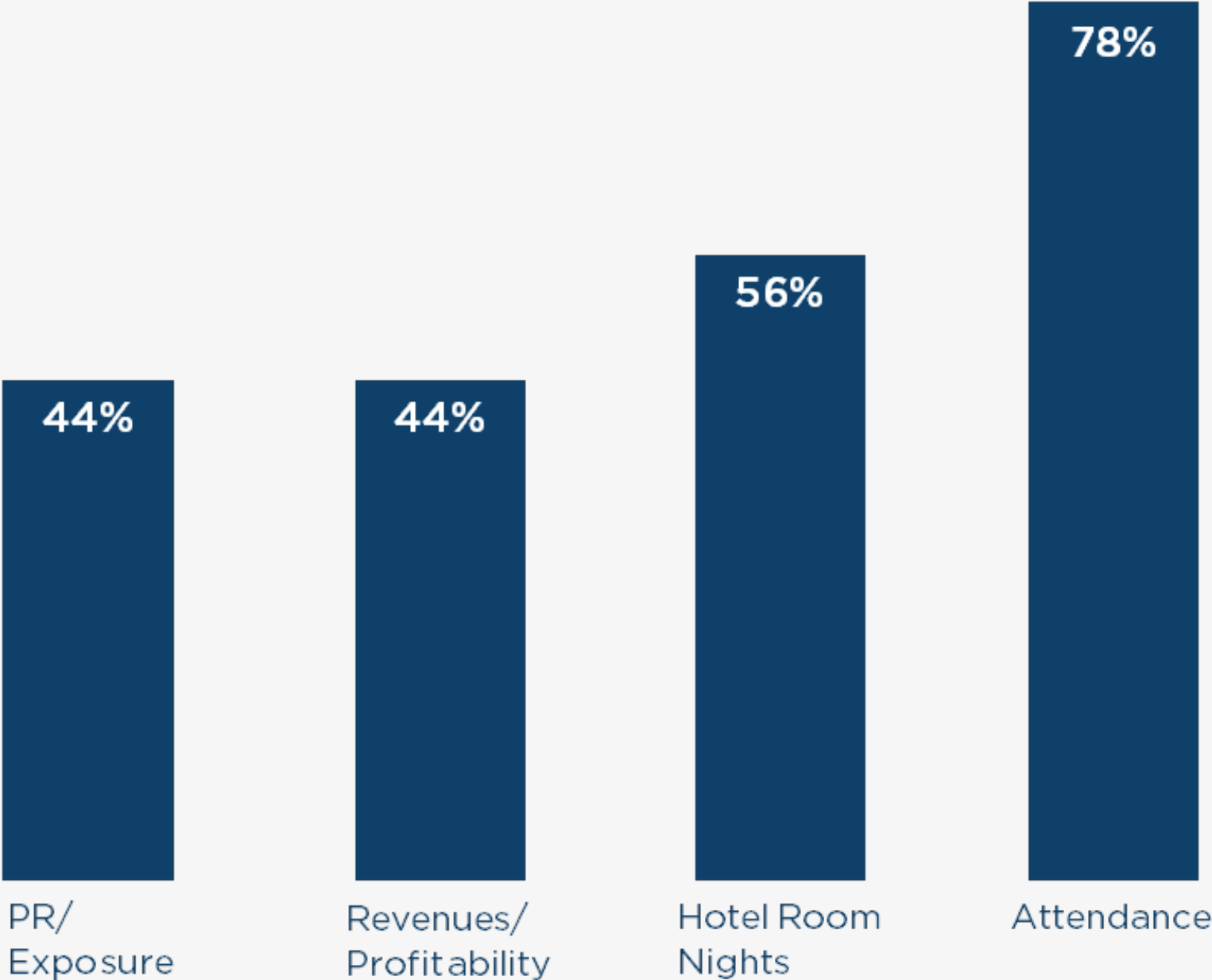
67%

Venues

Very interested
in hosting more
esports events

HOST EVENT VENUES FEEDBACK ON ESPORTS EVENTS

% of Responding Destinations Indicating “High” or “Very High” Ratings

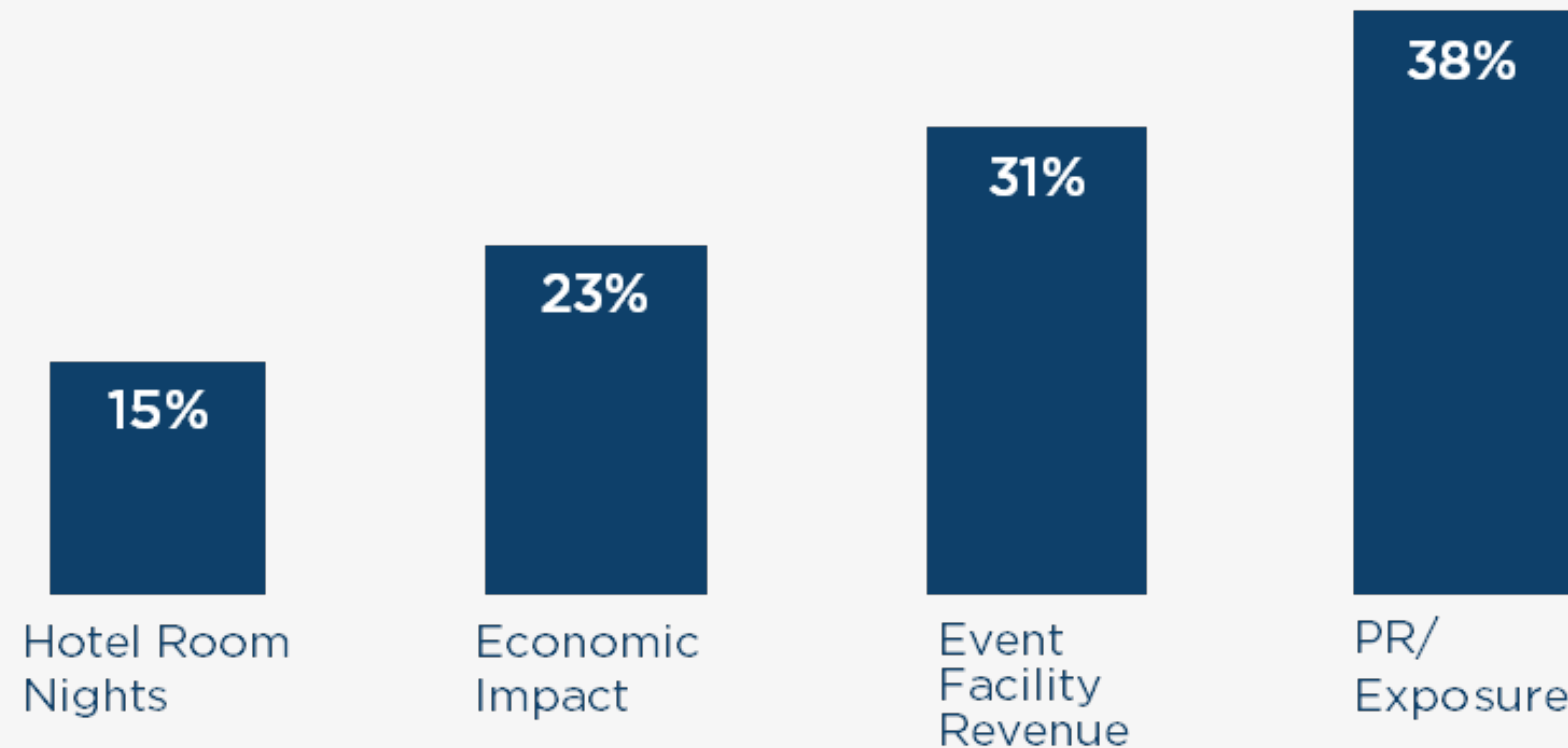


“IT’S A BRAND-NEW MARKET THAT WOULD REALLY HELP US CONNECT WITH YOUNG PEOPLE IN THE LOCAL AREA.”

“HIGHLY INTERESTED IN CONTINUING TO HOST EVENTS BECAUSE IT DIVERSIFIES OUR EVENT MIX, INCOME, AND ATTENDEE PROFILE.”

HOST DESTINATIONS FEEDBACK ON ESPORTS EVENTS

% of Responding Destinations Indicating “High” or “Very High” Ratings



“STILL AN EMERGING INDUSTRY, SO A
LEVEL OF LONG-TERM INVESTMENT IS
NEEDED.”

TAKING STEPS TO GROW IMPACT OF ESPORTS

DMO staff researching the esports industry

71%

Area universities fielding esports teams or clubs

68%

DMO staff finding leads and/or retaining events in the esports industry

59%

Local school districts have started esports classes and/or competitive esports programs

47%

Created self-produced esports events or festivals

18%

Initiated an esports task force, commission, or coalition

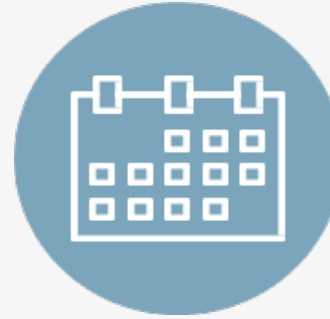
18%

KEY TAKEAWAYS

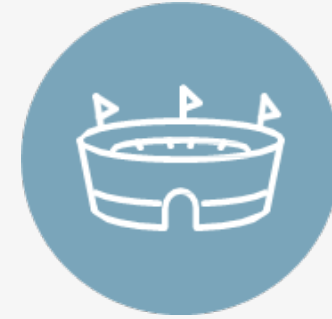
EVENT VENUES AND DESTINATIONS



SIGNIFICANT INTEREST IN
HOSTING ESPORTS EVENTS



TODAY, ESPORTS IS SHORT
TERM FILLER BUSINESS



THE ARGUMENT FOR
DEVELOPING TURNKEY
FACILITIES

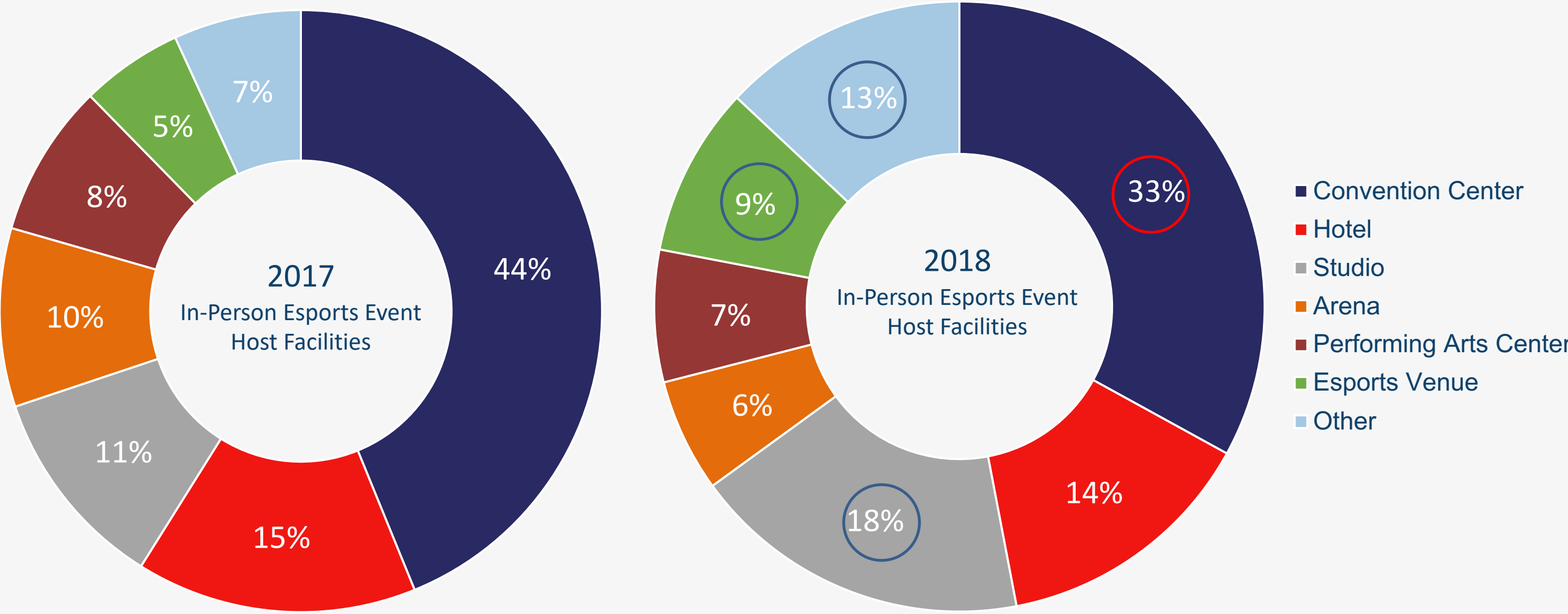


THE OPPORTUNITY FOR
BROADER DESTINATION
INVOLVEMENT



THE OPPORTUNITY FOR THE
COLLEGIATE AND HIGH
SCHOOL SCENE

WHICH VENUES ARE BEING USED?

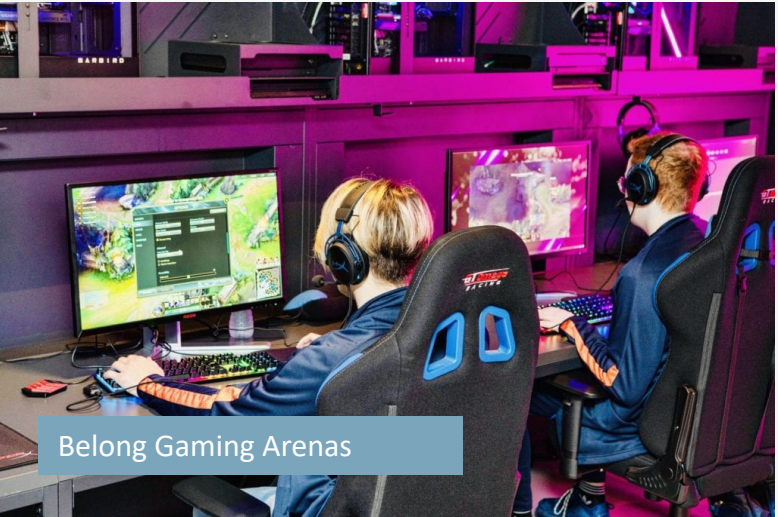


Source: Escharts, 2020.

WHICH VENUES WILL BE USED?

Local

Esports Community Centers



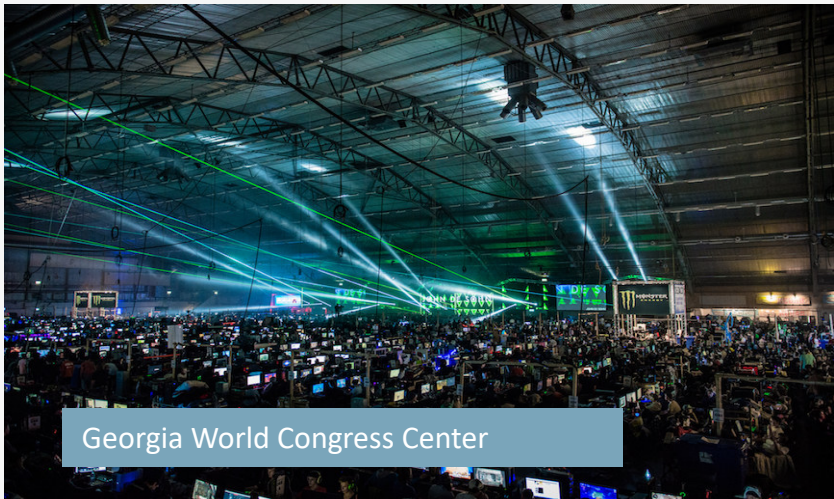
Majors

Purpose Built Esports Arenas and
Conv. Centers



World Finals and Conventions

Multipurpose Arenas and Conv. Centers



Growth
Outlook post-
2021:



Significant Growth



Slow Growth



Plateau
(for now)



THANK YOU

