



STREAM™
HATCHET

STATE OF COLLEGIATE ESPORTS

FRACTURED SECTOR WITH OPPORTUNITY

LIVE STREAMING // INTELLIGENCE PROPOSAL



COLLEGIATE ESPORTS ECOSYSTEM

STATE OF COLLEGIATE ESPORTS

5.4M COLLEGIATE ESPORTS HOURS
WATCHED SINCE 2018

- The room for growth and creativity are limitless
- Increased interest and wider adoption have led to various universities supporting both varsity and club programs.
- Organizers, publishers, and university programs are working to bring the community together under a unified structure

PROGRAMS



ORGANIZERS



PlayVS



PUBLISHERS



ESPORTS: INDUSTRY VS COLLEGIATE

FRAGMENTED SECTOR

INDUSTRY ECOSYSTEM

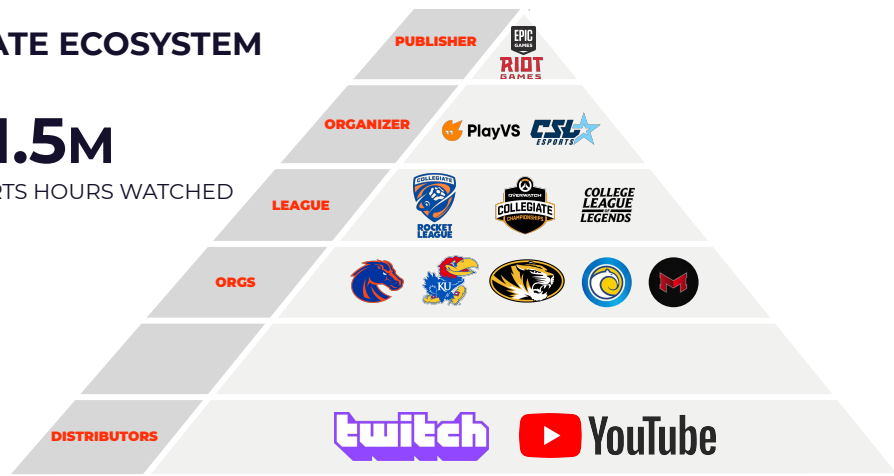
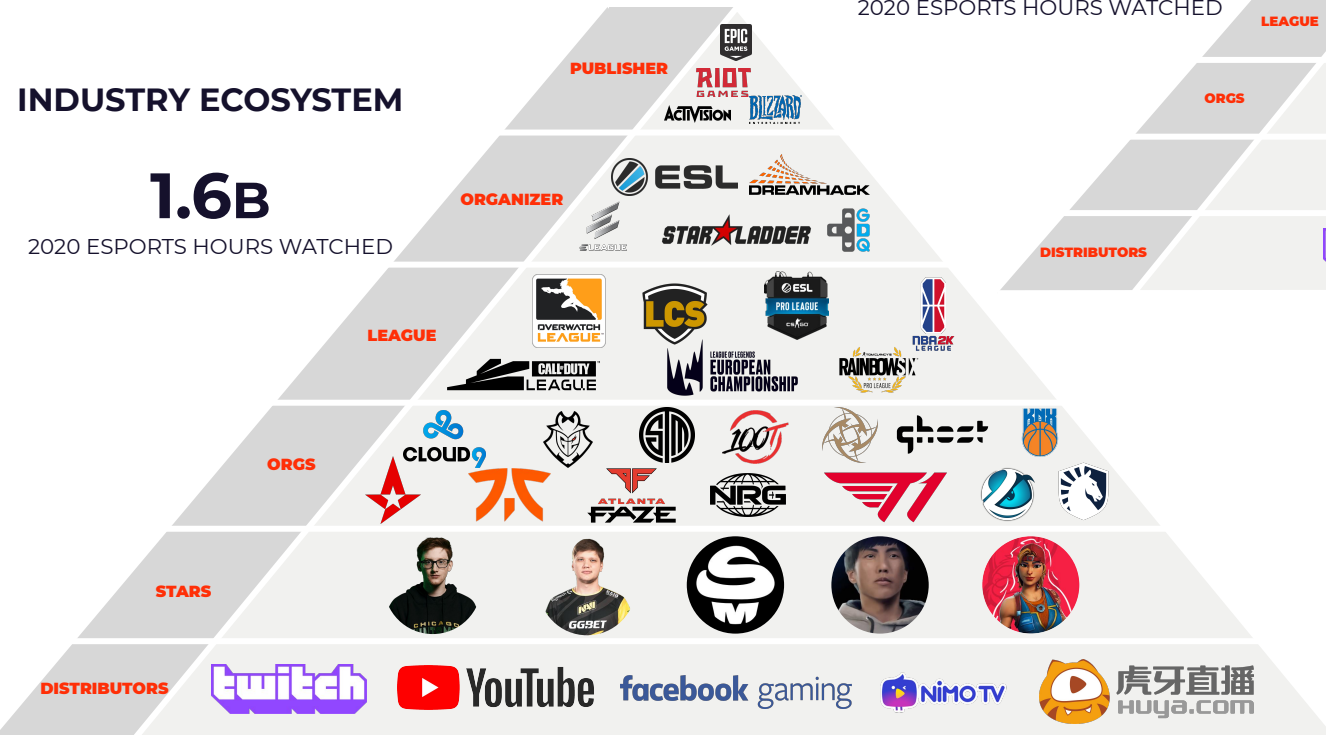
1.6B

2020 ESPORTS HOURS WATCHED

COLLEGIATE ECOSYSTEM

1.5M

2020 ESPORTS HOURS WATCHED





19.1K HOURS WATCHED

1.2K PEAK VIEWERS



196.4K

11.3K

VIEWERSHIP GROWTH OPPORTUNITIES



35M

SUMMER SEASON HOURS WATCHED

552k

SUMMER SEASON PEAK VIEWERS

COLLEGIATE ESPORTS PROGRAMS

STRUCTURE AND REGULATION

Companies like **PlayVS** and **CSL** have created structure for collegiate esports and set the groundwork for programs.

- Both varsity and club university programs compete as partnered schools
- Some publishers also play a role in structuring collegiate programs for their own IP

Riot Games created the Riot Scholastic Association of America to handle their owned collegiate properties

- Growth potential is extremely high with the increased interest & awareness of the industry



COLLEGIATE ESPORTS VIEWERSHIP 2020

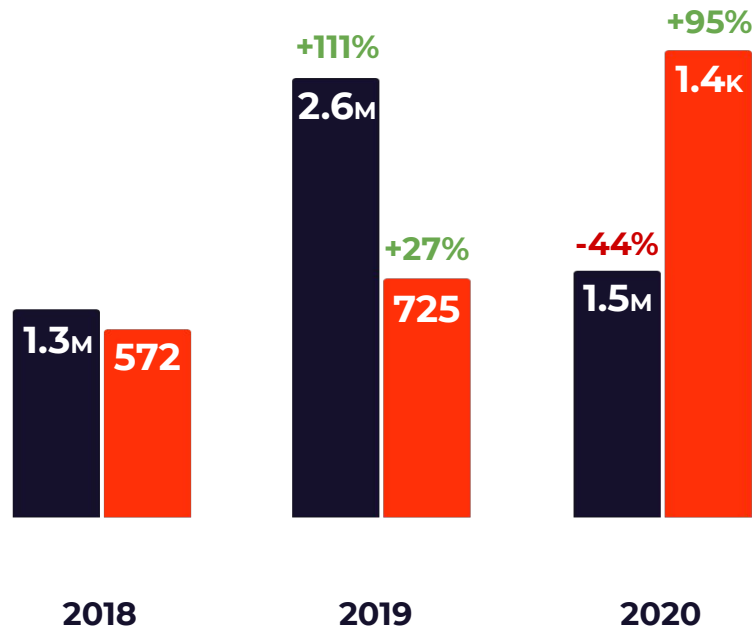
EVENTS AND GROWTH

Still behind its professional counterpart, collegiate events provide sizeable live stream viewership.

- Collegiate esports suffered during a pandemic riddled year with school closures
- Top tournaments provide an opportunity for players to showcase talents
- Events serve as a conduit for brands to reach their target audience through sponsorship
- Increased funding, programs, and events will likely drive collegiate esports viewership to new highs

COLLEGIATE ESPORTS VIEWERSHIP TOTAL HOURS WATCHED 2018 - 2020

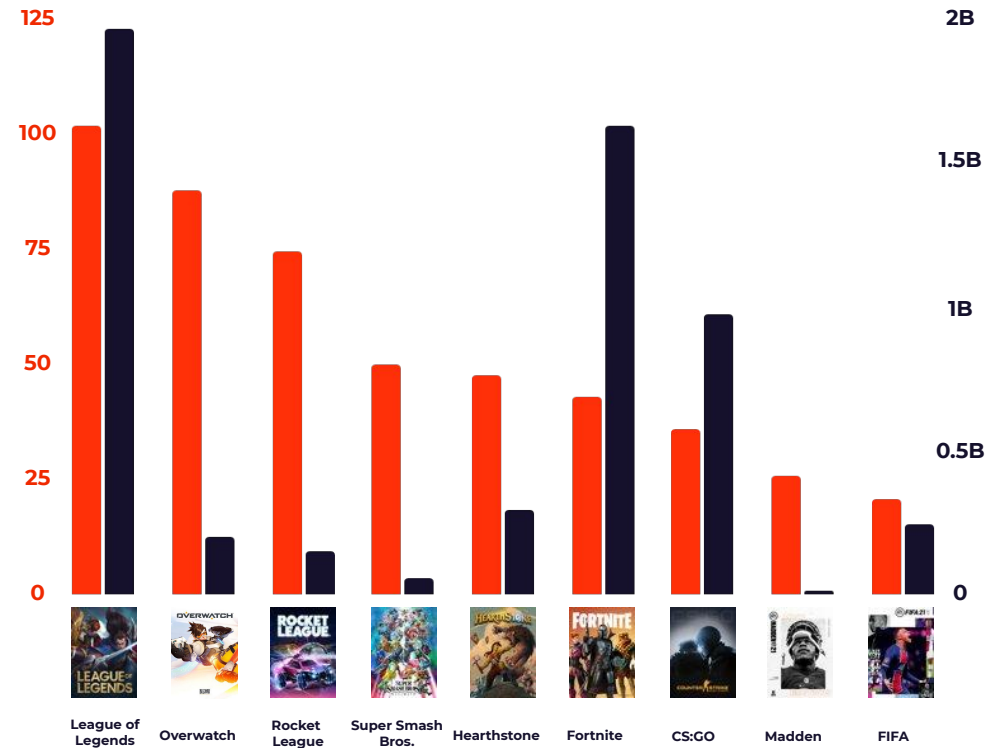
■ COLLEGIATE EVENT HOURS WATCHED ■ COLLEGIATE EVENT STREAMS



POPULAR ESPORTS TITLES

PROGRAM DATA FROM 136 SAMPLED PROGRAMS / CLUBS

■ NUMBER OF PROGRAMS ■ 2020 GAME HOURS WATCHED



LEVERAGING INTEREST OF STUDENTS

RECREATIONAL VS. COMPETITIVE

Universities are faced with a decision: create a program led by student interest or push towards forming competitive rosters.

- Allow students to explore games they like, even if they're not popular competitively
- A more recreational approach fostering a community first
- Focus on building the best rosters possible with a more competitive atmosphere
- Universities may test the water with a recreational approach before diving into the competitive scene



PROGRAM CHALLENGES

2021 AND BEYOND

The esports industry is still in its infancy - many are still trying to optimize their content and programs

- No historical benchmarking to compare strategies
- Heavy recruitment barrier connecting high school students to universities
- Programs need to stop selling the pipeline dream of a job in esports
- Teaching actionable skills within business, computer science, etc. will be more beneficial

2020 VIEWERSHIP OF STRONG COLLEGIATE PROGRAMS:



Boise State University

310,980

HOURS WATCHED

9,110

PEAK VIEWERS



Maryville University

4,029

HOURS WATCHED

190

PEAK VIEWERS



UC Irvine

1,576

HOURS WATCHED

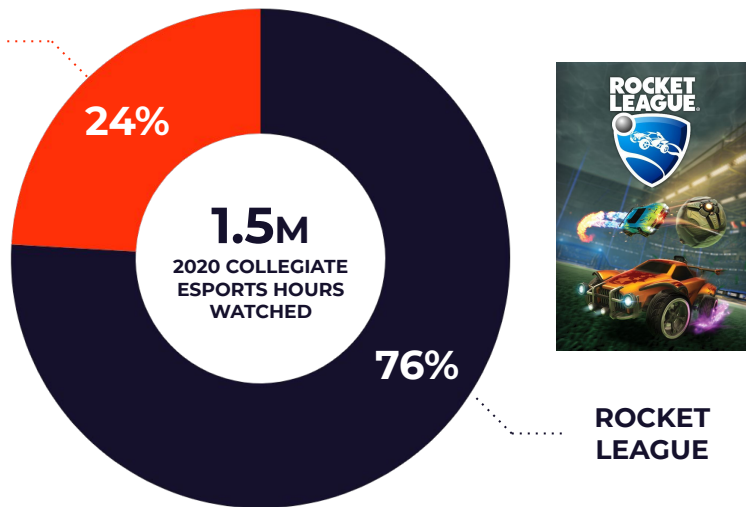
123

PEAK VIEWERS



2020 COLLEGIATE ESPORTS VIEWERSHIP:

OTHER
GAMES



Rocket League hosts events on their official Rocket League Twitch channel

99%

of all collegiate Rocket League viewership

OPPORTUNITIES

2021 AND BEYOND

- Mass adoption of gaming in pop culture and media
 - Leads to larger target audience and growth of programs
- Chance to attract quality students and tie esports programs to academics
- Esports events offers entertainment, sponsorships, and increased revenue for the universities
- Engrained with one of the fastest growing industries in the world today



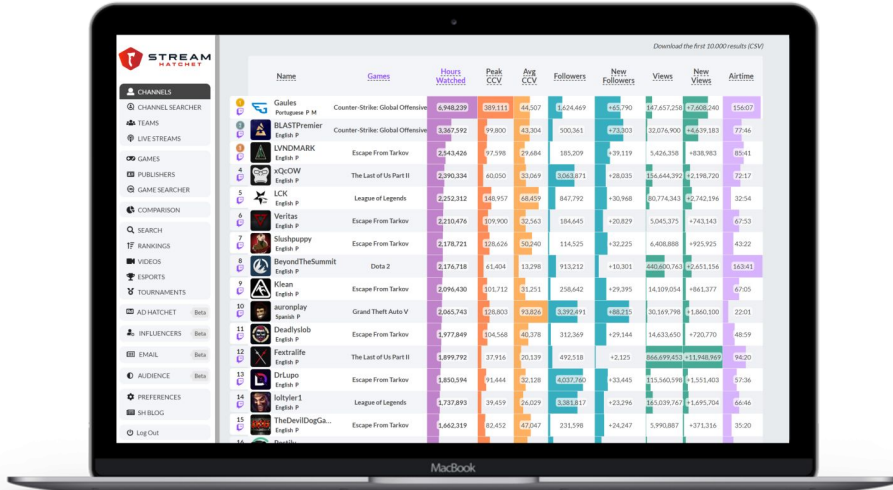


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PROFESSIONAL BUSINESS INTELLIGENCE SOLUTIONS

INDUSTRY LEADING DATA ANALYTICS PLATFORM & REPORTING AGENCY



FAST, INSIGHTFUL DATA AT YOUR FINGERTIPS

Browse millions of streaming channels around the world to discover influencers, report on campaigns and benchmark against competitors.

A GREATER DEPTH OF DETAIL

Measure the ebbs and flow of an audience at a minute level granularity. Optimize content by understanding the full context of a livestream.

CONTEXT IS KING

Reference both past and real-time data to make the most informed decisions. Compare and contrast metrics, time frames, and results all in one product.

SET UP A CONSULTATION TODAY

