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2021 ESPORTS FAN SURVEY ANALYSIS

AN ASSESSMENT OF THE IN-PERSON ESPORTS EVENT INDUSTRY'S CURRENT & FUTURE VIABILITY

INTRODUCTION

To Our Clients and Partners in the Sports and Tourism Industries,

CSL International and its team members at the Esports Entry Advisory (EEA) are pleased to share the following results from our second annual Esports Fan Survey. In partnership with Vast, a premium survey/giveaway website in the gaming industry, this survey process collected nearly 4,700 in-depth responses from esports fans around the world and more than 1,100 responses from those in North America. The survey process was completed in September of 2021.

Like last year, fans were asked to report the specific game titles they follow or participate in online, rate their interest in attending in-person events, and indicate their willingness to pay for tickets, travel, and hotel rooms to attend an event, among other questions. This year, they were also asked to describe their spending habits on food & beverage and merchandise at in-person esports events, as well as rate various elements of ideal esports events and venues.

The following pages provide a summary of findings from this survey of the 1,100+ North American respondents and their implications for the sports and tourism industries, followed by the detailed survey results. Key findings presented herein are designed to help destinations and facility managers better understand and plan for esports event activity in the future, and we hope you and your stakeholders find them to be useful.

We appreciate the assistance of these surveyed fans and the many industry participates in the development of this research. We look forward to continuing our research and dialogue with the many stakeholders that impact and are impacted by the quickly evolving esports sector.

To receive additional research and analysis on esports events, tourism and facilities conducted by CSL and EEA since 2020, please refer to the contact information at the end of this report.

Sincerely,

CSL International

CSL International and EEA

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KEY TAKEAWAYS: Esports Tourism

The Demand Gap: 61% vs. 20%

61 percent of gamers are interested in attending in-person esports events, but only 20 percent have been to them in the past. Esports is still in its infancy as an in-person event industry, and the pandemic has largely halted its progress for 20 months. As conditions return to normal, gamer interest suggests significant pent-up demand for more in-person venues and experiences.

Age Difference: 73% vs. 61%

73 percent of gamers 17 and younger are interested in attending in-person esports events in the future, exceeding the 61 percent interest level measured among the broader survey sample. Further, slightly more than 50 percent of gamers under 35 are willing to drive at least an hour to attend an esports event versus 30 percent who are 35 and older. Esports is clearly a sports and entertainment medium for younger fans, with high growth potential going forward.

Esports Tourism: 42%

42 percent of gamers would travel at least an hour to attend an in-person esports event of their choosing, and 24 percent would travel at least two hours. These data suggest material potential to generate overnight stays from a sizable portion of the esports event attendee base.

Spend Potential: $107

A $107 median in-facility spending per event was indicated by gamers. This includes a median spend of $37 on tickets, $40 on food & beverage and $30 on merchandise. As daylong or multi-day events, many in the esports industry theorize that the regular flow of foot traffic and extended in-facility experiences can generate higher food & beverage and merchandise revenues relative to traditional sports and entertainment events. Gamers also indicated a median of $70 in spending on hotel rooms.*

* - open ended feedback suggests fans would most likely stay in an overnight accommodation with one or more travel partners while attending an event.

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KEY TAKEAWAYS: Esports Event and Venue Design

Game Title Importance: 3.9/5

When asked to rate the most important factor when considering attending an in-person esports event, gamers indicated that the specific game title is the most important component with an average score of 3.9 out of 5. Partnering with the right game publisher is critical for the success of events in each destination. Research into titles that are popular in a market area should provide the data necessary to retain and/or organize events with significant draw potential.

The Rise/Fall of Game Titles

Since 2020, interest in Apex Legends and Halo esports quickly grew, while interest in others such as Fortnite, Rainbow Six: Siege, and Valorant fell substantially. With title popularity materially shifting year to year, providing the infrastructure to host esports events for a wide variety of esports titles and genres will be critical. In the future, it may also be important for DMO and event venue salespeople to track which game titles are most popular on a continuing basis.

Esports Venue Success Factors

Gamer scoring of various venue elements indicates that large video displays, robust food & beverage options, and world class audio systems are the three most critical components to creating their desired in-person esports event experiences. The next most important components include public gaming stations, outdoor event spaces, and seating for spectators. Amenities that scored somewhat low and should be considered secondary elements for host destinations and facilities include broadcast facilities, pro team tenants, private VIP playing rooms, and nightclub/dance lounges.

Younger Gamer Venue Preferences

Younger gamers (24 and under), who will continue to gain disposable income for events going forward, have somewhat different preferences regarding esports venues. Public gaming areas and interactive entertainment opportunities are their two most important features, scoring these elements significantly higher than their older counterparts. As such, venues that can accommodate a wide variety of programming and side attractions will succeed with future gamers and esports fans.

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IN-PERSON ESPORTS EVENT AUDIENCE

The following slides summarize the interest in and prior experience with attending in-person esports events among the 1,100 North American gamers surveyed.

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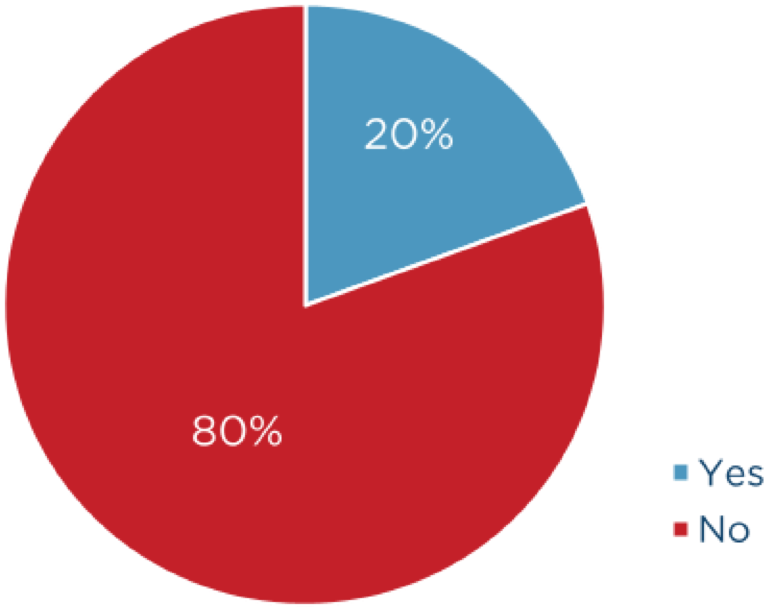
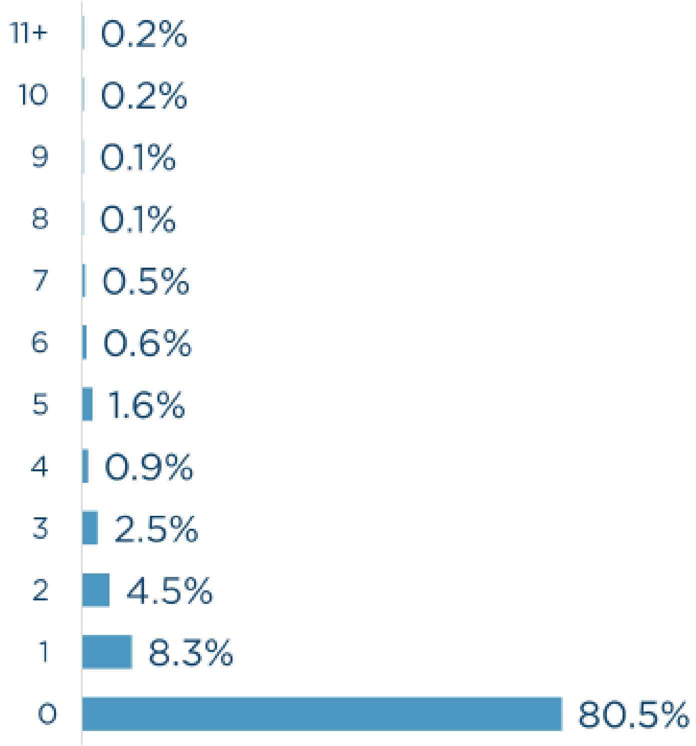
PAST ESPORTS EVENT EXPERIENCE

Have you been to an in-person esports event in the past?



How many in-person esports events have you attended in the past?



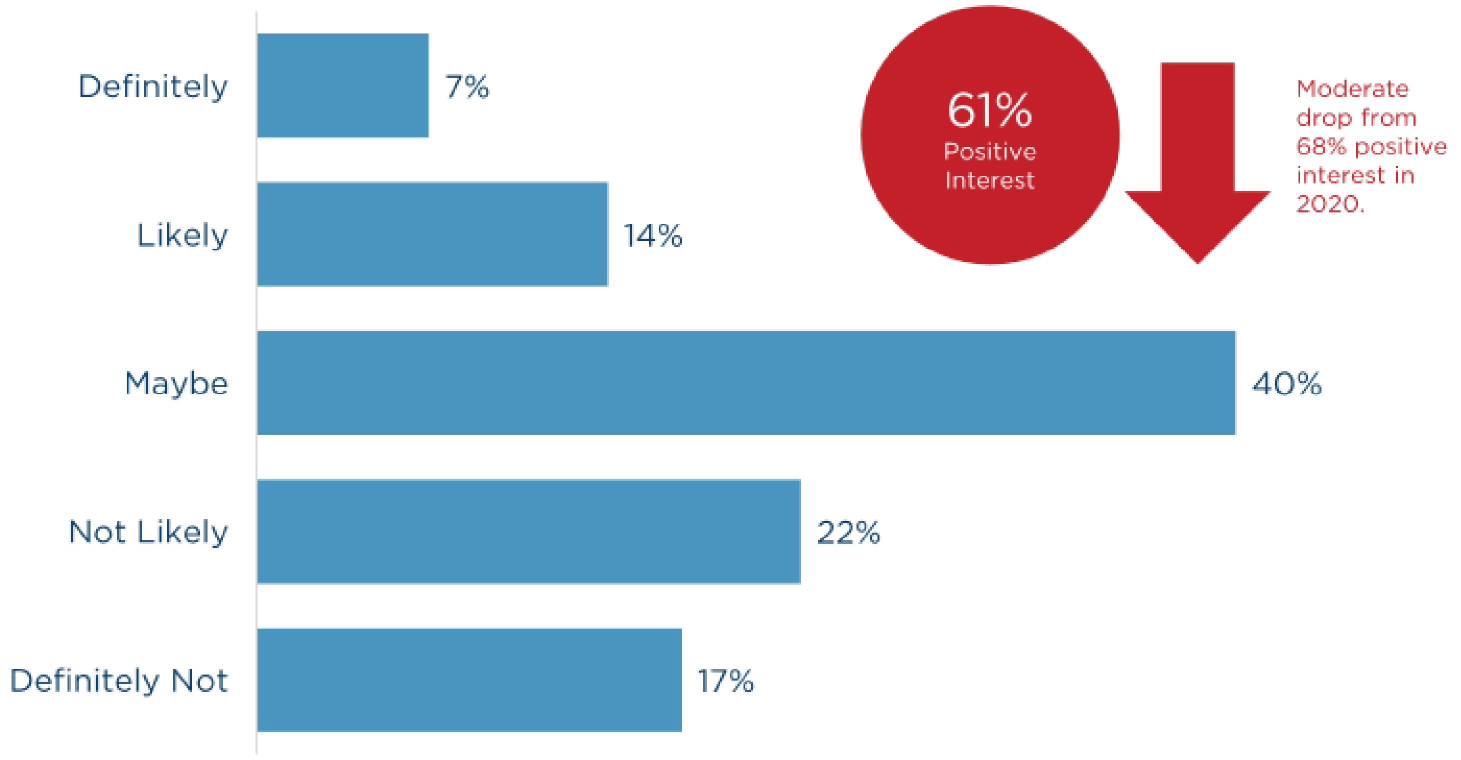
LACK OF PRIOR EXPERIENCE

- Only 20 percent of surveyed gamers have attended an in-person esports event in the past.
- Slight growth from 17 percent that was measured in 2020.
- 7.3 percent of gamers have been to three or more in-person events in the past.

TAKEAWAY
Esports is still in its infancy as an in-person event industry, and the pandemic has largely halted its progress for 20 months.

DEMAND FOR IN-PERSON EVENTS

How likely are you to attend an in-person esports event in 2022, assuming necessary safety measures are implemented?



MATERIAL INTEREST IN EVENTS

- 61 percent of gamers would at least “maybe” attend an in-person esports event in 2022.
- Slight drop from 68 percent in 2020.

TAKEAWAY
Considering that only 20 percent of gamers have been to an in-person event, but 61 percent are interested in attending them, suggests the existence of a gap in supply and demand.

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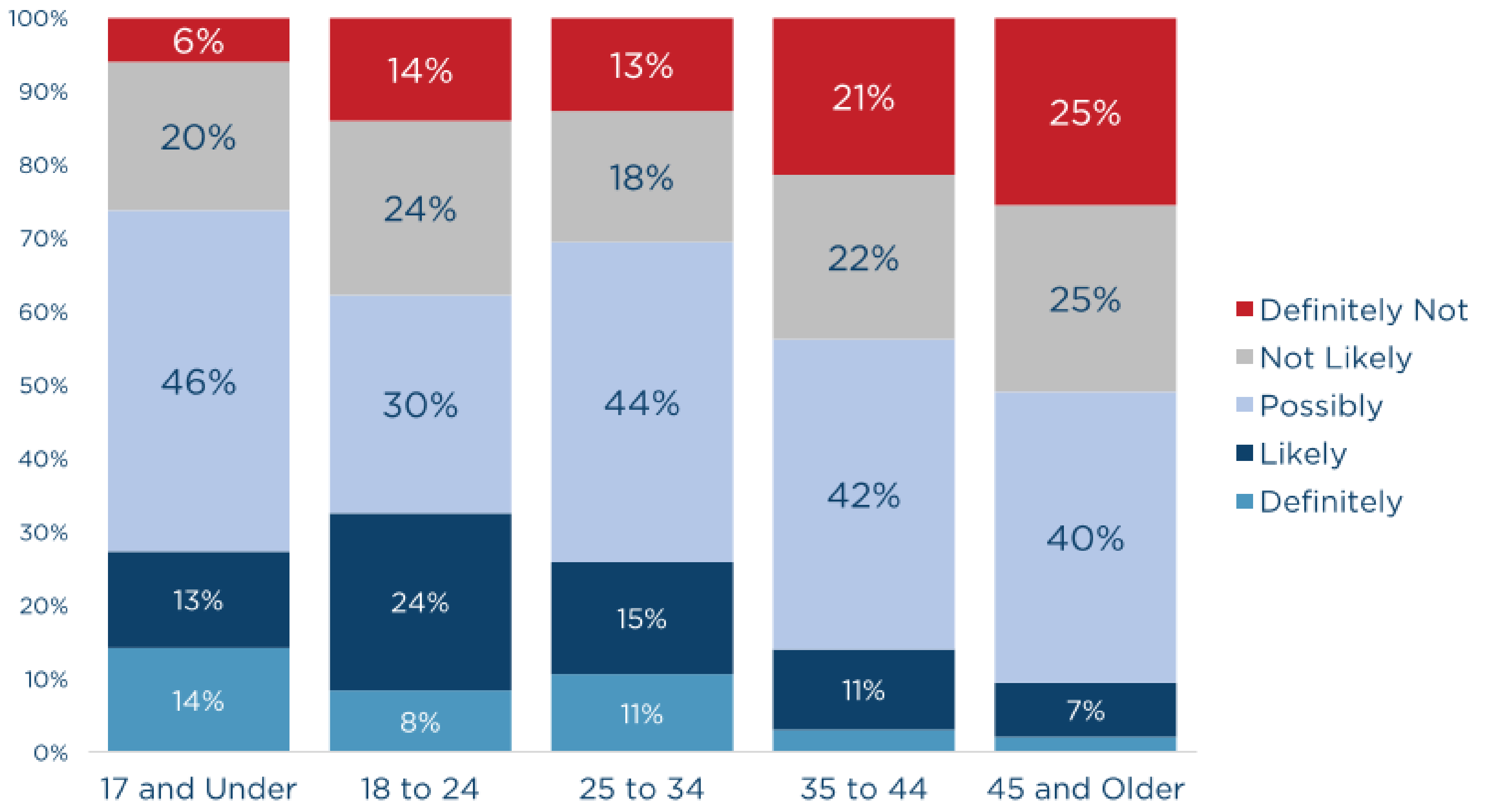
DEMAND FOR ESPORTS EVENTS BY AGE

How likely are you to attend an in-person esports event in 2022, assuming necessary safety measures are implemented?



AN INDUSTRY FOR THE FUTURE EVENT ATTENDEE

- 73 percent of 17-U attendees are interested in in-person esports events, as well as 70 percent of those 25 to 34.
- More intense interest shown among 18 to 24 years olds (32 percent would “likely” or “definitely” go to an event), but also less possible interest (30 percent would “possibly” go to an event).

TAKEAWAY
Know your audience: design events and venues that cater to needs of younger fans.

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ESPORTS TOURISM

The following slides summarize distance that gamers are willing to travel to in-person esports events. Data shown are representative of the 1,100 North American gamers surveyed.

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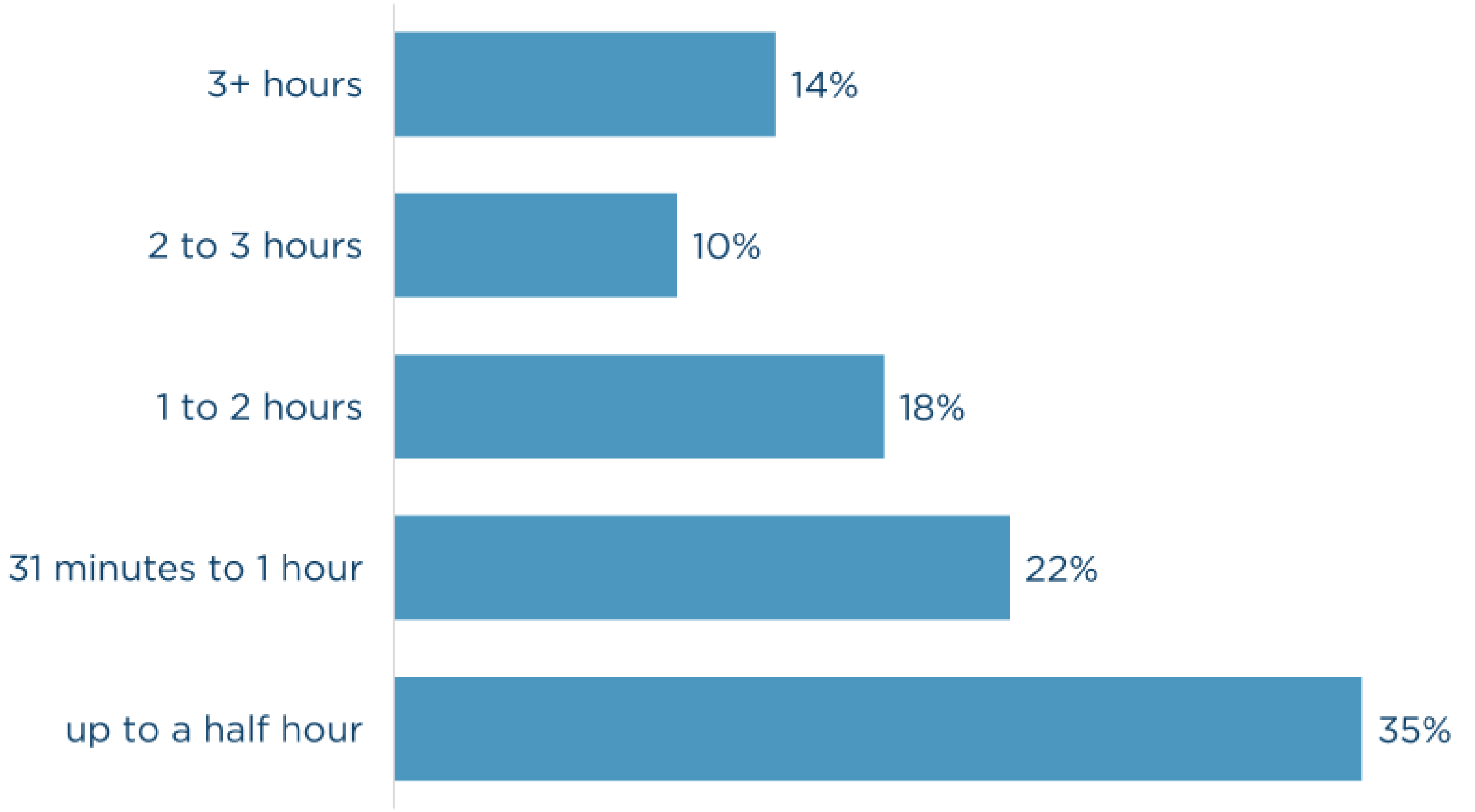
TRAVELING TO ESPORTS EVENTS

How far would you be willing to travel to attend an in-person esports event?



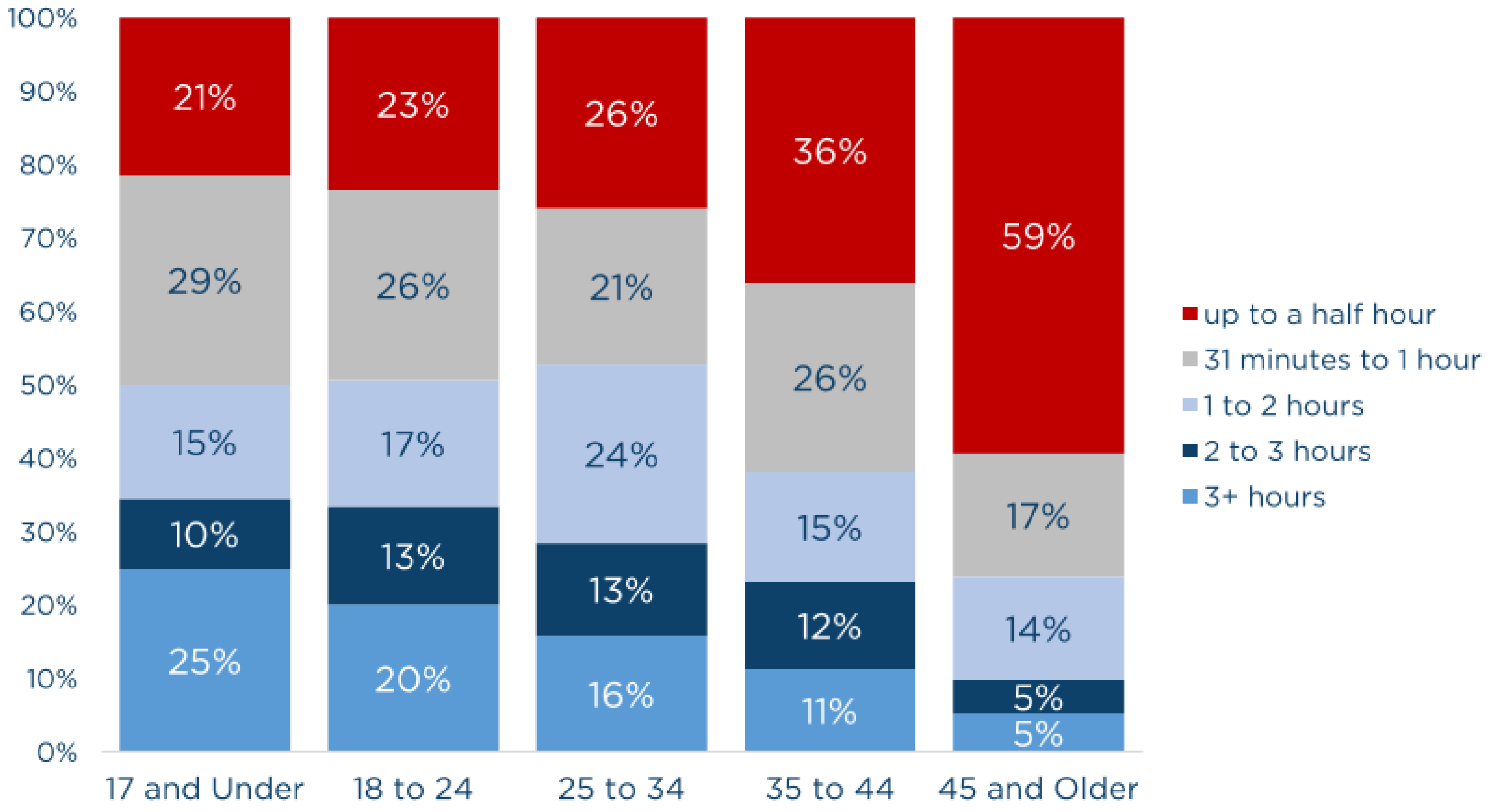
A NON-LOCAL DRAW

- 42 percent of gamers would travel more than an hour to attend or participate in an in-person esports event of their choosing.
- 64 percent would travel at least a half-hour.
- Comparable driving distances to popular concerts.

TAKEAWAY
Willingness to make daytrips suggests potential for overnight stays.

TRAVELING BY AGE

How far would you be willing to travel to attend an in-person esports event?



YOUNG GAMERS WILLING TO TRAVEL

- 53 percent of gamers 25 to 34 willing to drive more than an hour.
- Willingness to drive 2+ and 3+ hours drops by advancement of age.

TAKEAWAY
In-person esports events are worth an extended drive for younger gamers, reflecting their greater value of and interest in the sport. DMO's should strategize how to target and market to this young potential visitor base.

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ESPORTS IMPACTS

The following slides summarize North American gamers' willingness to pay for overnight accommodations while attending in-person esports events, as well as their propensity to spend on accommodations, tickets, food & beverage, and merchandise.

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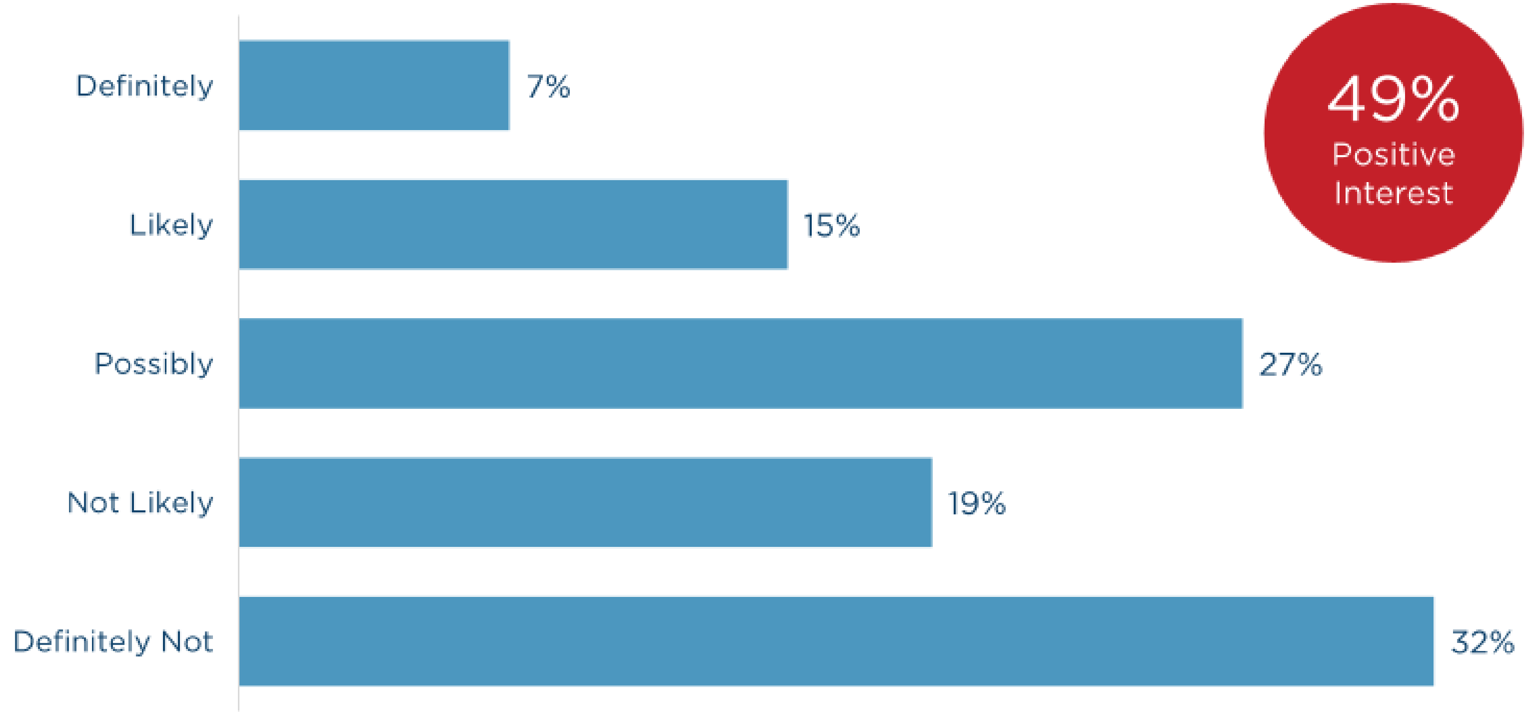
PAYING FOR HOTELS

What is the likelihood that you would pay to stay in a hotel room overnight as part of a trip to attend an in-person esports event?



SPLIT INTEREST IN PAYING FOR ACCOMMODATIONS

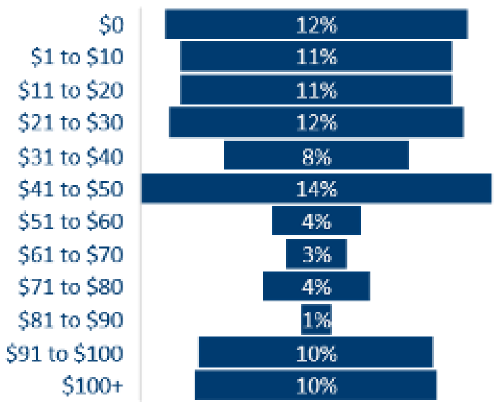
- 49 percent of gamers would consider paying for a hotel room to attend an in-person esports event of their choosing.
- 22 percent would “likely” or “definitely” pay for a hotel room.

TAKEAWAY
Esports events should have moderate to significant room night generating potential. Engaging hotel communities in host destinations for room blocks and/or bid packages will be important to retain some larger esports events.

POTENTIAL EVENT SPENDING

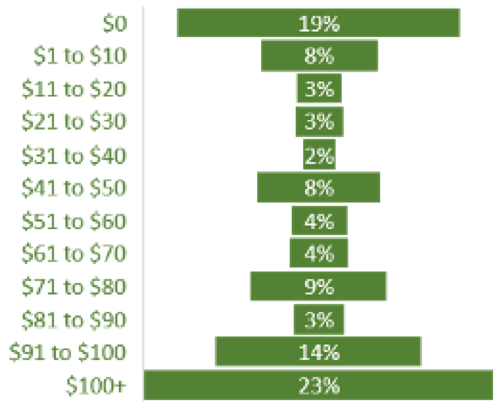
What is the maximum amount of money you would pay for the following items while attending an in-person esports event of your choosing?

Tickets



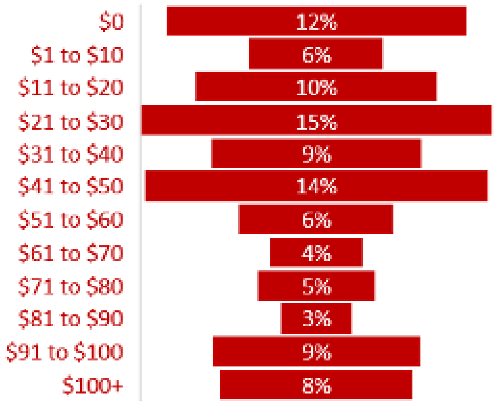
$37 median

Hotel



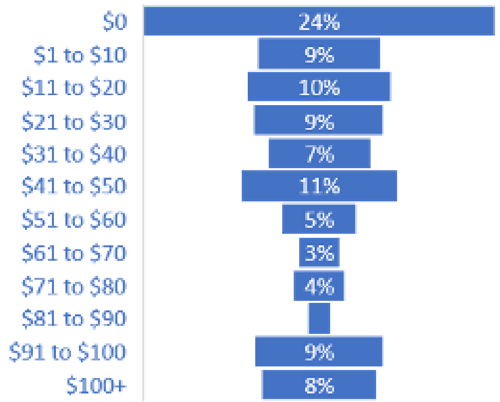
$70 median

F&B



$40 median

Merchandise



$30 median

SIGNIFICANT SPEND POTENTIAL

- Gamers indicated a median $37 ticket price, with 20 percent of respondents willing to pay $91 or more to attend an event.
- 23 percent would be willing to pay $100 or more individually on a hotel room, and assuming two fans per room this would equate to a convention-quality room rate ($200 per night).
- Many in the industry theorize that the regular flow of foot traffic and extended in-facility experiences can generate higher food & beverage and merchandise revenues in esports. With a median F&B spend of $40 and merchandise spend of $30 (which may include gaming hardware and software), these data support this notion.

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ESPORTS EVENT SUCCESS FACTORS

The following slides summarize North American gamers' preferences regarding esports events and esports host venues, in addition to the specific video game titles they participate in or follow.

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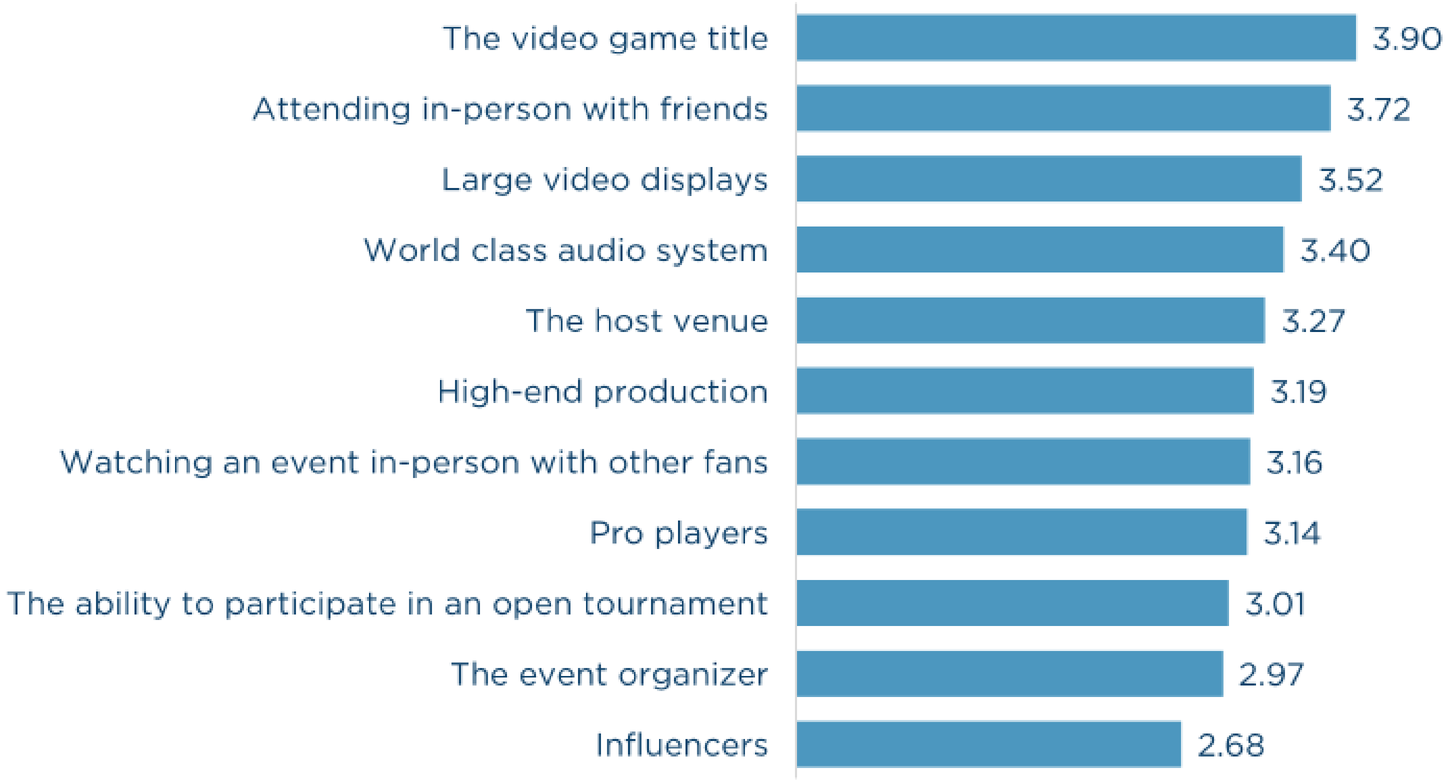
CRITICAL ESPORTS EVENT FACTORS

On a scale of one to five (five being the highest), what would make an in-person esports event most attractive to you?



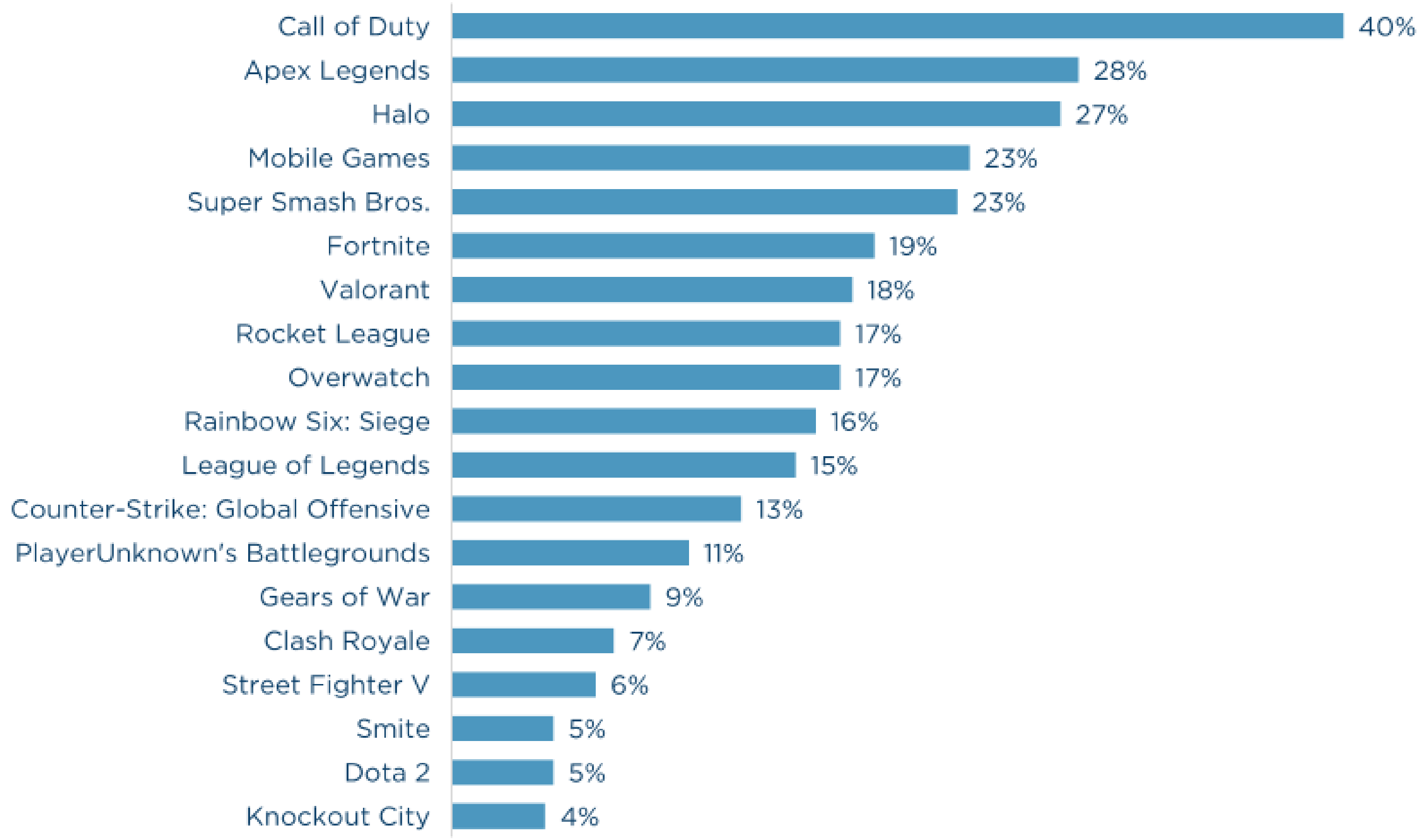
IP, ABILITY TO SOCIALIZE, AND A/V ARE TOP PRIORITIES

- With a rating of 3.9 out of 5.0, gamers scored the specific video game title as the most important element for esports events.
- Other important elements include the ability to attend events in-person with friends and the presence of large video displays and world class audio.

TAKEAWAY
As in-person esports returns, partnering with the right game publisher is critical for the success of events in each destination. Research into specific titles that are popular in a local population should provide data necessary to retain/organize events with significant draw potential. High-end a/v will also be necessary to meet gamer standards.

POPULAR ESPORTS TITLES

Which esports titles do you participate in or follow?



THE TIERS OF GAME POPULARITY

- Call of Duty is by far the most popular game title among gamers, with 40 percent indicating they participate in or follow Call of Duty esports.
- The next "tier" of popularity includes Apex Legends, Halo, mobile games, and Super Smash Bros.
- Other popular titles in North America include Fortnite, Valorant, Rocket League, Overwatch, Rainbow Six: Siege, and League of Legends.
- It is important to note that the titles at the top of the list (Call of Duty, Apex, Halo, Super Smash Bros.) are widely accessibly to casual gamers due to their playability on consoles. Those titles that are only available on PC, such as League of Legends, are likely underrepresented on this chart in terms of their *esports* popularity. Many PC gamers are avid followers of sport themselves, whereas console gamers are more likely to only participate in their game(s) of choice.

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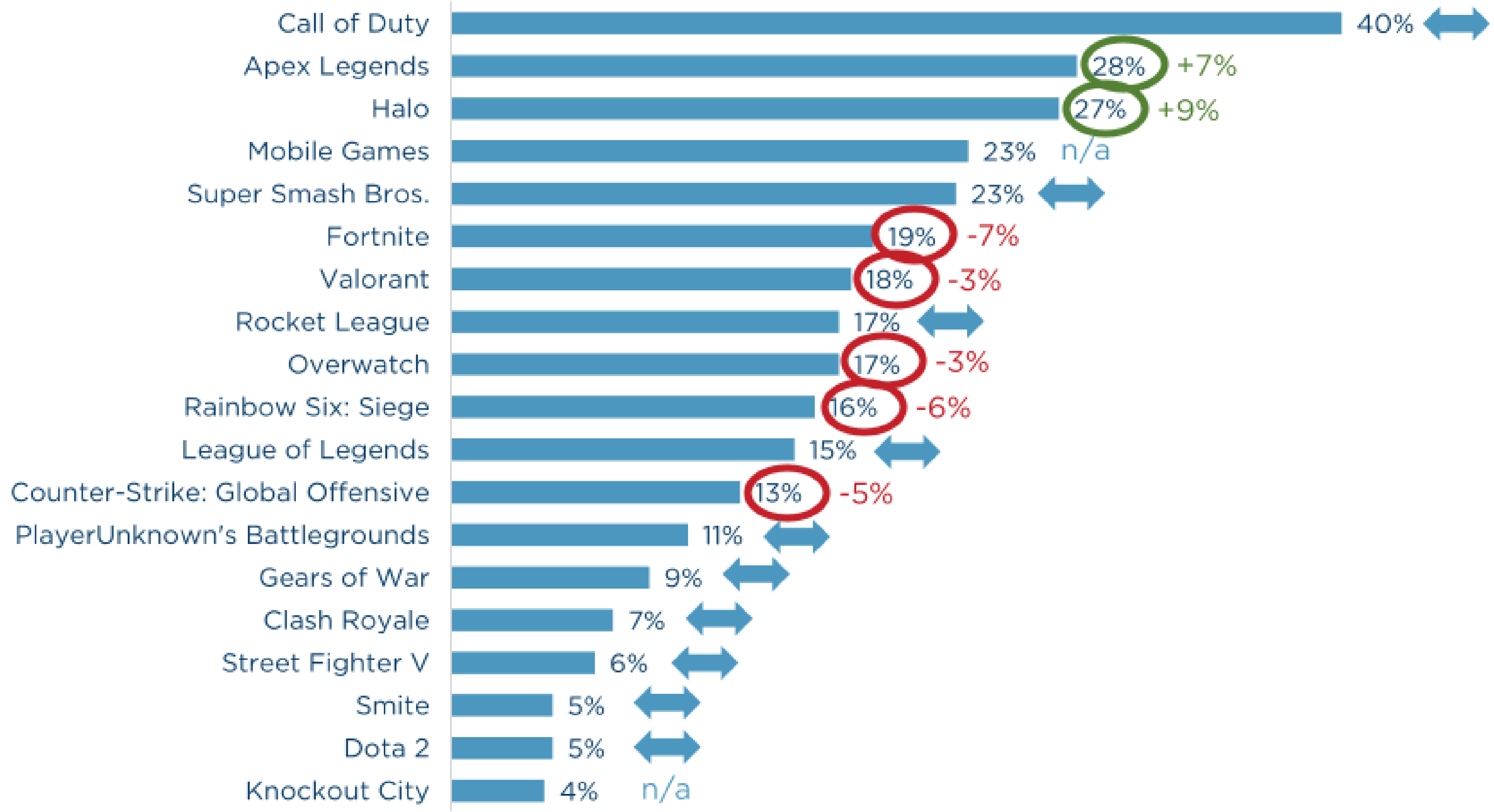
CHANGES IN TITLE POPULARITY

Notable changes in % of respondents who participate/follow game titles from 2020 to 2021.



POPULARITY CHANGES YEAR TO YEAR

- Apex Legends and Halo made the biggest leaps in esports popularity since 2020.
- Apex Legends has invested more into its esports infrastructure, while Halo has an upcoming title (Halo Infinite).
- Titles with changes in popularity of less than 3 percent are identified by ⟺.

TAKEAWAY
With title popularity materially shifting year to year, providing the infrastructure to host esports events for a variety of esports titles and genres will be critical. In the future, it may also be important for DMO and event facility salespeople to track which titles are most popular on a continuing basis. It may also be important to consider titles that maintain popularity year to year.

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TITLE POPULARITY BY AGE GROUP

Top 5 Most Played/Followed Game Titles by Age Group

	17 and Under	18-24	25-34	35-44	45+
1.	Call of Duty 63%	Call of Duty 44%	Call of Duty 46%	Call of Duty 36%	Call of Duty 26%
2.	Apex Legends 47%	Apex Legends 36%	Apex Legends 40%	Apex Legends 27%	Mobile Games 18%
3.	Valorant 45%	Valorant 35%	Halo 37%	Mobile Games 24%	Halo 18%
4.	Rocket League 44%	Halo 29%	Super Smash Bros. 32%	Halo 22%	Fortnite 16%
5.	Fortnite 39%	Super Smash Bros. 28%	Mobile Games 22%	Fortnite 19%	Super Smash Bros. 9%

KEY NOTES

- Call of Duty is the most popular title across all age groups, while Apex Legends is second most popular with all but the 45+ demographic.
- Valorant is significantly more popular among younger gamers.
- Mobile titles are more popular with older gamers.
- Note that overall participation and following of game titles generally falls by age group.

TAKEAWAY
Titles more popular with younger audiences may have more esports growth potential as those gamers gain disposable income. Further, including more broadly accessible mobile gaming stations at esports events could better engage older gamers/guardians during in-person events for other titles.

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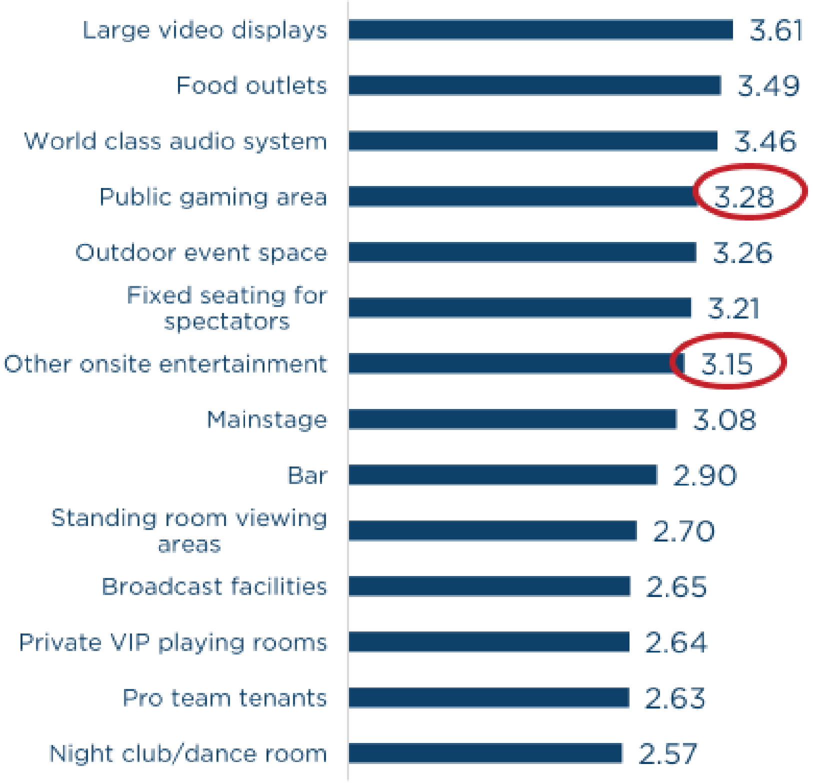
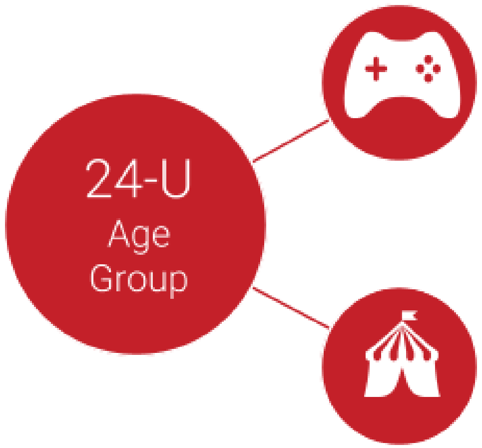
CRITICAL VENUE FACTORS

Most Important Venue Factors for Gamers and Esports Fans (scale of 1 to 5)



Young Gamers Desire More Interactivity at Events



- Rated public gaming areas as most important amenity
- 3.87 out of 5

- Onsite entertainment far more desired
- 3.56 out of 5 vs. 3.15 out of 5 among all age groups

THE IDEAL ESPORTS VENUE

- Gamers want large video displays, food & beverage options, and world class audio systems as part of any in-person esports event experience.
- Other important elements include public gaming areas with desktop game stations, outdoor event spaces, and fixed seating for spectators.
- Younger gamers (24 and under) prefer hands-on play and interactive entertainment opportunities.

TAKEAWAY

In addition to high-end a/v capabilities, "sub-areas" for food courts, public game stations, and onsite entertainment should support an "ideal" esports venue for both younger and older gamers.

ABOUT US

CSL INTERNATIONAL

CSL, the consulting and advisory division of Legends, has provided esports futures analyses and entry strategy plans for markets such as Washington, D.C., San Antonio, Los Angeles, South Bend, Atlantic City, Broken Arrow (OK) and other destinations throughout the country. In total CSL, has conducted over 1,000 planning projects focused on the tourism assets, facilities, policies, resources and other features needed to attract visitors and events to a market. CSL's reputation is built on meeting client needs by delivering quality services that have credibility in the marketplace. Led by industry veteran John Kaatz and Esports Manager Tyler Othen, the firm is able to provide these services by drawing on the years of experience of a large professional staff—one of the largest and most experienced in the convention and sports consulting industry.

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The Esports Entry Advisory is a strategic partnership formed by three highly experienced consulting firms in the esports space: CSL International, A-Game Esports, and Simply New. The Esports Entry Advisory assists venue developers, destination marketing organizations, sports commissions, facility managers, and other sports and entertainment industry stakeholders by providing tailored market analyses, return on investment, facility development guidance and technology consulting, among other advisory services.

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