eSPORTS GROUP

THE 2021 GUIDE TO

ESPORTS INFLUENCER MARKETING

Contents

Introduction

According to McKinsey, electronic sports (esports) is, "a specific subset of online gaming with a focus on the competition between human players…in a video/computer game with predefined rules." [1]

While competing at video games is not new (think: arcade games of the past), it is a novel concept for many outside the video game industry. Regardless, the global esports audience reached an estimated 495 million in 2020.[2]

Similar growth of digital media has also enabled influencers to flourish in about every major category imaginable. Brand dollars have followed in close pursuit – up to $15 billion could be spent on influencer marketing by 2022.[3] Popular personalities also exist in esports, where they attract large online followings and empower a refreshing communication vehicle.

Executive summary

The term "influencer marketing" is no secret but still poorly understood. For many, being an influencer is about taking selfies, posting them, then raking in cash from digital popularity. The truth is influencers are a diverse group of personalities who may or may not commercialize their online followings.

So, it is no surprise if you are not familiar with esports influencer marketing. However, by the end of this report you will understand:

- The characteristics of influencer marketing in esports
- How to discover top influencers
- The best way to identify relevant audiences
- How marketers can navigate challenges

1   Esports and the next frontier of brand sponsorships *[https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/e-sports-and-the-next-frontier-of-brand-sponsorships]*
2   Newzoo Global Esports Market Report 2020 *[https://newzoo.com/insights/trend-reports/newzoo-global-esports-market-report-2020-light-version/]*
3   Influencer Marketing Report: Social media influencer market stats and research for 2021 *[https://www.businessinsider.com/influencer-marketing-report]*

Cracking the video game code

The world's 2.7 billion gamers spent an estimated $159.3 billion on games in 2020.[4] The global esports audience is less than the total number of gamers, because all esports fans are gamers but not all gamers are esports fans.

Esports

Video Games

4   Newzoo Games Market Numbers Revenues and Audience 2020-2023 *[https://newzoo.com/insights/articles/newzoo-games-market-numbers-revenues-and-audience-2020-2023/]*

Whenever a person plays a video game, they are gaming. That includes anyone from top esports athletes to people playing Candy Crush on their phones. Every time someone competes in esports, they are also gaming. But just because someone is gaming, does not mean they are competing.

Esports is characterized by digital competition in the realm of video game play. So, all esports content is a form of video game content, but not vice versa. This means games-based media resonates with esports and non-esports audiences.

Gaming content is impactful due to the unfiltered dynamic with its audience. How impactful? People watched over 100 billion hours of gaming on YouTube alone in 2020. That figure more than doubled the platform's 2018 total.[5]

Things to note:

- Esports refers to a collection of video games, the same way traditional sports include multiple activities – basketball, soccer, tennis, etc.
- Different games reach different audiences
- Video game titles emerge and decline much faster than sports activities
- Esports content primarily lives on streaming platforms, alongside non-competitive gaming content – so there is a large audience overlap
- The global competitive video game community includes people who may be outside the target regions for certain brands

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[5]   2020 is YouTube Gaming's biggest year, ever *[https://blog.youtube/news-and-events/youtube-gaming-2020/]*

Understanding esports influence

Esports fans regularly engage with creators who are no longer, or never were, affiliated with official competition. These personalities influence esports audiences without even trying. One of the top video game streamers in the world – Tyler "**Ninja**" Blevins – illustrates this unique dynamic.

Ninja began his career as an esports athlete over a decade ago. However, it was not skill in digital sport that fueled his rise to fame. Instead, he became an online celebrity when clips of his personal Fortnite streams started going viral in 2018.

Butterfinger recognizes the appeal of influencers like Ninja

Shortly after, Ninja retired from competition and became a full-time video game streamer on Twitch – Amazon's livestreaming platform. His status as a gaming phenomenon is cemented by a digital footprint of over 60 million followers/subscribers across social media and creator accounts.
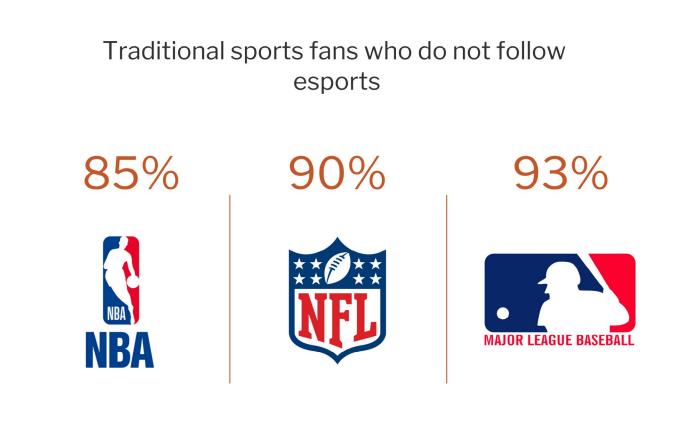
With a competitive career in the rear-view mirror, you might think Ninja is no longer relevant among esports fans. To the contrary, 58% of his social audience follows at least one esport.[6] For brands, that is a good mix of potential exposure to esports and other gaming lifestyle audiences.

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[6]   eSports iQ analytics [Social data of 10,000 Ninja audience members]

Why influencer marketing in esports?

Partnering with social media influencers is already familiar to many brands and marketers, but it is a fast-growing market. One that includes the emergence of gaming-related personalities. Accordingly, partnering with influencers to connect with competitive video game audiences deserves attention.

Esports is relevant because it attracts a hard-to-reach subsegment of the overall population. For example, 9 out of 10 NFL fans do not follow esports at all.[7] Buying impressions is also ineffective with this audience, as 78% of esports fans in North America are not likely to be influenced by online ads.[8]

Traditional sports fans who do not follow esports

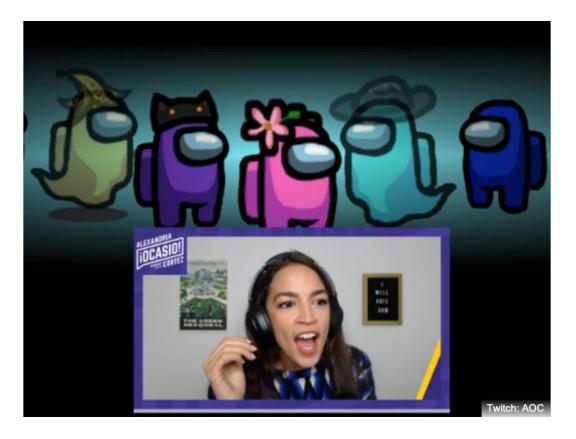85%

90%

93%

NBA

NFL

MAJOR LEAGUE BASEBALL

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[7]   eSports iQ analytics *[Social data of 30,000 MLB, NFL, NBA fans]*
[8]   eSports iQ analytics *[Social data of 10,000 esports fans in North America]*

Since esports is independent of any single digital platform, it is nearly impossible to buy followers and/or hack social media algorithms. Instead, influence is the product of organic, personal connections within the gaming community. You can join these hard-to-crack social circles in a meaningful way through relationships with the right influencers.

A shared passion for video games draws large audiences to various online personalities and is a growing phenomenon outside of just esports. Athletes ("**JuJu**" Smith-Schuster), politicians (Alexandria Ocasio-Cortez), and celebrities (Drake) have all taken to Twitch to connect with the gaming community.

AOC's Twitch stream was one of the most watched ever

Rep. Ocasio-Cortez's (D-NY) October 2020 broadcast peaked at 435,000 viewers and is in the top 25 of most-watched Twitch streams ever. Drake's 2018 Fortnite stream with Ninja is in the top 5.

Fun fact: On average, 77% of the social audiences for several leading Twitch streamers – Dakotaz, DrDisRespect, Dr Lupo, Ninja, Shroud – also follow esports.[9]

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[9]   eSports iQ analytics *[Social data of 50,000+ audience members of the listed streamers]*

How to proceed

Traditionally, influencer marketing depends on finding people who are passionate about and active in your niche. For example, a cosmetic and an athleticwear brand will pursue different influencers. In esports, prominent personalities are active in gaming instead of your category.

That might seem like a hurdle, but it is an opportunity. Joining out-of-market conversations allows your message to stand out. Targeting esports audiences via influencers allows you to reach them in a context they care about. To do so, you need to:

Clarify the message. Does your message resonate with gamers?

Define your segment(s). It is not possible to reach the entire esports audience all at once, so you need to segment via demographics, needs, interests, etc. (See: Dealing with demographics)

Understand the audience. What are their purchase motivators? Do they have a positive brand perception?

Find the right influencers. The online gaming community is full of unique personalities. Who should you consider? (See: Finding influencers and activating brand ambassadors)

Combine data and intuition. The best relationships are built on authenticity and trust. Quality data and analytics are critical, but it is the human connection that matters.

The power of personality

Sponsorship is a lively marketing channel for reaching competitive video game audiences. Comcast Xfinity, Louis Vuitton, Mercedes Benz, and Mountain Dew are just a handful of notable esports sponsors.

These partnerships lend a credible voice to brands within the world of online gaming. And while sponsor association with esports properties return value, the power of personality offers unparalleled opportunities to tell stories in a very human, humorous, and honest way.

G2 Esports – the 8th most valuable esports organization in the world[10] – already counts BMW, Phillips and Pringles as partners. Yet, two of the organization's notable members are its founder/CEO (Carlos "**Ocelote**" Rodriguez) and Twitch streamer (Ibai "**Ibai**" Llanos). Ocelote and Ibai were voted Personality of the Year and Streamer of the Year at the 2020 Esports Awards, respectively.

Ibai's authenticity and relatability make him an ideal influencer

Influencer marketing taps into the power of personality which allows Ocelote, a former League of Legends pro, to remain relevant despite retiring 7 years ago. Game streaming audiences demand the same authenticity and relatability from creators, like Ibai, that brands vet influencers for.

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10   The Most Valuable Esports Companies in 2020 *[https://www.forbes.com/sites/christinasettimi/2020/12/05/the-most-valuable-esports-companies-2020/?sh=2df2c96273d0]*

Keep in mind, esports organizations include content creators on their roster due to the appeal of games-based media. Team sponsors have first-hand opportunity to develop relationships with these creators. Quality data and analytics empower others to do the same outside a partnership agreement (See: Winning with AI).

Challenges marketers face

Successful esports marketing involves understanding the audience you want to reach. Key to that is segmenting by their interests, needs and/or purchase motivators.

However, the overall esports audience is already a very specific subsegment of the online population. And each game title attracts a unique audience segment. Navigating these complexities to find relevant touchpoints is no easy matter.

Esports Audience Overlap

Number of titles followed by esports fans of each game

Total number of game titles followed

● 1 title   ● 2 titles   ● 3 titles   ● 4+ titles

Game	1 title	2 titles	3 titles	4+ titles
CALL OF DUTY	20%	21%	17%	43%
COUNTER-STRIKE	17%	23%	21%	39%
DOTA 2	24%	25%	25%	26%
FIFA	64%	20%	8%	8%
LEAGUE OF LEGENDS	24%	24%	21%	31%
MADDEN NFL	37%	38%	13%	12%
NBA 2K	55%	29%	9%	8%
OVERWATCH	42%	22%	14%	23%
ROCKET LEAGUE	13%	19%	19%	50%
RAINBOW SIX SIEGE	17%	22%	22%	38%

Interest in multiple esports titles creates audience fragmentation

For example, some video game content does not fit brand guidelines. Counter-Strike: Global Offensive (CSGO) is a popular esports title that features gameplay with violent scenarios. On top of that, game popularity is subject to change without warning.

This especially affects the value of marketing assets like teams and leagues since their relevance is strongly tied to specific game communities. On the other hand, esports influencers attract followings based on personal appeal, not just association with a specific game title. Giving them added flexibility to keep audiences engaged and interested.

Fun fact: Esports fans of sports-simulation games are 3 times more likely than those of shooter-based games to follow only one game.[11]

Winning with AI

Esports influencers come in all shapes and sizes. They are professional players, creators, on-air personalities, or a combination of these. Plus, they are active on multiple platforms ranging from social media (Instagram, Twitter) to online video (Twitch, YouTube).

Nonetheless, social media is the connective tissue which connects the worldwide esports community. So, eSports iQ was developed to transform large volumes of publicly available social media data into analytics for competitive video game audiences. eSports iQ is a software platform that uses IBM Watson artificial intelligence (AI) to supply insights on:

- Behaviors, interests, and needs
- Brand perception
- Influencer discovery
- Purchase tendencies

Music preferences	Like hip hop music	Like rap music	Attend live musical events	Have experience playing music	Like R&B music	Like classical music	Like Latin music	Like rock music	Like country music
Madden community	52	60	43	30	64	54	54	71	50
League of Legends esports fans	63.5	62.5	78	81	51	69.5	67.5	77	15
Dota 2 esports fans	57.5	58.5	81	82	48	74	78.5	86	21.5
CSGO esports fans	72	76.5	81	71	59.5	53.5	52.5	70.5	21
Female esports fans	77.4	71.1	68.8	63.4	58.8	55	54.6	49.7	31.7

Predictive AI powers insight into audience lifestyle interests

11   eSports iQ analytics *[Social data of 50,000+ esports fans]*

AI performs repetitive tasks that are too time consuming for humans, e.g., churning through millions of social data points to discover leading influencers. Likewise, AI-powered analytics illustrate dimensions of esports audiences that are missed by traditional surveys and/or manual research. As a result, you can understand the competitive video game landscape in a simple, cost-effective manner.

eSports iQ's audience segmentation technology reveals important similarities and differences. For example, you can discover influencers for esports audiences in Europe vs. North America. This is important, because choosing the right influencers leads to a greater chance that they will take part in your program and succeed.

Finding influencers and activating brand ambassadors

Riot Games' League of Legends is the world's #1 esports title. Case in point: The 2020 League of Legends World Championship drew 3.8 million peak viewers and racked up 139 million hours of total viewership.[12] Put in proper perspective; 139 million hours is over 15,856 years of human attention! These impressive numbers have attracted several high-profile brand sponsors.

One such partner is Mastercard. According to eSports iQ analytics, 69% of League of Legends esports fans are likely to use a credit card for shopping and 67% of their financial service brand mentions are positive.[13] So, clearly this is a relevant esports audience.

Mastercard tapped Sjokz as a brand ambassador

Additionally, the highest rated influencer for this segment is Eefje "**Sjokz**" Depoortere – a popular broadcast personality – who made the 2016 Forbes 30 under 30 in Gaming and captured Best Host at the 2020 Esports Awards.

Mastercard is partnering with its global ambassadors to craft unique Digital Priceless Experiences that connect people to their passions. So, it is no surprise that Sjokz was named an ambassador. It is also fitting that three more top 10 League of Legends esports influencers – Trevor "**Quickshot**" Henry, Indiana "**Froskurinn**" Black and Andrew "**Vedius**" Day are in the same program.

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12   2020 LoL World Championship draws 3.8m peak viewers *[https://www.sportspromedia.com/news/league-of-legends-world-championship-2020-final-audience-viewing-figures]*
13   eSports iQ analytics *[Social data of 9,000+ League of Legends esports fans]*

Top Influencers

Audience	Name		Description	Association %
Female esports fans	Jeffree Star		Internet Personality	38%
Female esports fans	Imane "Pokimane" Anys		Content Creator	21%
Female esports fans	Brett "Dakotaz" Hoffman		Content Creator	25.9%
Female esports fans	Timothy "TimTheTatman" Betar		Content Creator	23.4%
Female esports fans	Shane Dawson		Content Creator	27.3%
Female esports fans	Alexandria Ocasio-Cortez		Politician	26%
Female esports fans	Ariana Grande		Musician	23.7%
Female esports fans	Eefje "Sjokz" Depoortere		Esports Personality	19.6%
Female esports fans	Ali "Myth" Kabbani		Content Creator	14.6%
Female esports fans	Chrissy Teigen		Model	15.8%
League of Legends esports fans	Eefje "Sjokz" Depoortere		Esports Personality	62.4%
League of Legends esports fans	Luka "Perkz" Perković		Professional Esports Player	28.4%
League of Legends esports fans	Martin "Deficio" Lynge		Esports Personality	29%
League of Legends esports fans	Trevor "Quickshot" Henry		Esports Personality	24.6%
League of Legends esports fans	Soren "Bjergsen" Bjerg		Professional Esports Player	23.5%
League of Legends esports fans	Paul "sOAZ" Boyer		Professional Esports Player	22.6%
League of Legends esports fans	Chris "PapaSmithy" Smith		Esports Personality	22%
League of Legends esports fans	Indiana "Froskurinn" Black		Esports Personality	21.1%
League of Legends esports fans	Andrew "Vedius" Day		Esports Personality	20.8%
League of Legends esports fans	Christian "IWillDominate" Rivera		Content Creator	21%

Audience analytics are your window into esports influence

Audience segmenting lets you learn about multiple groups within the overall esports community. For instance, eSports iQ analytics show that Sjokz is also popular with female esports fans. Selecting her as a brand ambassador allows Mastercard to speak to more than one audience segment in a way that each of them cares about.

Analytics are your data-driven access to intuitive knowledge that endemic partners, like Riot Games, have amassed from years of experience. Meaning, you do not need to sponsor an esports league just to find the right influencers. Especially since there is no substitute for making sure your campaigns will be promoted by real influencers and shown to real people.

Influencer integration

Fragmentation across the competitive video game landscape means it does not make sense to try to please everyone, at once. It also means you need to clearly define who you want to reach. Once done, analytics show how to best connect with that target audience.

Honda's gaming initiatives (see below) are strong examples of how to build authentic relationships with esports fans.

- Branded gaming channel on Twitch (Honda Head2Head)
- Official sponsor of the League of Legends Championship Series (LCS)
- Partnership with Team Liquid – a leading North American esports organization

Twitch is a hub for the gaming community and a key platform for connecting with Honda's target audiences — first-time car buyers under the age of 35. It is also home to a thriving group of video game streamers. One such creator is Brett **"Dakotaz"** Hoffman, who has over 4 million Twitch followers and is the 6th highest rated influencer for esports fans on Twitch.[14]

Twitch: Dakotaz

Dakotaz is a Twitch superstar and an esports influencer

Honda featured Dakotaz, and three other gaming creators, in a Fortnite competition during its 2022 Civic reveal on Twitch. Integrating the right influencer(s) into the campaign allowed Honda to connect to a valuable extended audience: 70% of Dakotaz's fans also follow esports and 75% of their automotive brand mentions are positive.[15]

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14   eSports iQ analytics *[Social data of 10,000+ esports fans on Twitch]*
15   eSports iQ analytics *[Social data of 10,000+ Dakotaz audience members]*

Finding the right influencers for any category is challenging. Even more so in esports, where it typically takes hands-on experience in the community to recognize opportunities. That is why quality data and analytics are so important: They level the playing field. Even though Honda worked with Twitch, influencer marketing in esports does not necessarily require a third-party partnership.

Fun fact: 40% of esports fans on Twitch are likely to be sensitive to ownership costs when buying an automobile, but only 11% are likely to prefer safety.[16]

Turn to the right channel

Influencers are valuable because they authentically affect purchase decisions. Yet, the competitive video game community is spread across multiple digital platforms, so it is important to find distribution channels that align with your core values. Segmentation by channel can then discover influencers and pinpoint audience behavior.

For example, Ali "**Myth**" Kabbani is a content creator and top 10 influencer among esports fans who use Instagram – 43% of which are likely to be influenced by social media when making a purchase.[17] The same figure drops to 15% and 18% on YouTube and Twitter, respectively.[18] This underscores the value of Myth's 7 million Instagram followers vs those on other channels.

Understanding cross channel consumer behavior helps your esports influencer campaign strategy. Especially since many leading influencers have large audiences on multiple platforms – Myth has 2MM+ Twitter and 4MM+ Twitch followers. Quality data and analytics illuminate buying behavior, brand perception and purchase tendencies. All of which help decide the type of campaign that best fits your target audience.

Myth and Samsung shared holiday wishes

16 eSports iQ analytics *[Social data of 10,000+ esports fans who use Twitch]*
17 eSports iQ analytics *[Social data of 2,000+ esports fans on Instagram]*
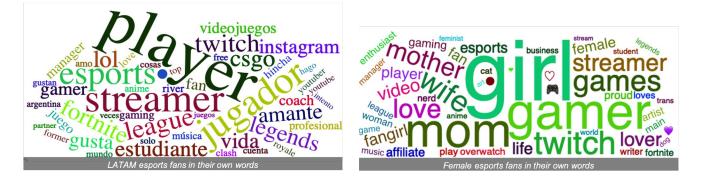18 eSports iQ analytics *[Social data of 17,000+ esports fans on Twitter/YouTube]*

This is particularly important if you are new to the world of esports and gaming. Finding esports influencers already active on a familiar platform opens the door to a relationship, where you can learn more about their community.

Fun fact: Esports fans on Instagram are three times more likely to be influenced by online ads than those on YouTube.[19]

Dealing with demographics

It is always important to connect with audiences that mirror demographics of your target market. This may seem irrelevant since esports fans are typically described as Millennial and Gen Z males. However, according to Nielsen, 22% of esports fans around the world are female.[20] Additionally, the aggregate audience is spread across the entire globe.

LATAM esports fans in their own words

Female esports fans in their own words

Demographics help keep you from wasting time and money marketing to consumers who are not likely to become customers. If your products are location-specific, or you only work within certain regions, the audience should match. Furthermore, to align your brand's values and beliefs with those of a certain demographic, you need to understand who they are.

Along those lines, social media data can paint an unfiltered portrait of a demographic group – in its own words. If there is alignment, the right influencers help you share stories that build an emotional connection with them.

Regardless of the esports demographic, the power of personality still holds. Two esports team owners – Martin Perez "**Coscu**" Disalvo and Francisco "**Frankkaster**" Postiglione are among the top 5 influencers for Latin American (LATAM) esports fans.[21] Both are also Twitch streamers, whose mix of personal appeal and online clout has led to partnerships with Nike (Coscu) and Samsung (Frankkaster).

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19   eSports iQ analytics *[Social data of 9,000+ esports fans who use Instagram/YouTube]*
20   Meet the Female Esports Fan *[https://www.nielsen.com/us/en/insights/article/2019/meet-the-female-esports-fan/]*
21   eSports iQ analytics *[Social data of 5,000+ esports fans in Latin America]*
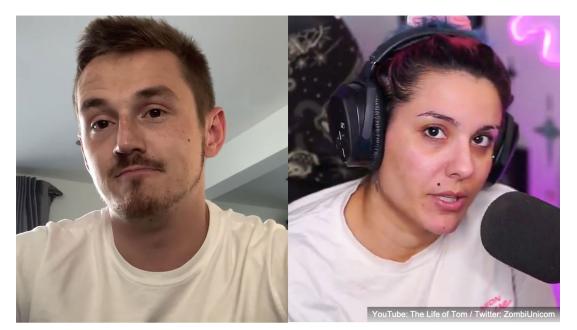
When brands align their target markets with influencers for specific demographics, they can create long-term relationships. Esports influencers know how to talk to relevant audiences in your market, and can help you reach them in an engaging, personal way that alternatives like traditional sponsorships cannot.

Fun fact: 31% of esports fans in LATAM follow one game title. Only 10% follow more than three.[22]

Conclusion: Risk vs. Reward

The COVID-19 pandemic was an unofficial coming-of-age moment for online gaming content. Twitch amassed 8 billion hours watched – the equivalent of 910,000 years – in the first two quarters of 2020 alone.[23] These numbers reflect the increasing appeal of digital channels for accessing products and services.

Influencer marketing is also poised for continued growth, albeit with some hazards. The same holds for its overlap with gaming and esports, where potential rewards are not without risks. For one, just because someone has an impressive online following does not mean they align with your brand values. It also means you have to vet influencers to get a feel for the person behind the gamertag.

YouTube: The Life of Tom / Twitter: ZombiUnicorn

Syndicate (left) denies sexual abuse allegations from ex-partner, ZombiUnicorn (right)
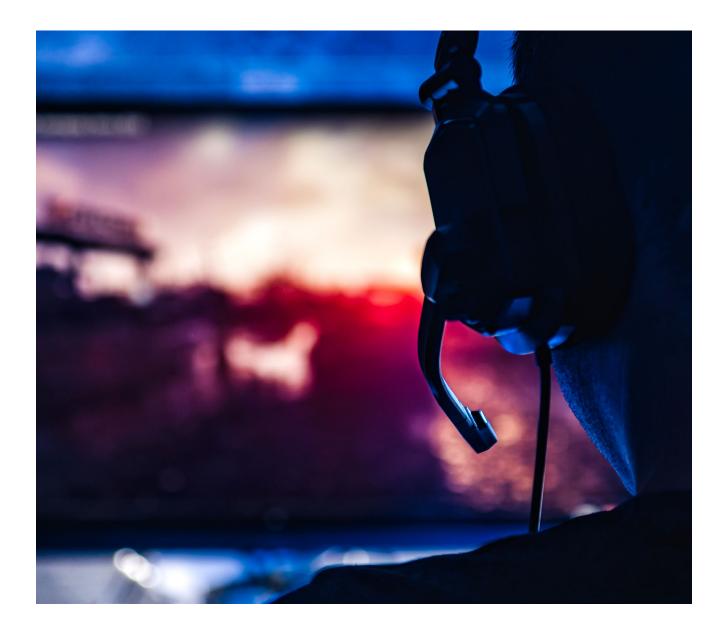
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22   eSports iQ analytics *[Social data of 5,000+ esports fans in LATAM]*
23   Twitch breaks records again in Q2, topping 5B total hours watched *[https://techcrunch.com/2020/07/01/twitch-breaks-records-again-in-q2-topping-5b-total-hours-watched/]*

Thorough influencer evaluation requires the proper degree of due diligence. Especially since online gaming is a complex community, whose members often have reputations that precede them. To illustrate, Tom "**Syndicate**" Cassell is a gaming content creator and leading esports influencer.

Syndicate faced allegations of sexual abuse by two of his ex-partners in June 2020. Prior to that, he was implicated in a July 2016 betting scandal. Brands and marketers must prepare to sniff out things that seem false to avoid scandal.

The risks are there, so they must be managed carefully. In doing so, working with influencers on individual campaigns or executions allows you to see a return before re-engaging for a longer-term relationship. eSports iQ audience analytics are your guide to doing just that. They provide the insights that lead to success with esports influencer marketing.

Terminology

- Esports: Competitive video game play in an organized format with a clear distinction between players and teams.

- Video game streaming: This is when people broadcast live video of themselves via a streaming platform, allowing viewers to see which video game is being played at that moment in time.

- Esports caster (shoutcaster): A commentator who gives a running commentary or insight into an esports game or event in real time, usually during a live broadcast. Very similar to a sports commentator.

- Content creators: People who create digital content. Includes video game streamers.

- Professional esports player: Someone who is paid to compete at video games, much like a basketball or soccer player.

- Esports audience: The people who watch competitive video game events, e.g. tournaments and leagues.

- Esports event: A competitive gaming tournament or league where players and/or teams compete in an organized fashion.

- Esports team: An organization involved with competitive video games. Teams have players who compete in different games and/or leagues.

- Esports league: organized, multiplayer video game competitions, particularly between professional players, individually or as teams.

- Twitch: a video live streaming service owned by Amazon.

- Video game publishers: a company that publishes video games that have been developed internally or by an external video game developer.

- Fortnite: an online video game developed by Epic Games and released in 2017.

- Games-based media: A method of communication in which the output from the media comes from human interaction with a video game. Considered a subset of interactive media.

- League of Legends: an online video game developed by Riot Games and released in 2009.

- Sports-simulation games: A video game genre which simulates a real-life sport.

- Shooter-based games: A video game subgenre where the objective is to shoot opponents and proceed through missions without the player character being shot.

eSports iQ is a next generation, artificial intelligence (AI) powered analytics platform that transforms social media data into one-of-a-kind insights about competitive video game audiences. It helps brands and businesses connect with esports consumers across the world. Empower your esports and gaming objectives with intelligence gathered from hundreds of millions of social media data points.

eSports iQ is developed by Esports Group and guided by a plugged-in approach to market needs. Its vision is shaped by the same respect for the culture of gaming and passion for esports, which formed Esports Group in 2015. Ultimately, eSports iQ is the product of a tireless commitment to excellence.

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