eSports in Canada

Summary Edition
This summary edition is a promotional version of the *eSports in Canada* report. The table of contents for the complete report is as follows:

**Introduction: An Evolving Sport, Highly Engaged Fanbase** 3

**The eSports Audience** 5
- Profile of those who followed eSports in the past year
- Recency of following eSports
- eSports vs. the most popular league within each sport
- eSports event attendance
- Where attended a live esports event

**Broadcasting eSports** 9
- Sources for streaming esports
- Time spend following eSports
- Devices used to follow eSports
- Average hours spent with media per week

**Sports Influence eSports Fans** 12
- eSports genre(s) followed
- eSports games/leagues followed

**Fan Love for eSports** 14

**A Truly Global Fandom** 15
- Favourite eSports teams
- eSports team ranking
- Team related statements

**Sponsorship in eSports** 18
- How likely are esports fans to notice sponsors?
- How likely are eSports fans to buy a sponsor’s product or service?
- Where fans notice sponsors?
- Positive attitude on brand involvement in eSports

**Conclusion: eSports: A whole ne world of sports** 20

For more information, or to purchase the complete report, contact Rahul Gupta: rgupta@vividata.ca.
The eSports Audience

4.4 million Canadians have followed esports within the past year

Vivintel’s Sports & eSports survey did not pre-define ‘followers’ or ‘fans’ for respondents. The survey simply asked respondents “when was the last time you followed esports”. The meaning to ‘follow’ was left to the respondents interpretation.

Based on this question, we found 15% (or 4.4 million) Canadians over 18 have ‘followed’ esports within the past year. These general esports fans are more likely to be male Millennials with a slightly lower personal income, due to their age.

Interestingly, when we look at the recency of following esports against the generations, Gen Xers are more likely than their younger counterparts to have followed esports ‘yesterday’. These Gen Xers are also high income earners with nearly 40% earning a household income over $100,000, and 1 in 5 work in the field of science and technology.

Profile of those who followed eSports in the past year:

- **57%** (2.5 million) are Male
- **43%** (1.9 million) are Millennials
- **31%** (1.4 million) are Gen Xers
- **26%** (1.2 million) have Household Income > $100k

For Vivintel’s Canadian Sports & eSports Study, nationally representative surveying was done during January, 2019, resulting in a total of 3,510 respondents. All respondents were either Traditional Sports followers and/or eSports followers. The Sports and eSports data were then integrated to Vividata’s Study of the Canadian Consumer (Winter 2019).
Overall, esports has not yet attained the reach of major traditional sports leagues like the NHL, NFL, MLB, or a sporting event like the Winter Olympics (which just barely beats the reach of the Summer Olympics in Canada). However, reaching nearly 1 out of 7 Canadians is significant for esports. When compared to traditional sports, almost the same amount of people engaged with esports as those did with the WBA (boxing), MMA (mixed martial arts) and WWE (wrestling) combined.

Following the 6th Olympic Summit in October 2017, the International Olympic Committee (IOC) also recognised esports as a “sporting activity” and was asked “to explore” esports further. This has increased the debate surrounding the potential inclusion of esports as an Olympic sport, an idea that has also been publicly expressed by the Organising Committee for Paris 2024. Such an inclusion of esports into the Olympics, which appears imminent, would further propel the reach of esports.

eSports vs. the most popular league within each sport:

<table>
<thead>
<tr>
<th>Sports</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>eSports</td>
<td>15%</td>
</tr>
<tr>
<td>NHL</td>
<td>58%</td>
</tr>
<tr>
<td>Winter Olympics</td>
<td>49%</td>
</tr>
<tr>
<td>NFL</td>
<td>38%</td>
</tr>
<tr>
<td>MLB</td>
<td>31%</td>
</tr>
<tr>
<td>Grand Slam Tours</td>
<td>23%</td>
</tr>
<tr>
<td>PGA</td>
<td>22%</td>
</tr>
<tr>
<td>NBA</td>
<td>21%</td>
</tr>
<tr>
<td>FIFA World Cup</td>
<td>19%</td>
</tr>
<tr>
<td>Formula 1</td>
<td>14%</td>
</tr>
<tr>
<td>WBA</td>
<td>6%</td>
</tr>
<tr>
<td>UFC</td>
<td>5%</td>
</tr>
<tr>
<td>WWE</td>
<td>4%</td>
</tr>
</tbody>
</table>

Q: How often do you follow eSports? (Past year)
Q: Which of the following Sports Events do you follow when in season and how often?

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Broadcasting eSports

eSports opens a whole new frontier to distribution. Recently, ESPN and SportsNet have been streaming esports consistently, while Twitch and YouTube have been leading sources for streaming esports since its emergence.

Though recent, this push by leading sports broadcasters is clearly paying off. ‘Sports broadcaster websites’, such as that of ESPN or SportsNet, come out on top as the ‘most often’ used source for streaming esports, followed by YouTube Gaming, then Twitch. However, YouTube Gaming is in amalgamation of commercial and independent channels, including that of sports broadcasters. As such, an esports audience on YouTube is still of benefit to sports broadcasters looking to extend their reach to younger audiences that gravitate to YouTube to follow esports.

Sources for streaming esports:

<table>
<thead>
<tr>
<th>Source</th>
<th>Most often</th>
<th>Sometimes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports Broadcaster websites</td>
<td>28%</td>
<td>16%</td>
</tr>
<tr>
<td>YouTube Gaming</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>Twitch</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>Facebook Live</td>
<td>15%</td>
<td>19%</td>
</tr>
<tr>
<td>Dailymotion Games</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td>Worldgaming.com</td>
<td>14%</td>
<td>2%</td>
</tr>
<tr>
<td>Teamliquid.net</td>
<td>15%</td>
<td>2%</td>
</tr>
<tr>
<td>Smashcast.tv</td>
<td>11%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Those who followed esports within the past year spend an average of 2.2 hours a week following esports. This time spent increases exponentially among those who have followed esports more recently, such as in the past week (3 hours), or yesterday (3.4 hours). This is on par with the average time fans spend following traditional sports during a regular season.

As of just a year ago, esports could only be viewed online. The impact of sports broadcasters delivering esports entertainment is also evident when we look at the devices esports fans use to follow esports; 55% of esports fans claim to use TV to follow the game.

However, esports entertainment is still firmly anchored online. As expected, a vast majority (65%) of fans use a laptop or desktop to follow esports. Smartphones are also a popular way to follow esports, but the use of this device for such an activity is likely more of a matter of convenience than preference.

Q: How much time do you spend following eSports in a typical week?  
Q: Which device do you use to follow eSports?

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