



# ESPORTS Q1 2021 INSIGHTS REPORT





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# INTRODUCTION GG'S ALL AROUND

**I wasn't expecting this, but, in a way, I knew we'd get here. And, look at us now.**

**When Blinkfire first started working in esports almost six years ago, I knew we'd gain traction with like-minded folks. After all, we work in tech, and esports is tech. You can't have esports without it.**

At the time, both the industry and Blinkfire looked to traditional sports for inspiration on products & features, content, learnings, and where to venture next. I believe that the time has arrived where the (turn)tables have turned, and many traditional sports are trying to mimic what's popular and working best in esports, especially in the past year.

And, what a year it has been. We've seen massive growth in market revenue, livestreaming content, and audiences, plus substantial investments from brands who, now more than ever, are trying to reach the esports audience. It's an audience that forgoes watching TV and prefers to watch streams or participate in them on platforms like Twitch and YouTube.

We're fortunate to work closely with brands, players, teams, and leagues with a general understanding that esports is not "the future" — it's the present. It's not a promising industry; it's already delivering. Blinkfire is empowering rights holders and brands to grow, surpass expectations, and pave a new path and standard.

I feel grateful to represent Blinkfire's esports efforts in all the events, panels, and sessions, and I am beyond excited to share with you our first edition of Blinkfire's Esports Q1 2021 Insights Report. I hope you enjoy reading it as much as we've enjoyed creating it.

GG's all around for a great Q1! Let's overdeliver for the next one.

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# TOP 10

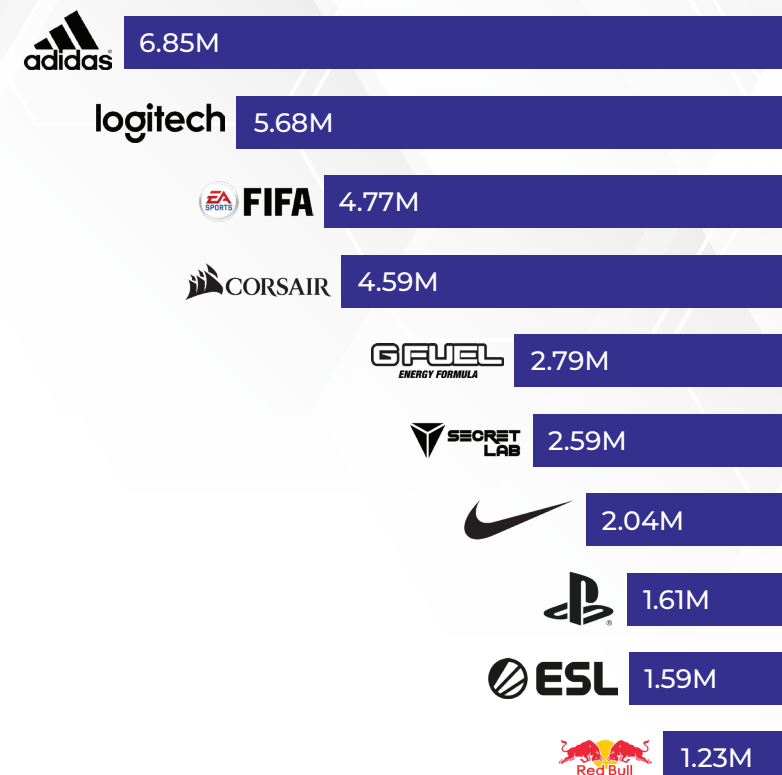
## ESPORTS BRANDS BY ENGAGEMENT

During Q1 2020, sports took a three-month timeout as the pandemic took hold of our world. Since then, the esports industry has been booming, making a defining, lasting impact — and brands are capitalizing. One callout we want to make: the topic of endemic versus non-endemic brands. That made sense ten years ago, but today's partnerships are in two phases: brands already in esports and brands that are yet to join the party. We believe everyone can find their fit in esports. The following pages break down sponsorship trends and why brands like adidas, G Fuel, and Corsair are on Q1 2021's leaderboard.

### Q1 2020



### Q1 2021





**adidas'** rise to #1 on the brand list was because of apparel deals with teams like Team Heretics, Faze Clan, and G2 Esports. Team Heretics sits in an interesting spot — Fortnite streamer David “TheGrefg” Martinez owns Team Heretics. Every time TheGrefg wears the team’s jersey and posts it to social media, more than 41.6 million fans have the potential to see it. That’s a lot of eyeballs!

This leads us to **G Fuel**, a gaming and energy drink, and front of jersey sponsor for Team Heretics and Faze Clan. TheGrefg often wears the Team Heretics jersey during Twitch streams.

**Corsair** is a leader in gaming gear. The brand is found not only on keyboards and headphones but also on jerseys and digital overlays and increased average engagement per post by 400% compared to Q1 2020.

**Secretlab**, a gaming chair manufacturer, sponsors teams like Team Secret and 100 Thieves and leagues like League of Legends and Overwatch. Secretlab earned 150% more engagements per post in Q1 2021 versus Q1 2020.

**Logitech**, the maker of gaming electronics, is omnipresent in the esports industry. Their logo is on the sleeve of Infinity Esports, front of jersey and sleeve of G2 Esports, step and repeats, and digital overlays.

**ESL Gaming's** ranking fell from #1 to #9. Early in Q1 2020, the event organizer could still host live events. When the pandemic progressed, social and digital strategies changed. In Q1 2021, of the top 50 most engaging posts, ESL’s brand appeared in 32% of livestream highlight videos compared to Q1 2020, where the brand was in 12%. In Q1 2020, the organizer included more event images with players, and their logo was prominent on headphones, step and repeats, and chairs. With more live events on the horizon, ESL looks to regain its hold — the household esports institution closed 2020 as the most engaged brand based on Blinkfire data.



# TOP 10

## ESPORTS BRANDS BY CATEGORY

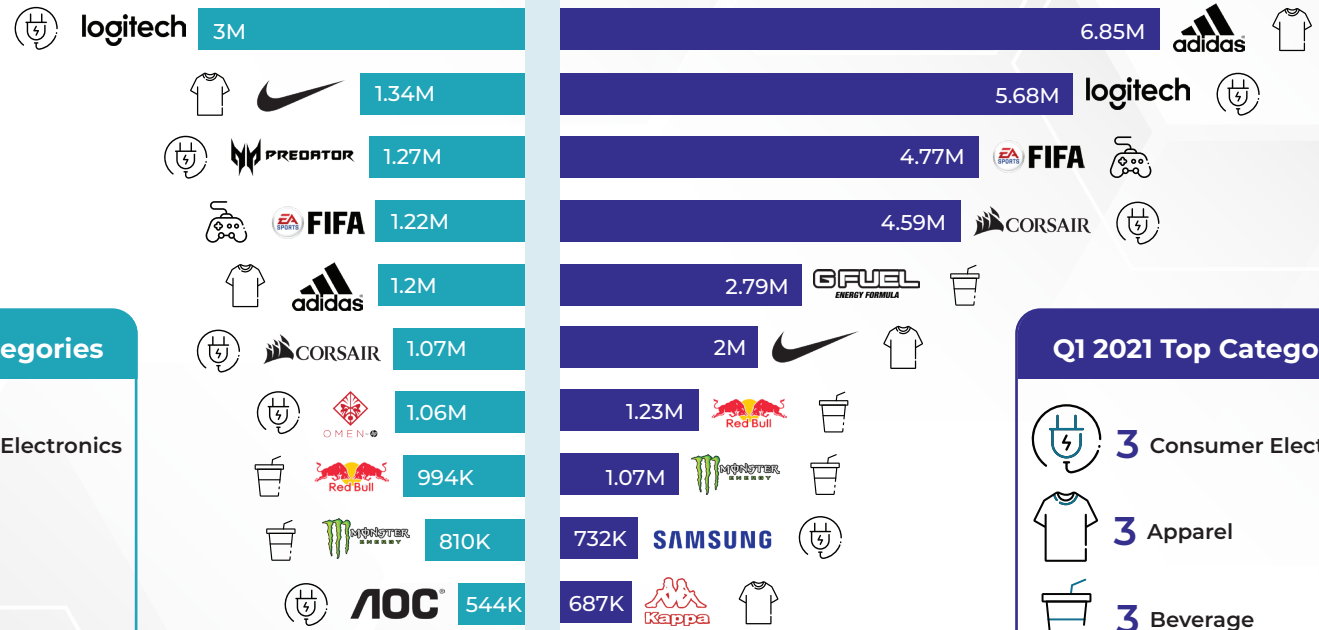
Apparel, Consumer Electronics, Non-Alcoholic Beverages, and Video Games

Many of the most sponsored brands in esports fall under four categories: apparel, consumer electronics, non-alcoholic beverages, and video games. G Fuel's **sponsorship renewal** deal with Team Heretics and **exposure from influencers** like TheGrefg helped the brand increase engagements and crack the top 10.

Brands are jumping into esports to target a new, fresh audience. Based on our category list, sponsorship exposure wins big with classic brands like **Logitech**, **EA Sports FIFA**, and **Corsair**.



Q1 2020 vs Q1 2021



### Q1 2020 Top Categories

- 5 Consumer Electronics
- 2 Apparel
- 2 Beverage
- 1 Video Games

### Q1 2021 Top Categories

- 3 Consumer Electronics
- 3 Apparel
- 3 Beverage
- 1 Video Games



# TOP 10

## BRANDS BY ENGAGEMENT: ESPORTS VS NON-ESPSPORTS

We track a lot of sports in Blinkfire. From soccer and basketball to tennis, mixed martial arts, and auto racing. **In Q1 2021, soccer made up 43% of posts in Blinkfire, followed by esports (20.1%), basketball (12.2%), and football (8.4%).** The type of brands that receive exposure and the teams they sponsor is a running theme. In a race for sponsorship dollars, we wanted to understand the brand overlap, if any, in esports compared with traditional sports.

From the Q1 2021 brand charts, the commonalities come from apparel makers adidas and Nike. Another trend from the most engaged brands — uniform sponsorship exposure. Six brands in esports and seven brands in traditional sports have on-jersey sponsorships. In traditional sports, soccer and basketball tend to generate the most brand exposure from jersey and patch partnerships.



	Esports	Non-Esports
1	adidas	adidas
2	logitech	Nike
3	EA SPORTS FIFA	Emirates
4	CORSAIR	Rakuten
5	GFUEL ENERGY FORMULA	PUMA
6	SECRET LAB	Jeep
7	Nike	CHEVROLET
8	PS	beko
9	ESL	unicef
10	Red Bull	State Farm

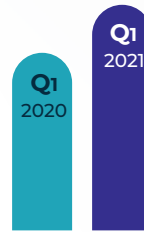




# CONTENT TRENDS

Instagram posts made up **13.3% of esports images and videos** in Blinkfire during Q1 2021. The social network saw a substantial increase in number of posts compared to Q1 2020 — both timeline images and videos and Instagram Stories images and videos.

## TIMELINE IMAGES



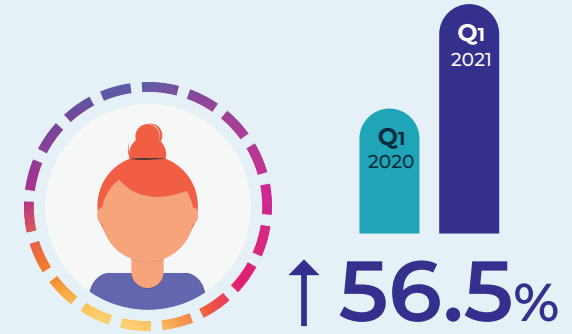
↑ 26.82%

## TIMELINE VIDEOS

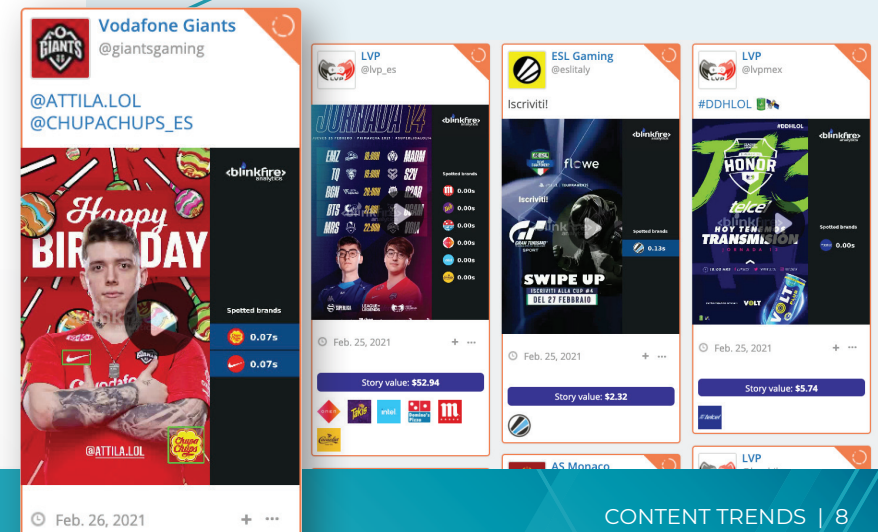
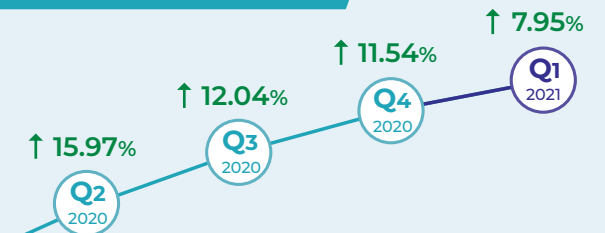


↑ 28.43%

## INSTAGRAM STORIES IMAGES + VIDEOS



## INSTAGRAM STORIES Q/Q GROWTH

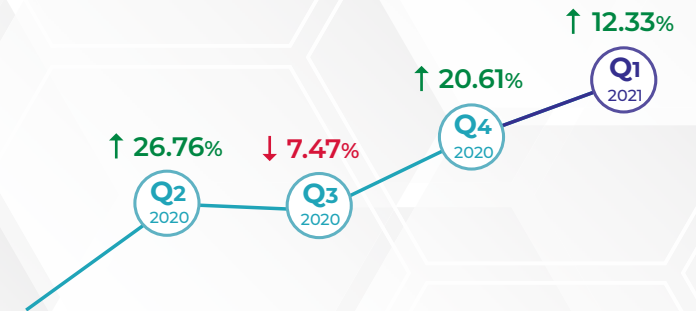


# TWITCH: BY THE NUMBERS

Over the past year, Twitch experienced a meteoric rise in large part due to the pandemic. With lockdowns, postponement of sports, and cancellation of live events, Twitch livestreams became mainstream. **Fifty-nine percent more Twitch streams were posted in Blinkfire this quarter compared to Q1 2020.** The number of streams steadily increased in 2020, with Q3 2020 as the only decline — a combination of summer and a return to play for leagues like the Premier League, LaLiga, NHL, MLB, NBA, and MLS.

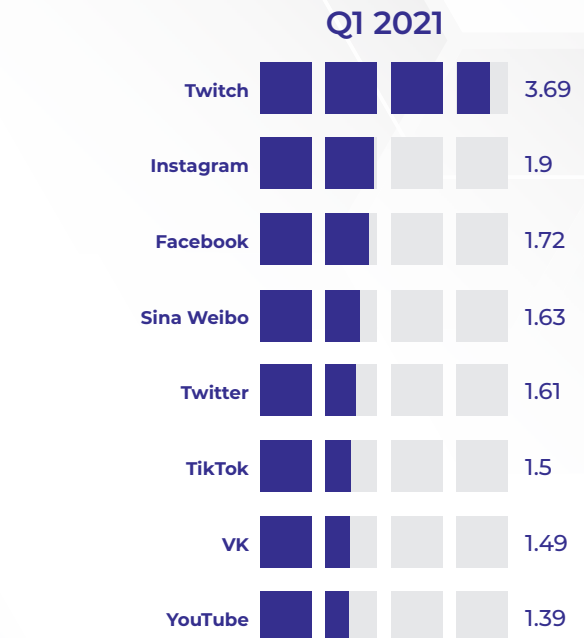
The platform also saw an increase in the number of brands per post. **During Q1 2021, Twitch videos averaged 3.69 brands per post, a 36% increase compared to Q1 2020.** During a Twitch stream, brand exposure happens in several ways: in-broadcast digital overlays, players' jerseys, gaming equipment, and product placement.

## TWITCH LIVESTREAMS Q/Q GROWTH



## BY PLATFORM

Average Number of Brands Per Post





# JANUARY'S RECORD-BREAKING TWITCH STREAM

**2.4M**  
CCV

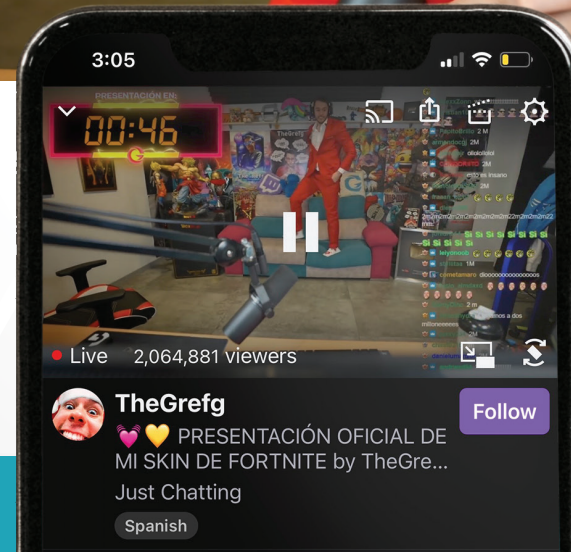
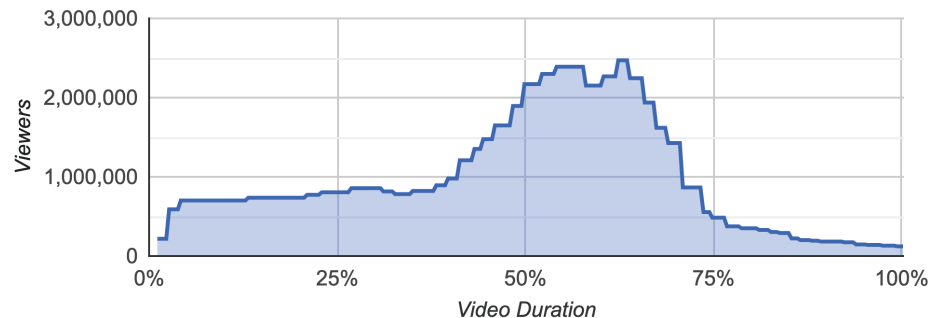
**25.3M**  
ENGAGEMENTS

Spanish Fortnite streamer David “TheGrefg” Martinez’s unveiling of his newly designed Fornite skin broke Twitch viewership records on January 12, 2021. TheGrefg saw **2.4 million concurrent viewers** during his two-hour-plus stream.

To understand just how impressive TheGrefg’s record-breaking viewership was, based on January 2021 data in Blinkfire, the average concurrent viewers was **2.5K per livestream**.



Live Retention







TEAM LIQUID

21,218

POST ENGAGEMENTS

Chair



Uniform





# ESPORTS ASSETS & SCENES

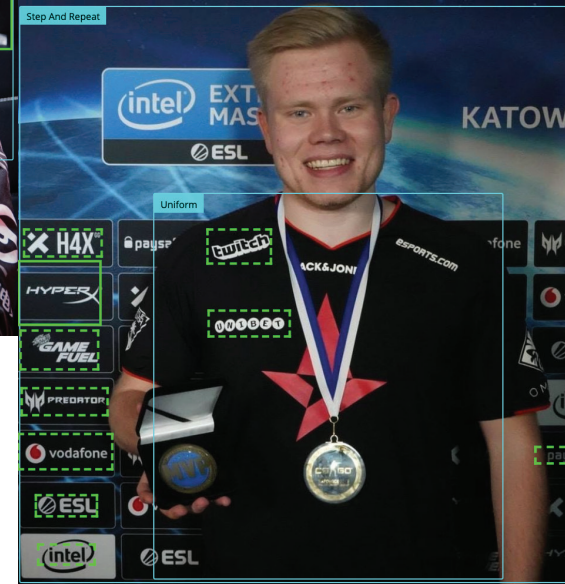
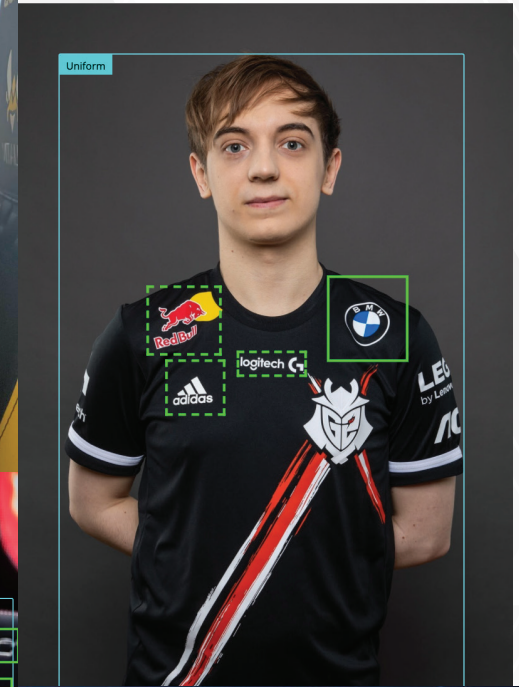
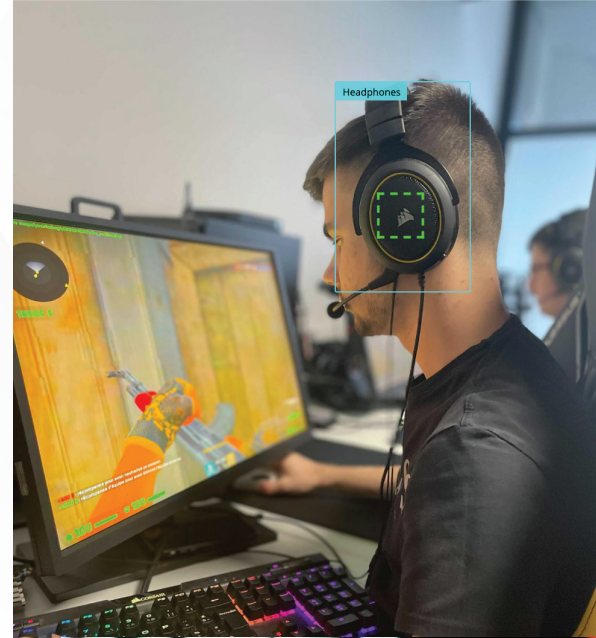
## ASSETS

Blinkfire tracks more than 60 assets in videos and images across 40 plus sports. Esports has endemic assets like keyboards, chairs, and monitors that are more popular in their content compared to traditional sports. **Two assets that are common across the esports and traditional sports ecosystems: uniform and step and repeat.** Esports sells on-jersey sponsorships, where a brand is visible on the front of the jersey (right, center, or left), the sleeve of a jersey, or on the back of a jersey.

### TOP 5

### BRANDED ASSETS DURING Q1 20201

- 1 UNIFORM
- 2 STEP & REPEAT
- 3 CHAIR
- 4 HEADPHONES
- 5 MONITOR





# SCENES

Blinkfire tracks more than 40 scenes like birthday, action, score, game preview, and man of the match. Popular esports scenes include birthday, score, and action, and they are either sponsored or unsponsored. With unsponsored scenes, teams strategically use images of passive brand exposure. Also, some esports teams create new content series. For example, **Giants Gaming added Fan of the Month to their social inventory** and made Chupa Chups the presenting partner.

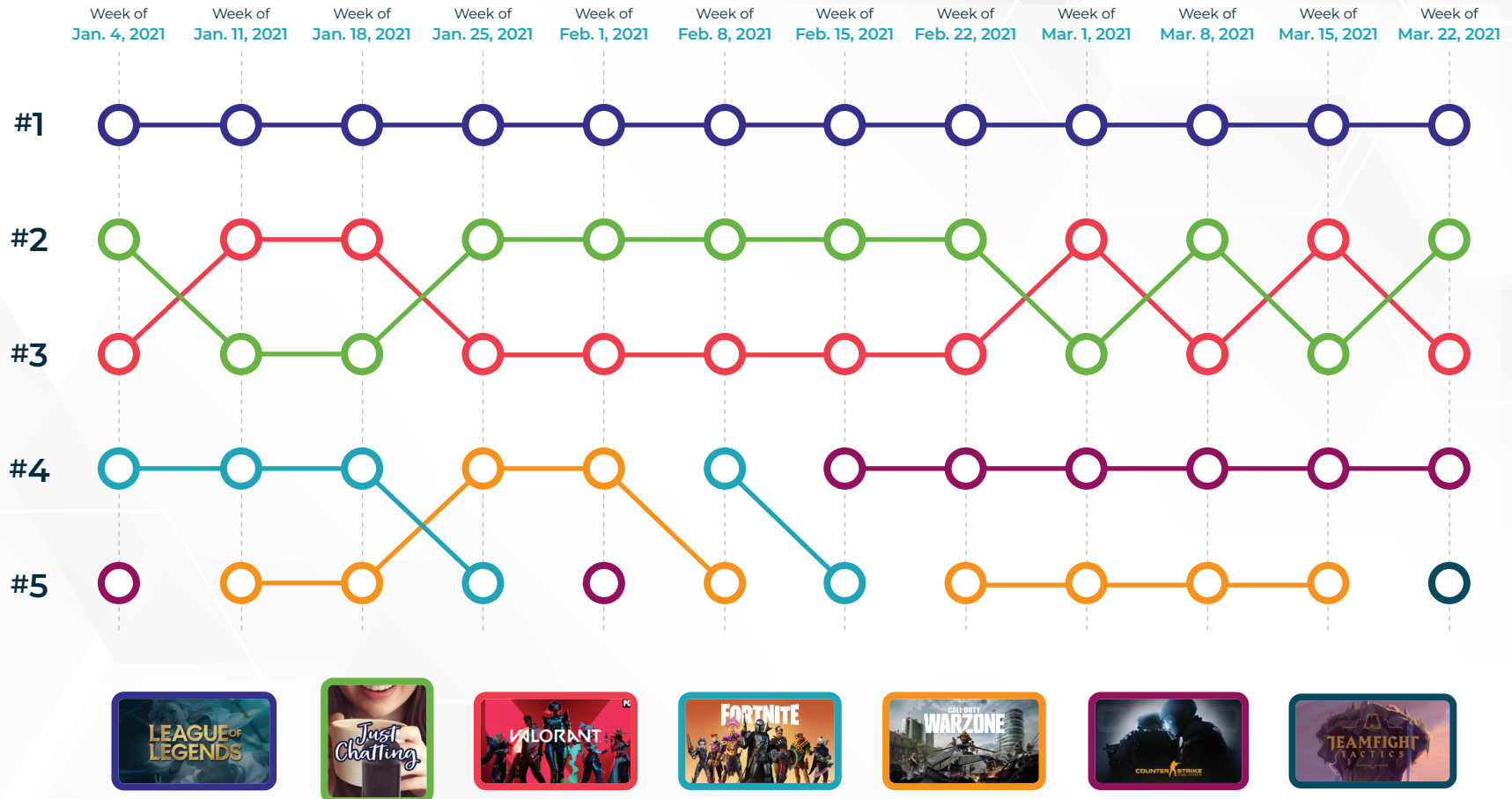




# BLINKFIRE'S STREAMING REPORT

Blinkfire launched the Streaming Report in December of 2020. This report brings streaming insights, value, and benchmarking into an interactive dashboard. Metrics include peak CCV, average CCV, total hours watched, number of streams, and more.

Based on the data in Blinkfire, we analyzed the **top five games streamed week-over-week** starting January 4, 2021 and ending the week of March 22, 2021.



# ESPORTS FUN FACTS: Q1 2021

- › Posts with a player drove **260% more engagements** than posts without players.
- › **Esports memes averaged 10.4K engagements per post** but are unsponsored. Maybe there's a need for official meme partnerships? We think so!
- › Posts from esports influencers and players drove **38% more engagement** than esports teams, leagues, and organizations.
- › **Esports Brand Hashtag Power**
  - ▶ Posts with **one brand hashtag** averaged **66% more engagements**
  - ▶ Posts with **two brand hashtags** averaged **366% more engagements**
  - ▶ Posts with **three brand hashtags** averaged **475% more engagements**
- › Esports posts in Blinkfire **increased 9.1%** compared to Q1 2020.
- › Instagram images and videos where a brand earned exposure visually, @mention, hashtag, or tagged earned **16x more engagements** compared with Facebook and Twitter.

When you AFK for half a second and find your whole team dead:

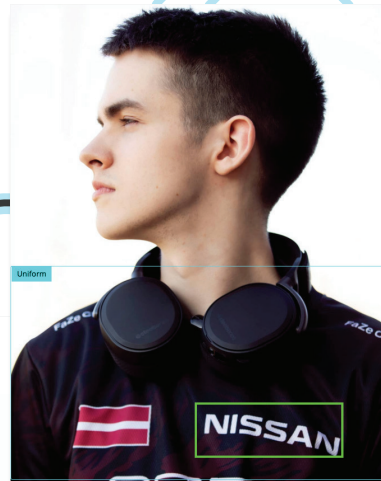


 **brokycs**  
@ Feb. 5, 2021 UTC

yo, what's up.

[#FaZeUp](#) [#newyork](#) [#2019](#) [#csgo](#)  
[#steelseries](#) [#gfuel](#) [#nissan](#)

153 Comments · 7,518 Likes



## Esports Influencers & Players



 **fazeclan**

@ March 3, 2021 UTC



fazerug / [#FaZeUp](#)

326 Comments · 71,781 Likes

**Post engagement: 72,107**

This is the verified minimum of real interactions users had with this post.

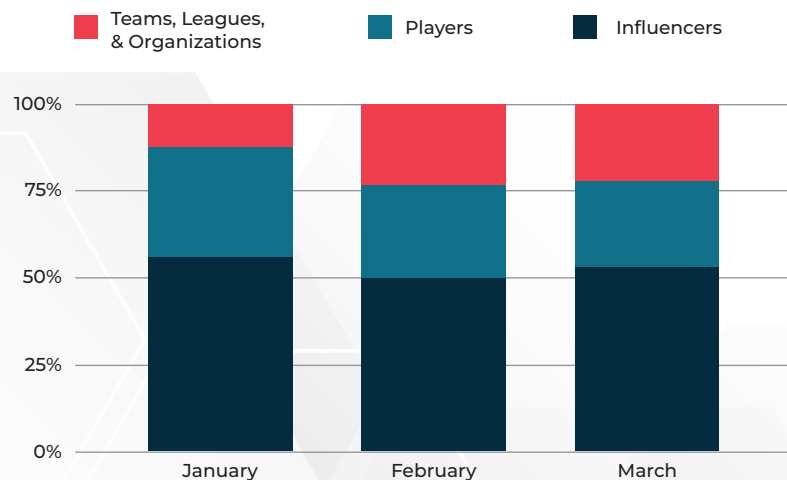


# ESPORTS 🤝 INFLUENCERS

These days it seems most everyone is a media business. During the past year, with the rise of the **creator economy** and as individuals continue to build their following and audience, the intersection of esports, creators, and brands is rife with opportunity. Esports streamers and influencers have made an impact, from garnering large audiences on Twitch and YouTube to earning millions of engagements on Instagram. When it comes to brand partnerships, esports influencers offer a unique, appealing, and exciting offering.

In January, **Barstool Sports** partnered with esports streamer Nick **“Nickmercs” Kolcheff** as a brand ambassador to promote the Barstool Sportsbook. **Kolcheff has more than 14 million followers** across Facebook, Instagram, TikTok, Twitter, Twitch, and YouTube and **averaged 68K CCV per livestream in Q1 2021**. As mentioned earlier in the report, **David “TheGrefg” Martinez** broke the Twitch CCV record in January. Former G2 Esports partner turned household name **Ibai Llanos**, with more than 19 million followers on Instagram, Twitter, Twitch, and YouTube, has amassed a passionate following in his native Spain. Fans are looking for authentic content, and brands are looking to target younger, more engaging audiences.

## Q1 2021: TWITCH TOTAL TIME WATCHED



## KEY INFLUENCER STAT - TWITCH

Influencers **drove more than 50% of Twitch total time watched** compared with esports roster players, teams, leagues, and organizations.



**1.18M**  
POST  
ENGAGEMENTS

## KEY INFLUENCER STAT - INSTAGRAM

Influencers brought value and engagement to their images and videos during Q1 2021. They **averaged 218% more engagements per post** compared with esports roster players and **245% more engagements per post** compared with esports teams, leagues, and organizations.





## ABOUT BLINKFIRE ANALYTICS

Blinkfire Analytics is the leading business intelligence & marketing analytics platform to evaluate sports, esports, media, and entertainment sponsorships across social media, digital, and Advanced TV. Using artificial intelligence, machine learning, and proprietary computer vision technology, Blinkfire Analytics measures media value and impact – allowing rights holders, players, influencers, agents, and brands to better engage their fans and sponsors across multiple platforms. Many of the world's top brands, teams, and leagues rely on Blinkfire Analytics' real-time, always-on platform for sports, esports, and entertainment sponsorship evaluation to quantify engagement and sponsorship dollars.

To learn more about Blinkfire Analytics, email [bizdev@blinkfire.com](mailto:bizdev@blinkfire.com) or visit [www.blinkfire.com](http://www.blinkfire.com).

