GET IN THE GAME

A QUICK LOOK INTO THE WORLD OF ESPORTS
Welcome to esports! This quick read aims to provide clarity on one of the more opaque questions when it comes to esports: the how. How does one game differ from another? How has the industry grown so big over the years? How do gamers become professional athletes? How does the shared experience of watching a single game-changing play ripple through many unique communities? The following pages provide a short comprehensive overview of the above topics and more. Enjoy!
To understand esports, one must first look at the individual games that make up the bulk of the industry. While there are currently more than 20 titles with professional competitions, the five featured here are considered to have the widest audiences, funding, and overall footprint, making them essential to know for anyone looking to understand the industry. Not only does their popularity drive industry growth, but their competitive ecosystems also serve as models for smaller titles.

**THE BIG 5**

**League of Legends** is a 5 vs 5 Multiplayer Online Battle Arena (MOBA) title, developed by Riot Games. League of Legends is the most watched esport to date, with the 2019 World Championship Finals having a global average minute audience of 21.8 million viewers. Teams competing in Worlds come from one of thirteen regional leagues of varying sizes. Leagues in China, Europe, and North America have all adopted a team franchise system similar to professional sports leagues used in North America.

**Counter-Strike: Global Offensive** is a 5 vs 5 First Person Shooter (FPS) developed by Valve. CS:GO is the latest release in the Counter-Strike series, which has been played professionally since 2002. Thanks to its stability, CS:GO’s competitive ecosystem is almost entirely community-driven. The most prestigious CS:GO tournaments are called Majors, and they occur twice a year with a $1M prize pool each. Valve funds half of each Major’s prize pool, with the tournament organizer who runs the event providing the other half.

**Dota 2** is a 5 vs 5 Multiplayer Online Battle Arena (MOBA) title, developed by Valve. Dota 2’s yearly championship, The International, has the largest prize pool of any single event in esports. Funded by in-game item purchases made by the game’s fiercely loyal fanbase, The International’s 2019 prize pool was more than $30M. Teams qualify for The International through the Dota Pro Circuit, a series of five tournaments held throughout the year.

**Overwatch** is an objective-based 6 vs 6 First Person Shooter (FPS), developed by Activision-Blizzard. Professional play takes place in the Overwatch League (OWL), run directly by Blizzard. The OWL was built on a franchise model and pulls inspiration from traditional sports leagues, with each team tied to a specific home city location, requiring travel between cities to play. With teams based in Europe, North America, and Asia, the OWL is a truly international league.

**Fortnite** is a third person Battle Royale (BR) game developed by Epic Games. Highly popular with younger players, Fortnite keeps its audience engaged with weekly game updates. Fortnite’s popularity on Twitch skyrocketed after Drake appeared on Ninja’s stream in March of 2018, and has been the most watched game on the platform since. The game’s reach peaked again after the Fortnite World Cup in July of 2019, when Bugha won $3M in the solos competition.
OCTOBER 27, 2009
League of Legends released

JUNE 6, 2011
Twitch founded

AUGUST 6, 2012
League Championship Series launches

JULY 9, 2013
Dota 2 released

MARCH 15, 2007
Intel Extreme Masters launches

JULY 27, 2010
Starcraft 2 released

AUGUST 17, 2011
The International launches

AUGUST 21, 2012
CS:GO released

Twitch

Viewership

Average Concurrent Viewers
Stats from twitchtracker.com

2011
101K+ Viewers

2012
207K+ Viewers

2013

JUNE 20, 2014
Robert Morris University launches 1st varsity collegiate esports program

MAY 24, 2016
Overwatch released

JANUARY 10, 2018
Overwatch League launches

JULY 28, 2019
Fortnite World Cup peaks at 2.3M concurrent viewers between Twitch and YouTube

SEPTEMBER 25, 2014
Twitch acquired by Amazon

JULY 21, 2017
Fortnite Battle Royale released

OCTOBER 10, 2019
League of Legends partners with Louis Vuitton on trophy and other merchandise design

MARCH 14, 2018
Ninja plays Fortnite with Drake
PRE-CAREER

The path of a pro frequently begins with an appreciation and some natural talent for a specific game. Although some esports athletes consciously choose which game to focus on based on their existing skill set, most begin playing for fun and discover their talent organically as it develops. Once this occurs, the next steps are to join a team and compete in lower tier competitions to build a deeper understanding of team-based tactics, and forge a personal reputation.

AMATEUR

Amateur players start their career with relatively little guidance. They often play on self-funded teams assembled around little more than a name and possible logo. In general, these teams practice together up to six hours a week, with players also playing separately to hone their individual skill set. Amateur matches tend to be streamed from their own in-game perspective, but are unlikely to garner much in terms of viewership. Most amateurs have an elementary understanding of the game, and primarily look for outside resources to improve their skills.

SEMI-PRO

Semi-pro teams are more structured than amateur teams, and have developed a deeper understanding of the game. Teams generally practice anywhere from two to eight hours a day, five days a week. Semi-pros have a noticeable profile within their competitive communities, giving them access to higher level practice environments, scrimmages, and tournaments where they have an opportunity to face pro and semi-pro players. Semi-Pro teams compete in highly organized tournaments, most of which serve as a talent development system for the professional leagues. Matches are frequently shown by a single broadcaster, with viewership peaking somewhere between the hundreds and thousands. Some semi-pro teams have sponsorship deals in place with computer hardware and peripheral brands.

PRO PLAYER

Professional teams allow players to fully focus on becoming the best by paying them a salary. On average pros will practice about 40 hours a week, and even more during intensive “bootcamp” weeks. To prevent injuries and increase performance, teams will often provide players with the means to begin fitness training. Some teams also provide their players with media training and personal brand development to help them reach and engage with a wider audience. Pros have the highest level of understanding for the game, and tend to not discuss their knowledge publicly to maintain a competitive advantage. Professional matches are streamed (frequently in multiple languages) to viewers through streaming platforms like Twitch, and on television channels like Disney XD, ESPN, and TBS. Pro teams tend to have sponsorship deals for each piece of gaming equipment they use, as well as other non endemic sponsorships.

POST CAREER

When a player stops competing in a specific game it does not necessarily mark the end of their involvement in esports. Some players may choose to compete in another game title, transferring their skills and knowledge from the previous game they played. Others go on to coach, become broadcasters, manage athletes, or build off their personal brand and following by streaming full-time.
Esports communities are often fragmented across platforms, languages, and geography, but are united through shared experiences of highly skilled play. Tournaments, leagues, teams, and players all come together to create compelling narratives of dynastic dominance, falls from grace, and redemption, through hard-fought competition. These narratives are punctuated by big plays, moments that focus and galvanize fans, and can potentially reveal new techniques and tactics previously thought to be impossible. Big plays have lasting effects within each community, and are immortalized in highlight videos, game vernacular. Sometimes, they are even written into the fabric of the game itself by the game’s developer. Here, several key community spaces are explored, each through the eyes of a single big play.

**Arenas**

Large esports events take place in arenas where thousands of esports fans can experience the thrill of watching their favorite teams and players compete live onstage. Frequently, fans will travel significant distances to experience a match in person and forge new friendships within the community. When a big play occurs, the impact of a big play can really be felt in these spaces as the realization of what happened sweeps through the crowd.

**Twitter**

Twitter is the primary social media platform for esports news and discussion. When a big play happens, pros and fans quickly go to Twitter to express their amazement or disbelief. This burst of tweets drives fans who may not have been watching to tune in, creating a visible spike in viewership. Frequently, if the event and the big play are both spectacular enough, the name of the player involved will become trending on the platform.

**Linear TV**

Linear TV networks such as ESPN and TBS have broadcast esports events since 2015. These channels often have a dedicated broadcast team tasked with providing more context and gameplay basics to an audience that is typically newer to esports. When a big play happens, these broadcasters break down what exactly made it so spectacular, contextualizing the event and helping bring new viewers deeper into the community.

**Watch Parties**

Growing in popularity, watch parties are specifically designed to create space for local communities to gather and watch live streams of their favorite teams. These parties take place in homes, event spaces, and traditional sports bars. The success of these events led to the creation of esports bars in multiple regions. Much like the energy in an arena, the impact of a big play can really be felt in these spaces as the realization of what happened sweeps through the crowd.

**Twitch**

Twitch is the primary digital platform where esports matches are streamed and viewed. Twitch grew rapidly alongside the rest of the esports industry, inspiring the creation of other streaming platforms such as Mixer and Caffeine, both of which are backed by major tech and media groups. Alongside a Twitch stream is the chat, where viewers can communicate with each other, the production team, and broadcasters. A good portion of this communication is achieved through a variety of emotes, small icons that have taken on specific meaning and cultural connotations within the Twitch community. When a big play occurs, the chat explodes in response as a flurry of passionate fans repeatedly post certain short phrases decorated with emotes to convey their amazement, joy, or despair.

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