

# THE ESPORTS BUSINESS IN THE AMERICAS

**newzoo**



# FOREWORD

The Americas are at the forefront of the esports economy. Together, they account for almost a quarter of the global esports audience and 40% of worldwide esports revenues.

North America's esports scene, in particular, has attracted massive investments—not only from game publishers, but also from venture capitalists, traditional media, and even celebrities. The ongoing success of the Overwatch League, as well as franchised North American LCS leagues, hints at even more investment and growth in the coming years.

Likewise, Latin America's scene has enjoyed plenty of success. Esports has rapidly spiked in popularity across the region, with its fans already known for their pure passion and dedication to esports events, teams, and—of course—the games themselves. What's more, Latin America has produced some of the world's most talented and popular esports competitors, especially in League of Legends and CS:GO, two of the biggest esports scenes in the world.

All in all, the Americas have solidified their positions as two of the world's biggest esports hotspots, with both regions showing no signs of slowing down. In this report, we will zoom in on their esports revenues, most active brands, and activations, further shining the spotlight on sponsorship opportunities for events across the two regions.

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Sr. Market Analyst



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Esports market revenues  
in North & Latin America  
combined will reach

**\$441 M**  
in 2019

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**NEXT EDITION:**  
October 2th-4<sup>th</sup>, Miami



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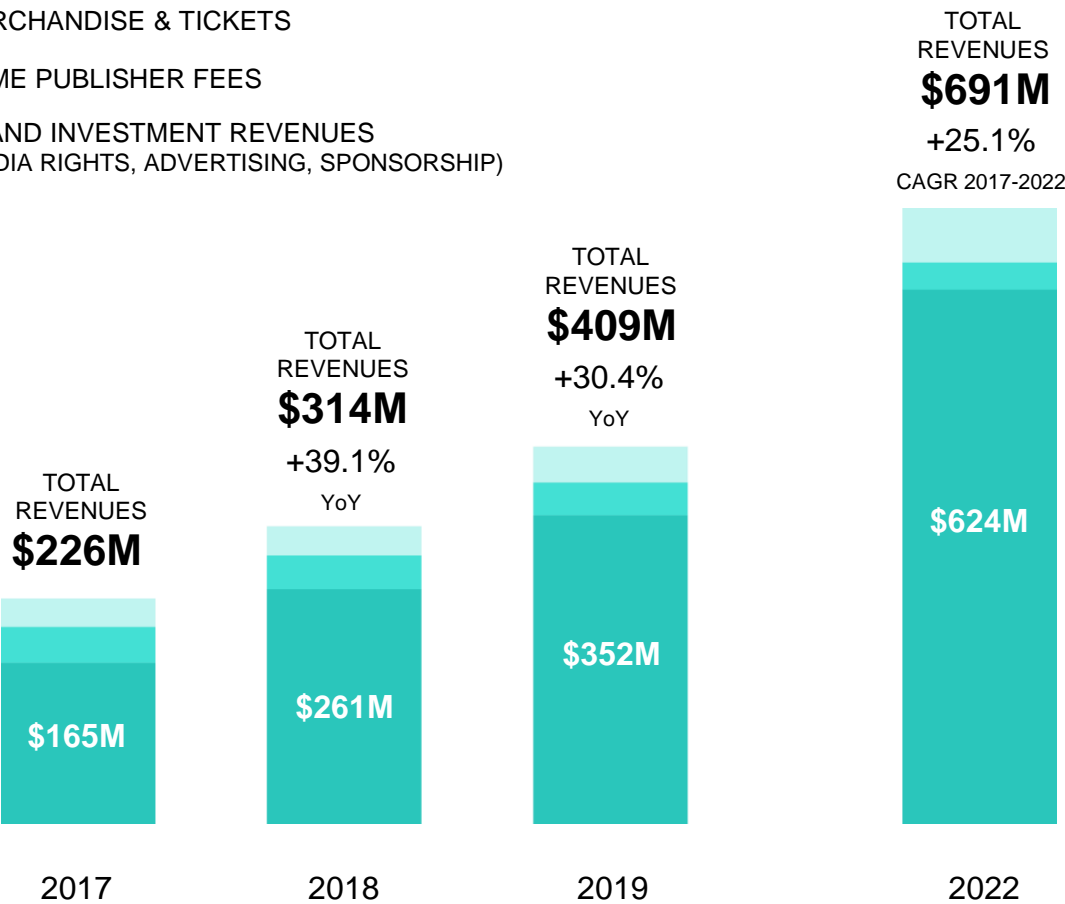
The background image shows a large-scale esports event taking place in a massive arena. The seating area is filled with a dense crowd of spectators. On the right side of the arena, a stage is visible, featuring several large video screens displaying game footage. Various brand logos, including Intel, ASUS, and ESL, are prominently displayed on the stage's backdrop and side panels. The overall lighting is dim, with stage lights providing the primary illumination.

# 40%

of global esports revenues are  
generated in the Americas

# NORTH AMERICA IS THE BIGGEST REGION GLOBALLY

- MERCHANDISE & TICKETS
- GAME PUBLISHER FEES
- BRAND INVESTMENT REVENUES  
(MEDIA RIGHTS, ADVERTISING, SPONSORSHIP)



86%

of esports revenues in North America in 2019 will come from brand investments, including sponsorship, advertising, and media rights.

# NORTH AMERICA: NOTABLE ACTIVATION



Spotify builds player curated playlists to accompany the Overwatch League Playoffs

Music



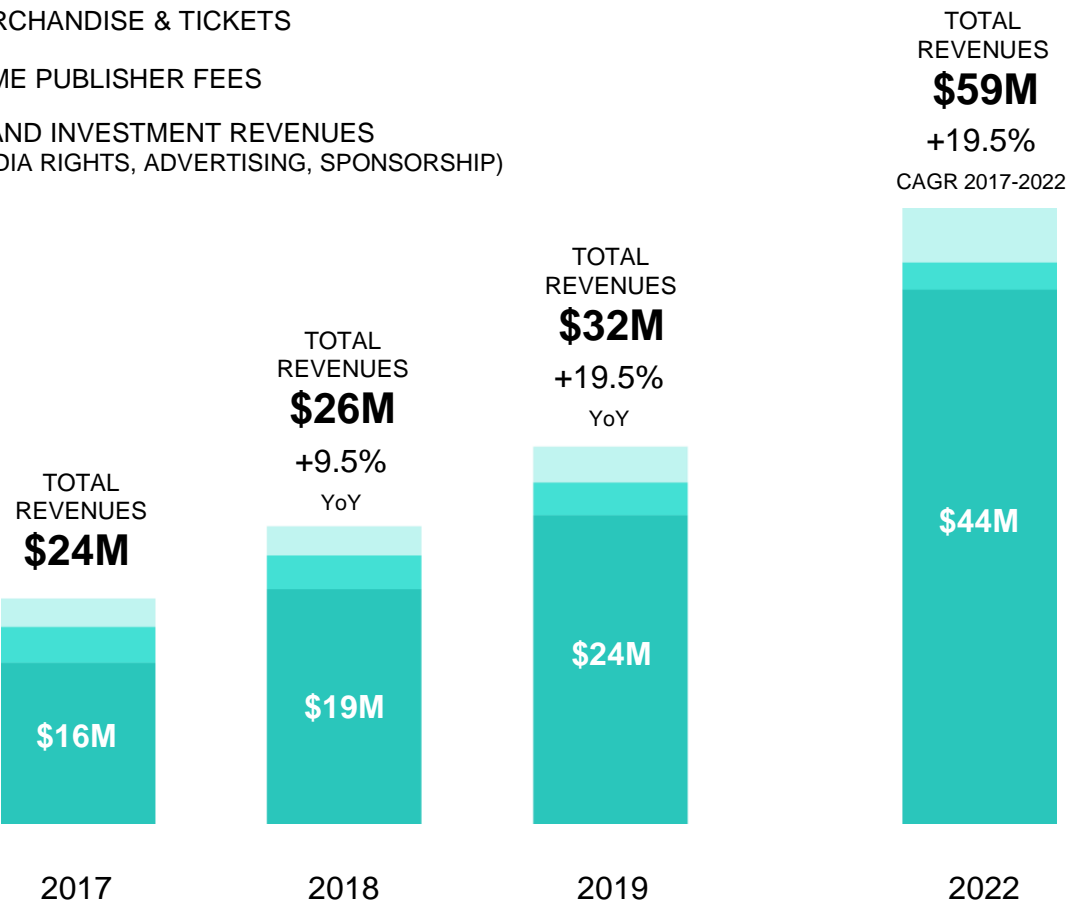
Start Date:  
July 12<sup>th</sup>, 2018

Spotify created branded playlists comprising of team players' favorite songs. This not only offers an enticing inside look at the preferences of fan-favorite players, but it also brings consumers directly to the application and allows them to interact with it. Spotify created five themed playlists for the activation, including relevant names such as "Party on the Payload" and "OWL Cool Down".



# REVENUES IN LATAM WILL PASS \$30M THIS YEAR

- MERCHANDISE & TICKETS
- GAME PUBLISHER FEES
- BRAND INVESTMENT REVENUES  
(MEDIA RIGHTS, ADVERTISING, SPONSORSHIP)

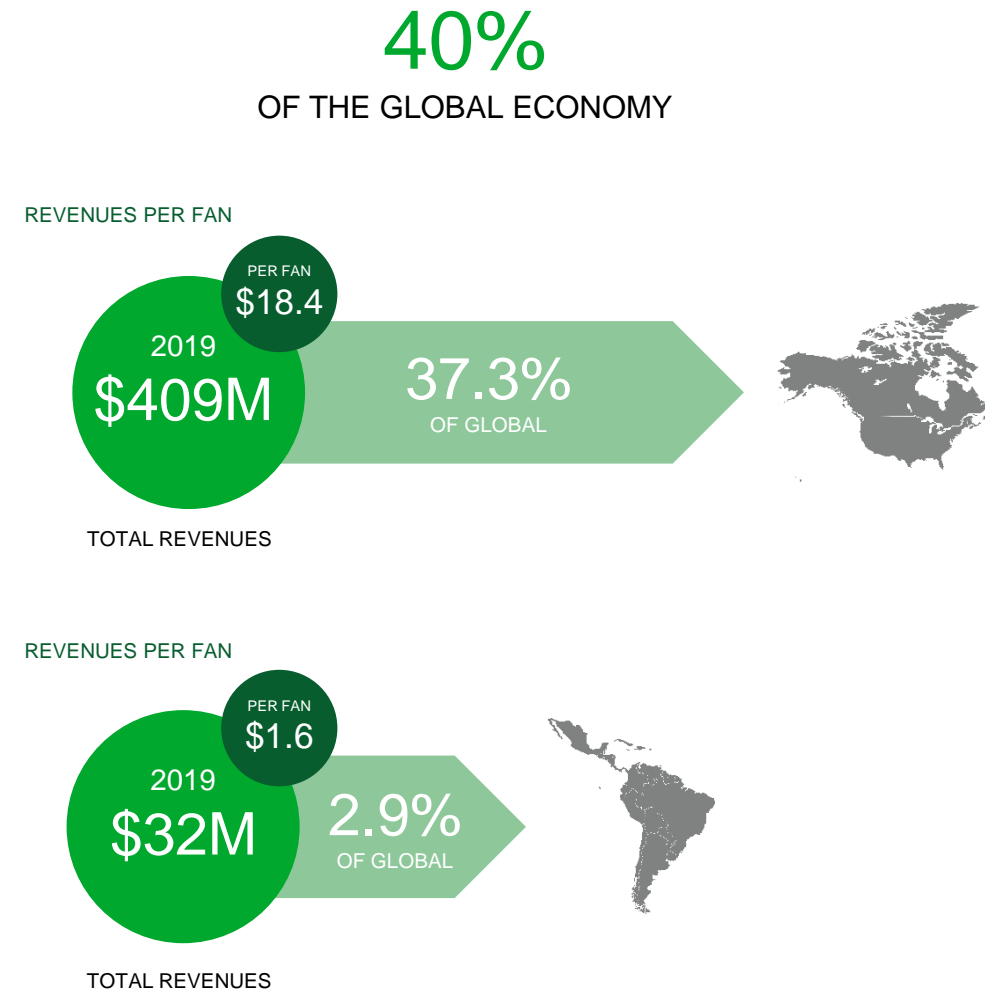
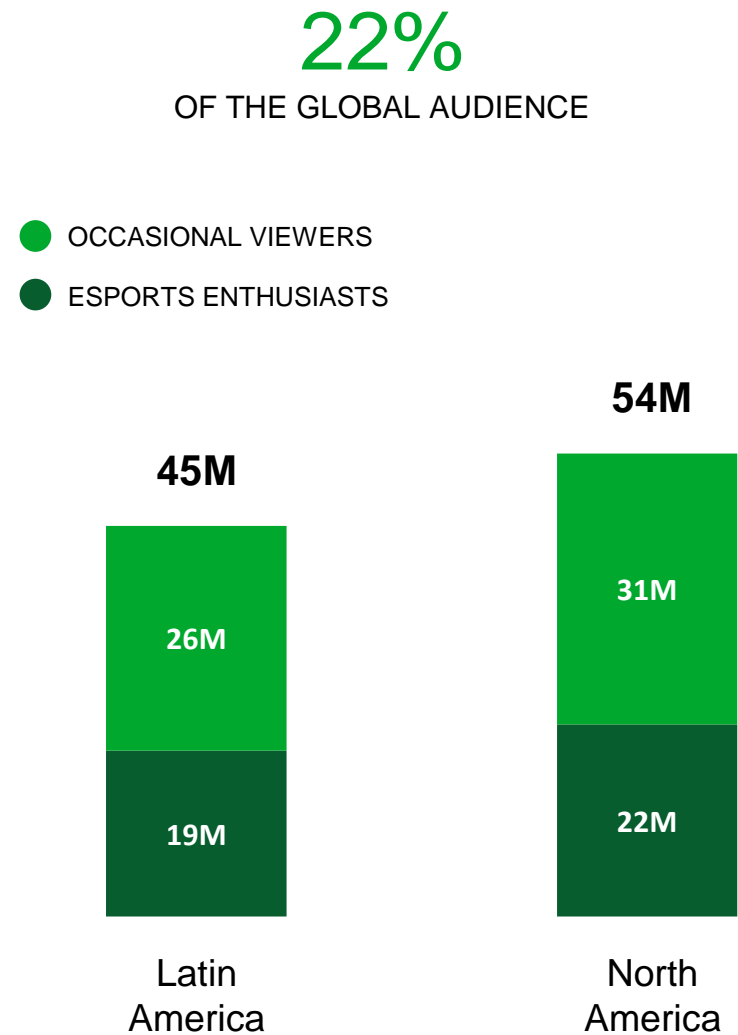


75%

of 2019's esports revenues in Latin America are generated by brand investments such as sponsorship, advertising, and media rights.



# DESPITE LATAM'S BIG AUDIENCE, SPEND IS SMALL



# NON-ENDEMIC BRANDS PARTNER WITH BIG TEAMS IN BRAZIL



## PAIN GAMING

**Teams:** League of Legends, CS:GO, Rainbow Six: Siege, Hearthstone  
**Founded:** 2012  
**HQ:** Brazil



390K

Twitter followers



259K

Twitter followers



## VIVO KEYD

**Teams:** League of Legends, Hearthstone, CS:GO, Rainbow Six: Siege, Garena Free Fire  
**Founded:** 2012  
**HQ:** Brazil



143K

Twitter followers



101K

Twitter followers

A large crowd of people is seen from behind, looking towards a stage in a large arena. The crowd is dense, and many people have their arms raised. The stage features two large video screens displaying a performance. The entire scene is overlaid with a semi-transparent dark purple filter.

# 54%

of sponsorship deals in the Americas in 2018 came  
from non-endemic brands

# MOST ACTIVE BRANDS IN THE AMERICAS\*

\*Based on new deals closed between June 2018 and June 2019

## North America

#1



#2



#3



## Latin America

#1



#2







































#3



# THERE ARE STILL MANY EVENT SPONSORSHIP OPPORTUNITIES

Sponsors per industry for key esports leagues and tournaments

	Apparel & Retail	Hardware	Peripheral	Automotive	Telecom	Finance & Payment Provider	Food & Beverage	Gaming Furniture	Music	Delivery	Electronics	Cosmetics	Media	FMCG	Betting
  LCS			Open	Open	Open				Open	Open	Open	Open	Open	Open	Open
  CBLOL	Open	 	Open	Open	Open	Open		Open	Open	Open	Open	Open	Open		Open
  ESL ONE		 		Open	Open						Open	Open	Open	Open	
  Blast PRO Series				Open	Open	Open	 	Open	Open	Open	Open	Open	 		

# THANK YOU FOR READING THIS EXCLUSIVE ESPORTS BAR WHITE PAPER!

## About Esports BAR

At Esports BAR, we are committed to transforming the sport of the digital generation into the future of entertainment by providing industry leaders with the most productive and meaningful events where esports tastemakers and non-endemic top-management executives meet to shape esports' future.

## The Author

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