

[For esports marketing professionals and video game developers](#)

January 2019

What we learnt about the esports audience

A review from consumer perspective.

By Philipp Wagner, Blicx Research Director and Harry Campbell, Blicx Commercial Director



harry@blicx.co.uk

phil@blicx.co.uk

Our take on esports

Background: Exploring esports spectator motivations

Our learnings in 2018

Why do gamers watch esports & competitive game content? Researching esports consumption and watching behaviour revealed a multi-dimensional, complex system of different motivations behind the relatively new form of entertainment.

Esports professionals and brand marketers are being periodically updated by a great number of esports market reports with the latest global growth facts and transparent viewership analytics of game tournament performances. However, the gamers individual reasons & motivations to why they watch esports content and the way they consume it, is still not fully understood.

In this article we discuss some of drivers we identified behind esports watching motivations. In 2018 we conducted a series of global esports research projects for video game publishers, investors and startups which helped us to understand what kind of detailed gratifications gamers look to find in esports. The aspects & motivations of esports consumption discussed here are by no means exhaustive. There are far more specific reasons for esports spectatorship than covered in this article.



What is esports actually? - A fluent definition by gamers

[Esports sits somewhere between livestreaming on Twitch and broadcasts of tournament events](#)

Esports marketing professionals wish to think of esports in clear defined categories & genres containing competitive videogame play content of a tournaments scenario, with esports pro players and esports teams competing for prize money. Further more esports spectators identify closely with gaming talents and therefore want to become part of the tribe of followers around the professionals. The assumption is that admiration of superior game skills creates a robust, strong personal bond between the esports teams and their followers, an effect known from traditional sports. That link to esports teams embraces popularity and viewerships for leagues, teams and competitions.

Gamers are easy with fluent definitions - at best they are not relevant

One of the biggest observations is the absence of an uniform definition of esports among gamers on the notion of

what constitutes esports content in the first place. Gamers use a more flexible, broader and fluent categorization. Speaking to esports spectators it is clear that any form of competitive gameplay content may count as “watching esports” for gamers. For some gamers esports starts with watching livestreaming of a coop gameplay session by an influencer or any other form of competitive player-versus-player (PVP) experiences. It doesn’t necessarily have to involve esports tournaments, even if that’s violating specific marketing definitions. When gamers speak about esports they often use the word “pro” or “professionals” to differentiate between the hobby player and anyone who managed to earn money with their beloved hobby. That includes the personality streamer/influencer as well as the pro-player and esports teams. In fact, livestreaming and esports are undeniably intertwined. For a long time, there has been a symbiotic relationship between the burgeoning livestreaming platforms - Twitch noticeably as the most dynamic one - and streamers with the emerging pro gaming scene. On the livestreaming platforms viewers browse freely and switch between the various channels of gaming personality stars, video game tournament leagues and video game publishers to find the esports content they feel like watching in the moment.

Our take on it is that esports and videogame game streaming are so closely connected, they hardly can be considered as two separate markets.

Fanship in esports: Somewhat loose personal attachment to teams & pro-players

For esports spectators the produced game content is what really counts

In traditional competitive sports disciplines, fans tune in and watch a game competition to expect and support their team to win, no matter what. Fanship describes the effect when a real personal feeling of excitement and empowerment is elicited by a team winning, and an authentic feeling of sadness and disappointment when a team is losing.

Comparison of traditional sports vs esports motivations

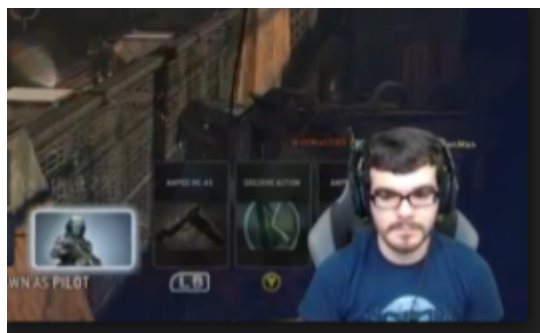
	Primary motivations	Secondary motivations
Esports Importance of gameplay	<ul style="list-style-type: none"> Acquisition of knowledge/learn tips & tricks Watching the best /learning from the best players 	<ul style="list-style-type: none"> Unwinding Following favourite team Checking out new games Admiration of esports talent & celebrity Entertainment spectacle/drama And more
Traditional sports Importance of team/player performance	<ul style="list-style-type: none"> Fanship of favourite team Feeling of personal empowerment & excitement when a favourite team wins/disappointment when losing 	<ul style="list-style-type: none"> Admiration of sports talent & celebrity Entertainment spectacle/drama/unpredictability Acquisition of knowledge Escapism Established social interaction Family tradition And more

In esports the strength and degree of general fanship between audience and esports teams varies. Esports spectators generally have a higher expectation on the visual game content than on the team or players, who are providing the content. The spectators are attracted by a hybrid experience between entertainment and the motivation for skill acquisition to get better in the game they love. Understanding tips & tricks to get better is a core motive for watching across all esports spectators. Esports spectators relate immediately to the game content and associate it to a specific game scenario they experienced themselves. Learning from the best of the best by watching entertaining video game content is the key driver and motivates them to watch esports and livestreaming. That’s why it is less important who is winning a game or match as long as the content is of high in-game challenge and quality.

The global gamer community tend to be very democratic and inclusive of new peers. Variety of interest in many games is standard. There is less rivalry between fans of the esports teams compared to fans of football teams for example. Therefore exclusive fanship-relations between esports teams and their fans is less strongly enforced. Fans of esports teams respect players and team achievements in tournaments but their emotional and personal support and attachment for a single team is less exclusively developed for just one team. It is widely accepted in the esports fan community to express fan interest in multiple teams or even change support during a live event or during a match. As the environment is driven by personalities and single characters, fans are even more attached to the single player in a team compared to the team as a whole.

We fall in love by emotions. Seeing is believing.

Our psychology is set up for emotions, especially in regards to facial expressions. And seeing is believing. However, the way esports is watched and the actual viewing experience plays a vital role in explaining the different nature of fanship in the esports world and traditional sports world. What we watch in esports is mostly gameplay screens of functional character scenes - mostly in ego perspective. Even if in-game characters have a human like appearances, the actual human video game player is able to express far more emotions than any video game character can do. That is triggering emotions. However the video game player is mostly shown small in picture-in-picture mode with limited possibilities of human expression. When watching a tennis or football match, the full focus and constant attention is on the performance and on the sports athlete, with all its drama. In video gaming we watch and concentrate on the gameplay, less on the athlete as a person. That reduces the emotional connection for many. A good esports commentary is often cited as the emotional link to the esports game. The job of a sports commentator is to help viewers understand the “why” of what is happening on the field, to understand the deeper level of the game as it’s being played.



Source: Popsoci.com

Although expressive tournament commentators and shoutcasters create emotions through a sense of tension and expectation setting during a match, a lot of them are ineffective as they just create over-drama, staged tension and missing authenticity.

Esports consumption between social and competitive motives

Dominance & competitiveness, social real-time interactivity and belonging to the esports community

The image of esports gives the impression that esports watchers are tapping into the mental constructs of winning, playing against the best, top rankings and in-game domination. This is certainly true for one part of the gaming community which come with a high degree of gamer self-identity. But there is also a great part of gamers who have lower emotive need for dominance & competitiveness but a higher drive for social relations with other like-minded gamers. Esports has always had a vivid culture to directly interact with esports stars, pro gamers and streamers on the live streaming platform via chat or gameplay. Esports spectators are dedicated to the game or esports streamer they identify with. They donate money to streamers to support them so they can continue to stream and keep coming back to these channels to spend time with like-minded community members. This allows for deeper group connections and community effects within the community members and esports professionals. It provides the sensation of being part of the in-group and pleases the need for social belong. In fact, the drive to socially connect with players, broadcasters and the community before, during and after broadcasts is one of the strongest esports motivations, stronger than the need for game play domination and competitiveness.

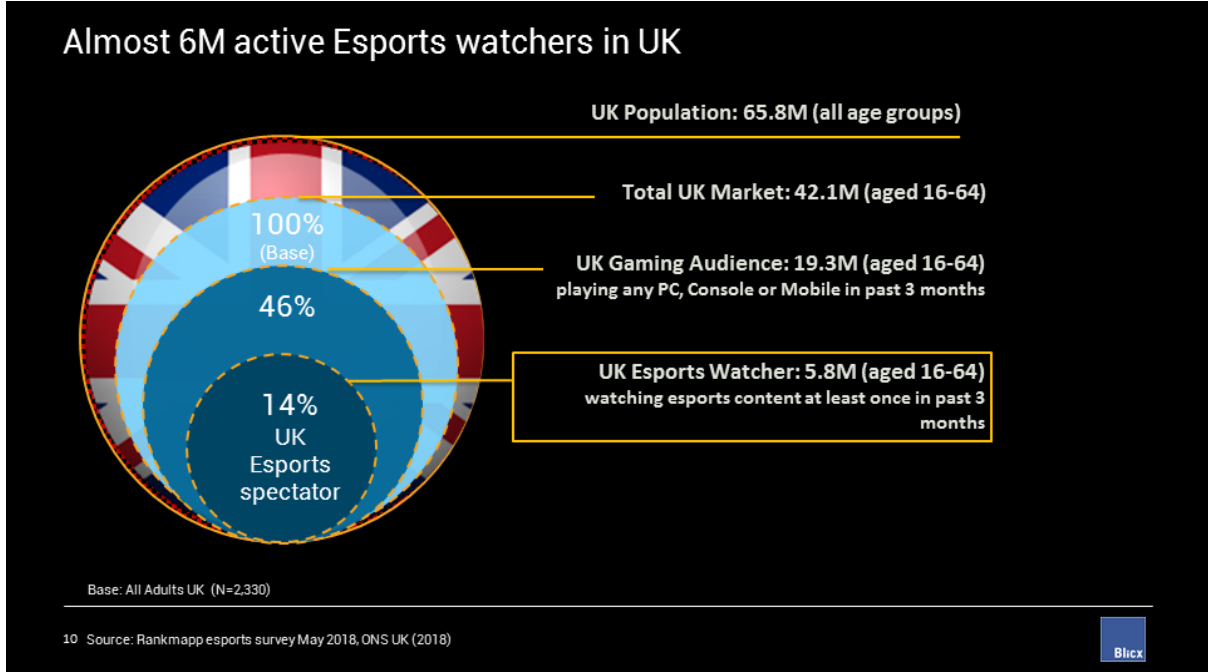
From active to passive immersiveness: Watching video games is like playing them

For some gamers watching video games creates the same immersive experience as playing

Video gaming is, in very broad terms, a combination of interactive, visual and social tasks that form experiences in many ways. These range from playing the game or just looking at a screen while somebody else is playing to have the strong immersive experience achieved when actually playing. Immersiveness is achieved when there is no longer a border between the gamer and the game reality. This can be seen as the highest goal of video game design. Quite a few esports spectators are attracted to experiencing passive immersiveness, which is a more intense feeling than watching a good movie or watching TV. They watch esports content instead of playing, to enjoy a form of immersiveness on a high playing level which they will never achieve themselves. Particularly small children and gamers with low gamer ethos, low self-regulation and a need for instant gratification show a higher tendency towards active to passive immersiveness replacement.

Esports watching adoption in UK - at least once in the past 3 months

In UK almost every second person is a gamer and 6M are watching esports



For more information visit www.blicx.com or <mailto:phil@blicx.co.uk>