



UNIVERSITÀ DEGLI STUDI DI TORINO

DM DIPARTIMENTO
DI MANAGEMENT

The World of Games:

eSports

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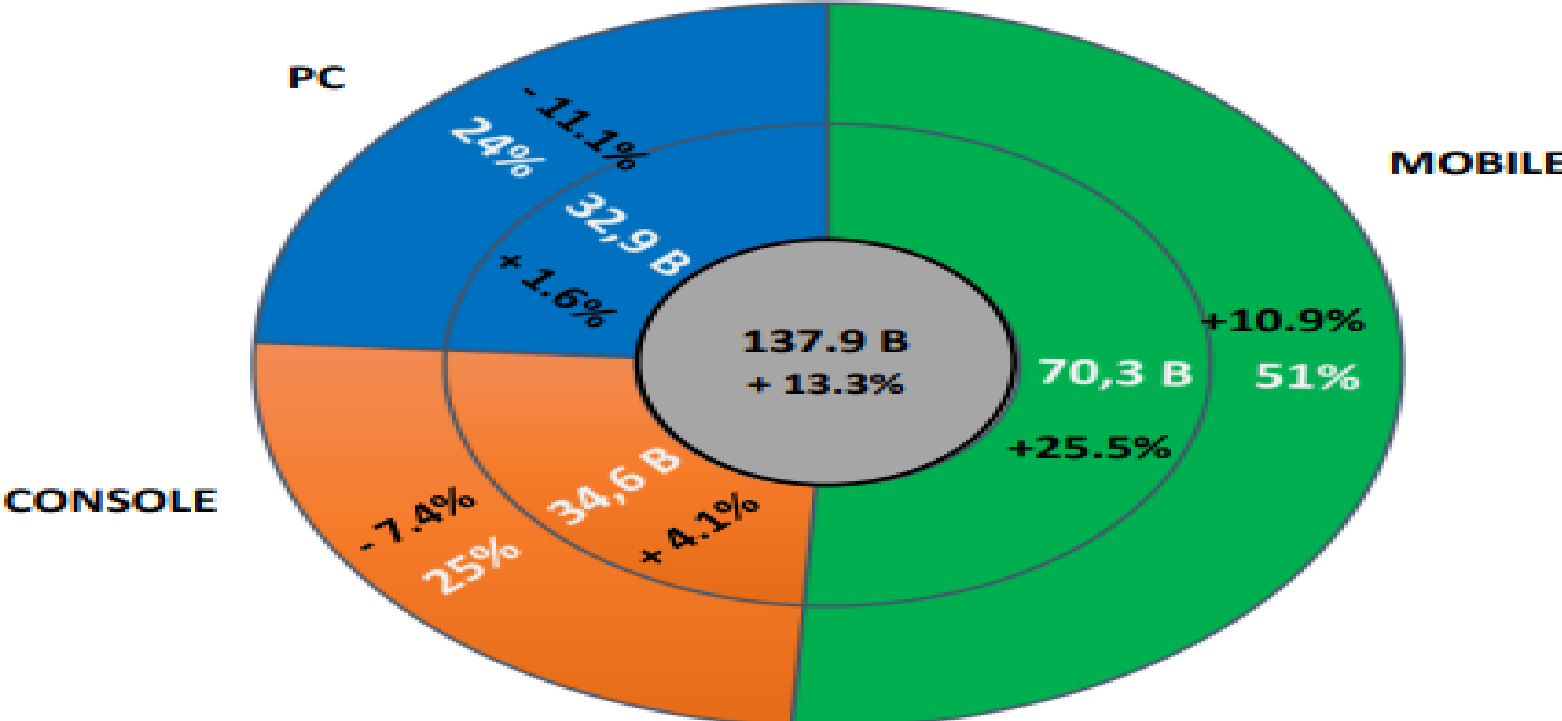


General Aspects

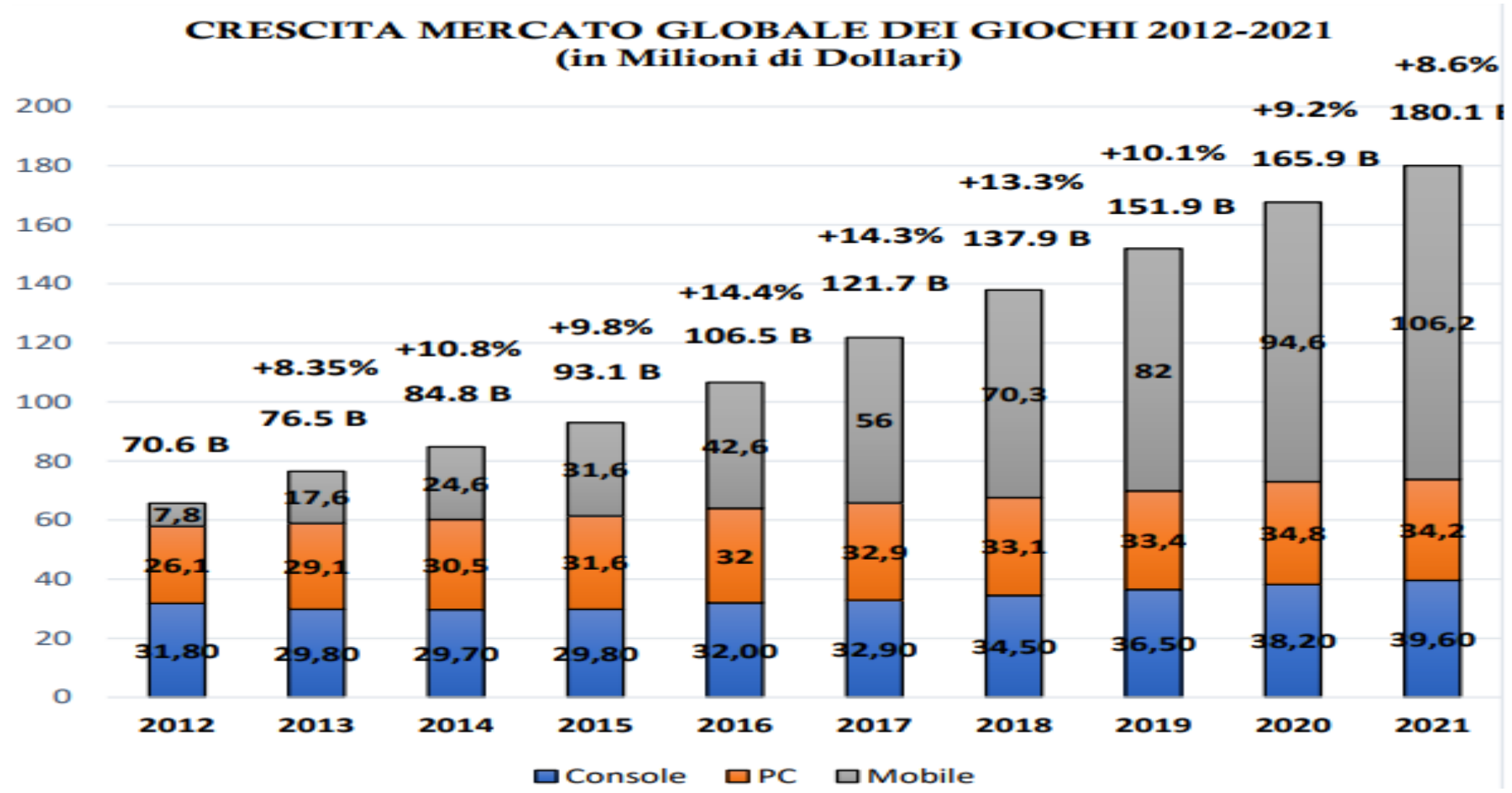
- **Cambridge Dictionary:** (ELECTRONIC SPORTS) the activity of playing computer/console games against other people on the internet, often for money, and often watched by other people using the internet, sometimes at special organized events.
- **Phenomenon of Continuous Growth**
- **Requirements:** Hardware, Internet and competitive skills (training session: even 8 hours per day)
- **Extremely Digital Environment:** high share content, no physical borders, easy accessibility for “watchers”.
- **Different Genres of Tournaments:** RTS, Fighting game, FPS, Battle Royal, MOBA, Simulators of real activities.

Global Market

MERCATO GLOBALE DEI GIOCHI 2018
(in Miliardi di Dollari)

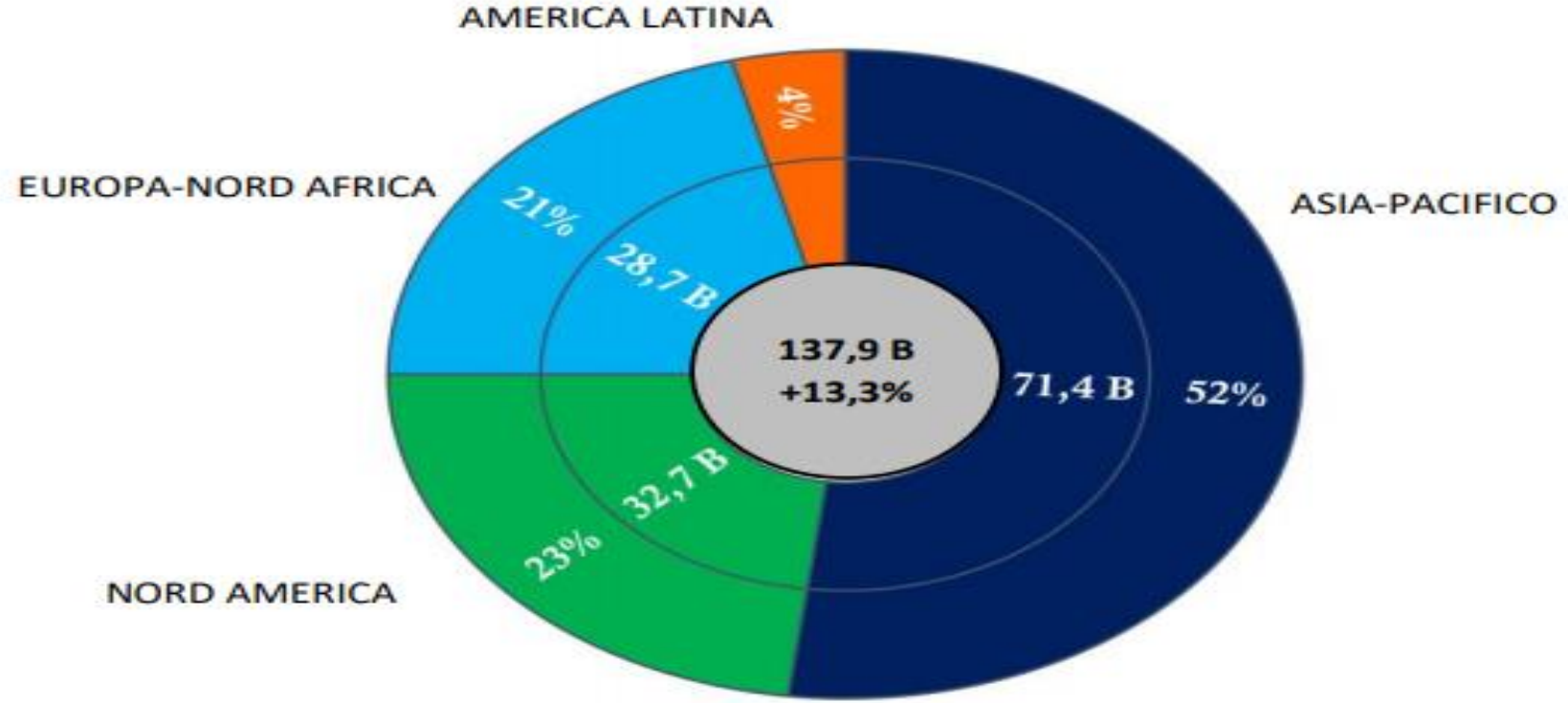


Global Market



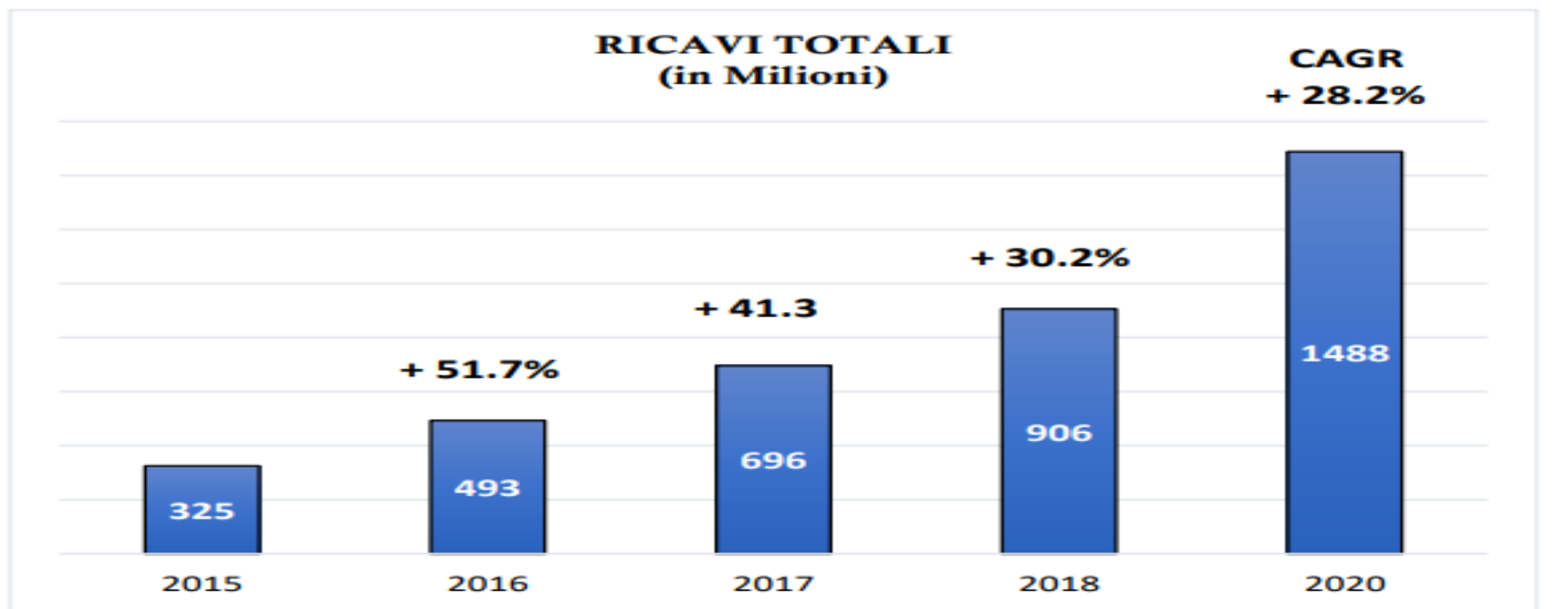
Global Market

FONTI MERCATO GLOBALE DEI GIOCHI 2018
(in Miliardi di Dollari)

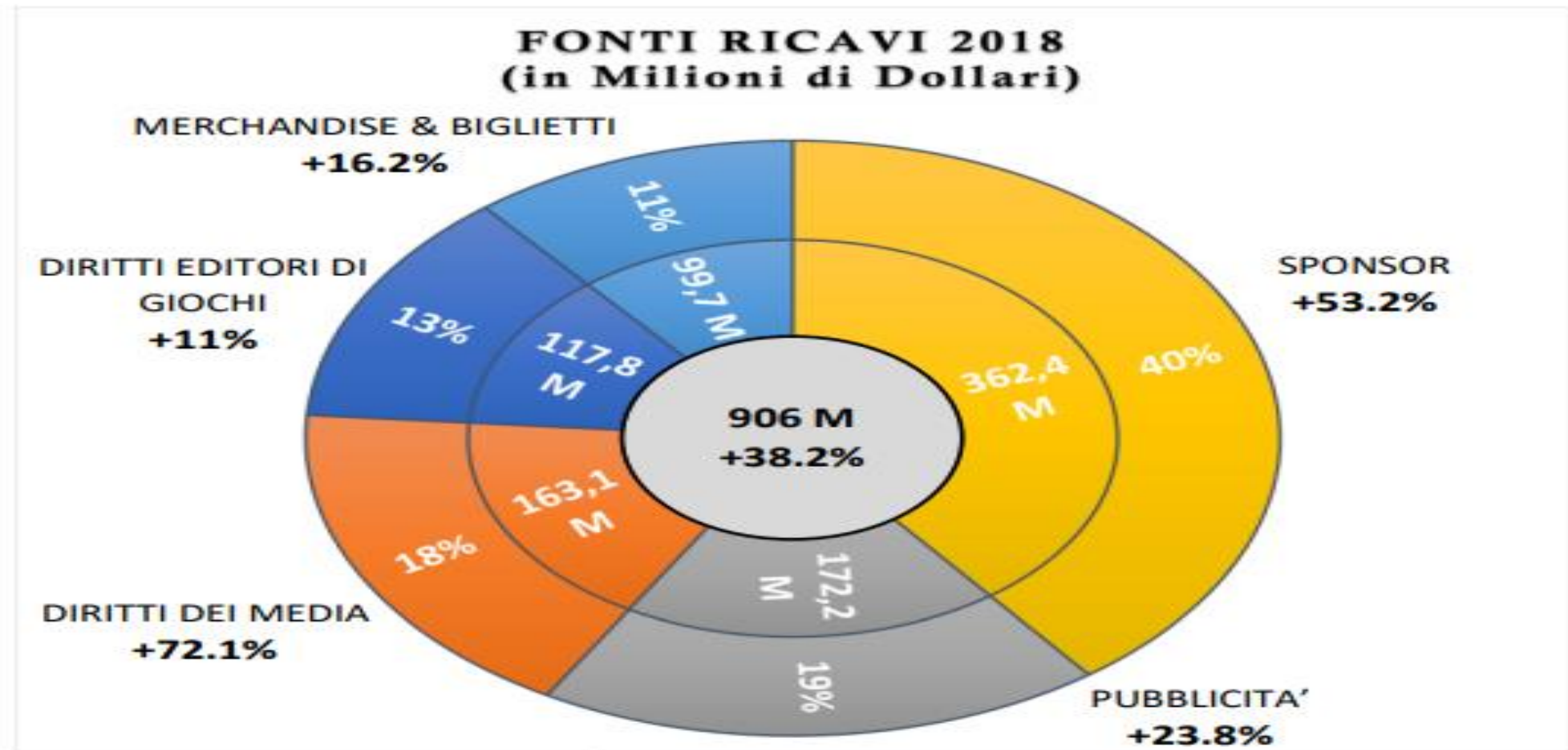


Revenues

- High Opportunities for Investors
- Highly attractive for Sponsorships
- **Components:** Sponsors, Commercial Rights, Merchandising, Advertising

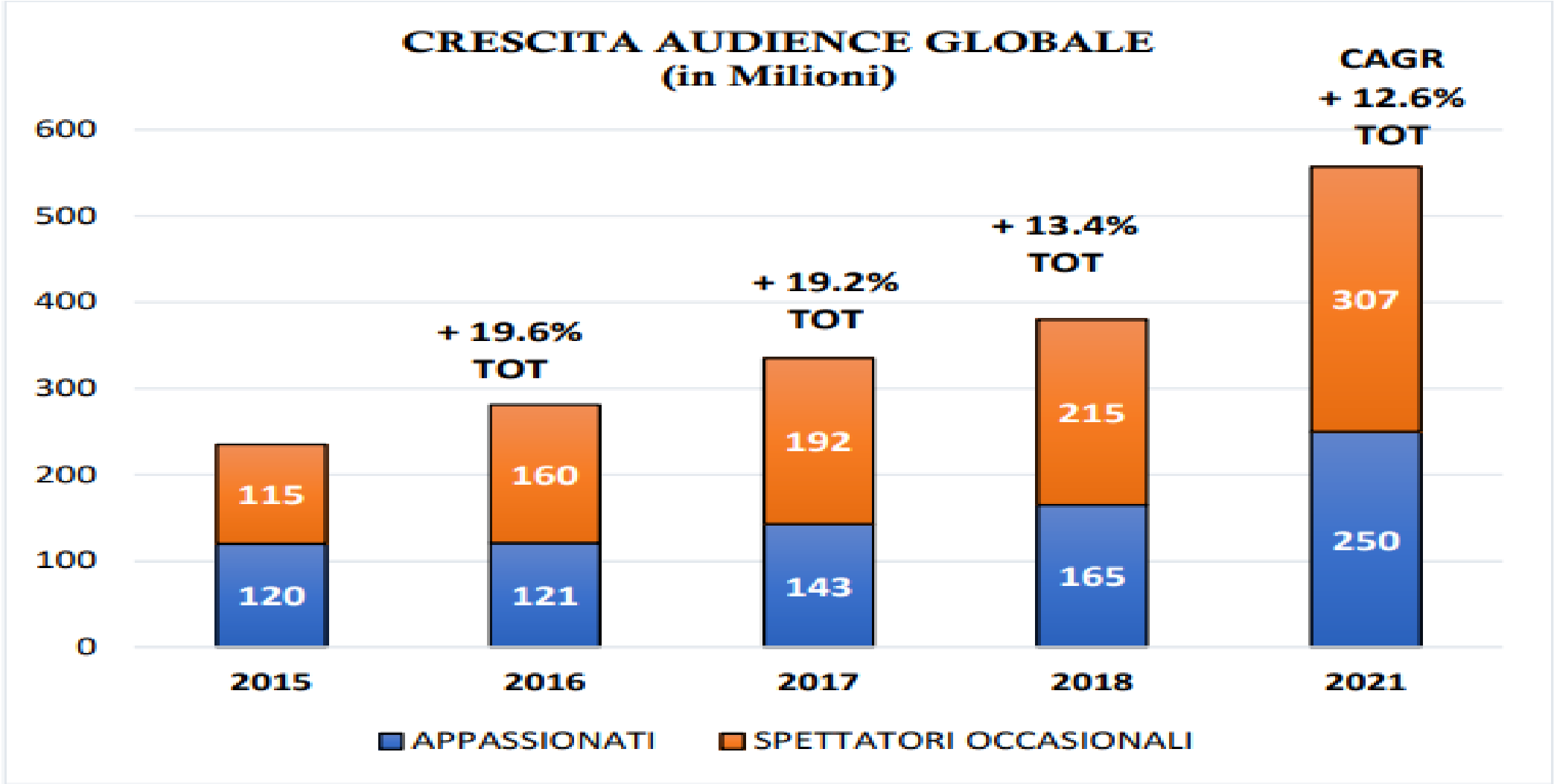


Revenues



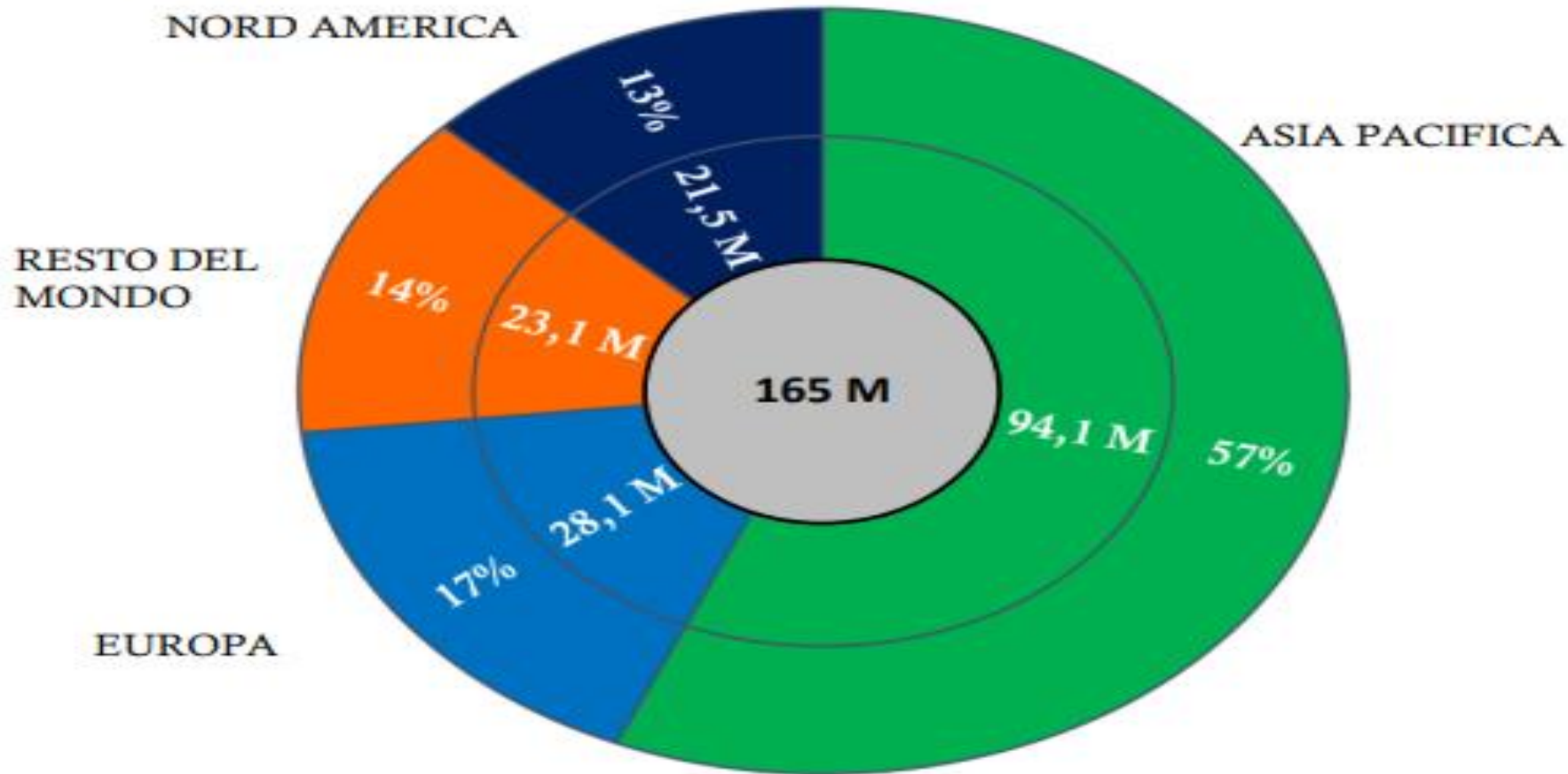
— Fonti Ricavi (Newzoo)

Audience

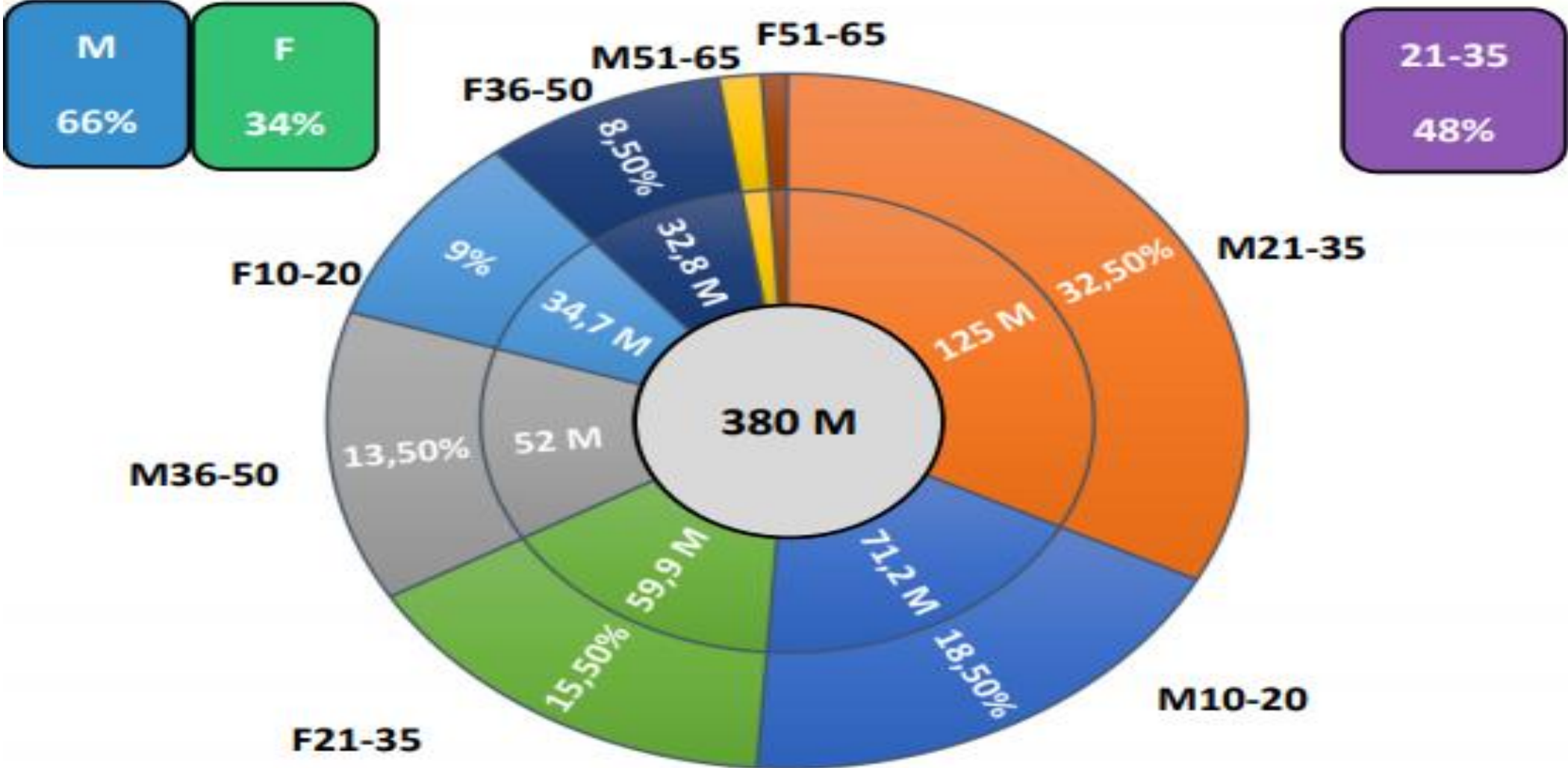


Audience

DISTRIBUZIONE GEOGRAFICA AUDIENZE 2018
(in Milioni)



Audience: Genres and Age (2018)



Transmission Channels

- Important **key for the success**: easy way to spread the show
- No needs to have particular devices: everyone can access and enjoy it.
- High Interactive experience for viewers

• Twitch

Youtube Gaming

BamTech Media

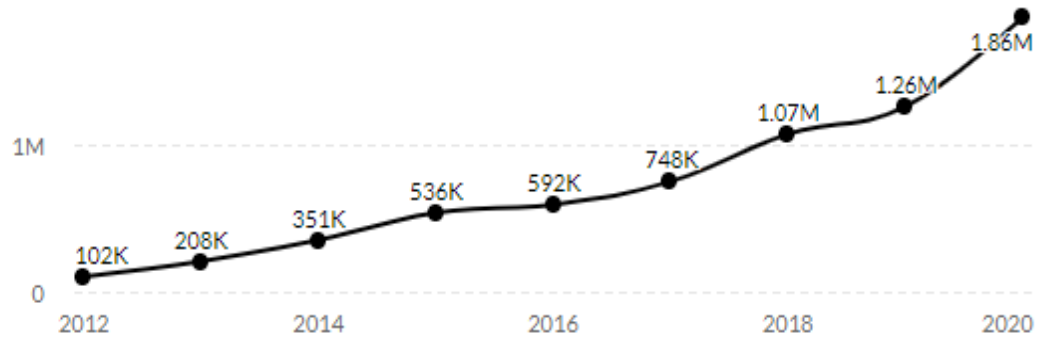
Facebook Gaming



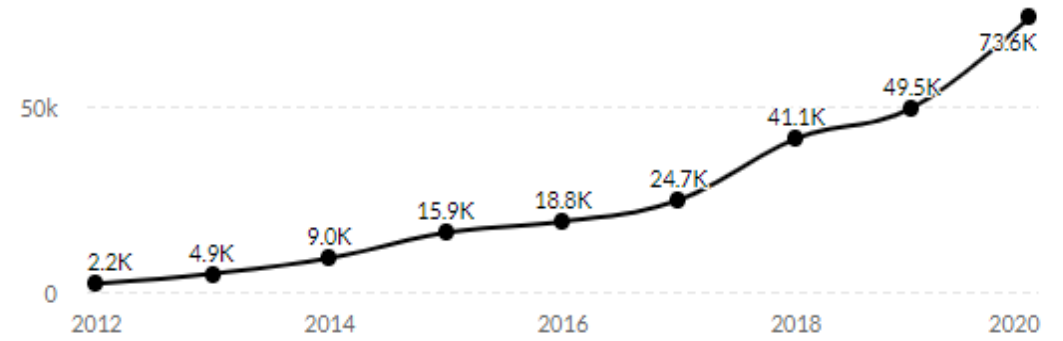
Transmission Channels

TWITCH GROWTH

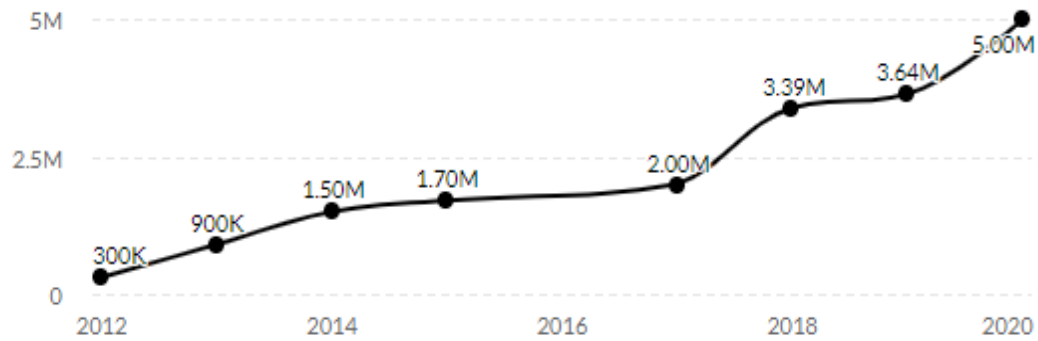
AVG CONCURRENT VIEWERS



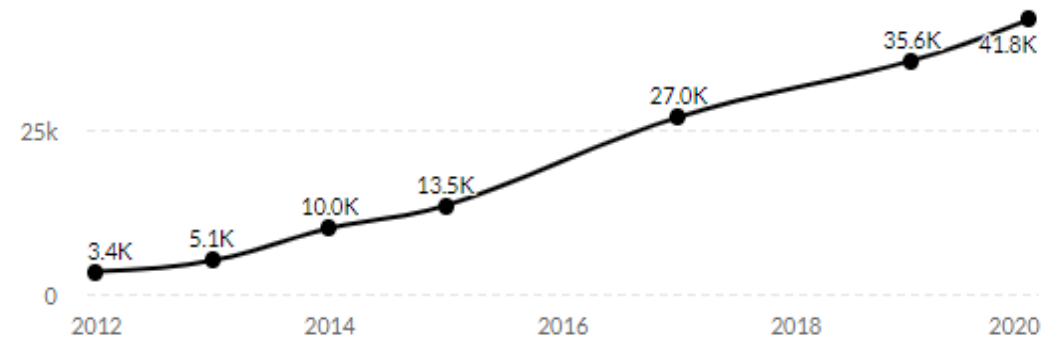
AVG CONCURRENT CHANNELS



MONTHLY BROADCASTERS

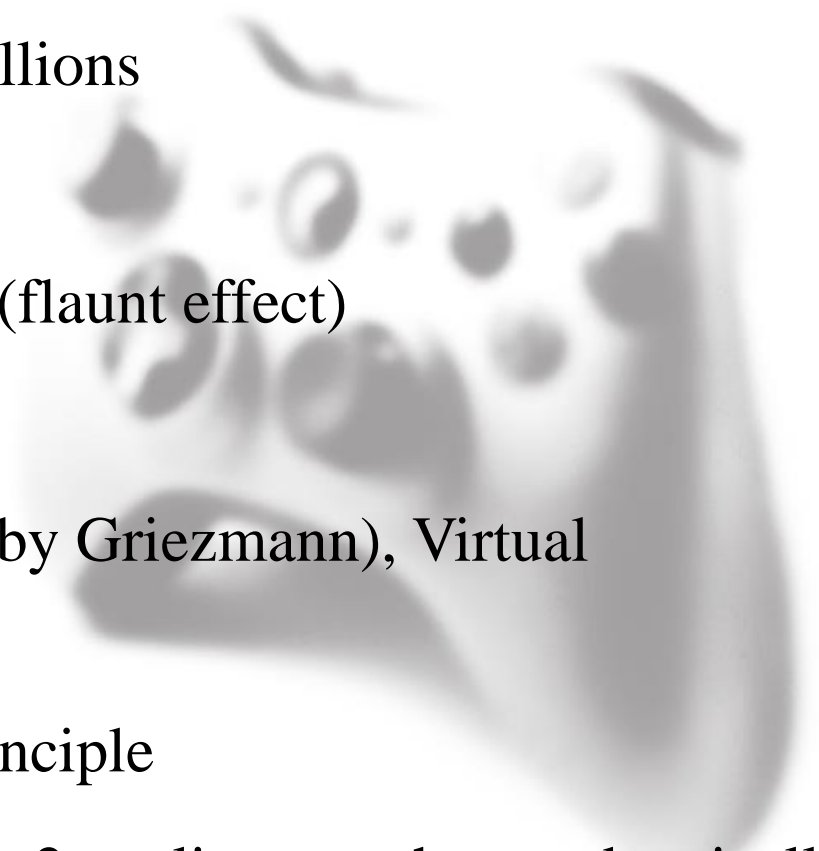


TWITCH PARTNERS



Fortnite: “Moneymaker Effect”

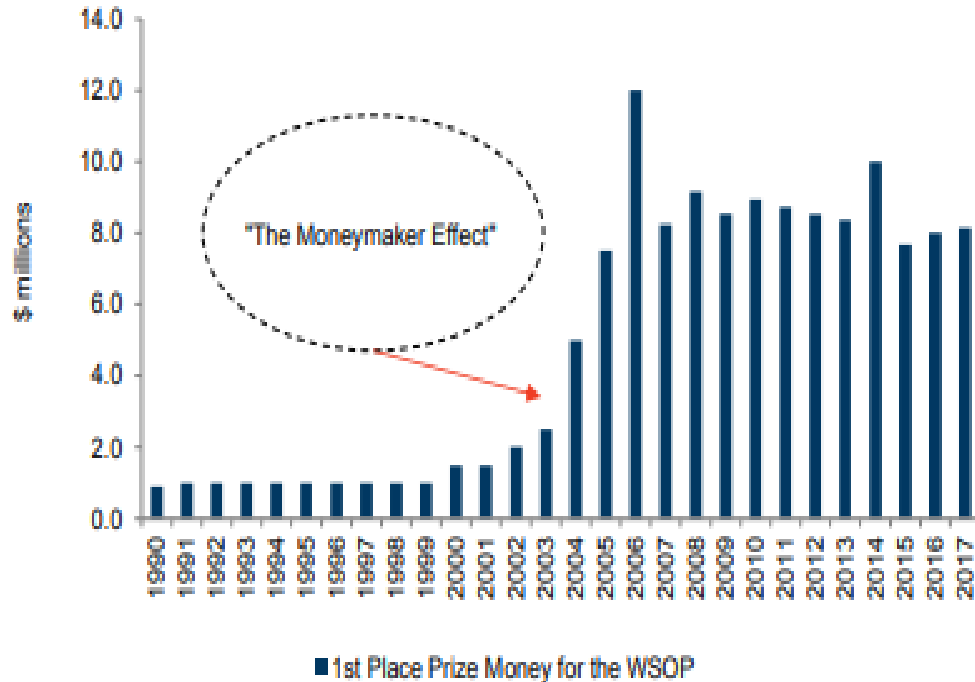
- Number of registered **users** of Fortnite (2020): 350 millions
- **Revenue** (2019): 1,8\$ billions
- **Free to play**: larger audience; possibility to buy skins (flaunt effect)
- **Most popular game** on the live-streaming site Twitch
- **Big Platform**: popular dances (Loser dance emulated by Griezmann), Virtual Concerts...
- **Chris Moneymaker**: everyone can win! Fortnite’s principle
- **Fortnite World Cup (2019)**: prize pool of \$100mn, 2mn live watchers, drastically increase of new potential interested viewers to the world of eSport.



Fortnite: “Moneymaker Effect”

The “Moneymaker effect” caused an inflection in growth for poker

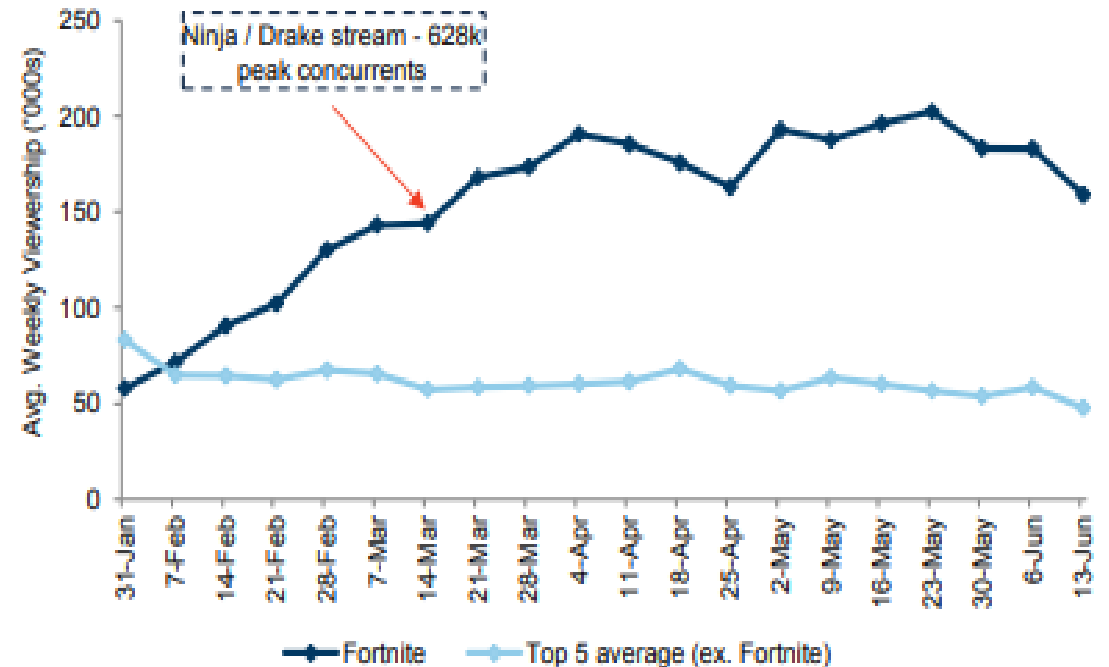
1st place prize money for the WSOP (1990 to 2017A)



Source: World Series of Poker

The Ninja / Drake live-stream coincided with accelerating growth for Fortnite

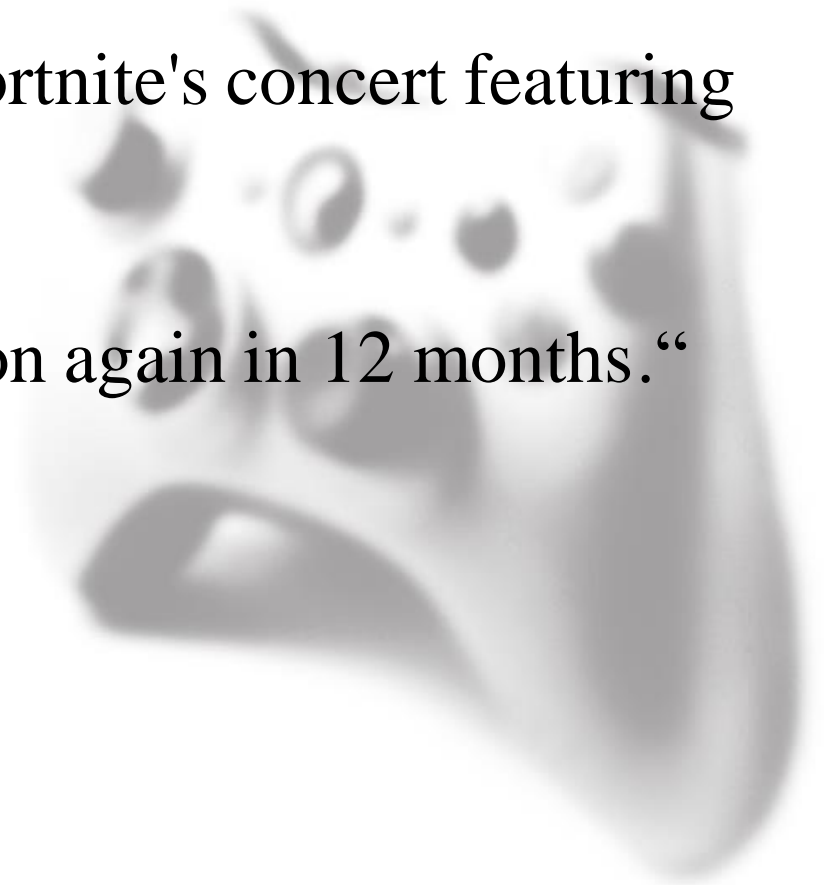
Average weekly Twitch viewership for Fortnite and top PC games



Note: The Top 5 Average includes League of Legends, Overwatch, PUBG, CS:GO, and Hearthstone

Fortnite: Travis Scott

- More than **12 million players** logged in for Fortnite's concert featuring Travis Scott
- "Fortnite is a game. But please ask that question again in 12 months."
(CEO of Epic Games)
- 15 minutes
- New trend



Fortnite: Travis Scott

