eSports Enthusiast Denver

4FRONT Fan DNA

October 2020

REPORT OVERVIEW

- **Methodology and Primary Audiences**

- **Report Summary**

- **Audience Demographics**

- **Denver eSports Enthusiast Deep-dive**
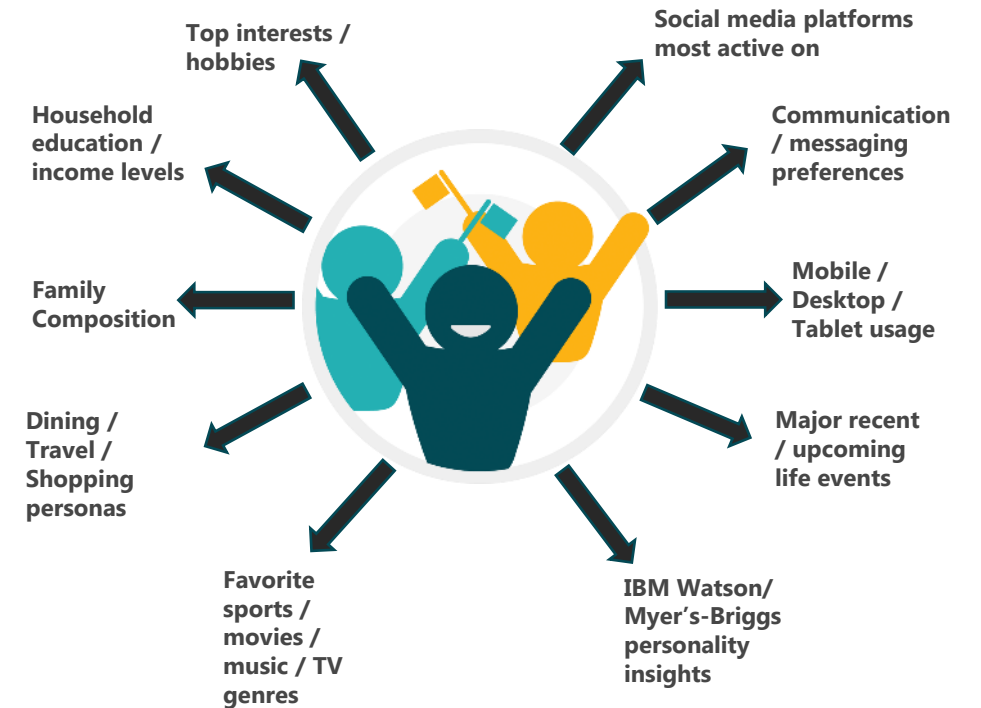
METHODOLOGY

CREATE AUDIENCES & UNLOCK INSIGHTS

ORACLE bluekai

Third Party Data

Experian   *Axiom*   *VISA*

MRI   *AmeribaseDigital*

DEVELOP 360º AUDIENCE PROFILES

Top interests / hobbies

Social media platforms most active on

Household education / income levels

Communication / messaging preferences

Family Composition

Mobile / Desktop / Tablet usage

Dining / Travel / Shopping personas

Major recent / upcoming life events

Favorite sports / movies / music / TV genres

IBM Watson/ Myer's-Briggs personality insights

PRIMARY AUDIENCES

eSports Denver | 2.1m Devices |

Devices in the Denver area that have a proven interest in gaming and eSports through performing one or more of the following actions in the last 180 days:

- Purchasing gaming laptops, consoles, games or accessories in-store or making online gaming related purchases

- Actively engaging in social sharing or searching for and consuming content around types of games, platforms and accessories

- Attending eSports events and frequenting gaming cafes

- Following esports related handles on social media

- Watching eSports competitions and related content on traditional TV and streaming platforms

Benchmark Audiences

- Denver Residents | 10.5m Devices |

- eSports US | 60m Devices |

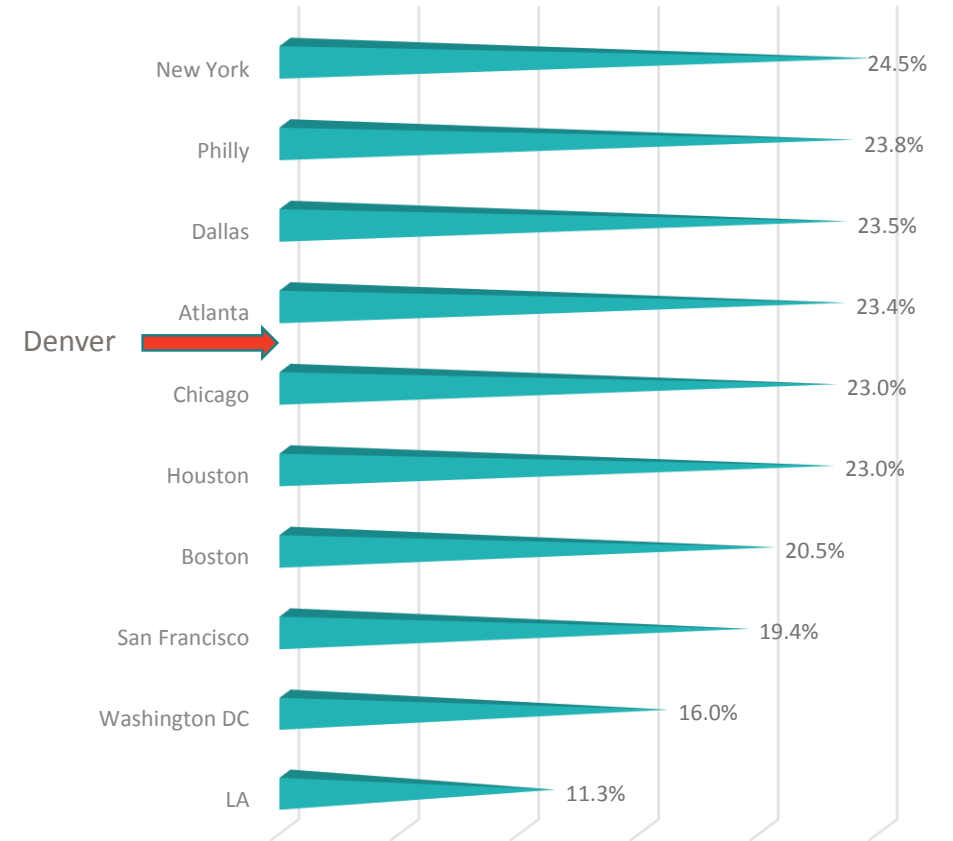- US population | 920m Devices |

REPORT SUMMARY

With **23.2%** of devices in the Denver area being tagged as eSports Enthusiasts, Denver matches up well compared to some of the top markets in the country

Denver presents an attractive audience to event organizers with a **tech savvy, diverse and affluent** population that has varied interests, aspirational values and high discretionary income.

eSports Enthusiasts in Denver over-index the Denver population in **discretionary spending on apparel and dining**. They enjoy the outdoors and have strong propensity for DIY living. **Social responsibility and concern for the environment** ranks high for them

Denver eSports Enthusiasts broadly split into 2 key personas – the **18-25 yr old Gen Z** beginning their careers and **High-income families with teens** in the household that spend time and money on video-gaming.
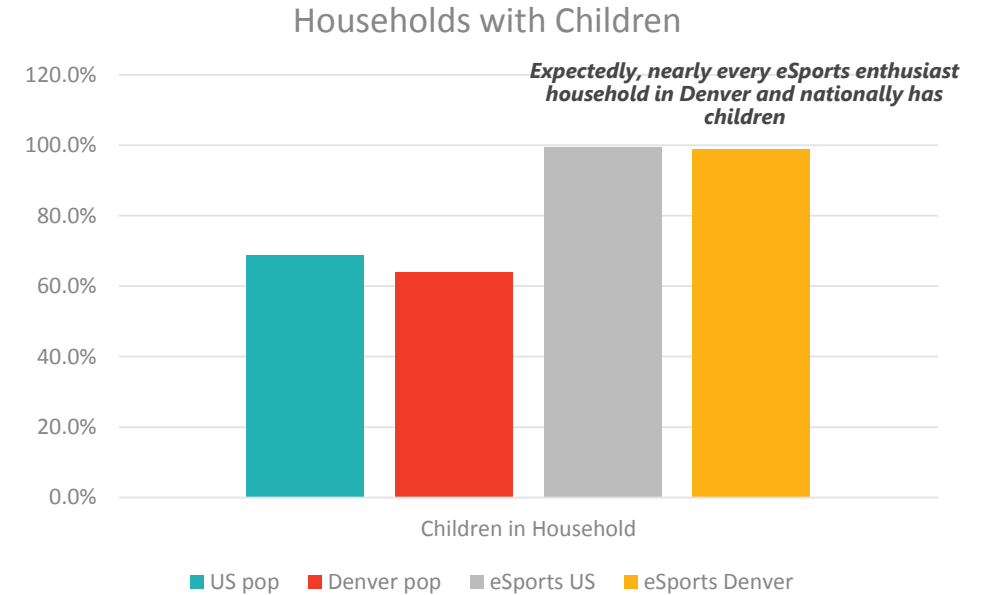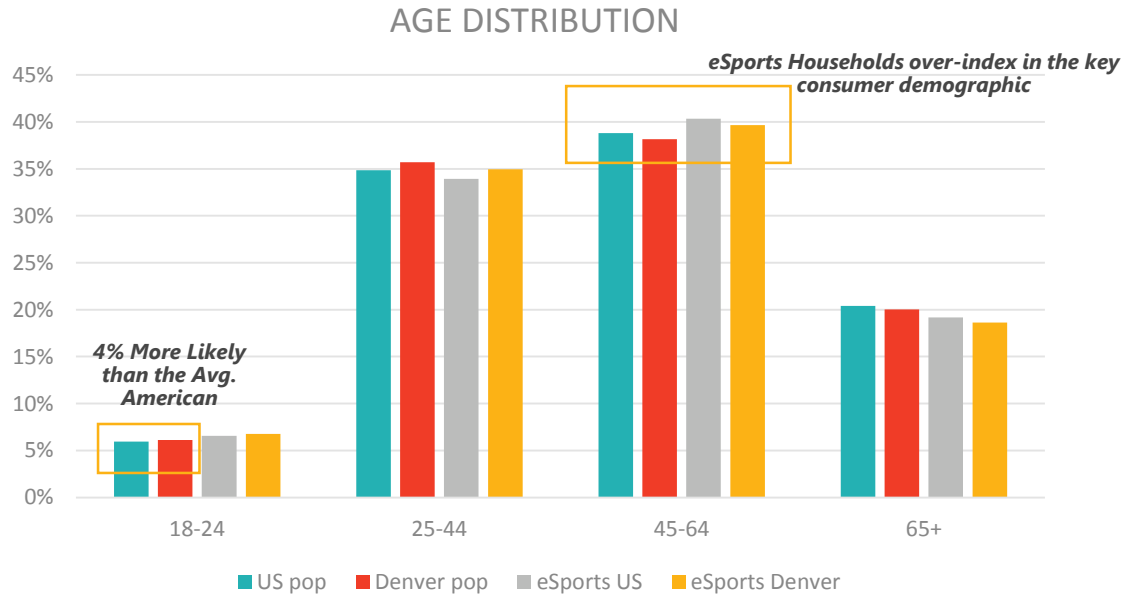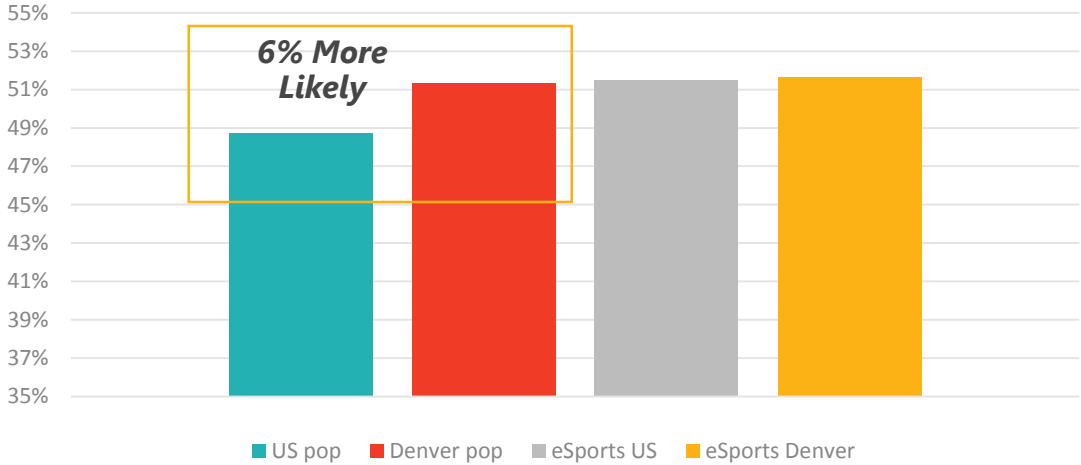
Market	Percentage
New York	24.5%
Philly	23.8%
Dallas	23.5%
Atlanta	23.4%
Denver	→
Chicago	23.0%
Houston	23.0%
Boston	20.5%
San Francisco	19.4%
Washington DC	16.0%
LA	11.3%

AUDIENCE DEMOGRAPHICS

AGE & HOUSEHOLD COMPOSITION

AGE DISTRIBUTION

eSports Households over-index in the key consumer demographic

4% More Likely than the Avg. American

Age brackets: 18-24, 25-44, 45-64, 65+

Legend: US pop, Denver pop, eSports US, eSports Denver

Households with Children

Expectedly, nearly every eSports enthusiast household in Denver and nationally has children

Children in Household

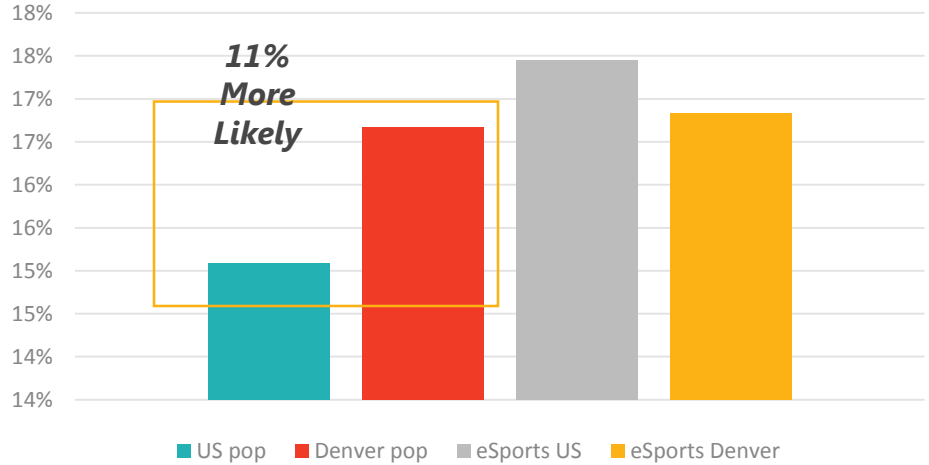Legend: US pop, Denver pop, eSports US, eSports Denver

Takeaway: Denver population over-indexes in the 18-44 age bracket when compared to the US population. Also, eSports audiences in Denver and nationally have an extremely high likelihood of having children in the household compared to the general population
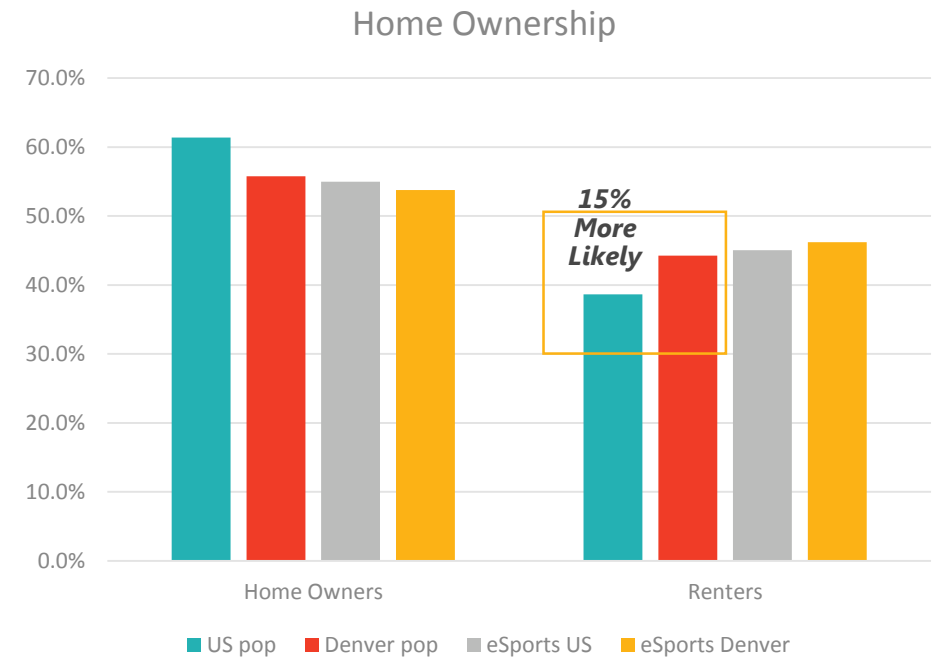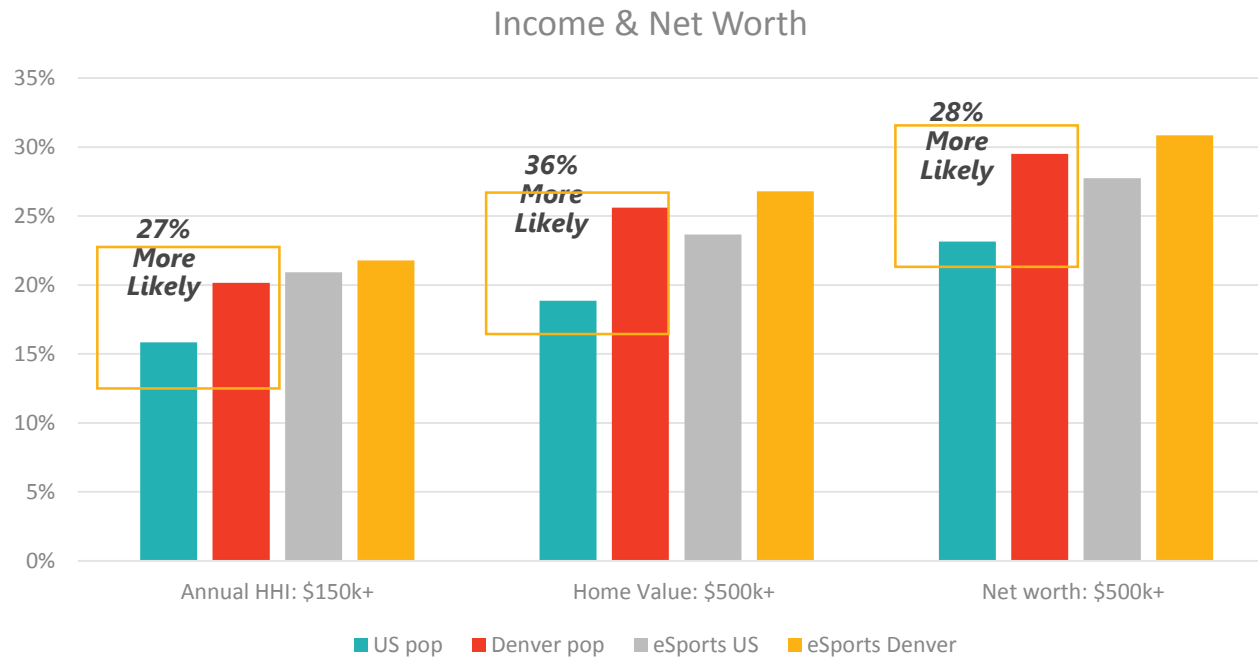
EDUCATION LEVEL

4-year College Degree

6% More Likely

Legend: US pop | Denver pop | eSports US | eSports Denver

Graduate Education

11% More Likely

Legend: US pop | Denver pop | eSports US | eSports Denver

Takeaway: The eSports enthusiast tends to be more well-educated than the average person. eSports enthusiasts in US are 16% more likely to have a graduate degree. The Denver population aligns well in this regard with higher likelihoods of undergraduate and graduate degrees compared to the US population.
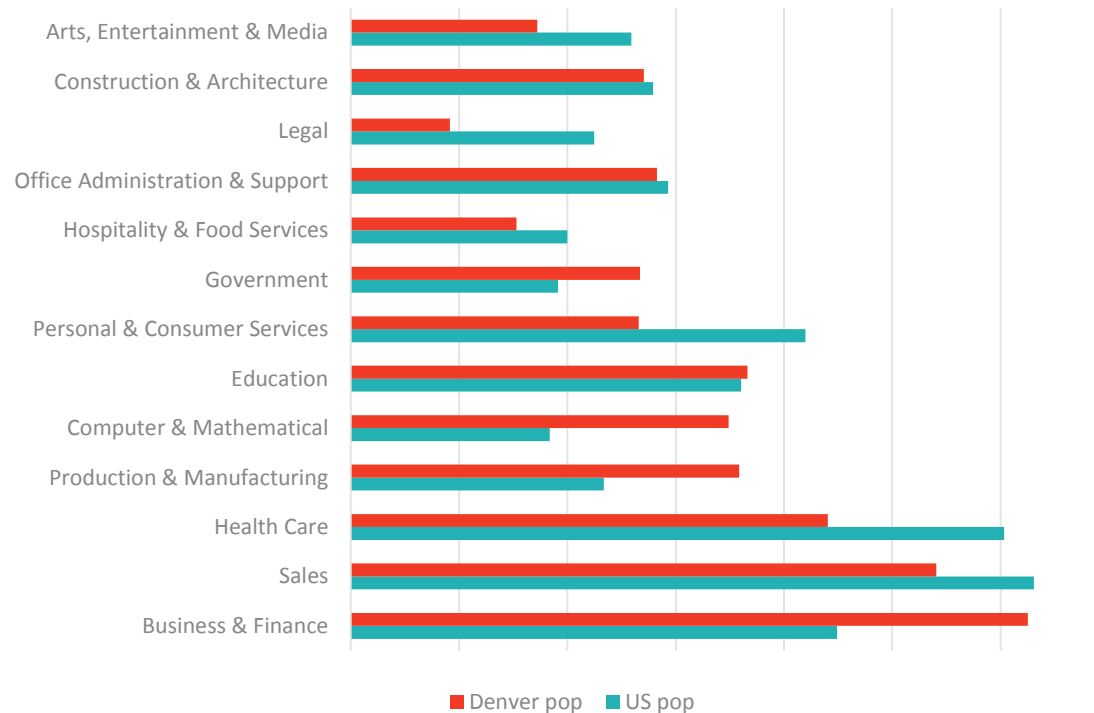
FINANCIAL ATTRIBUTES

Income & Net Worth

27% More Likely (Annual HHI: $150k+)
36% More Likely (Home Value: $500k+)
28% More Likely (Net worth: $500k+)

Legend: US pop | Denver pop | eSports US | eSports Denver

Home Ownership

15% More Likely (Renters)

Legend: US pop | Denver pop | eSports US | eSports Denver

Takeaway: The Denver population is inherently more affluent with higher incomes, asset values and net worth relative to the average US population. This aligns well with the financial make-up of eSports fans thereby presenting a great opportunity for event organizers and sponsor brands. Higher rates of renters among eSports enthusiasts is another key alignment for the Denver audience

CAREER AREAS

Top Occupations in Denver

Occupations (top to bottom): Arts, Entertainment & Media; Construction & Architecture; Legal; Office Administration & Support; Hospitality & Food Services; Government; Personal & Consumer Services; Education; Computer & Mathematical; Production & Manufacturing; Health Care; Sales; Business & Finance

Legend: ■ Denver pop ■ US pop

Over-indexing occupations	Denver vs US population
Sports & Recreation	*2x as likely*
Computer & Mathematical	*1.9x as likely*
Science & Engineering	*1.7x as likely*
Agriculture & Natural Resources	*1.6x as likely*
Transportation & Logistics	*1.5x as likely*

Takeaway: The Denver population over-indexes in sports and technology professions when compared to the US population indicating a higher appetite for eSports events that generally attract younger professionals in these career fields

eSports Enthusiasts in Denver

DEMOGRAPHIC OVERVIEW

Compared to the US eSports enthusiasts, the eSports enthusiast in Denver

- Skews slightly younger and is 4% more likely to be in the 18-29 age group
- Has a similar education profile
- Is 11% more likely to have a net worth of $500k+ and 13% more likely to have a home value of $500k+

Compared to the average Denver resident, the eSports enthusiast in Denver

- Is 16% more likely to have a graduate degree
- Is relatively more affluent with higher likelihood of having 150k+ in annual household income
- Is 54% more likely to have children in their household
- Is 6% more likely to be renting their current residence
- Is 26% more likely to be of Asian ethnicity

PERSONAL VALUES

80%
Honesty

77%
Stable Personal Relationships

74%
Freedom

71%
Authenticity

Top Personal Values vs avg. Denver resident

Adventure
Social Responsibility
*Ambition*
Preserving the Environment
Curiosity

24.5%

Frequent Donor

1 in 4 eSports Enthusiasts in Denver is tagged as a frequent donor to charitable causes, 39% more likely compared to the avg. Denver resident

Top Causes supported vs avg Denver resident

Animal causes
Children's causes
Environmental causes

Volunteering

25%   35%   45%   55%   65%

■ eSports Denver ■ eSports US
■ Denver pop ■ US pop
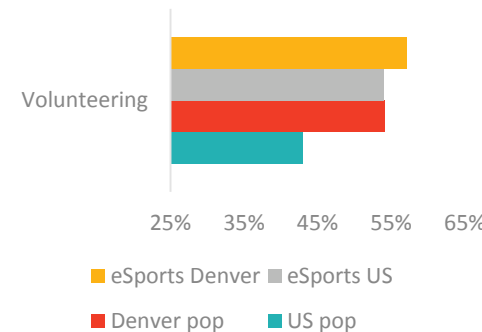
57% of Denver eSports enthusiasts have previously or are actively volunteering, compared to 43% of the US pop and 54% of the Denver pop.

LIFESTYLES INTERESTS


OUTDOOR ENTHUSIASTS

From hiking to mountain biking to running, no matter what they're doing, Outdoor Enthusiasts would rather be doing it outside.

56%
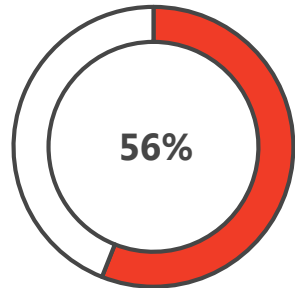
Nearly 6 in 10 eSports Enthusiasts in Denver are tagged as Outdoor Enthusiasts. They are 19% more likely to be outdoor enthusiasts compared to avg Denver population

DIYers

DIYers have likely interests and purchases toward home improvement supplies, tools, auto repair supplies, and landscaping materials. They are self-reliant and enjoy researching products and brands online before buying
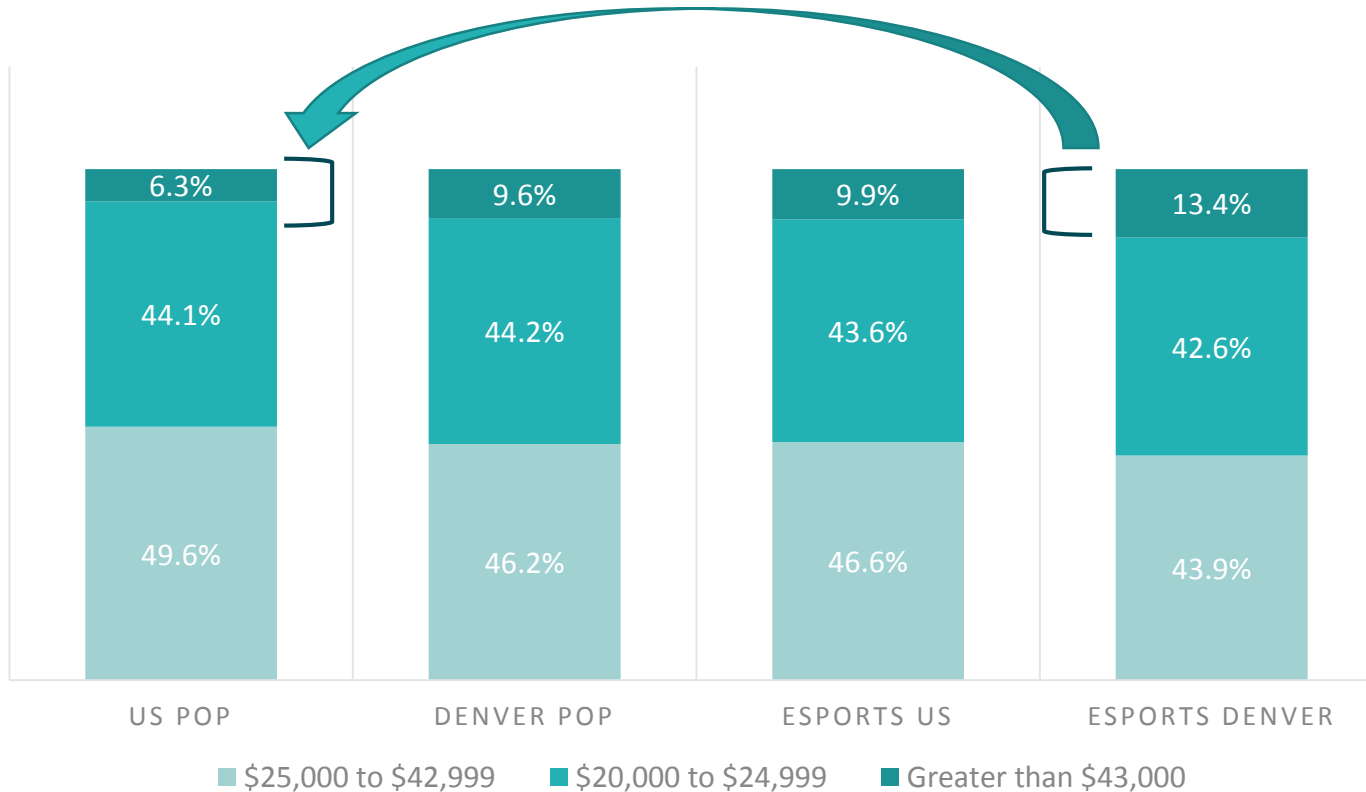
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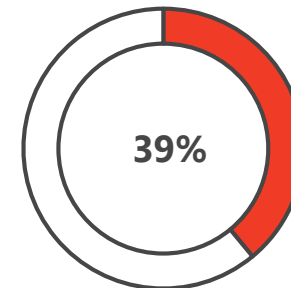
Nearly 4 in 10 eSports Enthusiasts in Denver enjoy the DIY lifestyle, 24% more likely than the avg Denver population to be tagged as such.

TOTAL DISCRETIONARY SPENDING

Over 2x as likely to have $43k+ in discretionary spending compared to avg. US population

	$25,000 to $42,999	$20,000 to $24,999	Greater than $43,000
US POP	49.6%	44.1%	6.3%
DENVER POP	46.2%	44.2%	9.6%
ESPORTS US	46.6%	43.6%	9.9%
ESPORTS DENVER	43.9%	42.6%	13.4%

- eSports Enthusiasts in Denver over-index all benchmarks in having a discretionary annual spend of $3.5k+ on entertainment

- This audience outpaces the general population in having higher avg annual spend in education and dining categories as well

- Compared to the Denver pop., eSports enthusiasts in Denver spend more on apparel and dining while under-index on personal care spending

BRAND AFFINITIES

Automotive

Consumer Technology

Food and Travel

Sports and Entertainment

Consumer Retail

Other

SOURCE – Oracle, Affinity Answers, AnalyticsIQ, Ameribase digital

KEY PERSONAS

Gen Z Gamers

Demos: 18-25 yr old, college-educated, likely graduate degree, renters

Values: Freedom, Authenticity, Social Tolerance, Curiosity

Interests: Fantasy Sports, Cycling, Podcasts, Adventure Travel

Purchases: Career services, Apparel, Electronics/Tech, Travel, Events

Brands: Etsy, AirBnb, Disney, Youtube, Audi, Amazon

Social Media: Facebook, Instagram

Life stages: Career Changers, First-time Homebuyers, College Graduation

Tech-savvy Families

Demos: Middle-aged parents of teens, high-income, high net worth, homeowners

Values: Protecting the Family, Working Hard, Faith, Freedom

Interests: Photo-Sharing, Board Games, Pets, NCAA Sports, Camping

Purchases: Home furnishings, Pet products, Golf equipment, Books

Brands: Whole Foods, Honest Company, Peapod, FitBit, EASports

Social Media: Facebook, Twitter

Life Stages: Prospective college students, Recent empty nesters, Job Seekers

THANK YOU