

CATCHY

2021 Esports Brand Report



February 2021

Introduction

Over the last decade, global esports have seen a meteoric rise in popularity, growing from small-time tournaments at local game stores to sold-out stadiums where teams compete for multi-million dollar prizes. [Since 2018, the global esports audience has grown by more than 25%, reaching over 490 million viewers in 2020. Streaming platforms like Twitch have seen monthly viewership explode, more than doubling over the last two years.](#) 2019 also saw one of the largest individual prizes ever granted for an esports tournament: [\\$3 million by 16 year-old Kyle Giersdorf at the Fortnite World Cup.](#) It's clear that esports has taken the world by storm, shifting from a niche competition to a global phenomenon.

As the landscape continues to change, esports organizations have adapted their approach to the market to meet the demands of the increasingly diverse fan base. In this report, Catchy analyzes the three different types of organizations that have evolved, and talks through the implications this fragmentation has on brands interested in entering the space.

Background

From the outset, esports organizations were built like traditional sports teams, focused on competition, tournament play, and the pedigree of their players. While these types of organizations still exist, technological advances in the ability to monetize and distribute content has opened up massive new opportunities within the ecosystem. In many cases, this change has shifted the focus away from **competition** as the only route to success for esports teams. As we move into 2021, a more considerable emphasis is being put on **community**, or how organizations build, engage, and monetize their audiences.



These two characteristics, competitiveness and community, are the main drivers of how organizations are positioning themselves within the ecosystem. What do they mean from a brand perspective?

Competitiveness:

How important is winning to the organization? Is it the primary mission, or is it secondary to the rest of the organization's activity? Are individuals seen only for the role they play as part of the team, or are their personalities given a place to flourish and thrive on their own?

Community:

Does the organization focus its efforts outside of core competitive teams? Are they focused on building a large following, engaging with them across a broad digital ecosystem, and pursuing multiple revenue streams? Is the strength of individual brands just as strong or stronger than the organization itself?

The Three Types of Esports Brands

By viewing esports organizations through the lens of competitiveness and community, we've segmented the market into three unique types of teams that approach these core concepts differently. From the brand perspective, they are clearly identifiable by their distinctly different approaches to design, content, and messaging:

Legacy:

The pinnacle of competition, these organizations tend to be older and more established in the realm of esports. They focus heavily on their accomplishments and compete in a wide variety of top-tier leagues. The core focus is on competing at the highest level, in the biggest games.

Modern:

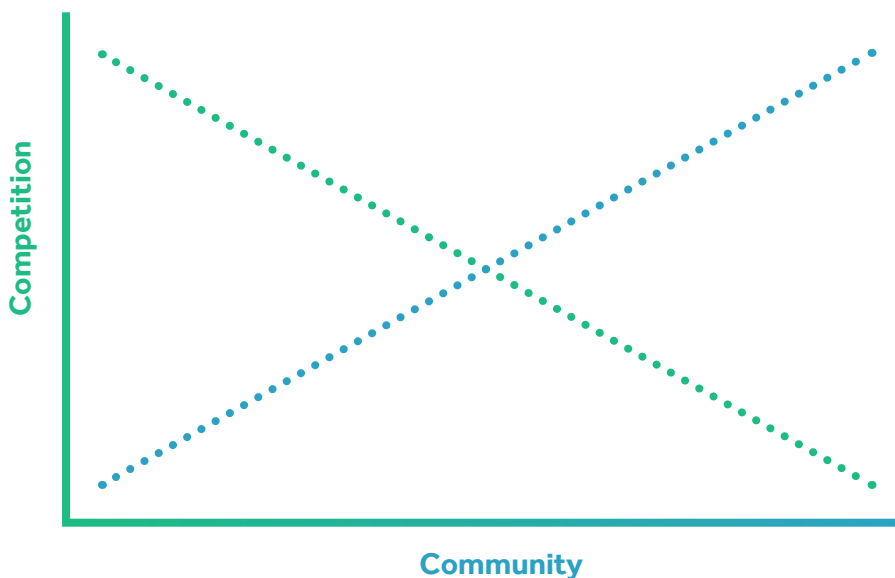
An evolution of Legacy esports organizations, Modern teams still value competitiveness. They tend to be more selective about what big leagues they compete in and are more willing to invest in smaller, up-and-

coming games. They embrace the personalities and individuality of their players and owners, using them as ways to grow the overall clout of the brand. Modern esports organizations are focused on bringing fans into a more extensive content ecosystem that goes far beyond competitive play.

Lifestyle:

Embracing streetwear culture and aesthetic, Lifestyle esports organizations are the most recent evolution in the space. For Lifestyle organizations, the focus has shifted away from mentions of teams, players, and competition on their digital properties. For them, it's all about being part of the lifestyle; You aren't a fan of these teams, you ARE these teams. With an emphasis on merch through exclusive drops, these esports organizations care less about their wins in competition and more about how they connect with their fans to build community.

For each of these types of organizations, we'll look at the design, content, and messaging attributes that make up their approach and what it means for brands interested in partnering with them.



Positioning Matrix

While not mutually exclusive, brands that prioritize community tend to focus less on the importance of competition.

Legacy Esports Organizations

Skewing more towards older and established brands, Legacy organizations rely on their equity in the esports space as powerhouses of competition. These brands define themselves by the competitions that they've won, building digital trophy cases as the focal point of their core values. Legacy esports brands don't spend time with fluff, but get straight to the point in their goal: to win. These teams are the pinnacle of competitiveness, with community as a secondary note on who they are.

Design Approach

Brand logos for Legacy organizations take on a similar note to traditional sports teams, especially soccer. Taking the form of a team crest, these logos fit nicely on the breast of a jersey, blurring the lines between esports and traditional sports. Merchandise mirrors this aesthetic, which doesn't stray far from how a traditional sports team operates. Clothing design emphasizes the logo, with little movement into more contemporary aesthetics.

Digital Touchpoints

Digital touchpoints are a secondary experience for these brands, as competitions are where they drive their real brand value. Team sites tend to be fairly lean on content, instead choosing to focus on partnership information, upcoming tournaments, results, and team updates. News takes the form of a standard press release and is typically straightforward writing with little flair or attitude.

Messaging

Messaging takes a similar form, where competition and team accomplishments take the forefront. When talking about themselves through a mission statement, a Legacy organization's content is typically focused on their wins.



For example, OG Esports wants you to know they were the first team to win the Dota 2 majors, and the only team to have won the Dota 2 World Championships twice.

This tone-of-voice flows into how these organizations talk about their players. Rather than highlighting the individual, Legacy organizations focus on the player's role in the greater team and how they will contribute to future success.

Partnership Recommendation

Legacy esports organizations are a great partner for endemic (gaming-related) brands or those looking to reach hardcore gamers and esports fans. However, their focus on competition may alienate a larger part of the broader gaming audience.

Acer's top-of-the-line gaming brand Predator is a great example of an endemic that has found the perfect fit with legacy organization Team Envy. The two brands work together to build content focused on high level esports coaching as part of the Training Room program.





Modern Esports Organizations

While still leaning into competitiveness, Modern esports organizations take a much broader approach to esports. These organizations have focused on balancing their competitive teams with a broad ecosystem of digital properties and individual influencers. Championships are not their only defining feature. Instead they've embraced the new world of digital media and culture as a tool for engaging directly with their fans.

Design Approach

Unlike Legacy organizations, Modern teams don't tie their logo design to a crest, but rather give themselves room to explore outside of the traditional athletic aesthetic. While not necessarily on the cutting edge of design, these teams give more freedom to the way they build their logos, similar to the traditionalist look and feel of professional soccer teams compared to the ever-changing design of NFL team branding. Merchandise also

pushes outside the bounds of a traditional sports organization as modern teams start to explore more contemporary streetwear style trends and aesthetics.

Digital Touchpoints

Digital touchpoints take a more prominent role for Modern brands as well. Rather than just focusing on upcoming tournaments, team information, and news, these brands use their websites as content hubs and fan engagement tools, providing content that's both inviting and engaging to their audience. Rather than using press releases, Modern player introductions incorporate video and a more fun and approachable tone of voice.



Messaging

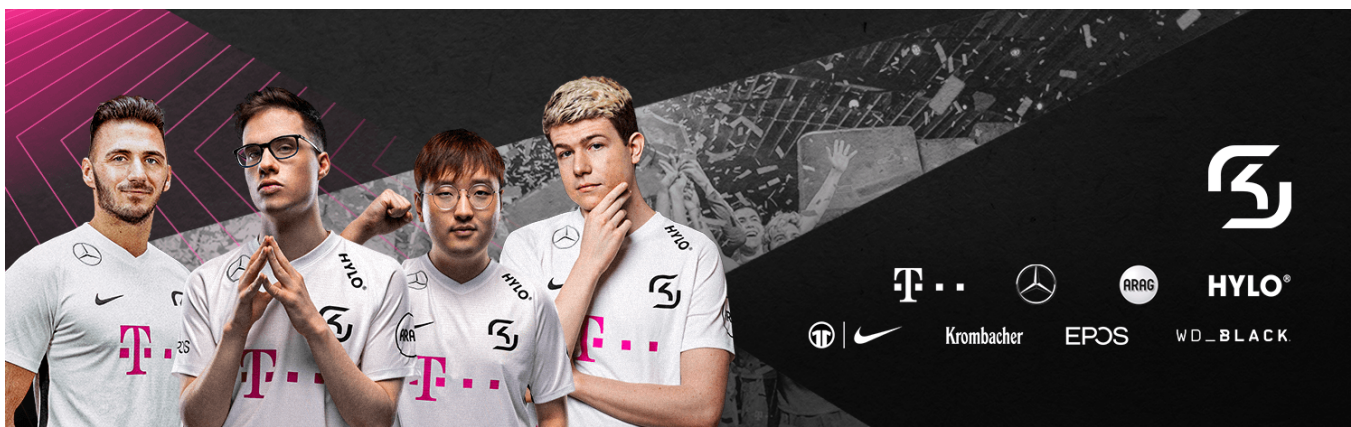
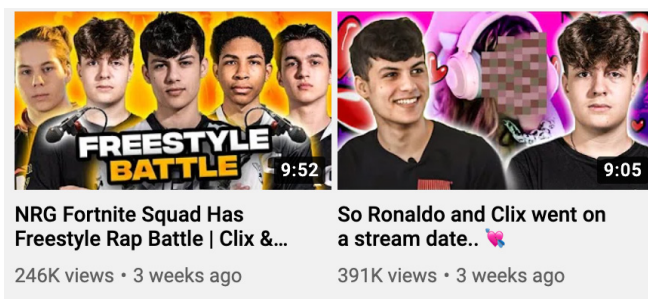
The messaging approach for Modern organizations is much more engaging than what we see with their Legacy counterparts. Fully embracing the new digital platforms that have gripped the gaming community, these teams promote their individual members' Twitch channels and social accounts, treating them as an extension of the brand as a whole. They also create more behind-the-scenes content that lets you get to know the players on a personal level, rather than just focusing on their competitive play and the role they take as part of the larger team.

Modern teams don't call out specific wins, titles they hold, or specifics in esports competitions. Instead, they focus on building a great group of individuals who come together to both win and entertain their audiences.

With Modern organizations, competitiveness is still important, but engaging with their fans takes an equal footing. This approach brings a new level of community to esports that doesn't exist in the Legacy era. Modern teams are pulling back the curtains of a championship team and bringing their fans into the fold.

Partnership Recommendation

Modern esports organizations are the perfect hybrid for endemic and non-endemic brands, allowing partners to reach hardcore gamers and a more general audience across a number of touchpoints. For example, the NRG Esports portfolio of partners includes endemic brands such as Legion and Turtle Beach, while also extending outside of gaming with brands like T-Mobile and Mountain Dew.





Lifestyle Esports Organizations

The latest evolution of esports branding comes to us in the form of Lifestyle organizations. With these brands, competition takes a backseat while entertainment and aesthetics take the lead. Lifestyle brands push away any semblance of traditional sports, and instead make a hard push into brand and community building by bringing their fans directly into the fold. You aren't a fan of FaZe Clan or Fnatic, you're a part of the team

Design Approach

From a design perspective, Lifestyle brands don't align with other esports or traditional sports organizations. Instead, they focus on the aesthetics of streetwear culture. The same goes for merchandise. With an emphasis on drops and exclusive items, you'd be hard pressed to find a shirt that's simply just a logo for these brands. Instead, they're constantly creating and releasing new gear for their fans, keeping them engaged and feeling like a part of something bigger.

Lifestyle organizations have found a unique way to build powerhouse esports brands. They don't have to win tournaments to be popular, they just have to win fans.

Digital Touchpoints

The Lifestyle move toward aesthetics comes to life on their digital touchpoints. Social media tends to be the main channel for communicating with fans, while official websites are a storefront first and a brand site second. Merchandise and partnerships take the spotlight over players, tournament results, and news. Player information is few and far between. Rosters are generally limited to just player name and individual social links (Fnatic) or the brands don't list their players at all on the main sites (FaZe Clan).



Messaging

Lifestyle teams also take a less esports-forward approach to messaging, placing a heavy emphasis on general gaming and entertainment, as instead of competition and results. Lifestyle brands value engaging with their audience above all else. That's clear in how they promote their team members, push the focus onto merchandise, and bring their audiences into the fold.

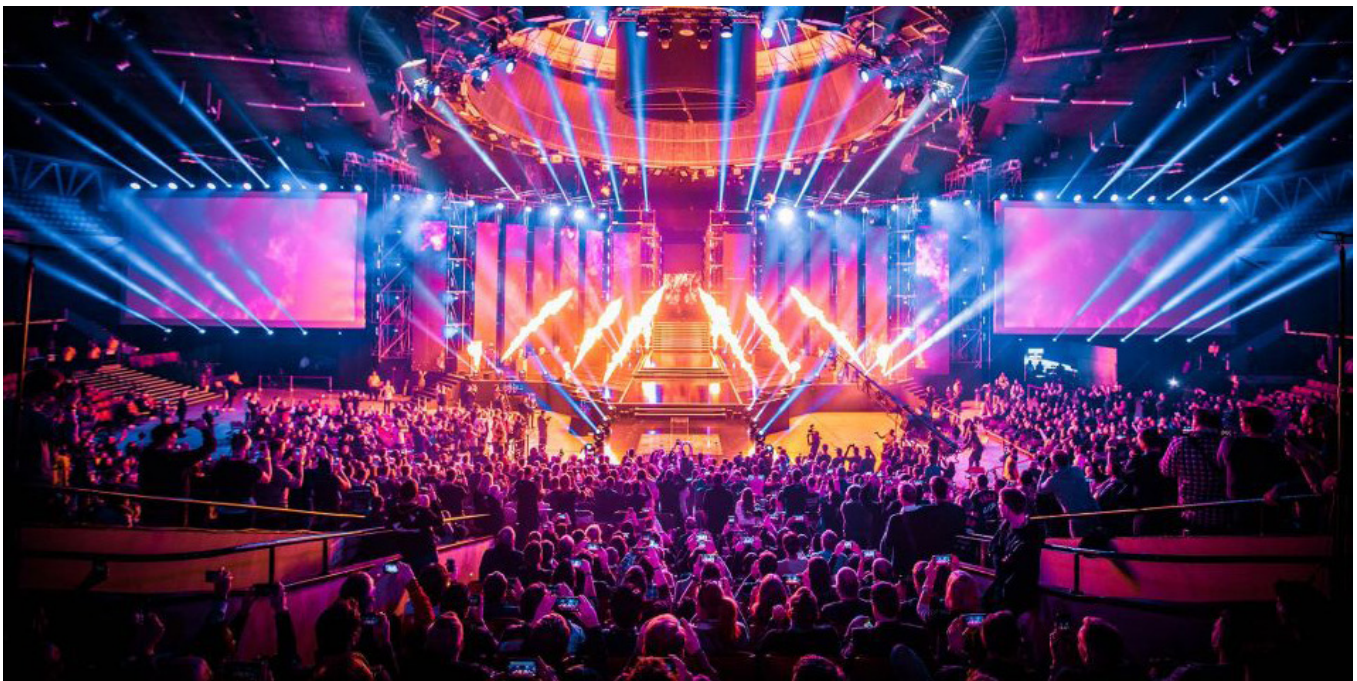
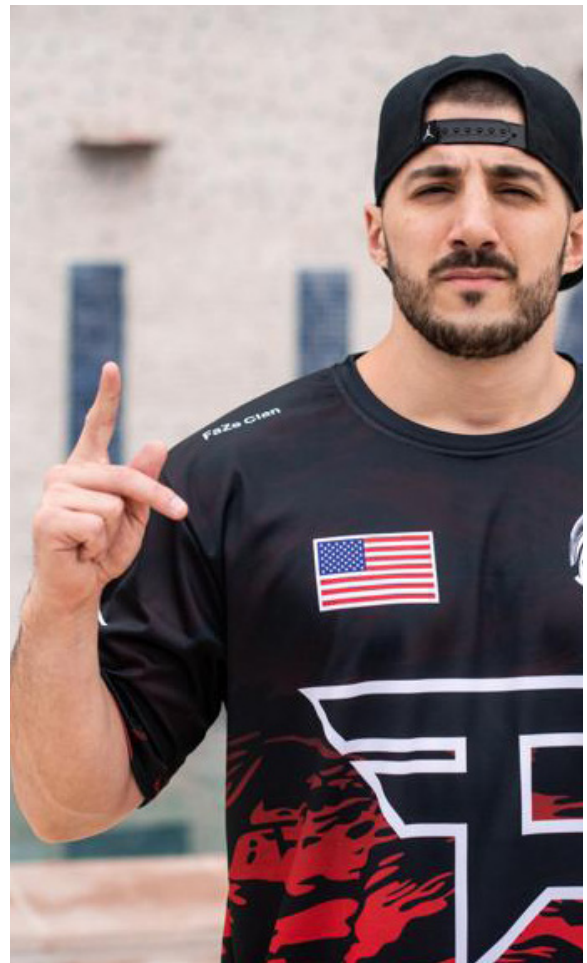
Partnership Recommendation

Lifestyle esports organizations are a great entry point for non-endemic brands that are looking to reach a broader gaming and entertainment audience. They offer unparalleled cultural relevance and have a broad network of personalities and influencers. Organizations like Fnatic utilize their cultural relevance to help brands like Gucci and BMW authentically reach a younger generation of consumers in a new space.

Conclusion

More than ever, the rapidly changing landscape of digital technology has changed the definition of what an esports team can be. With an ever-increasing amount of content for fans to consume, creating content that continues to engage audiences is just as, if not more important, than winning a championship. Like G2, we'll continue to see brands shift out of the sphere of Legacy organizations and into that of Modern brands. At the same time, we'll continue to see Modern brands embrace the aesthetics of streetwear culture that is popular with their audience, especially in their merchandise and apparel.

As the esports market continues to grow and fragment, there are more unique opportunities for brands to enter the space than ever before. By better understanding the types of organizations that exist in the market, brands can better align themselves to the ones that match their objectives and target audiences.



CATCHY

About Us

Catchy is the leading developer marketing agency with over ten years experience bringing the biggest names in tech to market. As gaming has become an increasingly large part of our clients' ecosystems over the past decade, we've committed to growing with them by acquiring Convoke in January 2021. The gaming and esports agency brings their integrated marketing experience across Xbox, Forza, Predator, US Air Force and the United States Esports Association to the Catchy portfolio of services.

Our Services

Marketing Audit

Marketing program review and audit

Go To Market

Value Proposition
Messaging
Audience
Channel

User Experience

Customer journey mapping and experience

Content

Content strategy
Creation of technical marketing content
Distribution

Acquisition

Campaign creative and execution
Media buying and management

Social Media

Social strategy
Management of social channels

Influencer marketing

Strategy and design
Influencer sourcing and selection
Program management

Events management

Event strategy and selection

Go-To-Market Consulting

Research
Planning
Strategy

Content & Creative

Branding
Design
Video Production
Content Creation

Digital Marketing

Paid Social
SEM
Display
Ecommerce
Analytics

Community Management

Editorial
Customer Care
Social Management
Influencer Marketing

Development and Deployment

CMS
Apps
Email
Websites

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Thank you.

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