



A LINKFLUENCE SOCIAL INTELLIGENCE REPORT | 2021

THE NEW AGE OF ESPORTS

THE BRANDS, TRIBES, AND TRENDS
DEFINING A NEW OPPORTUNITY



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What do we want to answer with this research?

Few industries have experienced the explosive growth of the gaming industry in the last 10 years. While long perceived to be the domain of children young and old, the combination of mobile accessibility, fast data, highly acclaimed content, and maturity of esports has accelerated the industry.



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What's the purpose of this report?


The goal of this report is to explore the social forces behind the persistent growth of the esports industry and opportunities created for brands, and to demonstrate the depth, relevancy, and value of social media intelligence to leaders in marketing and consumer insights.

How was this report created?









This report was produced by the insights team at Linkfluence, a leading global social intelligence company, using data from millions of social media posts, our proprietary social listening software, Radarly, and the expertise of our in-house entertainment industry researchers.

What is the listening scope, time frame and data analysed for this report?


LISTENING SCOPE

-  English (US, UK)
Chinese (worldwide)

PLATFORMS

-  Twitter
-  Facebook
-  Instagram
-  Twitch
-  Forums
-  Blogs
-  Reviews
-  Little Red Book

TIME FRAME

-  September 2019 -
September 2020

Note: Douyou platform is not covered in China



Where is esports today? A break-out industry with room to grow.

Few industries have experienced the explosive growth of the gaming industry in the last 10 years. While long perceived to be the domain of children young and old, the combination of platform accessibility, fast data, highly acclaimed content, and social media adoption has accelerated the industry.

7+ hours

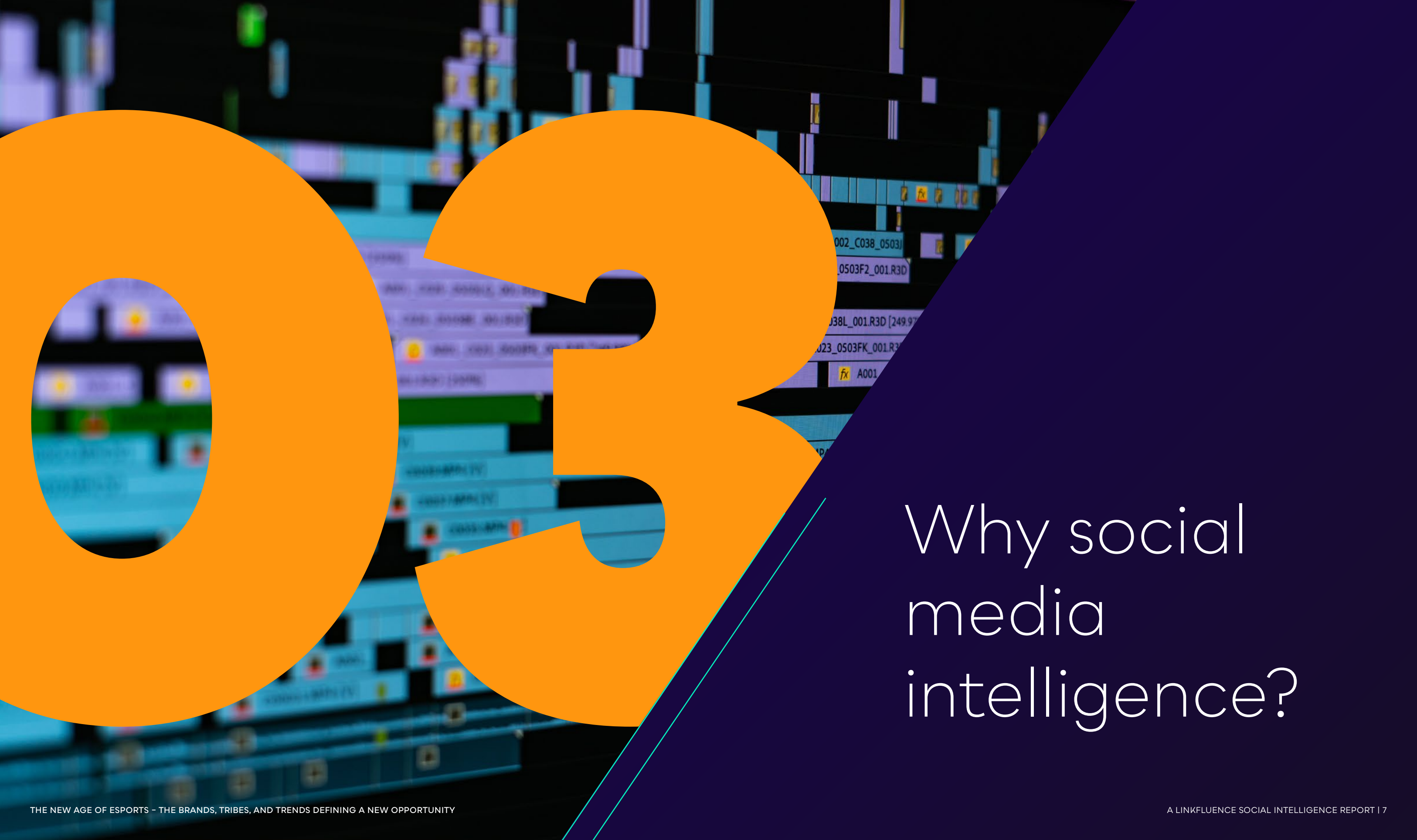
Average game time per week for video game players¹

\$2.5b

Estimated income for Fortnite in 2018²

87%

Increase in social media posts
since February 2019³



Why social media intelligence?

A ground-breaking approach to insights that matches the speed of modern digital consumers' lifestyles.

As the largest focus group, the web offers:

- Massively significant and diverse data
- Unprecedented speed of delivery
- An unsolicited, objective research asset

100m SOCIAL MEDIA PROFILES

From Twitter and other social media platforms.

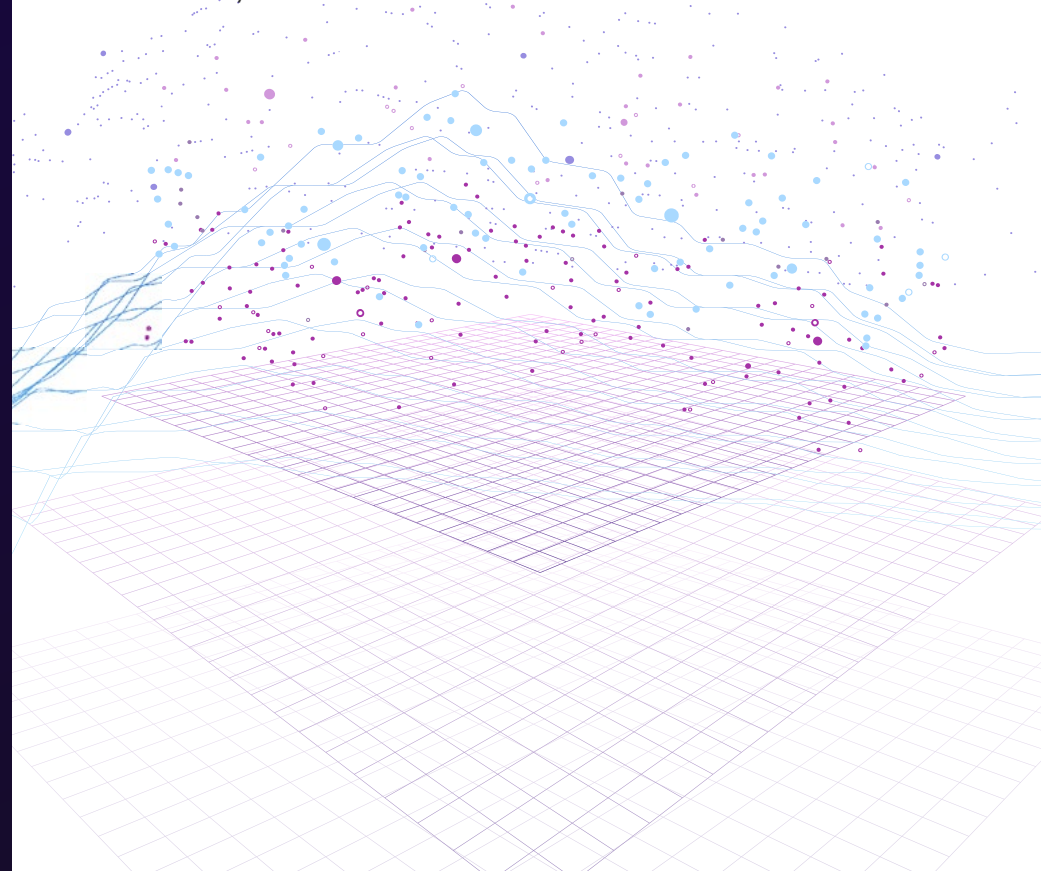
200m+ POSTS PER DAY

From Twitter, traditional web sources like forums, blogs, and websites, review sites, and other media platforms.

What makes social intelligence a must-have part of the modern research toolkit?

Social intelligence is a powerful approach to insight with relevance, depth, and breadth, and a game-changing tool for strategy, planning, marketing, and communications.

Linkfluence combines big data, artificial intelligence, real-time visualization, and human expertise to analyze consumer attitudes and behaviors, and adapt this analysis to the needs of the user.



UNSTRUCTURED
RAW DATA

- Words
- Phrases
- Images
- Hashtags
- Emojis
- Locations
- Links
- Behaviors
- Demographics
- Times
- Platforms
- Devices

DATA STRUCTURING
TECHNOLOGY AND PROCESS

- AI
- Data science
- Market expertise

ACTIONABLE INTELLIGENCE

- Psychographics
- Conversation drivers
- Topics and emotions
- Tribes + communities
- Audiences
- Influencer topic authority
- Trend prediction
- Occasions
- Brand and category attributes

How big is the conversation and where is it happening?

This report focuses on the US, the UK, and China.



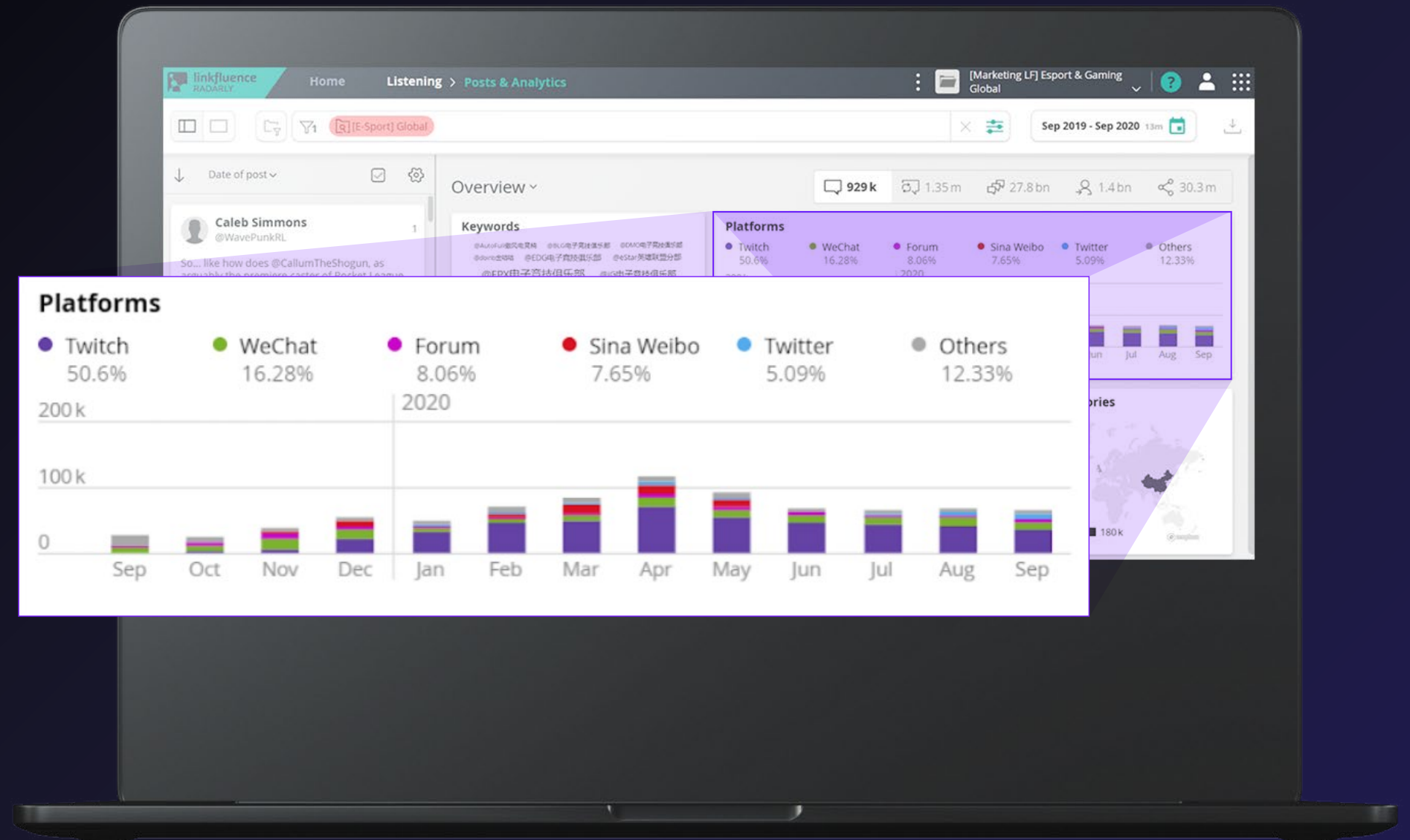
The topic of gaming represents a volume of 8m posts between September 2019 and September 2020, with 5.2m for the US, 344k for UK markets and 1.66m for China.¹

¹Data tracked by Linkfluence. While this data is representative and includes the major Chinese networks, the actual number including non-public forums, university forums, and regional websites is higher.

Where is the conversation happening?

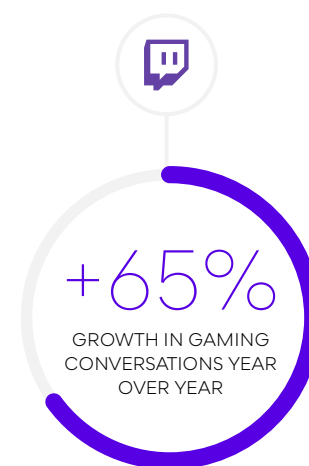
The type of the social media platforms favored by gamers, compared to social media users in general, provides a window into gamer culture. Platforms that allow for in-depth discussions allow gamers to express their passions and frustrations, while responding to those of others, as well as to discuss and hypothesize about technology innovations and upcoming content.

Blog and forums represent 53%, (approximately 3.9 million) of total conversations about gaming in social, e.g. 3.9M of conversation on the key platforms throughout the year, suggesting that users hold better-quality discussions compared to the other platforms.

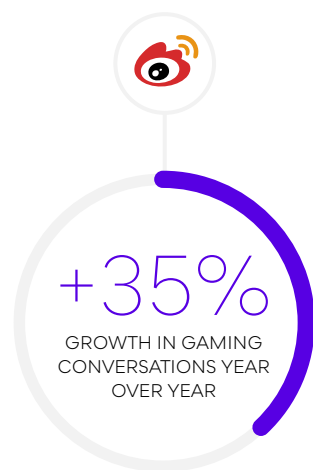


Distribution of platforms over the last year indicate that esports fans favor forums, Sina Weibo, and Twitch, and that conversations spiked in April, when most lockdowns in the west began.

The social media platforms of gaming



Twitch is the perfect place for brands to communicate with gamers, but only with contextualized content. Twitch users are demanding and are accustomed to high quality video with commentary from experts. To engage on Twitch, brands must partner with legitimate players and understand gamer culture. The Razer Streamer program is worth special note for its efforts to discover new and sponsor influencers on Twitch via the hashtag #razerstreamer.



The Chinese platform **Sina Weibo** (新浪微博) is the largest social media channel for news, gossip, information, and entertainment, is the leading social media platform for gaming and esports content.

Esport and gaming clubs host fan pages on Sina Weibo, sharing competition and other gaming community information. Fans frequently create sub-community fan pages for their favorite esports gamers. Reporters from diverse media outlets share their analysis through their Weibo accounts.

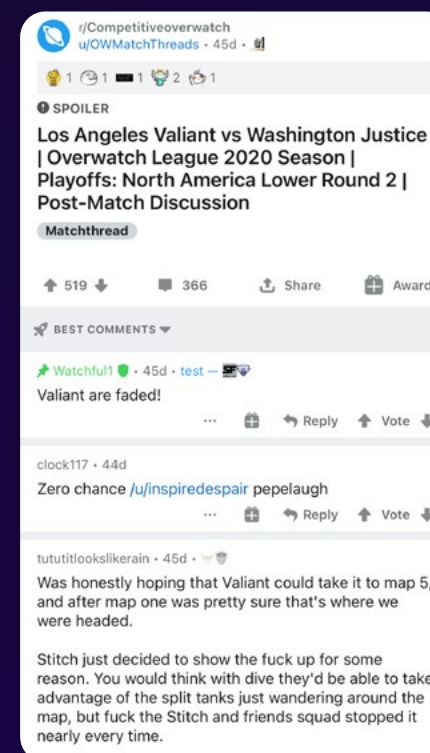


With its news-outlet oriented appeal, **Twitter** is the primary platform for creating visibility around gaming events, including the F1 Virtual Grand Prix, Modern Warfare Tournament, and FIFA20. Despite being blocked in China, Twitter is also popular for the China-focused LPL 2020 competition, 2019 LOL World Championship, and the 2020 LOL World Championship. Twitter is an ideal place for pop-culture events like Grand Theft Auto (GTA) memes, and Animal Crossing player references.

Twitter is the ideal platform for community engagement with jokes, memes, news, and is a more transparent forum where 1.3 million users refer to gaming or esports in their bios (based on analytics from Linkfluence's Tribes software).



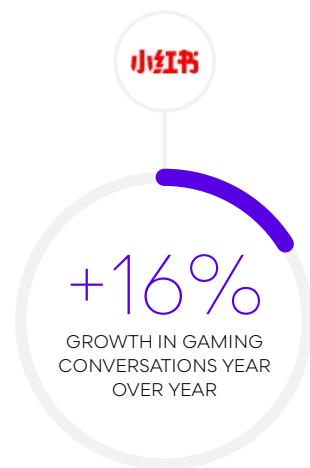
While Reddit is the most well-known platform in the west, **'Forums'** represents thousands of global platforms, attracting more involved gamers discussing athletes, events, game details, tournaments and leagues, and gaming tips. As the primary domain for user-generated content (UGC), forums are closely protected by users, and are not the ideal place for a brand to communicate, unless for customer care or support.



Reddit threads about Overwatch League:

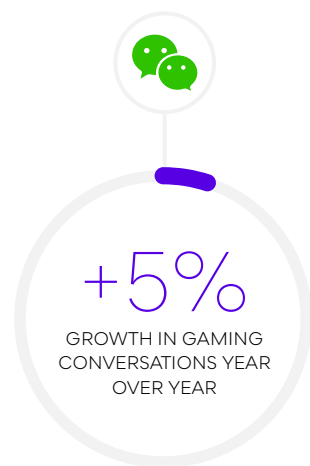
- + **Los Angeles Valiant vs Washington Justice**
OVERWATCH LEAGUE 2020 SEASON
- + **Paris Eternal vs Washington Justice**
OVERWATCH LEAGUE 2020 SEASON
- + **Vancouver Titans vs Boston Uprising**
OVERWATCH LEAGUE 2020 SEASON

"I coach overwatch for a collegiate esports team and can confirm that you are indeed correct in what you are outlining here in your post. Most of my practices are lined with posing questions and poking and prodding the answer from players on the team. The fact is that Overwatch takes serious cognitive function to play well." – Reddit post



RED is a user-generated content (UGC) platform primarily for discussing beauty, cosmetics, travel, and fashion, used mainly by women 18 to 25 years old. However, it is a key channel for topics and content that overlaps with these topics and gaming.

Products discussed related to esports include the massage gun, esports hotels, esports travel spots (such as the LOL Park in South Korea), fashion products (such as the Nike X LPL / Air Jordan X LPL collection), and cosmetics (such as the MAC X Honor of Kings collection).



With 1.2b monthly active users, **WeChat** is the most adopted social media platform in China, and is also used for non-social purposes from banking to ride-hailing to food delivery. WeChat's public accounts are complete websites in their own rights, many of which are structured like blogs, sharing news on gaming and esports. Unlike on Sina Weibo content on WeChat is usually long, containing detailed information and analysis.

The most highly engaged gaming topics on WeChat are League of Legends (LOL), LOL Pro League (LPL), LOL King Pro League (KPL), political topics, such as the trade war's impact on Tencent, and banning of Chinese apps in the US and India, and gossip about gaming ambassadors such as Jay Chou and Karry Wang. The most successful content on WeChat uses titles with names of celebrities, interesting images, and giveaways. Advertising is placed at the bottom of the article.



Due to its short-form, visual nature, **Instagram** has less overall gaming content with less engagement. One exception is Overwatch, which has 71% of content on Instagram, including podcasts, news, fanart, and cosplay, supported by influential communities like monicpost.

Many Twitch posts are shared on Instagram, indicating that the platform is used more for distribution than creation, especially when it comes to streaming. Regardless, it is an important platform for maintaining fan base through art (sketches; cosplays). It is also ideal for cross-pollinating gaming with pop culture, through the broadcast of memes, and gaming related news.

Like Twitter, Instagram is a great place for brands and soft players (for example, the Animal Crossing community), but the need for visual content limits the interaction of hard gamers.



What are the trends driving growth?

The explosion of gaming and esports did not happen in isolation simply because of an increased demand for gaming. A rapid improvement in access to content and democratization of production, the fostering of esports competitions by government and industry, and innovation in technology have coalesced into a perfect accelerant for the industry. Each of these trends are a possible entry point for brands seeking to access new customers and their communities.

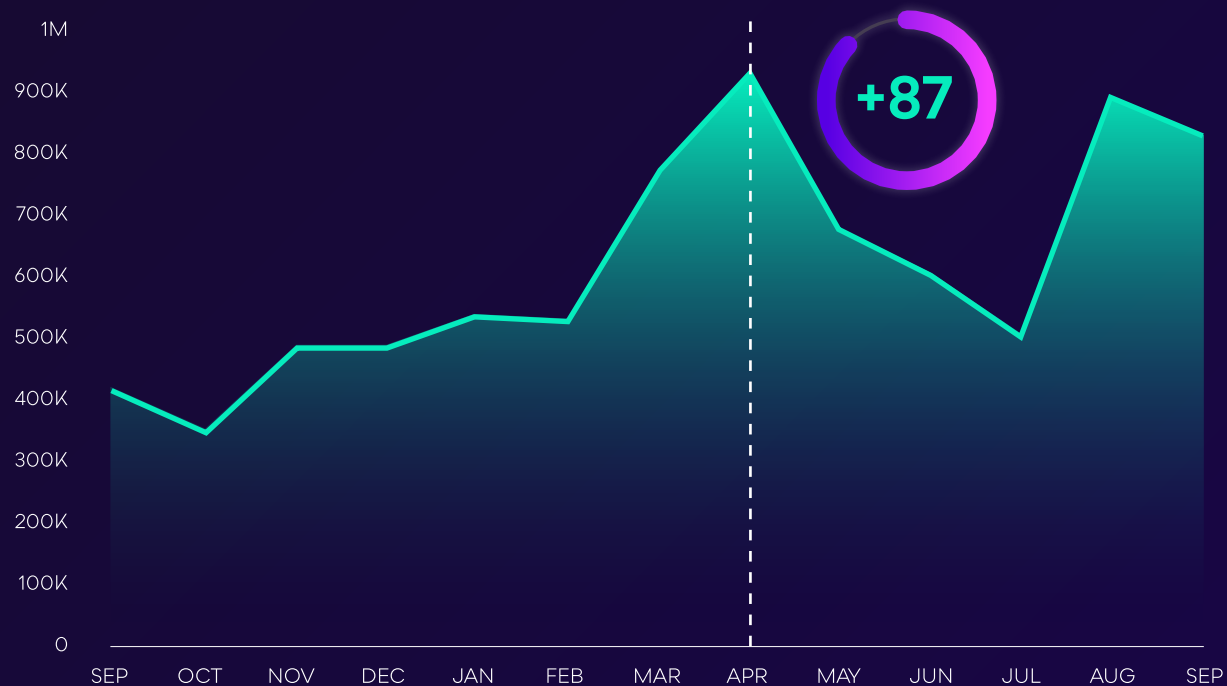
Growth driver #1: Live content and social broadcasting

“Live gaming and sports content will serve as the foundation for a new category that I call social broadcasting.”
– Ben Keighran, CEO Caffeine

Gaming is a very conversational topic, with consistent growth over the past 12 months, led by strong demand for content, especially video-on-demand, and it’s ever-expanding accessibility on devices from laptops to smartphones, over platforms with better user interfaces and exclusive content.

Live content and broadcasting have been especially popular, as evidenced by #PS4live in March and August 2020 (81K and 41K posts, respectively).

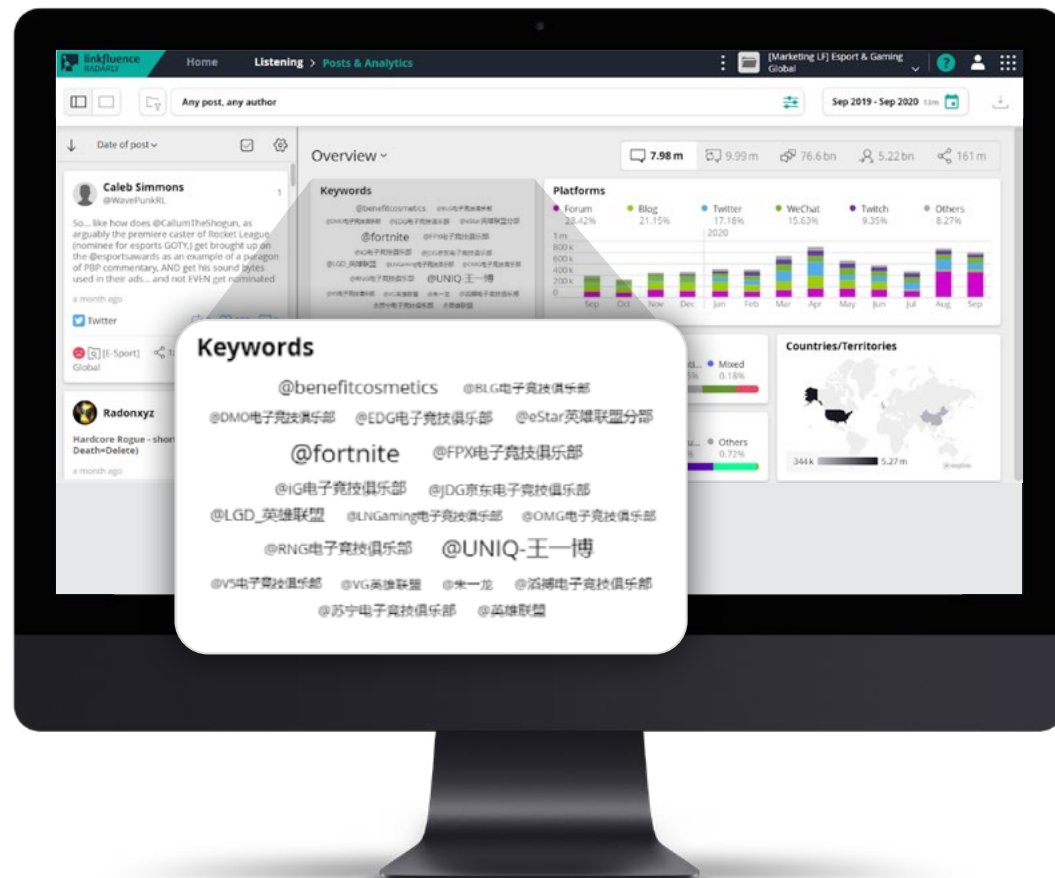
TOTAL VOLUME PERSPECTIVE OVER THE YEAR – GAMING AND ESPORT



6 MONTH PERIOD EVOLUTION, MAR-SEP 2020 (VS. SEP 2019 – FEB 2020)



ANALYTICS FROM RADARLY



Top hashtags include **#streamer**, **#twitch**, **#youtube**, and **#googleplay**, emphasizing the importance of broadcasting to the video game experience.

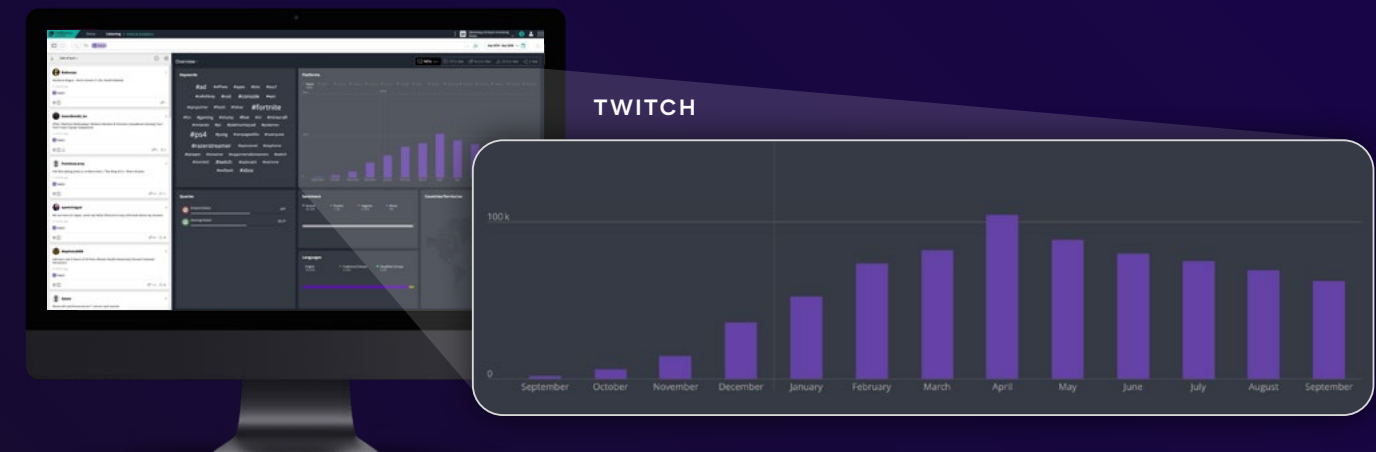
With more and more apps focused on streaming and broadcasting, Google Play is also a domain for gaming reviews and consumer content.

GOOGLE PLAY

Keywords

activision amazon android app store apple
best call of duty china craziest game hack
craziest ways download epic epic games
exclusive hack easy trick fortnite google
google play google play store hk
hack hack tools here legit ways minecraft
most powerful hack most wanted pc play store
pokemon pokemon cafe mix pokemon go
pubg mobile hack cheat samsung
super powerful hack safest hack special hack
update exclusive vwp want unlimited

TWITCH



Twitch has enabled people to broadcast from their usual devices without specialist technology, opening broadcasting to millions. Viewable on phones, smart TVs, game consoles, and PCs, the reach and regularity of livestreams indicates accelerating momentum.

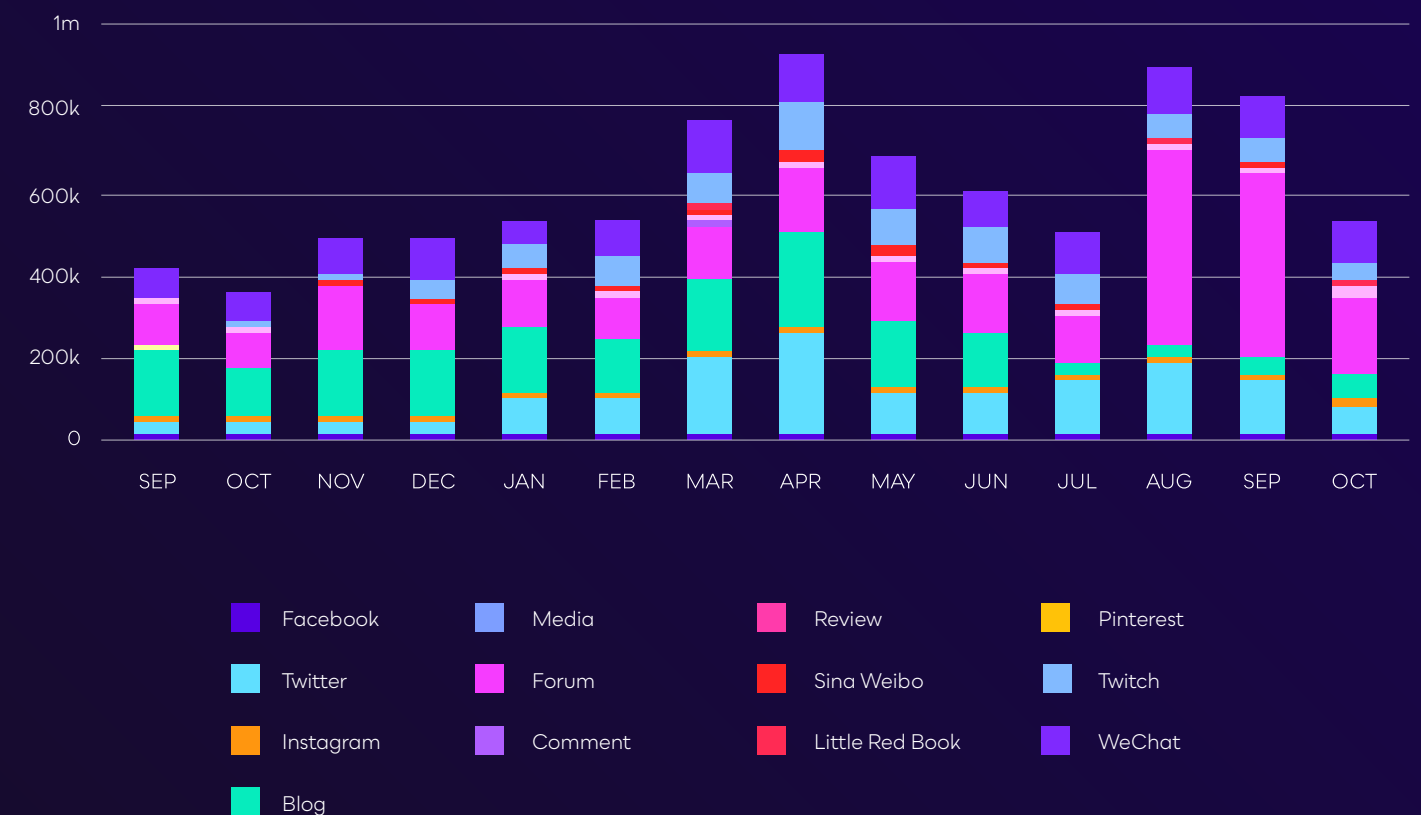
Growth driver #2: Esport competitions become mainstream

Watching esports has become a common way to enjoy gaming, with a 102% increase in discussions on the topic worldwide since September 2019. In China, the rise of esports has been even more dramatic, with competitions being the primary driver of conversations throughout the year. One tournament alone, the LPL Spring competition, drove the bulk of conversation from January 2020 through May 2020.

But the large FPS and MOBA tournaments aren't the only driver of conversation about esports and gaming. Virtual concerts in Fortnite and the esports NBA 2K tournaments are perfect examples of the growing popularity of spectating outside of the 'die-hard' community.

For example, one of the largest spikes in engagement in 2020 was driven by controversy after fans of a famous Chinese actor, Sean Xiao, criticized LOL.

EVOLUTION OF GROWTH ACROSS SOCIAL MEDIA





Throughout the last year, every time there was a peak in conversations, it was driven by various types of esports and gaming events. Here are the main peaks that occurred and the events that created them.

39% monthly growth | November 2019

Major events included the ONE Esports Dota 2 World Pro Invitational Singapore, LOL Final Championship, and Ultimate Battle Royal Live. In China, the LOL World Championship (LOL S9) was held in Shanghai and Beijing, as well as the 2019 LOL World Championship, All-Star Las Vegas 2019 (LPL全明星), the LCL Competition (esport competitions between university students), and Xiamen International Animation Festival.

20% monthly growth | April 2020

As the suspension of sports and other activities drove attention to gaming, the most discussed titles were Overwatch, Call of Duty, and Valorant. In China, major tournaments were still a topic of conversation, including the 2020 LPL, 2020 Spring LPL, LPL Playoffs, KOK Esport, and the story of FPC, the team that won the 2019 LOL World Championship (S9).

46% monthly growth | March 2020

Major events included the MotoGP Esport World Championship, and the cancellations of leagues due to coronavirus pandemic, which generated a high level of discussion due to their cancellations. In China, the 2020 LPL and 2020 LPL Spring Competition drove conversation, as did traditional sports including the NBA, World Cup, and Tokyo Olympics as the audience for these sports shifted to esports due to cancellations.

20% monthly growth | August 2020

In the US and UK, Fortnite, Call of Duty, and MarioKart Esport drove the most buzz, while in China, the 2020 LPL, 2020 LPL Summer, LOL 9th Annual Grand Ceremony, Hainan Dota2 Master Sponsorship, and S10 competition in October and November created the most excitement. JDG, the Chinese esport team, also held an event for their fans online. Fans also discussed Bilibili's exclusive rights to distribute the LOL competition.

Growth driver #3: Technology innovation and novelty

“We want to give gamers certainty that they’re buying a true next-generation console. There’s been a lot of technology changes and advances, which only really interests us in the extent that they enable transformative change in the way that people play and experience games.

For us, the time to capture that and to make a big step is with a console transition or platform transition. What we call the generation approach.”

– JIM RYAN, CEO PLAYSTATION

Technology and content innovation is the second biggest driver of excitement, after esportsing events. In fact, conversations on Reddit and 4chan, two of the most highly respected platforms in the gaming community, (together representing 71% of conversations on forums) are mainly about device updates, new platforms, title releases, and game settings, underlining a need in the gaming community for constant novelty in both technology and content (with 781K posts about these topics on Reddit, and 862K on 4chan).

Of these topics, new releases drive the most interest. For example:



April 2020

Popular content included the latest episode of future-gazing podcast “The World Ahead”, FIFA updates, the PlayStation Plus Celebration pack, Nintendo pre-order, and new products from hardware brands.

“That doesn’t mean I want another Pokémon. I play Lucario for his glass canon underdog play style, not because of the franchise. I do enjoy the Pokémon games, but the newest ones have definitely been pretty bad.” – Reddit



August and September 2020

Topics that drove conversation included the release of Final Fantasy XIV Shadowbringers, news about Animal Crossing New Horizons (Joe Biden’s signs, Nintendo’s success with the game), and the release of Hyrule Warriors for Nintendo Switch.

“Black Ops Cold War is arriving in November, but before that, players will get the beta version. The beta version will come out before a month of the official release. Releasing the beta version is an old tradition of the Call of Duty franchise.” – Blog





What are gamers playing and what drives them?

The world of gaming and esports is not a closed community only accessible to geeky insiders. Far from it, esports is now entrenched in larger society, and conversations related to gaming show that the nature of gameplay and communities surrounding each type of game have a major impact on the affinities of gamers and their worldview, and their interactions with brands outside the game.



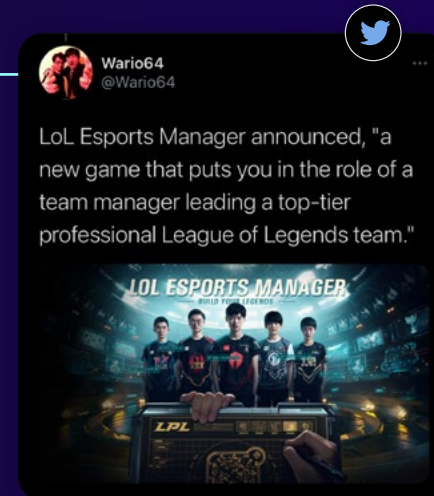
Esports not only creates an arena for competition, but gives space for meaningful conversations about many topics of varying emotional charge. This provides a door for brands to foster a relationship with the community, which can be opened by talking to players (and observers) about what they care about, while being acutely aware of the emotional context to maintain authenticity and avoid coming off as 'too cool'.

Frequent positive emotions discussed include accessible entertainment, relaxation, the emotional reward of improving skills, and fostering a sense of community. Negative emotions include game bashing, hate speech, and violating community rules.

Strategy Games

EXAMPLE: STARCRAFT

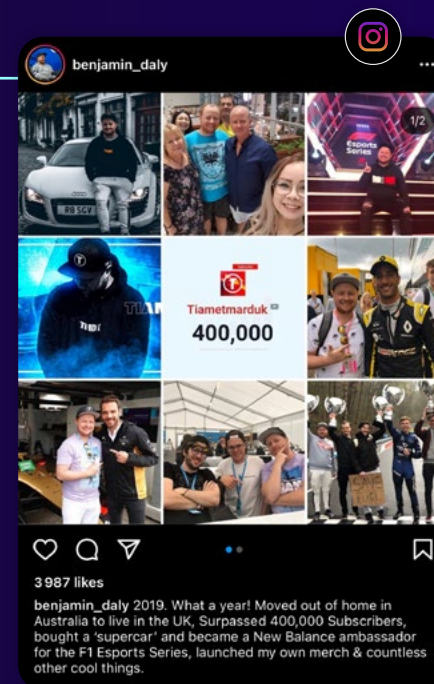
Often perceived as being the most challenging of esports categories, conversation is usually positive and driven by fan discussions about skilled players, tournaments and awards announcements. Developers and designers are also a topic with a high level of engagement.



Racing

EXAMPLE: F1 / MOTO GP

Of all esports categories, racing garners the highest percentage of conversations from a broader community, with support for teams, players, and streamers (#SupportSmallStreamers). Live streaming is highly viral and there are a larger percentage of observers than other categories.



Survival

EXAMPLE: FORTNITE

Although still competitive, this gaming category is the most collaborative among players and brands (as long as they hold an appeal to the player community). The most recognized example is the Travis Scott Fortnite Tour, which earned acclaim for providing a positive place for youth to socialize.



Sports

EXAMPLE: NBA 2K

Engaging a more conventional audience due to its overlap with traditional sports, the Soccer and Football simulation gaming community is similar to the racing and survival community in its strong collaboration and positive impact on gamer's lives. Sponsorships are the main mode of brand interaction and often have an overlap with real-world marketing (BurgerKing for Stevenage).





First-Person Shooters / FPS

EXAMPLE: COUNTER-STRIKE GLOBAL OFFENSIVE

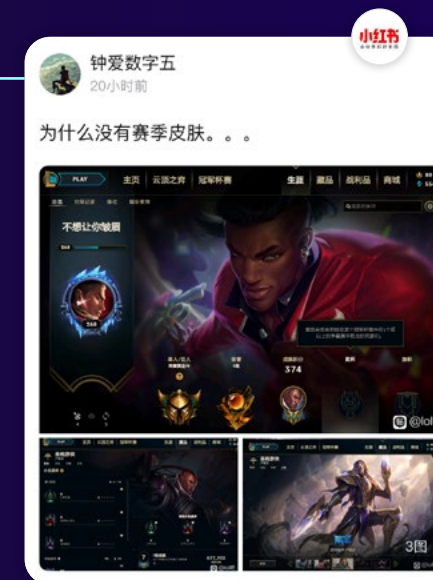
Outside the gaming community, FPS games have been accused of fostering violence in society, especially among youth. While this is vehemently rejected by the FPS community, controversial opinions are often posted on Twitter with lots of trolling and sarcasm, although viral debate deflates as quickly as it escalates. FPS game-bashing is a common practice across Twitter.



Multiplayer Online Battle Arena / MOBA

EXAMPLE: LOL

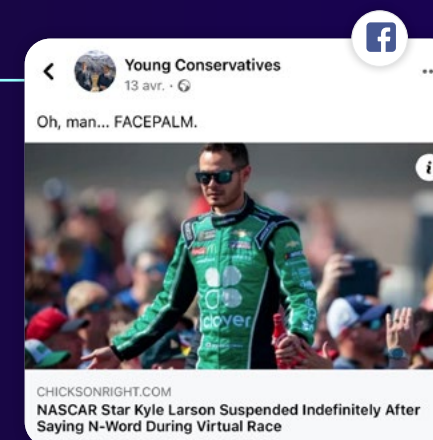
The category with the largest 2020 prize pool, MOBA has a large insider community, especially in China and Korea. While many brand partnerships have been forged, the category has also experienced the most negative conversation around sexual harassment, especially related to DOTA2 (mainly in Forums; Reddit), suggesting a chance to support women's empowerment.



Racing

EXAMPLE: NASCAR

Although anchored in a broader community of Racing fans, and with a real-world marketing opportunity overlap similar to sports simulators, the racing simulation category also has a higher level of aggressive conversation, including incidents related to hate speech, firearms, and gamer suspensions. These topics are most frequently discussed on Forums.





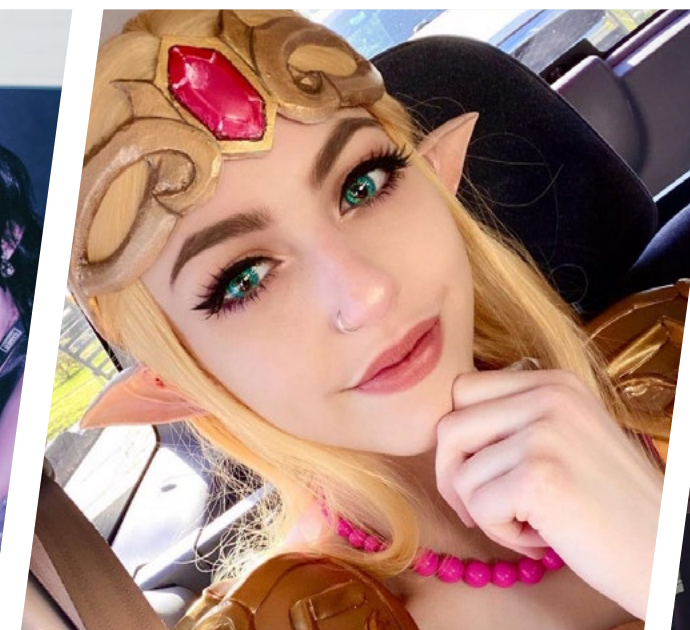
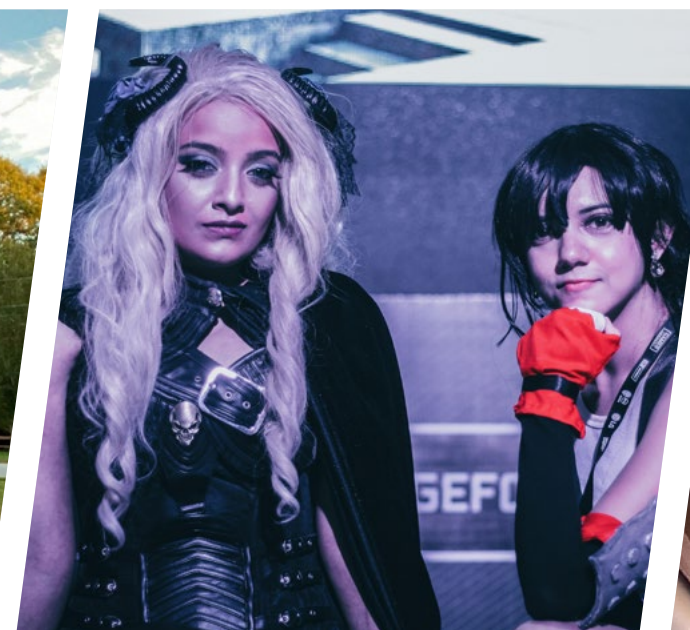
Who are the Tribes defining the future of esports?

The biggest influence on consumer behavior is word-of-mouth and social media, controlled by an ever-shifting mix of cultural trends and identities. And it is digital culture, not national borders, that define new consumer segments. These rapidly-shifting psychographic groups are defined by common passions rather than traditional demographics, and are known as 'Tribes'. They are vocal, listen to their peers and influencers, and engage in online, offline, and social buying journeys that are not linear but circular, multi-directional, and even reversible. More than anything, they define the future of esports.

The Tribes of esports have grown and diversified

The events of 2020 presented a major challenge to esports. Just like traditional sports, esports teams and their fans were accustomed to engaging in real-life, and were forced to find new ways to engage. However, unlike traditional sports, gamers were able to adapt to gaming in isolation and not only survive, but thrive.

Consequently, esports moved into the spotlight, with an emphasis on providing a richer experience, and pushing leagues and teams to find novel ways to interact with their fans. Based on the type of game, digital and real-life community, and other interests, the various Tribes surrounding gaming and esports have grown and diversified.



Living Fantasists

With a focus on role-play and immersive experience, Living Fantasists enjoy attending conventions related to their favorite leagues or Twitch affiliation, such as #OWL2020, #blizzcon, and #homestand. They identify as creatives and describe themselves as artists, designers, creators, and event promoters, and due to their involvement in real-life events, were most impacted by COVID.

+ Where to find them?

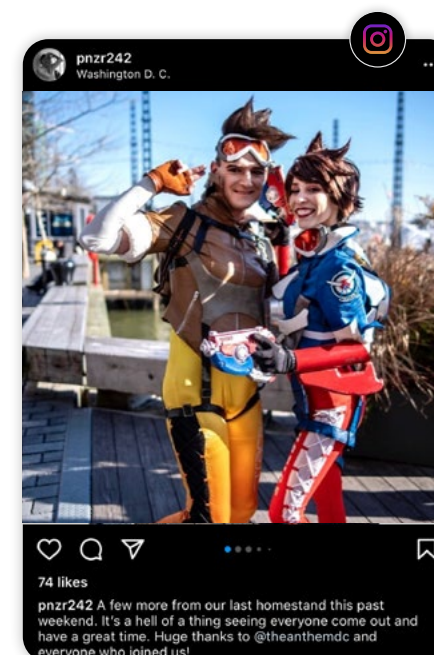
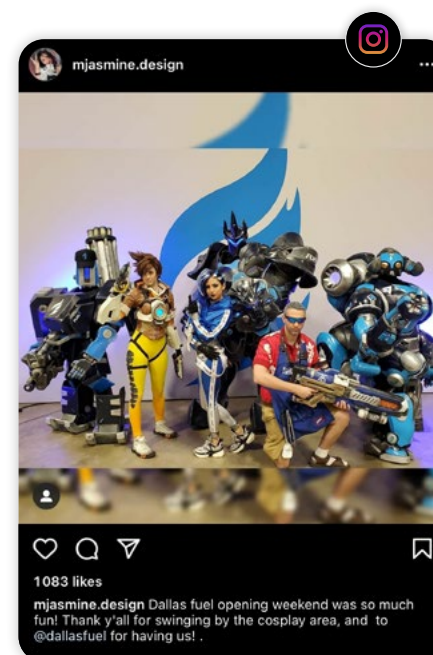
First-person Shooter (FPS)
Third-person Shooter (TPS)

+ What do they talk about?

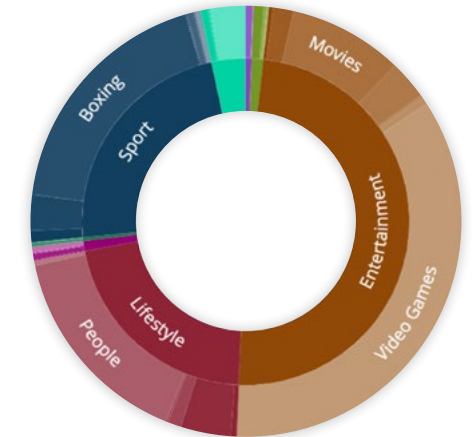
Fashion and luxury
Tech and innovation

+ Examples of profiles

@delcattnip
@black_ace_cosplays
@annjelife
@angalese



TOPICS



EMOJIS



HASHTAGS

#2020pl #anime #cod #cosplay #cosplayer
#cosplayers #cosplayersofinstagram #cosplaygirl #cosplaying
#dark #esports #fitness #food #fortnite #funny
#gamer #gamer girl #gamerguy #gaming #goth
#instagood #lol #love #makeup #meme #memes
#mlg #model #music #overwatch #photography #punk
#streamer #twitch #twitchstreamer #twitchtv
#videogames #xbox #电竞[超话] #英雄联盟

Gaming Culture Maniacs

This tribe strives to connect esports with the mainstream and to remove player stereotypes. They serve to broaden the gaming audience and therefore are a great entrypoint for brands. They mix gaming content with mainstream content and frequently post about social issues like sexism and racism which they highlight in their bios with #blacklivelstories, #womeninesport, and #realonesgaming.

+ Where to find them?

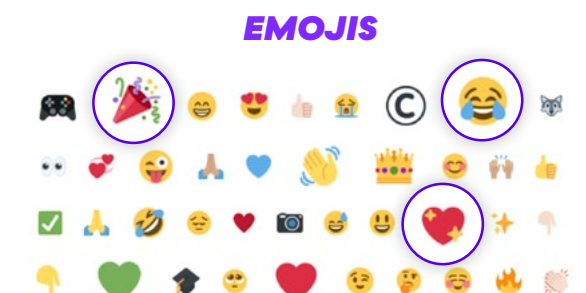
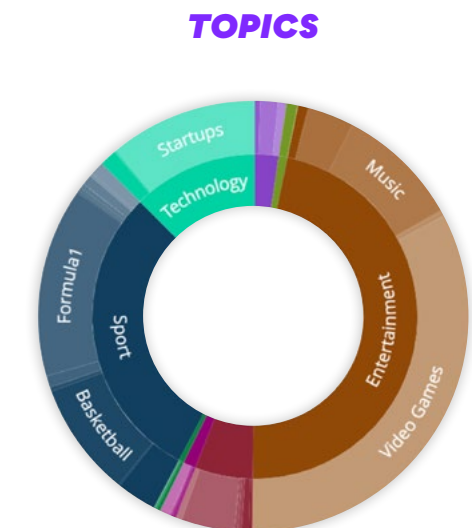
TPS
Sports

+ What do they talk about?

Fitness
Food
Technology

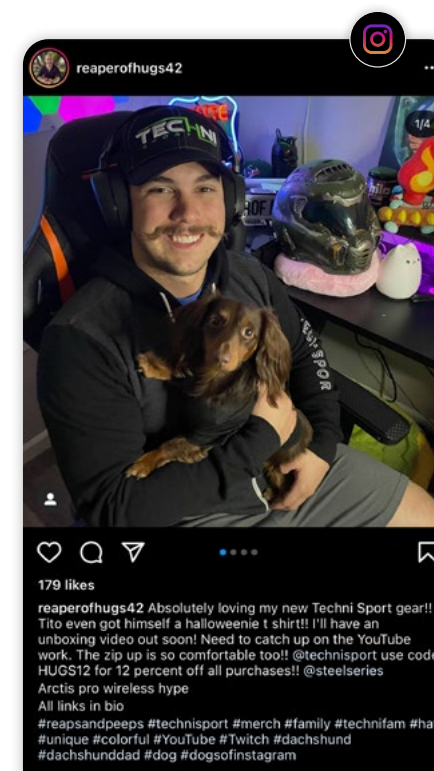
+ Examples of profiles

@313queenpinky
@blackdogceo
@reaperofhugs42
@watchvenn
@gengesports



HASHTAGS

#2020lck #2020lpl #apexlegends #blackgirlgamers
#blackmommiegamer #blerd #business #community
#contentcreator #dota2 #elpaso #entrepreneur #esports
#family #fortnite #gamer #gaming #hiphop #motivation
#mspinky313plays #music #newmusic #pc #pinksquad
#ps4 #rap #rapper #realonesgaming #reapsandpeeps
#streamer #thepinksquad #twitch #underground #work
#xbox #youtube #天輝夜魔 #春日游戏季
#英雄联盟 #英雄联盟[超话]



Slow Lifers

With a focus on relaxation, enjoyment, and a collaborative mindset, they spend more time observing gaming, and often post about their environments and “chill-out” activities. Although their accounts are full of soft-tone colors, food, and fashion, they are often serious players who project an image of a balanced and more mainstream lifestyle. This also makes them an excellent entry point for brands.

+ Where to find them?

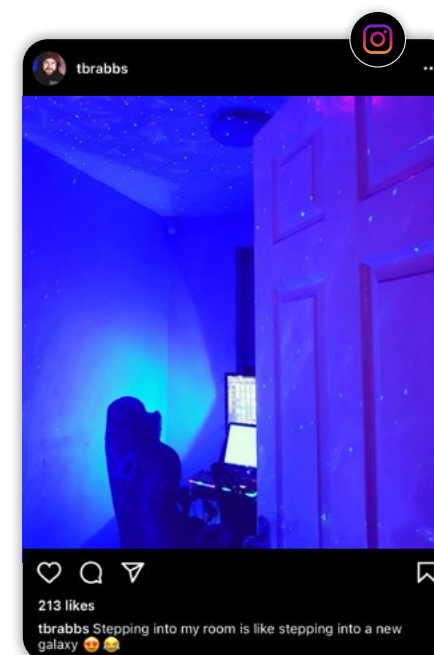
FPS
Multiplayer Online Battle Arena (MOBA)

+ What do they talk about?

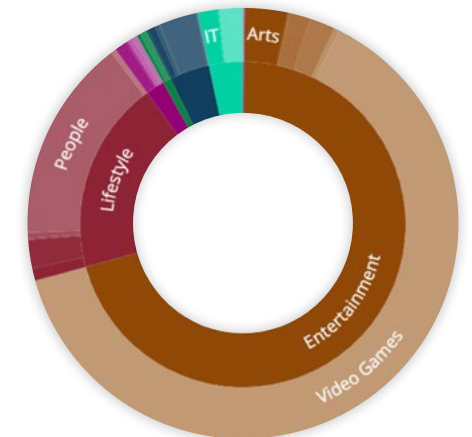
Food
Fashion
Photography

+ Examples of profiles

@treatzlol
@dwreckidoez
@itsbririvers
@michelemorrow



TOPICS



EMOJIS



HASHTAGS

#apex #apexlegends #b34rrcubs #bigb34rr #callofduty
#cannabis #cod #ea #esports #esportsorganization #fashion
#fortnite #gamer #gamerl #gaming #instagood #love
#mightyb34rrarmy #mixer #mixercommunity #mixerstreamer #modernwarfare
#org #photography #photooftheday #professional #respawn #rise #riseesports
#riseup #roadtopartner #rocketleague #stream #streamer
#twitch #twitchkittens #twitchpartner #twitchstreamer
#videogames #xbox

Inspiring Mentors

Finding greatness, improving skills, pushing technology, and spreading a gaming culture are the objectives of the members of this tribe, who define themselves as innovators and community leaders. They are sometimes coaches, commentators, or operate businesses related to gaming, and or are sources of knowledge around platforms, AI, live tracking, and broadcast tools.

+ Where to find them?

Esports competitions
MOBA

+ What do they talk about?

Technology
Business
Sports

+ Examples of profiles

@the_evany
@jefchau
@felwgg
@juliaalexandria00



TOPICS



EMOJIS



HASHTAGS

#2020lpl #9mm #business #dfs #draftkings #elpaso
#entrepreneur #entrepreneurlife #esports #gamer #gaming
#igmilitia #instagood #lol #love #mentor #motivation
#nascar #nba #pcl2020 #podcast #pubg #riseorfall
#sports #theedcguy #titans #value #wegl微博杯 #win
#work #守望先锋 #微博杯v for victory #斗鱼黄金大奖赛s9
#春日游戏季 #炉石传说 #电竞[超话] #绝地求生

Aesthetic Addicts

Instilling creativity, design, and realism into gaming culture is the aim of the Aesthetic Addict. They are usually casual gamers, but obsessed with the visual language of gaming, and often involved in gaming design directly, or peripherally via the incorporation of gaming imagery into their artwork. They are involved in creating player or league visuals such as custom banners and backgrounds, including for brand partnerships.

+ Where to find them?

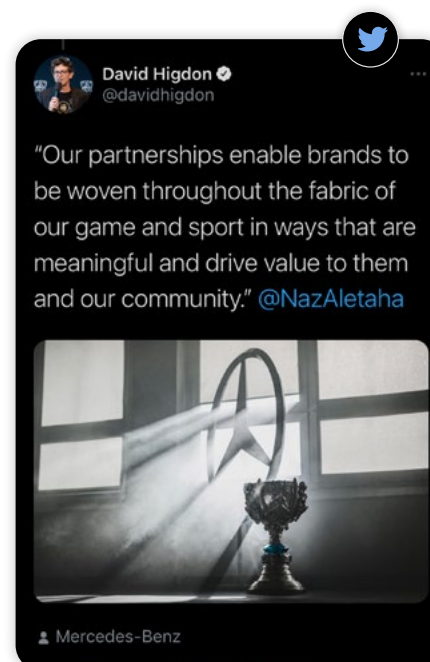
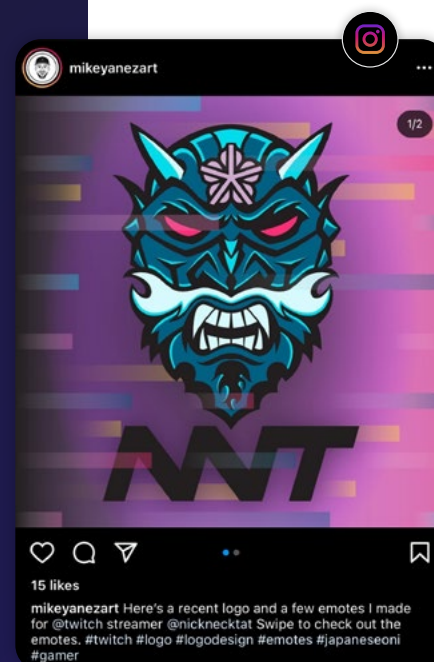
FPS
TPS

+ What do they talk about?

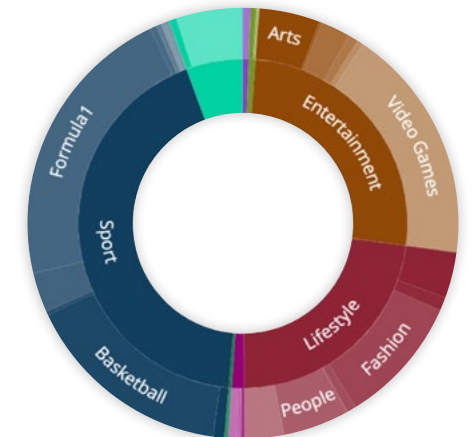
Art
Fashion
Sports

+ Examples of profiles

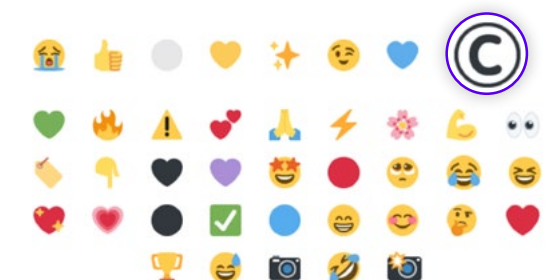
@mikeyanezart
@mattwildbore
@rid_pesik



TOPICS



EMOJIS



HASHTAGS

#arabrubies #art #astonmartin #basketballshoes #cardesign
#carsofinstagram #complex #complexkicks #complexsneakers
#design #esports #gaming #hypebeast #hypebeastkicks
#hypebeastsneakers #illustration #instacars #kicks #kicksoftheday
#kicksonfire #kickstagram #luhan #luhancrossfire
#luhanproducecamp2020 #nike #nikeair #nikebasketball #nikesportswear
#sketch #sneakerhead #sneakerheads #sneakers #whatakick
#whatwewear #xiaolu #لوهان #我很潮 #球鞋很潮
#穿搭很潮 #鹿晗

How can brands win? *9 tactics and 9 examples.*

Esports has not only bolstered the gaming industry, but opened it up to mashups with other industries. This has created opportunities for brands, particularly those able to think creatively and move quickly into a less-understood space. The following is a list of tactics brands have used with success to take advantage of the growth of gaming and build fresh rapport with consumers.

TACTIC 01

ADAPT MARKETING TO ESPORTS TRIBES AND DIGITAL OCCASSIONS

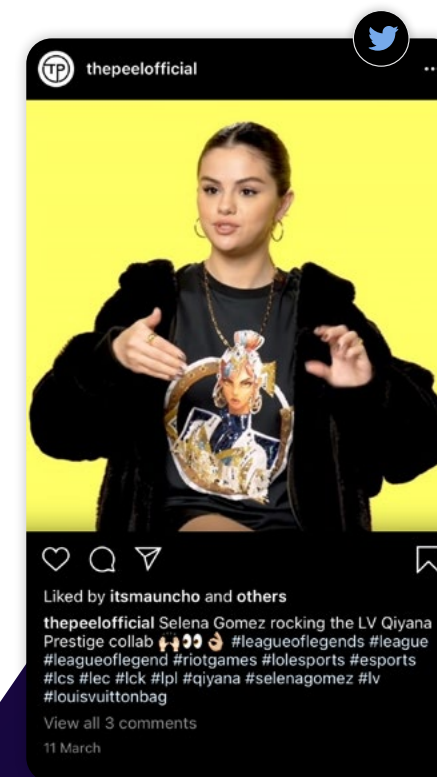
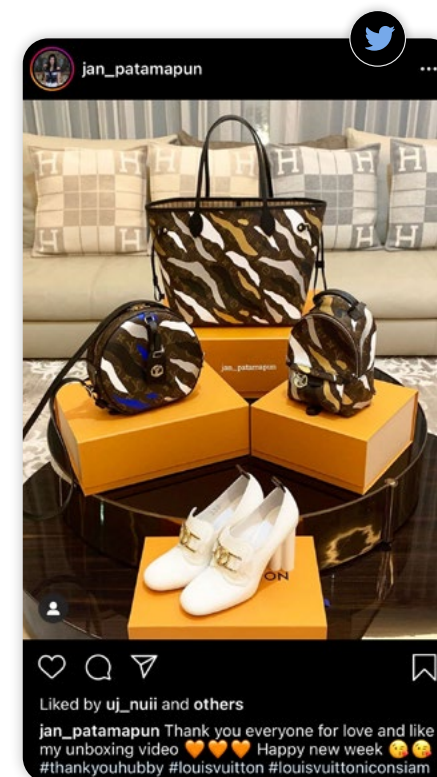
"As a brand, you always want to go where your consumers are," says MyAnh Nghiem, director of communications for Venus. Female gamers are on the rise, and gamers' overall spending capabilities have increased, creating opportunities for brands to see this cohort as a marketable audience of potential customers. While data on the amount of actual spending on luxury and beauty within esports and gaming is scarce, the success of recent fashion and beauty collaborations signals the audience is ready to spend on these new offerings.

Brand case study

Before the pandemic, Louis Vuitton's 2019 partnership with LOL included a real-life capsule collection, in-game prestige skins, and a custom-made trophy - a pre-pandemic precedent in the space.

With more than 1.2M posts on social web covering this unexpected collaboration, and highly positive reception coming from users across the world, the Louis Vuitton partnership can be seen as a "validating moment" for the esports' audience, Naz Aletaha, head of global esports partnerships and business development at Riot Games says.

While in-game prestige skins characters helped the brand to infuse LOL with its aesthetics and codes, the capsule collection (displaying t-shirts, hoodies, jackets, leather goods as well as accessories like keyrings and bag charms) offered something to everyone with a price range from around \$10 to over \$5,600. The collection became viral, mainly due to engagement of the younger generation playing with the LV Instagram filter, gamers and luxury addicts. Similar mechanics were used in the luxury collections visible online, with retailers, celebrities and luxury collectors adding to the buzz.



TACTIC 02

ACTIVATE UNDER-USED GAMING INFLUENCERS

While the influencer economy has boomed, increasing media prices and influencer fatigue have diminished the value of this key media channel. Meanwhile, gaming influencers have remained under appreciated and under-utilized, especially in the west. Many gaming influencers have a broad range of interests which overlap with those of thier gaming audience, and are an excellent opportunity for brands to access new customers with trust and relevance.

Brand case study

While Louis Vuitton capitalized on a holistic approach through gaming (branded collection, branded skins, luxurious trophy), luxury brands also leverage the powerful influence of popular players.

The increasing popularity of gaming influencers drives online craze and sales. Over the summer, Gucci's collaboration with "the Fnatic" was widely discussed on social media during men fashion week. In a partnership with the London-based esports club, the brand released a collection of limited-edition dive watches. Priced at \$1,600, all 100 pieces sold out within 48 hours.

Launched at the same time as the #GucciOffTheGrid collection, the limited edition generated 12.4K posts. The partnership succeeded

in engaging broader Twitter community, securing significantly higher reach than a typical fashion collection (Gucci x The Fnatic: 82% of related posts on Twitter vs. an average of 3-5% for typical fashion collections such as Off The Grid, Gucci Epilogue). Users appreciated the "subtle nods to the gaming world", including the fact that divers are a specific category in LOL, and that Gucci's double G logo can also stand for "good game" among players.



TACTIC 03

LOOK BEYOND THE HARDCORE, TO THE GROWING MAINSTREAM

As seen in the first part of the study, gaming communities are on the rise. With casual gamers representing a significant chunk of the players, this “mainstream takeover” makes the esports universe a key territory for brands wanting to increase visibility.

“There’s a huge crossover, especially given the continued growth of the female gaming community, as well as gamers integrating fashion, style, and beauty into their streams,” writes Mark Jiang, MAC’s vice president of global commercial.

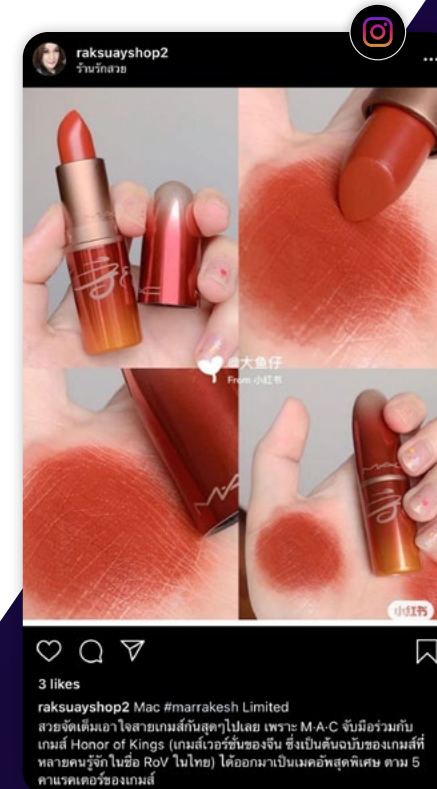
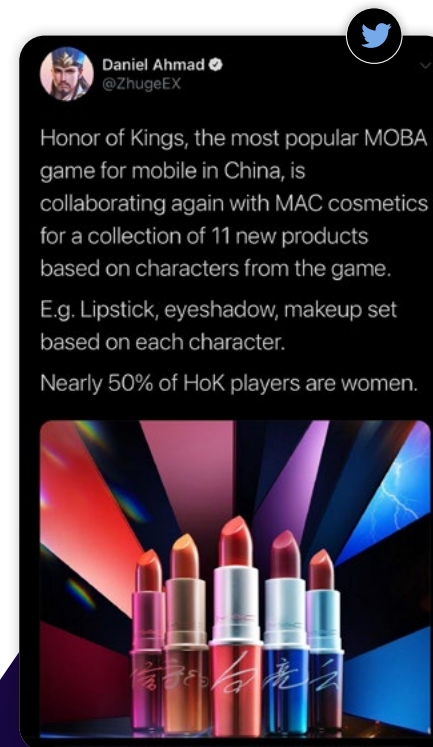
Brand case study #1

In May 2020, MAC Cosmetics partnered with a hit video game, Honor of Kings, for the second time in China. The exclusive makeup collection proved to be popular amongst players, more than half of whom are females under 24 years old).

Over 209K posts on social media referred to the exclusive makeup products, highlighting the expressive makeup look echoing the Honor of Kings color codes. Online conversation reflected consumers’ love for MAC’s bold lipstick colors and their signature eyeshadow palette. Smart influencer strategy, tapping into the online beauty community and beauty gamers, helped the company reach new audiences without sacrificing its unconventional brand DNA.

#MACxHonorofKings generated 5.06M engagement actions on Sina Weibo as Honor of Kings fans were eager to show off products they bought. A popular esports blogger got involved, boosting engagement as he saw the MAC X Honor of Kings collection lipstick as a perfect gift for his girlfriend on May 20th (520’s pronunciation in Chinese is “I love you”, therefore couples gift each other on that day). Furthermore, aesthetic addicts shared their creations by putting MAC X Honor of Kings lipsticks on 4 Honor of Kings characters.

As per WeChat conversations, Honor of Kings has more female players than male. However, the signature lipsticks also attracted male gamers, demonstrating that the gender blur is reflected in the gaming universe.



TACTIC 03

LOOK BEYOND THE HARDCORE, TO THE GROWING MAINSTREAM

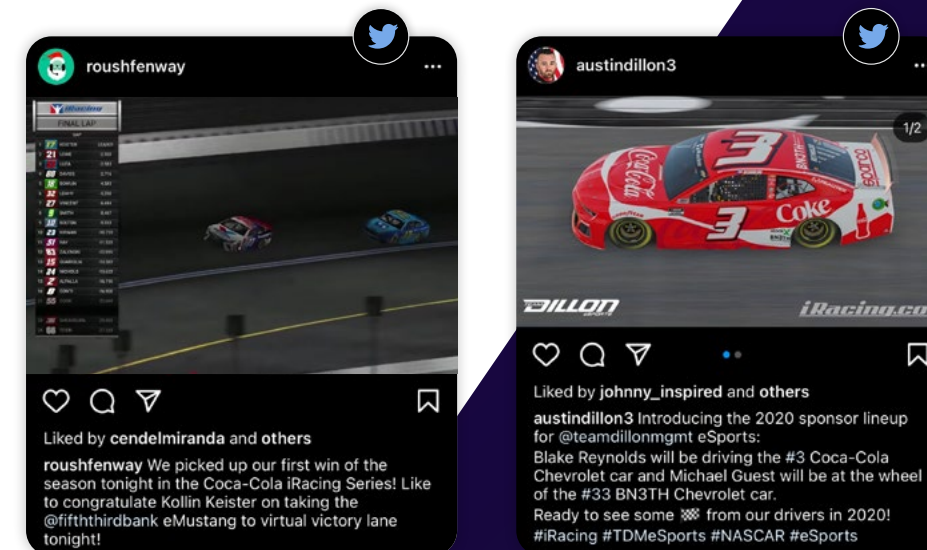
As seen in the first part of the study, gaming communities are on the rise. With casual gamers representing a significant chunk of the players, this “mainstream takeover” makes the esports universe a key territory for brands wanting to increase visibility.

Brand case study #2

Coca-Cola tried to implement interactive platforms to reach mainstream audiences. In 2018, the brand launched @cokeesports to run weekly tournaments sessions: Major league soccer and Clashroyale battlefield. The initiative generated relatively low engagement on twitter (319K followers vs. 1.9M followers for LOL esports). Learning from this, Coca Cola decided to focus its investment in core sponsoring, cross-gamings and cross-channels. Recently, the brand announced its plans to promote new talent.

The company has also been named as the sponsor for the eNASCAR iRacing Series, and created new assets to promote the partnership

- iRacing series, Coke machine, Happy hours. Chris Bigda, Director of Sports Marketing and Activation for The Coca-Cola Company, commented the news: “eNASCAR presents a unique opportunity for Coca-Cola to engage with consumers through some of the best esports competition that exists today. Through our new position as a NASCAR Premier Partner we’re exploring innovative ways to activate across the sport. This series allows us to connect with race fans, identify new talent and ultimately, celebrate champions with refreshing ice-cold Coca-Cola.”



TACTIC 04

USE THE SPIRIT OF GAMING TO INSPIRE FUN AND PLAYFUL CONTENT

While exclusive collaborations boost visibility and help reach mainstream audiences, gaming codes, aesthetics, and playfulness can also be explored as a new way of storytelling and content creation.

Brand case study

While exclusive collaborations reach mainstream audiences, gaming-specific aesthetics, and playfulness can also be explored as a new way of storytelling and content creation.

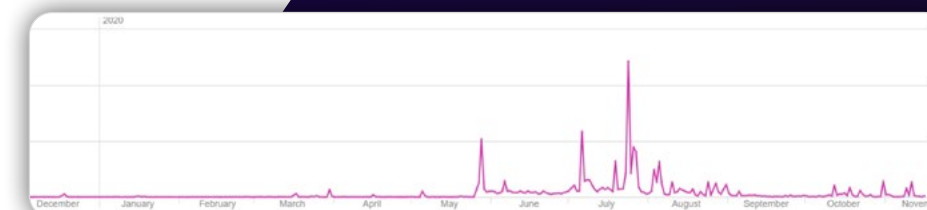
In 2013, KFC was accused of breaking a food safety law in China. The case led to a loss of trust, something the brand had to address. In 2015, KFC entered the esports category, hoping to reforge a bond with consumers.

KFC created the “KI” (KFC’s AI), a tool which tracks player behavior and delivers KFC discounts and other rewards. KI uses KFC coupons to invite fans to enjoy winning moments. The activation triggered strong engagement from esports players who call KI “the Paul’s Octopus of esports”.

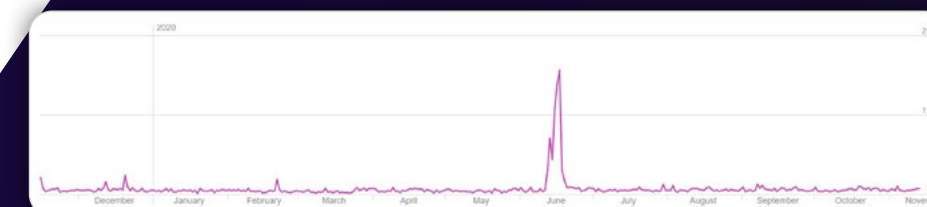
In 2020, KFC supported the LOL World Championship (S10) in Shanghai, to huge success. Comments like “it is already a habit of watching esports games while eating KFC”, “cannot watch the esports competition without KFC, family bucket here i come”, and “S10 and KFC is the perfect combination” were a result of the initiative.

The “WOW bucket Esport Season” and partnership with Chinese actor Wang Yi Bo (王一博) was another.

In the west, KFC’s Gaming Twitter account showcases esports events, device updates and brand activations. Partnerships include Nintendo (Animal Crossing, 200K views on Twitter) and X box (Invasion, 135K views on Twitter). Light-hearted content, such as a prototype of the KFC console, generated 24K mentions.



RADARLY ANALYTICS SHOWING THE SUCCESS OF KFC'S COLLABORATION WITH CHINESE ACTOR WANG YI BO



RADARLY ANALYTICS SHOWING KFC'S SUCCESS IN COLLABORATIONS WITH NINTENDO AND X BOX

TACTIC 05

EXPLOIT GAMING'S SUITABILITY FOR AUGMENTED AND IMMERSIVE EXPERIENCE

The unexpected Covid outbreak and crisis in 2020 meant that major gatherings and festivals were forbidden. Smaller-scale meet ups and celebrations were also affected, giving brands little room and opportunities to raise awareness and remain top of mind. Gaming platforms came to the rescue, with forward thinking brands leveraging the online universe to host creative events and create a 'phygital' experience augmenting creativity with an extra level of emotions.

Brand case study

Gaming platforms offer major opportunities to engage with mainstream audiences. They also serve new creative possibilities to showcase products and host seasonal events. With the pandemic still affecting day to day lives, the 'new normal' urges global brands to re-



invent IRL events and customer experience, and find innovative ways to engage consumers.

Launched simultaneously on Instagram Live and Twitch, Burberry Spring-Summer Collection 2021 was the first collection broadcasted on a gaming channel. More than 60K Twitch viewers were registered in just three hours and 2.7K on Instagram Live. As Rod Manley, Burberry's chief marketing officer, explained, *"Twitch unlocks an exciting new space where our Burberry community can be digitally transported to feel like they have a virtual seat at our live show. It is an interactive experience where guests can connect with both our brand and each other while personalizing their viewing journey."*

Burberry Spring-Summer Collection, the first fashion collection broadcasted on the gaming platform, triggering 3.9K posts on the social web.

Inviting Bella Hadid, Rosalia, and Erykah Badu, the brand teased the event 30 minutes before the show. To access content and ambassadors chat, "squad mode" needed to be activated, generating thousands of

comments and discussions about the collection and its theme ("a love affair between a mermaid and shark").

The squad mode allowed the brand to showcase multiple gamers playing at once, allowing players to decide which streams to interact with:

- show discussion between celebrities like Rosalía and Bella Hadid
- models getting ready and walking the forest runway
- musician Eliza Douglas providing the soundtrack and multiple views of the performance art, produced in collaboration with Anne Imhof.

Each stream had a comment section, multiple opportunities to discuss content, which is usually fragmented on owned accounts (typical content for fashion shows includes backstage photos, runway looks, celebrity endorsements, and more).

This one-of-a-kind experience and the use of Twitch's features not yet available on traditional social media platforms, demonstrate how gaming platforms can leverage creativity and increase engagement.

TACTIC 05

EXPLOIT GAMING'S SUITABILITY FOR AUGMENTED AND IMMERSIVE EXPERIENCE

Industry case study

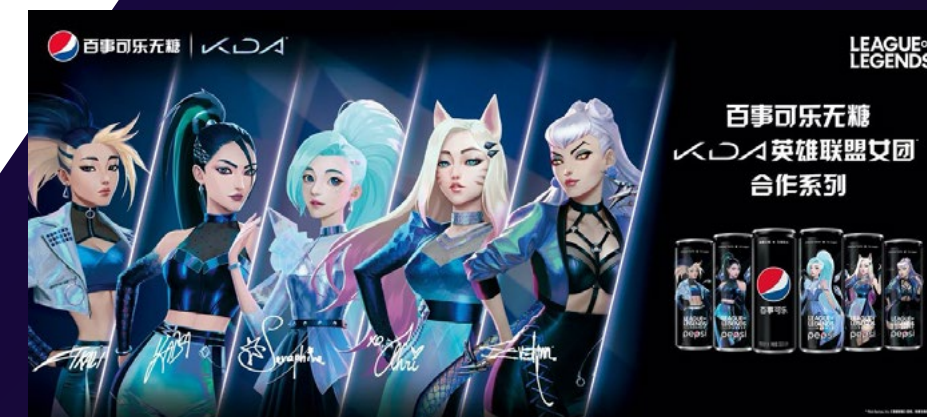
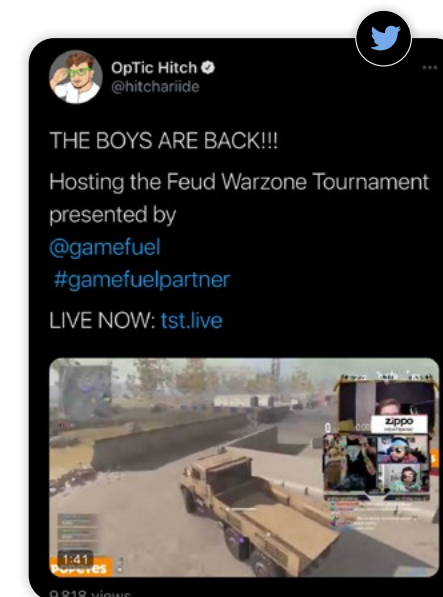
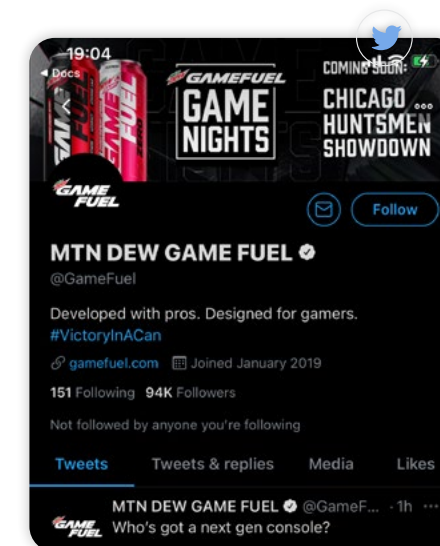
Red Bull has been a long-time sponsor of professional video game players, which makes its latest esports lab aimed at improving gaming skills a helpful tactic. The Red Bull High Performance esports lab, located in California, is said to "measure, deconstruct, and train key gaming skills – with the goal to enhance the performance of novice and pro gamers". Beyond immersive experience, the brand aims to monitor all-round gaming skills, and track data to build an experience database with relevant measurements such as eye movements, brain states, facial patterns, heart rate, galvanic skin responses, levels of team communication and even sleep, nutrition and physical regiments. All to better understand what goes into a successful play.

In China, several investments which aim to strengthen the interactions with players and fans despite the covid restrictions have been spotted. Pepsi Zero Sugar, for example, partnered with the LOL virtual girl band group to release their limited-edition beverage, with every can showcasing a different group member. As part of the campaign, a limited gift box with a set of five beverages and an interactive stage where customers will be able to hear the band singing when they open the box were launched. The activation became one of the hottest topics to discuss in the esport community in China.

To compliment the product launch, a pop-up store in Shanghai was opened. Customers and esport fans were able

to interact with Pepsi Zero Sugar and KDA between 5-8 November 2020, playing with the senses of vision, hearing, touch, and smell.

Sina Weibo discussions reflected the positive experience (90% of the total discussions about pop up store Pepsi on Sina Weibo), with customers sharing photos and descriptions of the pop-up store and the limited edition product. Hashtags such as '#开黑听我 我超敢的' and '#KDA女团' were highly associated with the brand activation.



TACTIC 06

ENTER DAILY LIFE VIA GAMIFICATION & INTEGRATED MARKETING (IMC)

Today's esports players are no longer passive. They seek immersive experiences, enabling interaction, learning and participation. The feeling of belonging to something bigger is hard to beat. Brand activations focusing on mental and physical well being have been gaining traction online. The values they champion – skill, positive energy, fun – resonate well with the audience.

Brand case study

Nike's partnership with Korean Esport athlete Faker generated positive buzz. The immersive campaign which highlighted the physical and psychological effects of intensive gaming had the potential to reach a global audience and some users expressed regret that the content was in Korean.

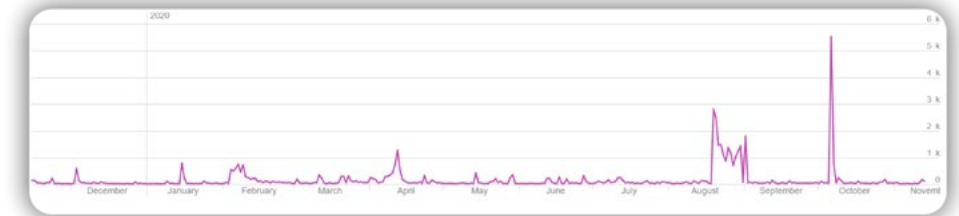
The MTN Dew drink, Game Fuel, was a collaboration between Call of Duty World League and Team OpTic. Pro players, hardcore gamers, and everyday players helped to develop the product, making it the first beverage designed just for gamers (Twitter). The launch triggered shout outs with hashtag #gamefuel (16K posts on Instagram, 57K on overall). The release continues to cause spikes in conversations relating to Call of Duty league, Twitch Esports and ESL Counter Strike.

In April 2019, Harbin beer partnered with LPL in China. The brand released an ICE can

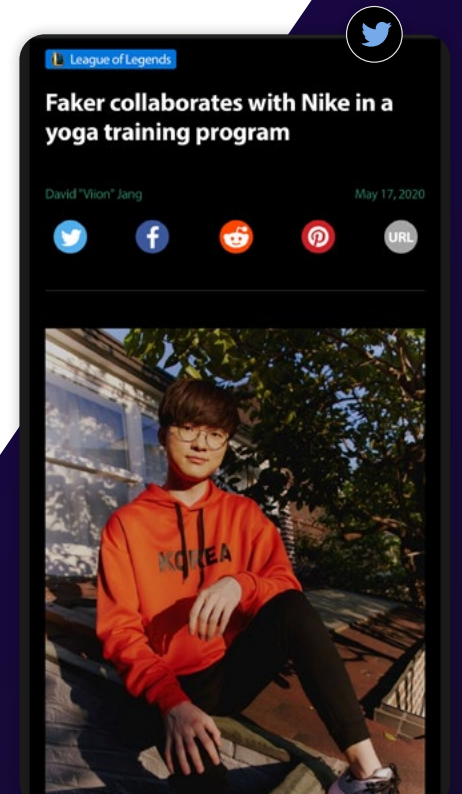
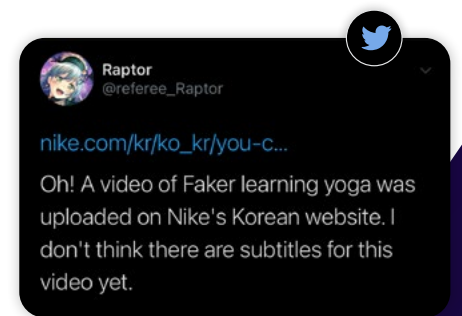
collection for the LOL and LPL fans to reach a younger market. Harbin Beer is planning to create a customized beer can with LOL pro players on it.

In May 2020, Harbin beer and LPL collaborated with one of the most popular LOL players, Uzi, to release a new edition beer. Harbin promoted the beer via a livestream on one of the leading E-commerce platforms in China, JD. The hashtag #哈啤LPL# was read 78 million times on Sina Weibo, and discussed 65K times.

By drinking beer, fans showed support for their favorite players during the LOL S10. WeChat conversations of the LPL and Uzi collaborations highlight that esports is not just for male players, opening up the category to female players and fans, and to a younger audience.



RADARLY ANALYTICS SHOWING CONVERSATIONS USING THE HASHTAG #GAMEFUEL, TRIGGERED BY MTN DEW AMP GAME FUEL DRINK



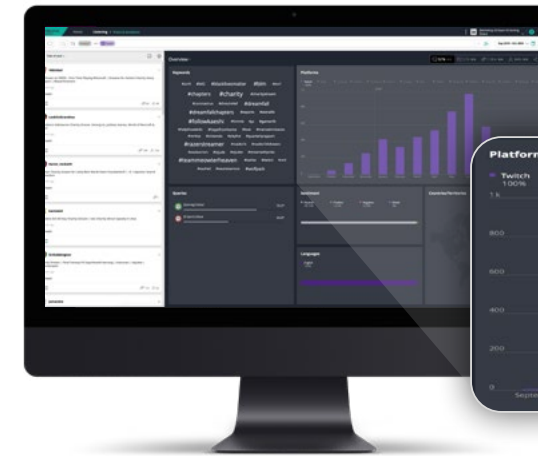
TACTIC 07

HARNESS THE VIRTUAL WORLD TO CHANGE THE REAL WORLD

Gaming is not only about entertainment. The recent success of the Z event in France demonstrates the growing success of streaming and esport. The players raised €170K when the event launched in 2016, to reach €5.7M during the last wave in October 2020. Charitable streaming makes gaming the opposite of solitary or violent - something the industry has been associated in the past. On Twitch, videos containing 'Charity' in their title increased by 84% last year, an encouraging figure reflecting what gamers care about today.

Brand case study

Games Done Quick benefits from the support and partnership with Red Bull, an established brand among the players ecosystem. Other brands have also joined the movement, with Love Your Melon, whose legitimacy comes from its DNA charity dimension, supporting Gamers For Giving in 2020. Far from the stereotype of a selfish practice, esport and online gaming are about joining forces and sharing values. As streaming gains popularity, and new platforms such as Twitch or Discord enter the landscape, the gaming universe becomes part of something bigger: playing for the common good.



ANALYTICS FROM RADARLY SHOWING TWITCH VIDEOS CONTAINING THE WORD "CHARITY" IN THEIR TITLE

Z Event est un projet caritatif créé par **Adrien Nougaret** et **Alexandre Dachary**.

Le but est de rassembler plusieurs animateurs spécialisés dans le streaming de jeux vidéo sur internet pour un marathon s'étalant sur tout un week-end.

Pendant **plus de 50h**, les participants diffusent du contenu en direct tous ensemble et encouragent les spectateurs à se mobiliser pour soutenir **une association caritative**.

Historique des éditions :

- 4-6 mars 2016 - Save The Children : **170.000 € (Avengers France)**
- 8-11 Septembre 2017 - La Croix Rouge : **500.000 €**
- 9-11 Novembre 2018 - Médecins Sans Frontières : **1.094.731 €**
- 20-22 Septembre 2019 - Institut Pasteur : **3.509.878 €**
- 16-18 Octobre 2020 - Amnesty International : **5.724.377 €**

Discord's Fundraising Leads To Something Bigger Than Gaming

By Daniel Wise — On Jul 19, 2020

If you speak to any gamer today they probably use Discord while playing their favorite games. Discord is a chat app that was launched in 2015 and is specifically designed for gamers to create their own communities. Unlike other chat apps like Skype or Zoom, Discord focuses less on video calls and more on voice calls for communication.

Gaming

Level up with the latest games and esports news, reviews and films. Learn tips on how to improve your gaming, get the inside news on the biggest tournaments and enjoy exclusive film series' and shows.

Playing Fields

Exploring the Japanese video game industry

TACTIC 08

TAKE YOUR E-COMMERCE STRATEGY INTO THE G-COMMERCE REALM

During confinement, games like Animal Crossing empowered users to style their avatar. Social media conversations relating to this activity rose by 850%.

Released during the pandemic, the game was a creative escape for quarantined players. Gamers were seduced with its cooperative gameplay and trading. As players gather resources and expand their collections, they find themselves with far more options for designing their island.

"We firmly believe that games and interactive initiatives have business relevance. They are key to offering an innovative and personalized shopping experience, which is what customers, millennials, and gen-Z are increasingly asking for."
– Yoox president Paolo Mascio, Speaking to GQ magazine

Brand case study

With the ability to create and style their own avatars, fashion gamers (and fashion insiders) jumped on an opportunity to organize virtual fashion shows. Reference Festival, a Berlin-based fashion organization, took Animal Crossing's fashion potential one step further to a virtual show of avatars dressed up in current season looks inspired by Loewe, Prada, and GmbH. The show was created by photographer Kara Chung, who runs the Instagram account @animalcrossingfashionarchive, and stylist Marc Goehring of 032C.

"We met through a mutual friend, curator Evan Garza, who had contacted the both of us for an Animal Crossing piece on Art Forum. We connected on a call right after and thought it'd be a fun way to collaborate!" Chung and Goehring told Vogue.

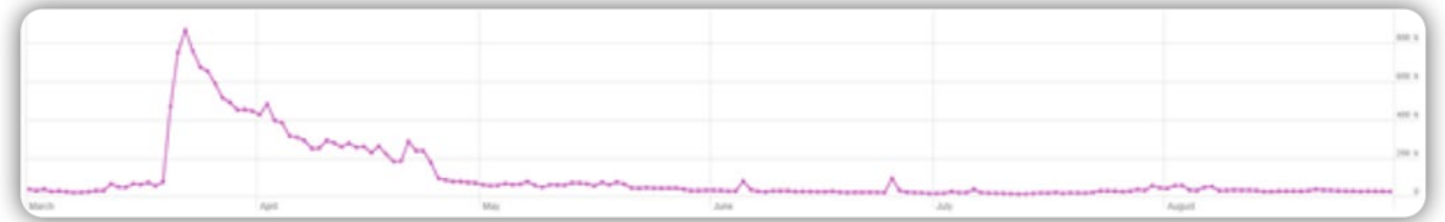
From Chanel to Loewe, Prada, and GmbH:

Generating more than 14.7K views on Youtube, this virtual event set the tone and started something new, enhancing Animal Crossing players' love and growing interest in fashion. While industry experts praised the show for its non-traditional format, comments from gamers highlighted personalisation and fashion garments.

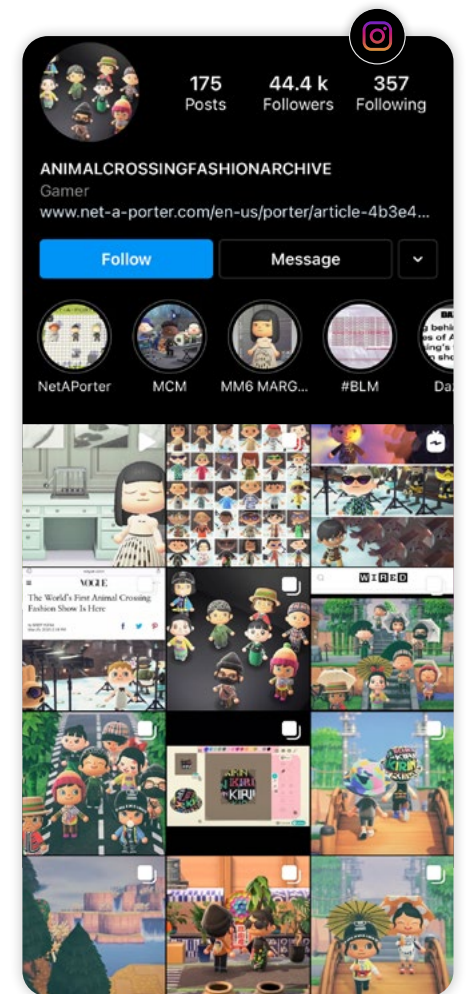
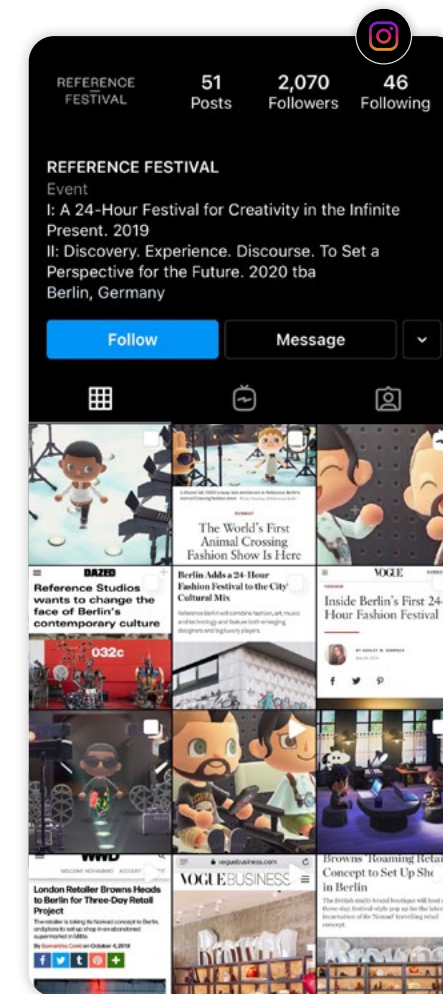
Few comments on the animal crossing show by Reference festival:

"These are amazing! I really wish I could have the code for the neon green / black dress for the girl with bangs and long hair. Is it available somewhere? I love it SO MUCH!"

"Nowhere near as good as sims ones"



ANIMAL CROSSING BOOMED DURING LOCK-DOWNS, WITH 19M MENTIONS ON THE SOCIAL WEB. (#ANIMALCROSSINGNEWHORIZONS) AND THE POPULARITY OF THE GAME ON SOCIAL MEDIA (#ANIMALCROSSINGDESIGNS, #ANIMALCROSSINGCODES, #ANIMALCROSSINGOUTFITS).



TACTIC 09

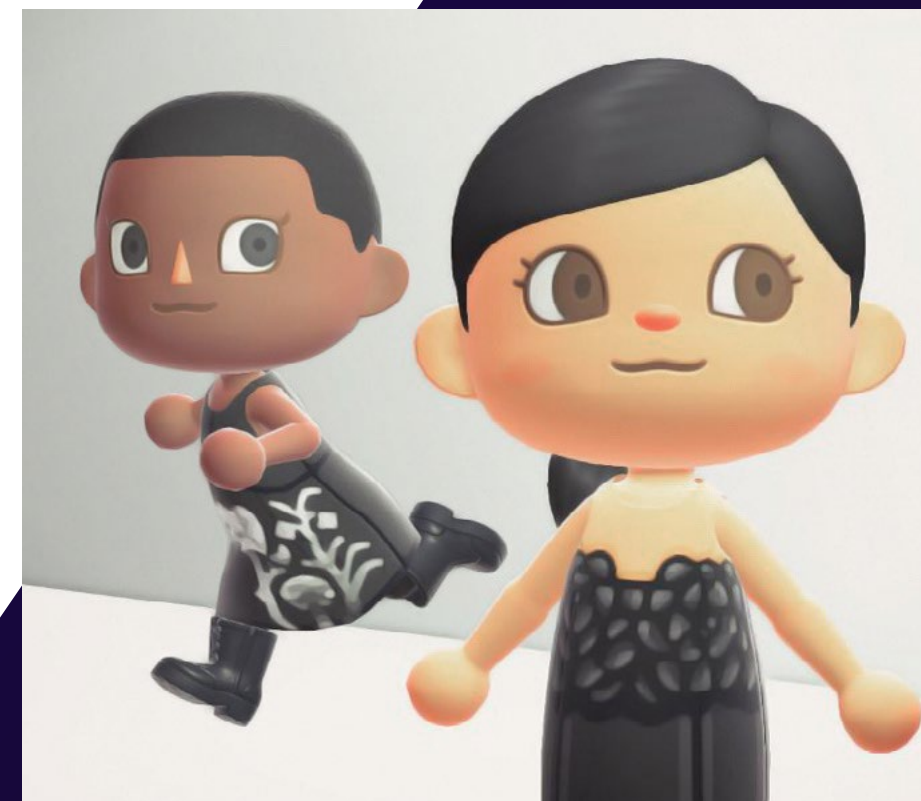
USE NON-GAMING CONTENT TO BRING NEW COMMUNITIES INTO THE GAME

Luxury fashion brands excelled at forging partnerships with games to bring interests from the real world into the game, resulting in both a more fun and diverse game environment, and fresh exposure for the brand in a totally new occasion.

Brand case study

The popularity of Instagram accounts such as @NookStreetMarket, @CrossingTheRunway, @AnimalCrossingFashionArchive, who share designer outfits from Animal Crossing avatars, underlined how gaming platforms can generate positive and far reaching conversations about fashion. The online figures for traditional formats, including offline fashion week, only confirm the growing potential of the gaming category. In September/October 2019, women fashion week celebrities accounted for 60% of social media conversations, not leaving much space for collection-related discussions. Since then, content on animal crossing "outfit of the day" (#ootd) and fashion trends are much more visible, thanks to users' willingness to express their creativity and styles online.

Examples adjacent show the Animal Crossing 'looks' from @crossingtherunway, generating discussion about Valentino Autumn/Winter 2020 shows (number 12 and 58).



Sexism in gaming: What can brands do to help?

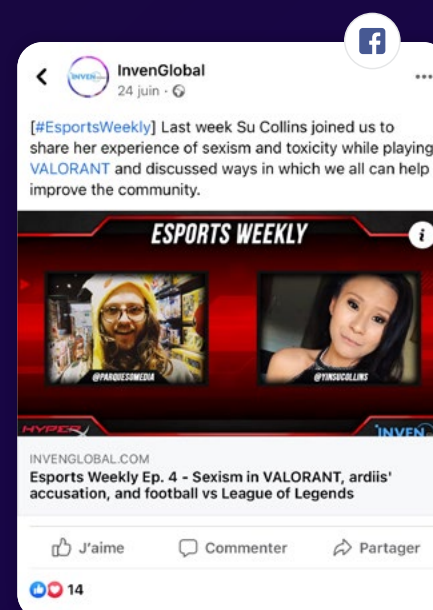
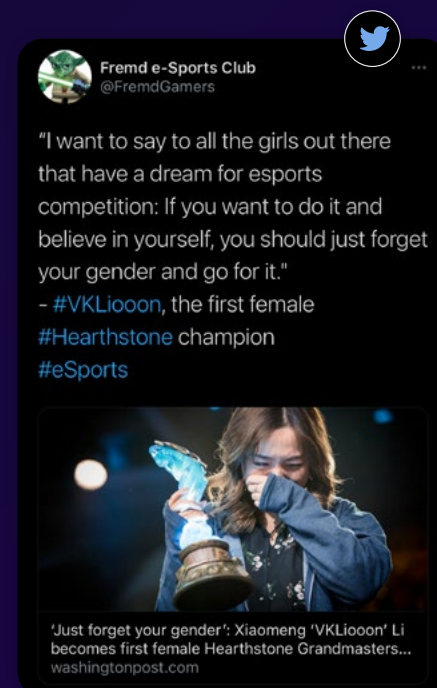
Esports is no longer a boy's club. It's time to stop treating it like one.

Like traditional sports, video gaming and esports has been historically male-dominated, and women have been forced to pretend to be males, or to accept sexist behaviors from their male peers.

While female players are aware of their perception in gaming and are eager to discuss sexism, misogyny, and gender discrimination, some female players have been intimidated out of the game due to the high level of stress created by sexist behavior.

In response, many female esports players have shared their experiences of discrimination and pushed for visible discussion and equality in the gaming community. They point out that despite the fact that many gamers defend gaming as an equal playing field (often based on the assertion that unlike traditional sports, there is no physical advantage to being a man), women still face claims that female players are just not as good.

Female gamers/players are giving support and standing for each other in the US/UK:



Consequently, female esports players have organized their own communities and events

- + **Wonder women of the gaming world**
Hosting talks about women in gaming
- + **Valorant Ignition Series event**
The first all-women Valorant tournament
- + **Esport virtual camp**
Coaching from esports professionals
- + **Female Empowerment Through Esports (#FETE) event**
Supporting women in esports
- + **All-female Team Bumble, partnering with the online broadcasting platform Caffeine**
Encourage women to join the gaming community
- + **#InternationalWomensDay**
Cheering and supporting women in the Hearthstone scene
- + **GIRLGAMER Esports Festival**
The first esports festival to celebrate women in video games

In China, there are many forum-based organizations, which are online clubs and hangouts for female players. Best represented by groups on douban.com, they have a forum style structure, where every member is encouraged to post in the group, and the group is run and maintained by one super admin and several admins. These groups do not exclude men, but require members to leave their sexism at the door (see intro of 'league of female gamers'), and all forms of harassment, including dating requests, are forbidden (see intro of 'Cutiepies for LOL').

Did you know?

Unlike men, whose top three gaming categories by order are action games, simulation games and action adventure games, women's top games are simulation games, action games, and RPG games.

Which brands are getting involved?

Like traditional sports, the movement for equality has opened the door for female champions such as Hearthstone Champion Liooon to emerge (@lxm1996), as well as an increasing number of both professional players, casual gamers, and fans. This has also attracted brands. Content about women in gaming is by its very nature purpose driven, and sister to the movement for equality in traditional sports adopted by large global brands like Nike.

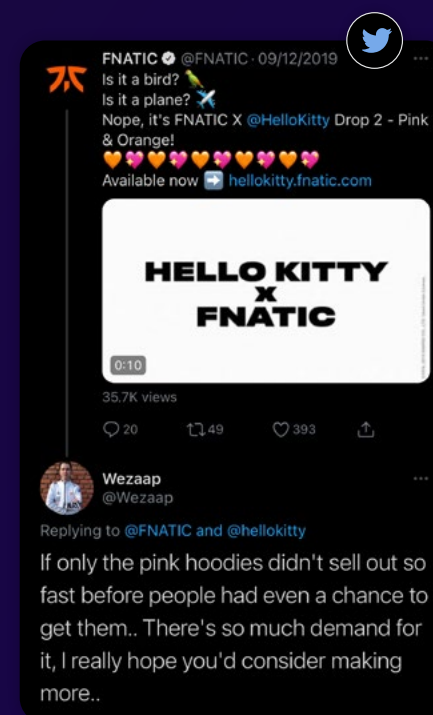
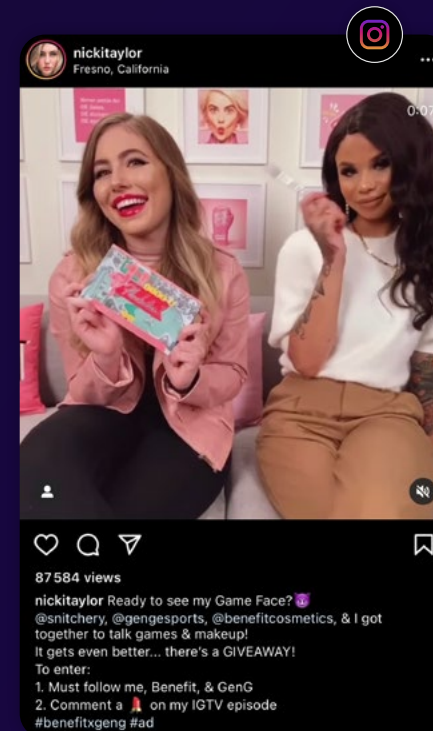
Importantly, apart from the goal of brand purpose and CSR that comes with supporting female players and viewers, women tend to generate more engagement than men, with an engagement ratio of 70 for female contributors, and 35 for males.

In the US, beauty brand Benefit joined forces with Gen.G, a collaboration that received positive feedback from women in the gaming community. In another example, the esports club Fnatic surprised their audience by partnering

with Hello Kitty. While followers of Fnatic responded both positively and negatively, the partnership was a commercial success, with a prized pink hoodie selling out almost overnight.

In China, L'Oreal collaborated with Hearthstone Champion Liooon, encouraging female players to focus on what they love, regardless of the challenges in the community, which was shared mostly by women. Withing the gaming community, outstanding accomplishments by female platers are shared by bots in socialmedia accounts dedicated to female gamers. The most famous one is @SecretsForEsportGalGamers supporting primarily LOL players.

While female gamers have made progress in establishing safe spaces for gaming and community, they still suffer from prejudice in and outside the game, and there is significantly more room for brands to not just target them, but invest in building an industry free of discrimination.



How has Covid-19 impacted gaming?

While the esports sector may appear to have coped better with the crisis than other industries, it has done more than just increased the amount of people who have time to stay at home and play games. It has also shaped the industry in unexpected ways.



Athletes find a new way to compete

Just like every industry, esports competitions have experienced delays and cancellations, and shifted to an online format. This has also made esports more accessible to many, and instilled a home-life attitude in both tournaments and training. Examples on both sides include the Singapore esports company Reality Rift, who closed their DOTA club, and WCG 2020 which was renamed to WCG 2020 CONNECTED.

Many esports clubs, such as EDG, RNG and FPX, have had to focus more on optimizing brand image and investing in content, such as publishing tutorials and daily blogs from pro gamers. The need to reach a broader online audience has also pushed organizations to form partnerships for distribution.

NASCAR partnered with FOX TV for the 'eNASCAR iRacing Pro Invitational Series', which helped them attract over a million new fans.

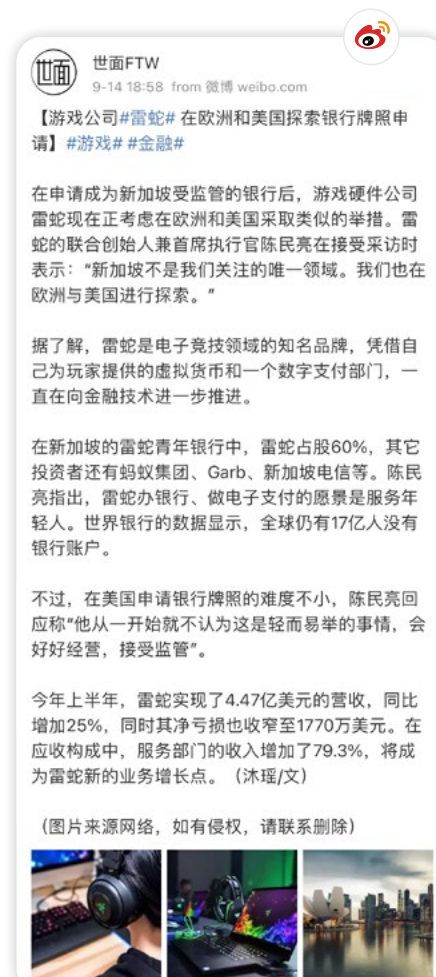
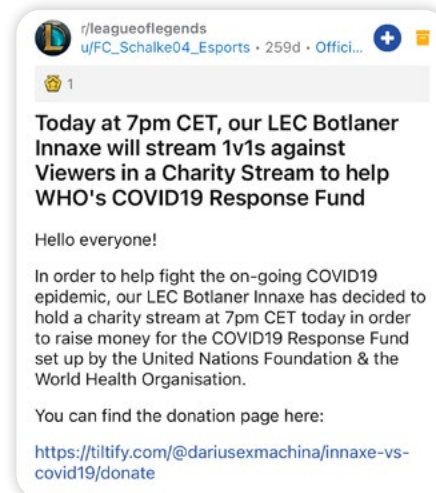
The pandemic's impact on traditional sports has also affected consumer behaviors, driving them to look for different content, and making the online format more mainstream. As the traditional sports industry adapts to live and digital streaming content, and to a multitude of new marketing to engage consumers, esports has become more accessible to many. Social intelligence data backs this up: in China, there were 26 million new esports viewers, and LOL and CS:GO had the highest amount of views of all time. For CS:GO, viewing time increased 113.2% over last season.

Revenue models shift and diversify

With esports arenas closed and brands pulling back on sponsorships, athletes, their teams, leagues, and media have been forced to find new sources of revenue. While some players have retired, most have stuck with it found success by engaging outside their past audiences.

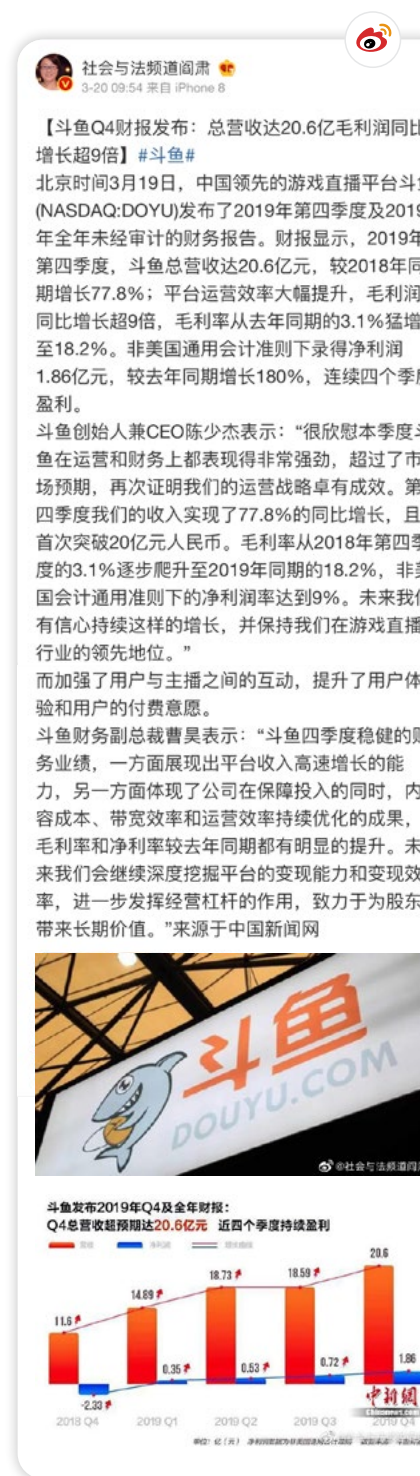
Examples of this include athletes working as ambassadors to Wuhan to provide moral support to those hurt by the economic recession, organizing charity sporting events and showing how their strenuous training regimens are continuing despite the pandemic.

All of these activities have opened up new revenue models for gamers and even financial services dedicated at the gaming community, such as the online bank created for esport players by Razer Inc.



Demand for 5G increases

Although not directly related to the pandemic, conversations about 5G technology and gaming have increased over the last year, with most discussions falling into two topics, firstly, the anticipation of higher quality content and accessibility of new formats such as virtual reality esports, and secondly, reducing the cost of broadcasting and making content available to more users. Some conversations also mention that 5G is expected to increase the comfort of watching on larger screens, with faster data to more users. A growing demand for at-home streaming and gaming have both contributed to increased buzz about 5G and its impact on the gaming industry.





How to influence esports?

While relevance and authenticity is more important to consumers in 2020 than ever before, the gaming community is particularly sensitive to astroturfing efforts by brands and requires an approach that takes the nuances of the gaming community into account.

While building influence among online Tribes should be a focus of any consumer brand's marketing strategy, influence in the gaming industry operates in a number of distinct tiers.



The Teams

While sponsorships are the most common way to work with teams, there are other options such as participating in team events, co-branding merchandise in fun and unexpected ways, or forming brand ambassadorships.

In the US, teams form around regional affiliations in LA, NYC, Atlanta, and Dallas, and working with these regional teams is a way to reach a regional audience. LA in particular has a strong and growing esports community with many opportunities and locations for brand engagement, including The LA Street Festival, SoFi Stadium and Hollywood Park, and the Final Four of the California Cup Esports tournament.

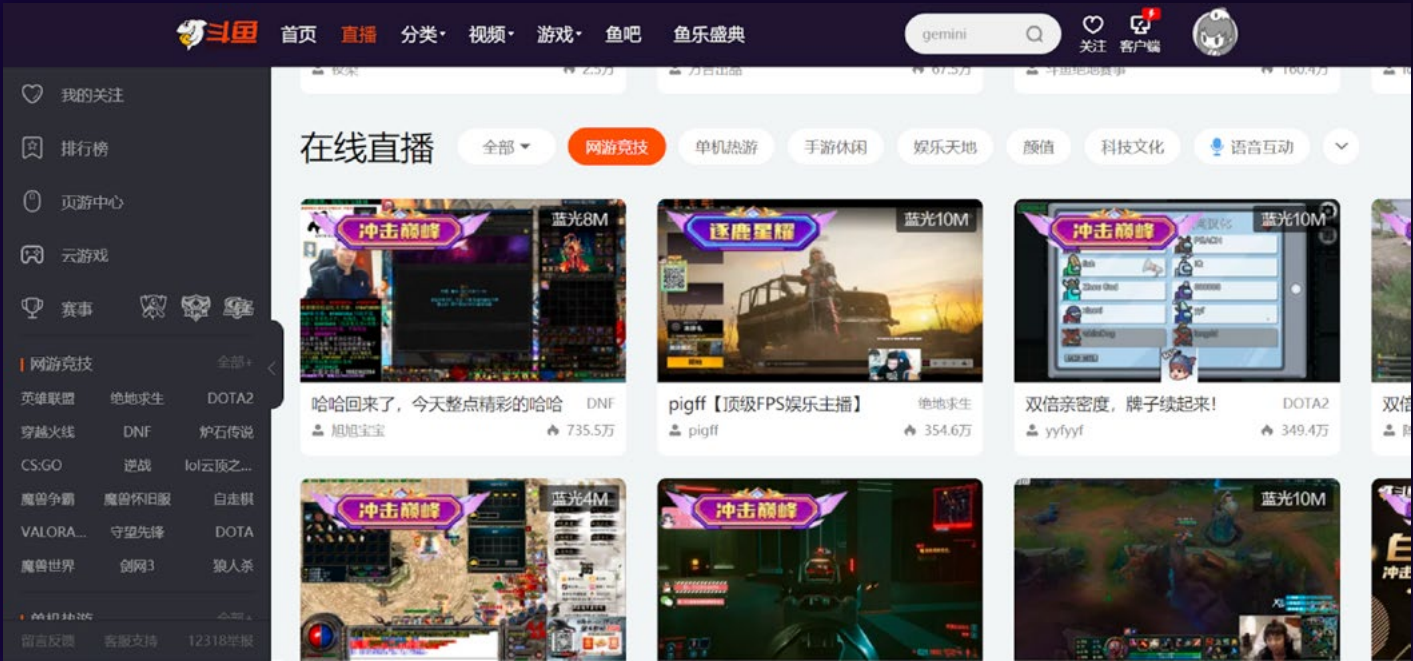
In China, the government and the tech giant Tencent promote and organize esports competitions, including the CrossFire Pro League, held in six major cities. There are six large annual esports competitions in Shanghai alone: LOL, Honor of Kings, Peacekeeper Elite, CrossFire, FIFA 4 Online, and QQ Speed. The esports clubs most discussed include EDG, FPX, iG, JDG, and RNG.

In the UK, London is the center of esports events, and popular British teams include Fnatic, Endpoint, Prophecy, MnM Gaming, and Team Dignitas.

The Experts

These are thought leaders with reach and credible voices who are independent of a team. Most often media outlet commentators, analysts, ex-champions, or industry professionals, they are primarily active on Forums and Twitter, and share esport-focused content. They are trusted avenues to every Tribe and speak with authority. Although they may not have the same relevance to an individual community as a brand activation within that community, ambassadorships with experts present a low risk way to get involved.

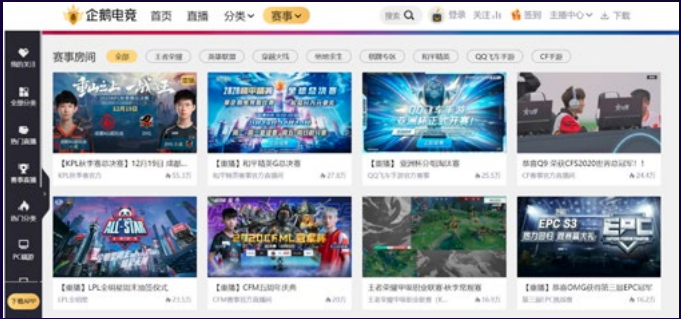
In China, experts are most active on Sina Weibo and are mainly reporters who work for streaming platforms. They engage their audience by sharing polls, quizzes, and other fun activities, in to sharing news and commentary. Their main activity is on platforms Douyu (斗鱼直播), Huya TV (虎牙直播), Penguin Esport (企鹅电竞), Kuaishou (快手直播), and Bilibili (Bilibili 直播).



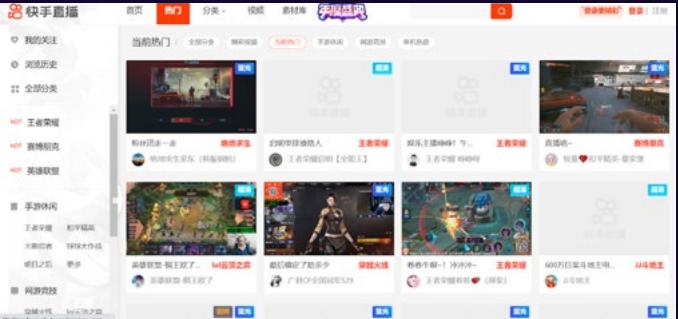
DOUYU (斗鱼直播)



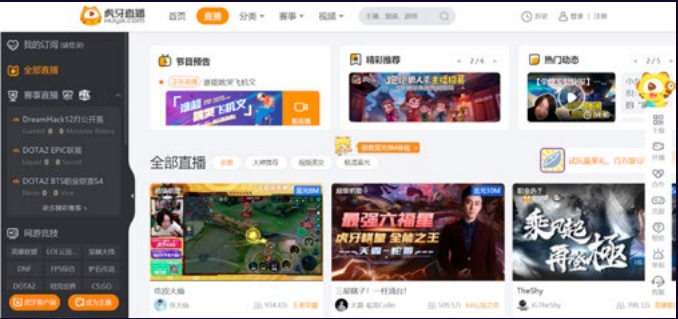
BILIBILI (BILIBILI 直播)



PENGUIN ESPORT (企鹅电竞)



KUAISHOU (快手直播)



HUYA TV (虎牙直播)



The Athletes

While sponsorships are the most common form of brand partnerships with Athletes, this is not the only way to harness this type of influencer, who induces the most aspiration among gamers. While most active on Twitch and YouTube Live, they also share their performance on Instagram and Twitter, via video snippets and links. On Instagram, they combine gaming with a broad range of other lifestyle content, and while they are members of a certain gaming Tribe, they are also members of other communities affiliated with their passions, and makes them more accessible to brand activation.

Chinese athletes are unique in that most of them are members of an esports club. These clubs serve to amplify the athlete's own content, promoting them via additional content such as "a day in the life" and other athlete snapshots. Brand image is paramount for Chinese esports athletes, and more so than for athletes in the west.



Tips for marketers

Maintain a high level of creativity and flexibility

The typical western social media platforms used by brands are not well-suited to the gaming ecosystem, as Facebook, Instagram, and Twitter are limited for streaming and real-time interactions. The gaming community has strict requirements for the quality and relevance of content as their authenticity and style are critical to their audience. Interactivity, live engagement, immersive experience, and suitability to the game are prerequisites for successful brand content.

Target Tribes to stay relevant

Gaming and esports communities are becoming larger as well as more fragmented and diverse. Psychographic attributes such as passions outside gaming are often more important than a specific game or dominant demographic - meaning that brands must make a specific effort to look beyond demographic segmentation. Lifestyle benefits and long-term engagement are key for brands who choose to be a part of these tribes. Supporting female gamer's interests within these Tribes is an important part of building relevancy and trust.

Be aware of risks and address them proactively

The entrance of global brands such as Nike received mixed a reaction due to the exclusive and sometimes defensive nature of gamers, who felt that mainstream brands don't understand the gaming community and are only becoming involved now to profit from the work of gamers in establishing the industry. Therefore, brands must make a special effort to prove their legitimacy and form trusted partnerships with influencers who are willing to 'vouch' for these brands. When done successfully however, sponsorships result in a huge demand for branded gear from casual gamers and fans, who are beginning to adopt their teams sponsors as an identity and differentiator.



A Linkfluence Social Intelligence Report

To learn more about using social data for consumer insight, digital transformation and staying close to the voice of the consumer, reach us at insights@linkfluence.com