



**Virtual
Town
Square**

**Don't be a n00b!
How to Leverage Content Creation for a Gaming Audience**

August 20, 2020, 9a PT/12p ET/5p BST



Why the Town Square?

“Sticks in a bundle are stronger”
African Proverb

APR Resource Hub

With the limits of COVID-19 demanding new adaptations in the world of Production, we're here to provide you with the expertise necessary to not only continue creating quality content – but to thrive while doing so.

The graphic features three white cards on a dark purple background. Each card has a teal circular icon at the top: a shield with an exclamation mark, a lightbulb, and two speech bubbles. Below each icon is a bold title, a paragraph of text, and a button with a white background and dark purple text.

- COVID-19 Production Resources**
Here's where you can find all of our COVID-19 resources created for our global client-partners, made available for public-use. Live-updated Shooting-Location Trackers, Market Research, Global Trends, & more.
VIEW RESOURCES
- Virtual Town Squares**
Our Virtual Town Squares aim to address, predict, and create innovative Production methods utilizing the most brilliant thought-leaders across the globe. During COVID-19, we're offering this information on production capabilities entirely free.
VISIT OUR TOWN SQ
- Ask Our Subject Matter Experts**
Our Subject Matter Experts are here to help you navigate the uncertainties of Production during COVID-19. Whether it's insurance coverages, shooting locations, or budgeting concerns – we can help.
START A CONVO

For COVID-19 Resources with the latest updates, click [here](#).

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Virtual Town Square



Jared Yeater
APR



**Sallyann
Houghton**
Epic Games



Darren Glover
VaynerSports



**Jonathon
Troughton**
Frameplay



THE LANDSCAPE (for today's discussion):

- **In-Game Advertising**
- **Game Engine Technology (and why it matters)**
- **E-Sports**
- **Gaming Influencers**



Consistencies Across “Gaming”

- Platforms create endless possibilities for content, interactivity, and commerce.
- Blurred lines between content receiver and content creator.
- Bring together traditionally segmented audiences into a single democratic community
- Unique creative and technical challenges when producing content.



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With over **2.5 billion global users**, and **tens of millions of new users added during the pandemic**, gaming has been catapulted to the forefront as an alternate advertising channel. It is currently a **\$135 billion business**, now **larger than global film and music industries combined**, presenting a unique opportunity for marketers to reach an influential group of consumers and content creators.



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Thank you
for joining.



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Additional Esports Information

Brand investment in esports heads toward \$1 billion, with Asia leading consumption

Asia leads the world in consumption of both esports content and overall gaming content, including livestreaming, according to a new forecast from Warc.

Esports penetration is approaching a billion viewers worldwide and is strongest in Asia, where nearly one in three people (30%) watches esports, according to a new Warc report, [Global Advertising Trends report: Opportunities in Gaming](#). The rest of the world lags behind, with penetration of 20% in Latin America, 14% in Europe and MEA, and 13% in North America.

Asia also leads in viewing of general gaming content, including livestreams. Among 16- to 24-year-olds globally, 41% have watched a gaming stream in the last month, per GlobalWebIndex, and the rate is 35% among millennials. Penetration in Asia is 38%, followed by Latin America (31%), North America (30%), MENA (30%) and Europe (27%).

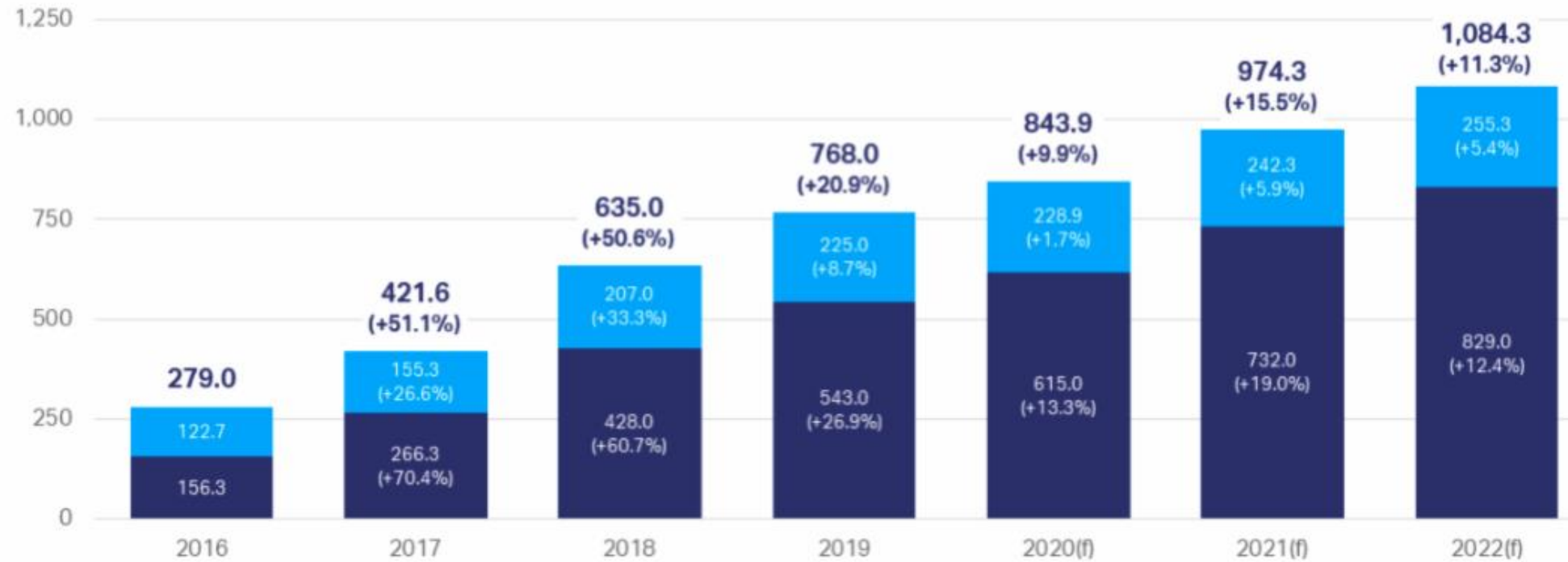


Global, Brand investment in e-sports

US\$ millions, Nominal

WARC
DATA

■ Sponsorship ■ Advertising

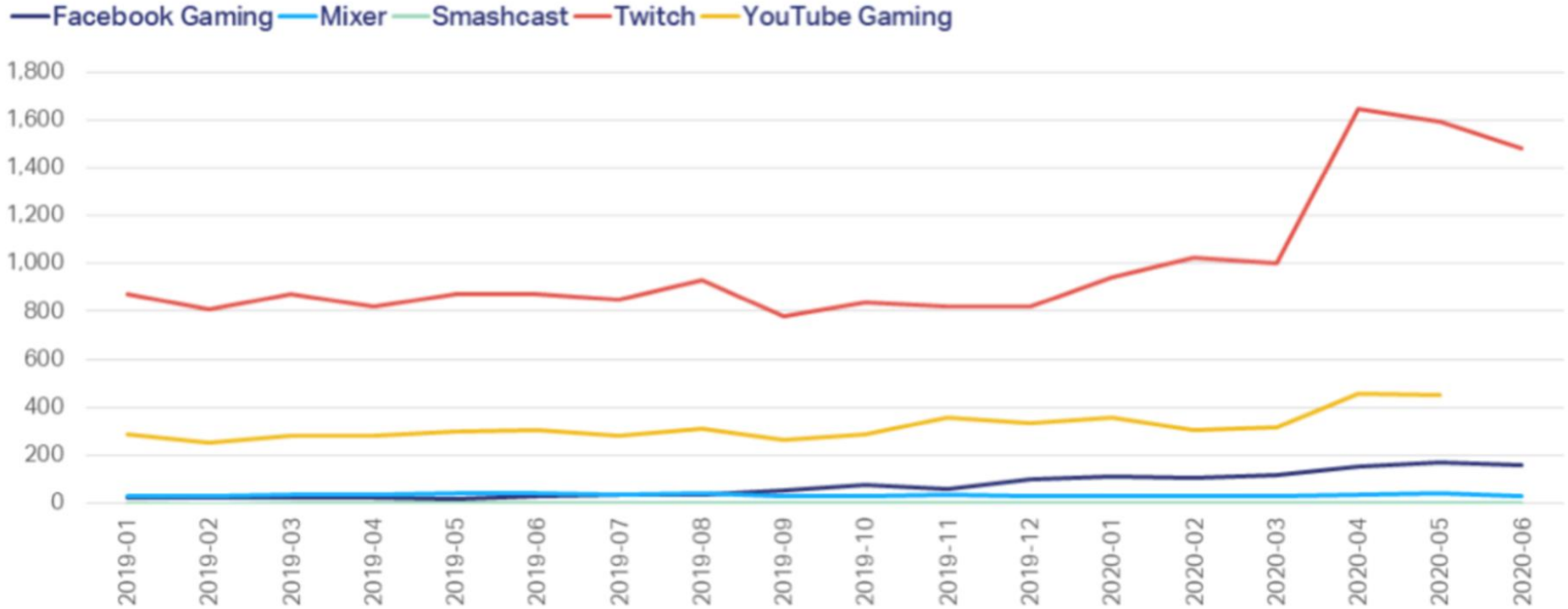


Note: Advertising is predominantly spot during breaks in live broadcast.

SOURCE: Newzoo, WARC Data Global Ad Trends, July 2020

Global, Gaming content consumption

Cumulative hours of gaming content watched per month, Millions



Note: No YouTube data for June due to a change in algorithm.
SOURCE: Arsenal.gg, WARC Data *Global Ad Trends, July 2020*



Streaming is the new prime time for much of Gen Z, and Mixer's shuttering this month served only to highlight the stranglehold Twitch has on the market. Tencent may yet prove a challenger in the US with Trovo this year, but it has a great deal of catching up to do, along with Facebook and YouTube. Competitive gaming is big business in Asia—where Tencent is already king—though traditional sports fans in the West are yet to be wooed, with existing audiences instead consolidating during lockdown. A great deal of merger and acquisition activity, especially around media rights within esports, is expected in the short term as investors vie for control of potential windfalls.

-James McDonald, Managing Editor of WARC Data and Author of this Research

- **27% of males** have watched an esports tournament in the last month, equivalent to 554 million people. The rate among females is far lower at 17% (349 million), placing the total audience at just over 900 million worldwide.
- Brand investment in esports **will rise 9.9% worldwide** to \$844 million this year. This is less than half the growth rate in 2019. That breaks down to \$615 million to be spent on sponsorships and \$229 million to be spent on ads during esports broadcasts.
- On a global basis, esports uptake is **greatest among Gen Z**, at 27%, and stands at one in five among millennials.
- Gen Z gamers watch **six hours and 19 minutes** of esports content a week on average. That's over an hour longer than they spend watching traditional sporting content (5:10), according to data from Limelight Networks.
- Amazon-owned Twitch is a big beneficiary from lockdown-driven changes in consumption. In April alone, consumption of gaming content on **Twitch rose 63.8%** from the previous month, topping 1.6 billion cumulative hours, more than double that of Facebook Gaming, YouTube Gaming, and the now defunct Mixer combined.
- Twitch draws a predominantly Gen Z audience of **1.9 million per day**, with viewing concentrated after 7 pm.