

A qualitative study exploring the perceptions of South African esports consumers towards non-endemic brands advertising through esports

Submitted on behalf of the faculty of Research in partial fulfilment of the requirements for graduation from The Independent Institute of Education with the degree of Bachelor of Arts Honours in Strategic Brand Communication

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I hereby declare that the Research Report submitted for the degree in Bachelor of Arts Honours to The Independent Institute of Education is my own work and has not previously been submitted to another University or Higher Education Institution for degree purposes.

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Abstract

Esports is a massive global phenomenon with an inexorable interest in the market itself, from both a consumer, and a brand perspective. An industry that was once dominated by endemic brands is now open for all brands to use as a means of brand extension. However, the evolution of esports demonstrates how endemic brands are more apt to being accepted by gamers on account of their specific product offerings and habitual presence in the esports scene. Non-endemic brands in particular need more than basic esports knowledge to enter the complex esports industry. The objective of this study is to explore the influence of esports advertising on the brand equity of non-endemic brands, by considering brand awareness and brand associations as mediators. This study is qualitative in nature, hence the interpretivist approach that was adopted for analysis purposes. A total of 4 in-depth voice call interviews were conducted over Zoom. Interpretation of the findings suggested that esports consumers do not foster any negative perceptions towards the involvement of non-endemic brands in the industry. Additionally, findings showed that social media advertising and player sponsorship are the best ways for non-endemic brands to enhance their brand extension through the burgeoning esports industry.

Keywords: Esports, esports consumer, consumer perception, brand equity, endemic brand, non-endemic brand, advertising.

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Table of Contents

Introduction	6
Contextualisation	6
Rationale	7
Problem Statement.....	9
Purpose Statement.....	10
Research Questions	11
Research Objectives	11
Literature Review	11
Conceptualisation	11
Theoretical Foundation.....	13
Review of Related Literature	17
Research Methodology	22
Worldview	22
Research Design	24
Population and Sampling Method.....	24
Data Collection Method	26
Data Analysis Technique.....	27
Research Findings	31
Presentation and Interpretation of Findings.....	31
Conclusion.....	38
Discussion	38
Implications of Findings for Future Practices	40
Ethical Implications.....	41
Limitations	42
References	44

Appendices	49
Appendix A: Consent Form	49
Appendix B: Survey Instrument.....	50
Appendix C: Ethical Clearance Letter.....	51
Appendix D: Final Research Report Summary Document Table	52

List of Figures

<i>Figure 1. The Brand Equity model.....</i>	<i>13</i>
<i>Figure 2. Evolution of Esports Branding.....</i>	<i>17</i>

Introduction

Contextualisation

Over time, conventional video gaming has progressed towards becoming one of the most popular recreational activities of our contemporary era. The general playing of video games has also recently transformed into that of a professional vocation known as electronic sports, commonly referred to as 'esports' (Bányai, Griffiths, Király & Demetrovics, 2019).

The esports phenomenon refers to a non-traditional model of sport that is organised into various video game competitions (Gawrysiak, Burton, Jenny & Williams, 2020). To elaborate, the esports model is reliant on a purely online environment, unlike traditional models, whereby the sport itself is dependent on the physical presence of both the athletes and the sales of tickets (Ahmed, 2020).

On the other hand, the two models present the following similarities: the players maintain a central role, and also, both industries are reliant on powerful endorsements from various cultural icons and investors. More specifically, this type of involvement refers to the leveraging of established esports events, as well as professional gaming teams and renowned leagues, through specific media outlets that are used for advertising means. In this context, involvement in the esports arena is divided into two distinct categories: endemic brands, and non-endemic brands (Gawrysiak *et al.*, 2020).

An endemic brand describes a company that has either naturally integrated into the gaming ecosystem, or is simply native to the esports scene. The term traditionally refers to gaming equipment such as the technology, software, and publishing services and products that are typically involved in gaming and esports (Esports Insider, 2020). With certain exceptions, for instance, food snacks and energy drinks, as they are similarly deeply ingrained in the gaming experience (Annasilvia, Daniel & Emeline, 2018). In other words, an endemic brand pertains to any nascent brand that naturally comes to mind when thinking of the gaming and esports experience.

Aligned with this notion, a non-endemic brand covers all brands that are not included under the endemic umbrella. Brands that do not naturally come to mind when thinking of esports (Esports Insider, 2020), as they are not hardware manufacturers, game developers, game publishers (Allenstein, Gediehn, Lehmann & Singer, 2020), or simply attached to the gaming experience in any way.

Ensuing from the impressive evolution of the esports industry, companies have realised how the industry itself represents that of a fertile ground, with which they are able to utilise as an effective opportunity to both enhance their brands efficiency, as well as extend the reach of their brand (Gawrysiak *et al.*, 2020).

However, the esports industry has a complex ecosystem. Brands are seeking a trusted third party to provide guidance and help navigate them in this burgeoning, yet unfamiliar context. Likewise, the esports industry is similarly looking for advertising professionals to attract more sponsors and grow the industry even further (Wootton, 2020).

Rationale

More recently, it has become apparent that the esports industry is not simply a hype, but rather a global phenomenon with an inexorable presence. Considering the recent outbreak of the COVID-19 pandemic, not only did the popularity surrounding esports endure the crisis, it grew exponentially (Allenstein *et al.* 2020).

In terms of viewership and revenue, esports has surpassed many traditional sports. In 2020, the esports audience reached close to 500 million enthusiasts and occasional viewers (Allenstein *et al.* 2020).

Correspondingly, esports has secured a substantial market size. On a global scale, the industry was predicted to accumulate approximately \$1.1 billion in 2020, after having accumulated \$950 million in revenue in 2019, with an impressive 58% of that revenue having been attained solely from sponsorship and advertising means within the market (Allenstein *et al.* 2020).

The general consensus surrounding the involvement of brands in esports is that an endemic brand will stand out more than that of non-endemic one (Allenstein *et al.* 2020).

Contrary to this misconception, conventional gaming is now characterised by extensive branding opportunities that are not limited to only endemic brands (Gawrysiak *et al.*, 2020). In fact, there has been an influx in the presence of non-endemic brands (McCarthy, 2020), the industry has attracted new sponsors to the point that non-endemic brands actually exceed endemic ones (Johan Cruyff Institute, 2020).

Sponsorship remains the one of the key sources of revenue that both contributes to, and acts as an enabler of, the overall success of the industry itself (Gawrysiak *et al.*, 2020). The global esports economy is thus extremely dependant on sponsorship. Wootton (2020) suggests that when one has a dependency to this extent, one is in a weak position. In this regard, esports and gaming is grossly undervalued (Zapp, 2020).

The esports landscape essentially represents a highly influential consumer base with attractive interactive environments. In this context, gamers seemingly fit an ideal consumer profile, in that they engage in attractive online platforms that are widely watched, essentially introducing a massive target market with tremendous purchasing power (Zapp, 2020).

Aligned with this notion, one can surmise that the esports target market has extensive disposable income. This assumption is derived from the fact that the games themselves, along with their systems and subscriptions are relatively pricey. The young adult gamers are therefore an ideal target market for brands wanting to approach the esports audience, as they are already accustomed to purchasing products online and have greater incentive to do so (Zapp, 2020).

Henceforth, a brand wanting to get involved in esports sponsorship is simple. A brand can send out a proposal and will receive back an absurd amount of responses. The difficulty lies with the complexities of the esports ecosystem, presenting a myriad of events and tournaments that puts brands in a challenging position, in terms of determining how to enter the market and how to make the winning choices (Wootton, 2020). In this regard, brands are forced to simply guess which option to go with.

Brands need to acquire esports knowledge that is supported by a comprehensive analysis of current esports trends and developments (Allenstein *et al.* 2020). In doing so, having knowledge on the esports market can actually assist brands in understanding the esports audience better. Considering the sheer dependability that the esports industry has on sponsorships, the industry itself presents an opportunity to create brand mindfulness amongst the extensive esports audiences (Neema, 2020).

Esports therefore represents an agile industry, with interesting marketing channels that brands can utilise, specifically through understanding the target market, as well as the use of innovative sponsorship and advertising positioning (Allenstein *et al.* 2020).

Problem Statement

The problem begins with the general lack of empirical journal articles on South African competitive and amateur computer gaming (De Coning, 2018). Unlike most traditional sports, the esports industry presents that of a volatile one, with new teams, streamers and games emerging at an exceedingly rapid pace (Allenstein *et al.* 2020).

For brands to stay ahead in the esports scene and remain up to date with the constant gaming developments, more than just basic esports knowledge is required. It is imperative for brands to identify new emerging trends in esports and ensure that the right language is used when communicating with esports audiences (Allenstein *et al.* 2020).

However, esports consumers typically display an inherently strong sense of community, along with a firm grasp of the esports industry, essentially making communication with esports audiences somewhat challenging for brands that do not fully understand the industry itself (Nichols, 2017).

Authenticity is crucial in the gaming environment. Prominent placement is worthless if the sponsorship either is not credible, or does not convey a genuine interest in the esports world. Authenticity refers to having an activation strategy. For example, partaking in a game-related giveaway, sponsoring an MVP (most valued player) award, or even using game specific analytics for the purpose of media advertising (Allenstein *et al.* 2020).

According to a list compiled by Wootton (2020), non-endemic brands have been observed to frequently make singular attempts at getting involved in the esports scene, while the endemic brands commonly have a pattern of repeated business in the field. Given their outsider status, many non-endemic brands feel that they have to work harder to create a connection with esports audiences (Hultgren, 2020).

The esports landscape seemingly has a coveted audience, yet at the same time, the viewers and participants themselves expect authentic engagement from brands, creating hurdles when attempting to first approach the industry (Wootton, 2020). Henceforth, brands that are hesitant to get involved in esports is usually on account of their fragmented and misunderstood perception of the ecosystem itself (McCarthy, 2020)

Purpose Statement

The research aims to determine the most effective forms of advertising that would enable non-endemic brands to reap the benefits that esports has to offer. The research aims to investigate this by exploring the perceptions of esports consumers towards brand involvement in esports.

Firstly, the research intends on formulating an understanding of the esports audience, and its ecosystem, within the context of South Africa. Then, the research aims to align particular elements found within the theoretical framework that underlies this study, with perceptions that are commonly shared by members of the esports community. More specifically, the objective is essentially to generate useful esports consumer insight based on the consumer perceptions regarding the involvement of endemic and non-endemic brands in the field.

This study specifically pertains to non-endemic brands that demonstrate a clear willingness and desire to understand the esports market and its audience. That which is relevant to the complex practices surrounding esports can be used to formulate new knowledge surrounding the practice itself, and avail non-endemic brands both in understanding the best approach when entering the esports scene, as well as how to communicate with the esports audience in South Africa.

Primary Research Question

What is the most effective form of esports advertising for non-endemic brands to get involved with?

Sub-Questions

1. What is an esports consumer?
2. How does the esports ecosystem function in South Africa?
3. What are the perceptions of esports consumers towards non-endemic brands that are involved in the context of esports?
4. What advertising options are offered through esports?

Objectives

1. Identify the esports audience in South Africa.
2. Gain an understanding of the esports ecosystem.
3. Reveal how South African esports consumers perceive non-endemic brands involved in esports.
4. Determine the most effective forms of esports advertising for non-endemic brands.

Literature Review

Conceptualisation

Esports

Emerging from the general playing of video games, 'esports' is an abbreviation for electronic sports. What began as simply a source of leisure and entertainment, is now a professional activity (Bányai *et al.*, 2019).

The professional arena of competitive gaming is comprised of massive online platforms which essentially collaborates millions of players engaging simultaneously in a multiplayer environment, typically playing against other online players, or non-player enemies (Gawrysiak *et al.*, 2020).

The esports phenomenon will be operationalised by exploring the key actors within the esports industry, namely: the game publishers, clubs and teams, streaming platforms, event organisers, and the sponsors (Annasilvia *et al.*, 2018).

Esports Consumer

The players are also the key actors within esports, as they are the ones using gaming as a professional vocation, analysing the games and training on a daily basis. Annasilvia *et al.* (2018) provide a classification of esports consumers as consisting of the following categories:

- Professional gamers;
- Semi-professional gamers;
- Non- professionals, or amateur gamers.

Considering the aforementioned varying classifications, the research will operationalise this particular concept by investigating what essentially defines an esports consumer.

Non-Endemic Brand

A non-endemic brand in the context of esports describes a company that is in no way associated with the esports experience, and is not a necessity for esports gaming to take place (Gawrysiak *et al.*, 2020). In other words, a brand that does not produce the hardware or software used for gaming, and does not contribute to the gaming experience in any way.

The research will operationalise this concept by inquiring from esports consumers about the distinction between the term's endemic and non-endemic.

Brand Awareness

Familiarity and liking can lead to an increase in brand awareness. Typically resulting from a positive attitude that is formed by the consumer, transferred onto the brand itself and thereafter being spread by word of mouth (Aaker, 1991).

Brand awareness will be operationalised by exploring how esports consumers perceive the presence of non-endemic brands that are involved in esports.

Brand Association

One of the indicators that can be used to measure brand associations specifically looks at the extent that a consumer is able to retrieve a particular brand name from

their memory, specifically from the perspective of the extended associations that are attached to the brand itself (Aaker, 1991).

Brand association will be operationalised by exploring which brands that are/were involved in the esports scene, that the consumer was previously exposed to and is able to recall.

Theoretical Foundation

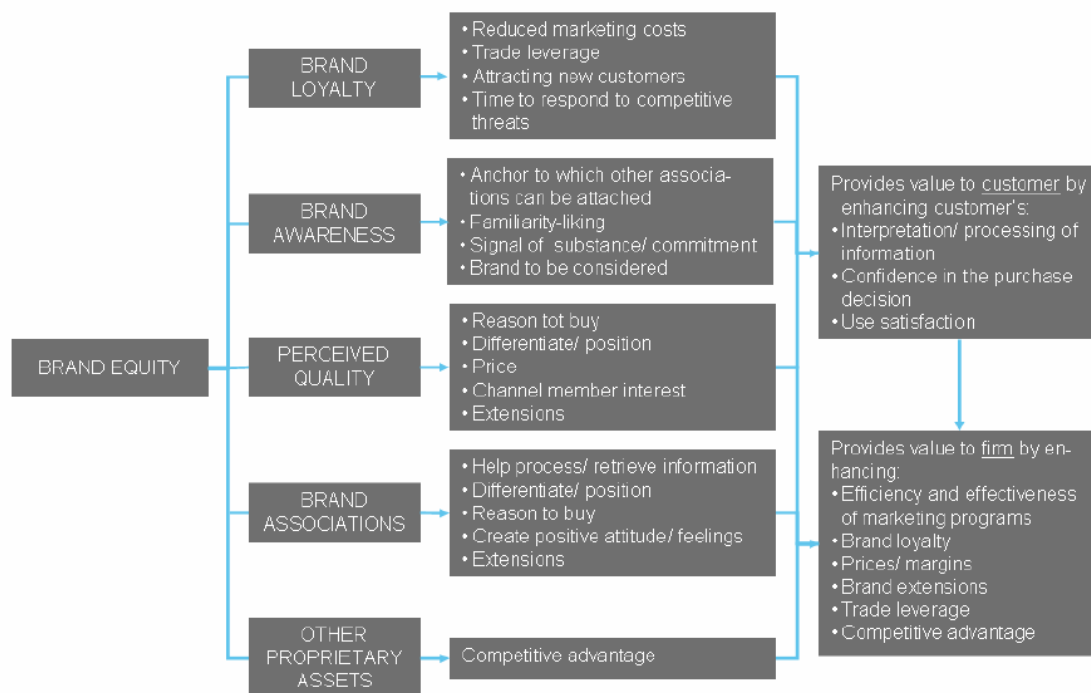


Figure 1: The Brand Equity Model (Aaker, 1993: 1)

Brand equity is defined by the set of assets and liabilities that are linked to the brand itself, for instance, pertaining to the brand name and symbols. The latter, either add value to, or subtract value from the brand and the product or service being offered (Aaker, 1991).

David Aaker's carefully crafted Brand Equity model presents a conceptual approach to the building and evaluation of brand equity, specifically by looking at five key brand equity components; and the relation that these have with the future performance of the brand itself (Aaker, 1991).

Despite the model itself lacking in a clear distinction between whether the value is being added to the brand/company, or the consumer (Aaker, 1991). For the purpose

of this study, focus will be placed on the value of the brand as it is perceived by the consumer.

The research therefore undertook a consumer-centric approach by placing consumer perceptions as a central theme. That which ultimately guided how the research addressed the research questions.

A detailed account of Aaker's brand equity model, as well as his fundamental contribution towards branding policy indicators and consequences will now be considered. Specifically, by examining all the elements involved in the model, whilst also placing emphasis on the key components central to the study: brand awareness and brand associations.

Brand Loyalty

Brand loyalty measures the extent to which people are loyal to a specific brand, and it is assessed according to several factors.

The reduced marketing costs aspect suggests that maintaining loyal customers is less expensive than attempting to attract new ones. Trade leverage similarly argues that loyal customers represent a stable means for distributive trade, and therefore, a consistent source of revenue (Aaker, 1991).

Aligned with this notion, current customers can be used to leverage new consumers, specifically by boosting the brand name, which will ultimately raise brand awareness, and in turn, attract new customers (Aaker, 1991).

Lastly, brand loyalty makes it less likely for consumers to swiftly switch brands, essentially ensuring that companies have efficient time to respond to competitive threats (Aaker, 1991).

Brand Awareness

Brand awareness focuses on the extent that a brand is familiar to the public, and is measured according to certain parameters (Aaker, 1991).

Brand awareness can refer to when a brand is being considered during the purchasing process, in a way that the brand becomes differentiated in the mind of the consumer, and set apart from the evoked set of brands (Aaker, 1991).

Additional or fewer associations can also be attached to the brand itself, and this is largely dependent on the strength of the brand name.

This notion can arguably be applied to the context of esports, in that the players of the esports community, specifically those that have taken on esports as a professional career, place an exceptionally high value on being part of the gaming community. In other words, their participation in, and commitment to, the esports scene essentially grants them with the opportunity to experience a sense of accomplishment, along with a high self-esteem (Bányai *et al.*, 2019). The close nature of the gaming community can be utilised as a means to increase awareness surrounding a particular brand name.

Notably, the symbolic benefit of a particular product or service within the context of esports, is therefore paramount to the overall effectiveness of the brand itself, as it largely revolves around social recognition, that which is similarly held to a particularly high regard amongst members of the esports community (Huk, 2019).

Perceived Quality

Perceived quality specifically considers the extent that the brand is able to offer quality products. Moreover, this component ultimately determines whether the quality of the product or service being offered by the brand is sufficient enough to entice a purchase.

In line with this reasoning, the level of differentiation is evaluated, specifically by positioning the brand in relation to their competing brands (Aaker, 1991). However, price also plays a role, and is usually taken as a quality indicator by consumers. Brand status is considered when the product decision becomes difficult to assess (Aaker, 1991).

Notably, the most innovative and notable advertising in esports is observed to focus on improving packaging. More specifically, by formulating products that ensure improved efficiency with the use of branded ingredients. All things considered, gamers

are attracted to high-level premium products, that offer high functionality and high performance. It is therefore imperative that the product attributes must align with the expectation being presented (Zapp, 2020).

Furthermore, the availability of the brand/product or service is also a highly influential factor. Consumers appreciate when the product is widely available in different sales channels, and similarly perceive this to be an indication of high quality (Aaker, 1991).

Lastly, the number of brand or line extensions is suggestive of a certain quality guarantee, as this demonstrates what the brand stands for, which can also be applicable to a wide scale (Aaker, 1991).

Brand Associations

Brand associations analyse the brand in relation to their competition by identifying the brand differentiation. These associations can be abstract, or even concrete product benefits (Aaker, 1991).

The greater the extent of brand associations, the greater the total brand equity will be, and likewise, the greater the opportunity will be to add brand extensions. The aforementioned claim applies to the buying process, the number of brand extensions available in the market, as well as the creation of positive feelings and attitudes. In light of this, brand associations can play a major role in the purchase decision (Aaker, 1991).

Henceforth, brand associations can be both triggered and assessed in the context of esports. For instance, esports consumers value particular functional attributes, namely, a product or service related to improving focus, eye health, and reflexes; as well as enhanced concentration, energy, memory recall and relaxation. The nature of these attributes are easily applicable to people outside of the gaming sphere, brands are therefore given ample opportunity to utilise a category crossover. In other words, by positioning the product or service being offered by the brand in such a way that it appeals to the salient functional benefits that are valued most by esports consumers. Notably, category crossover is essential when attempting to tap into a niche market (Zapp, 2020).

Proprietary Assets

Other proprietary assets are the final component outlined by Aaker, and specifically refer to additional proprietary rights that the brand has accumulated. For instance, patents, establishing trade partner relations or intellectual property rights. Notably, Aaker suggests that the greater the number of additional proprietary assets, the more likely the brand will have a competitive edge in those respective fields (Aaker, 1991).

Review of Related Literature

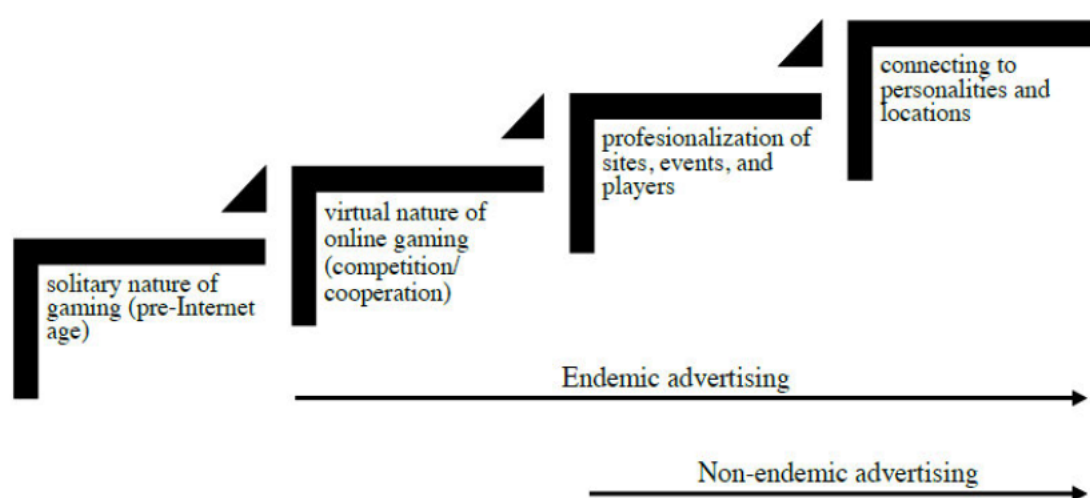


Figure 2: Evolution of Esports Branding (Gawrysiak *et al.*, 2020: 8)

As seen in *figure 2*, it is the professionalisation phase of esports that essentially introduced the opportunity for non-endemic brands to get involved and use this space as a means to enhance and extend their brands, specifically by taking advantage of the *exclusivity* of this stage (Gawrysiak *et al.*, 2020). To elaborate, non-endemic brands can attach their brands to certain components within the esports industry. For instance, by forming a collaborative partnership with an esports “influencer”, which describes a professional player with a substantial presence on social media (Hultgren, 2019).

Esports can in fact be seen to mirror traditional sport marketing models. Companies take advantage of significant professional esports players that dominant the current

esports competitive arena; just as in traditional sports whereby sponsors typically seek out famous sportsmen in popular leagues (Gawrysiak *et al.*, 2020).

On the other hand, the apparent shift towards social media marketing and digital platform merely reiterates the fact that traditional sport marketing models are not appropriate for esports (Gawrysiak *et al.*, 2020).

Parallel to this argument, Annasivia *et al.* (2018) similarly point out how brands are increasingly wanting to associate themselves with broadcasting platforms to reach the esports audiences.

A study by Lou, Tan and Chen (2019) posit that by disclosing important sponsorship information and making sponsorship presence apparent, the specific ad being promoted by a famous celebrity, which in this case would be by an esports influencer, is typically expected to increase the conceptual persuasion knowledge of the consumer regarding that particular brand.

The use of marketing through sponsorship therefore has many benefits. One significant benefit of sponsoring a well-known esports player, is that it tends to lend a level of credibility to the claims being made on that product or service. Simply on account of the pre-established trustworthiness and attractiveness of the appeal coming from a familiar person within the esports gaming industry (Lou *et al.*, 2019).

However, new brands entering esports must understand that, just as with any newly established relationship, it takes time to build (McCarthy, 2020).

Chalmet (2015) outlines four key concepts that ultimately define and influence that of a quality relationship between a sponsor and a consumer: Commitment, which is defined as a willingness, displayed by the sponsor, to maintain relations with their consumers. Trust, indicating the validation of a particular attitude or expectation regarding the benefits being promised by the other party, which in this case will be the non-endemic brand. Lastly, satisfaction, representing the overall evaluation of the feeling or attitude specifically regarding the relationship on a whole. The latter, when successfully managed and achieved, represents the elements that bind consumers to the sponsored entity.

In this regard, with specific reference to player sponsorship, which is inclusive of both the millions of players trying to make it, as well as the top pros. Brands must ensure that they uphold a balance between supporting the masses of aspiring players and the credibility that comes with representing top talent (McCarthy, 2020).

Brands wanting to get involved in esports sponsorship need to understand that it is specifically tailored around the reach of content and the level of engagement, and in order to avoid failing in this regard, brands need to prove their value to the esports audience (McCarthy, 2020). When done correctly, sponsorship in esports presents an opportunity for brands to not only promote their products and services, but also enables the possibility to use their brand as an employer (Allenstein *et al.* 2020).

Sponsorship aside, considering the vast amount of power held by the billions of players that identify themselves as esports enthusiasts, should ultimately remain a central concern when approaching the esports industry. Not only are they the ones purchasing games and tickets for esports events, in fact, they determine the popularity and success of the games being offered (Annasilvia *et al.*, 2018).

The amateur players are thus principle actors that essentially finance the esports ecosystem (Annasilvia *et al.*, 2018) and are therefore an exceptionally important segment for advertising strategists to consider and understand.

Correspondingly, Bányai *et al.*, 2019 posit that in order to assess how branding influences consumer perception towards a brand involved in esports, a comprehensive understanding the esports participants, audiences, and fan bases must be obtained first and foremost.

Huk (2019) posits that esports essentially entices the formation of both formal and informal social groups. Defining a specific gaming culture, which similarly informs the shaping of one's gaming identity.

This particular factor draws a distinct comparison between amateur players, and esports players. In that esports players consider the creation of, and belonging to, a specific clan as being one of the key salient aspects that contributes to the game itself and its overall enjoyment. Here the differing life goals between the types of players

becomes apparent, esports players are particularly concerned with satisfying their need for belonging, or even their desire to be a leader. However, that being said, it is clear that regardless of the level one is presently at in terms of gaming, social support is a fundamental element within the esports gaming environment (Huk, 2019).

Despite the rife controversy surrounding the possibility of online gaming providing players with various cognitive benefits, previous research that was conducted on students that play computer games, revealed that students perceive gaming as more than a mere source of entertainment. Instead, they regard it as a teaching tool, and similarly, view it as means to: acquire a heightened reaction of speed; improve one's ability to communicate in foreign languages; and lastly, encourage logical and creative thinking (Huk, 2019).

Furthermore, once esports gamers develop their unique gaming identity, it serves the purpose of reiterating their self-concept. That which is aligned with the global consensus of being an esports player, in turn, largely informs aspects of their daily lives (Bányai *et al.*, 2019).

In essence, the self-concept of an esports gamer reflects that of a unique ethos, indicating the prevailing attitudes of esports players: stressing the importance of equity and fairness that remains consistent throughout the institutional norms and rules; celebrating and recognising the mastery of skills that is required for gaming (Bányai *et al.*, 2019); valuing mutual respect and honesty amongst players; and lastly, placing the pursuit self-improvement as being a salient premise when it comes to constructing one's self-concept (Huk, 2019).

The position advanced herein is that consumers tend to choose brands that reflect a brand personality akin to their own self-concept; however, in certain instances, the appeal is based rather on consumer desires, and is less focused on the actual image being depicted (Huk, 2019).

Certain images which essentially formulate the brands personality are seemingly more affective for publicly consumed goods, this being on account of the signalling aspect being more prominent in social contexts. To elaborate, consumers appear to favour

brands based on their personalities fit, relative to the consumption environment (Keller, 2013).

Keller (2013) argues that inconsistencies regarding the personality of the brand can result in a heightened sense of resistance for consumers to accept information being communicated. Although, that being said, Keller (2013) also points out that a brand's personality and their user imagery are not always perfectly aligned. In this instance, performance-related attributes become the key driving force that determines consumer decisions.

For instance, brands who affiliate with sporting organisations are, more often than not, remembered by consumers. Specific packaging that is designed in accordance with a particular sporting organisation or event is common (Gawrysiak *et al.*, 2020). Thus, the particular use of image related attributes, specifically associated with esports players or the experience of esports gaming has the potential to create unique associations with a non-endemic brand.

Additionally, companies have the chance to increase awareness surrounding their brand and gain visibility through esports (Annasilvia *et al.*, 2018), as well as succeed in reaching a new generation of consumers. Demographic factors such as income, age and education, play a major role in defining the global esports audience: younger, tech savvy, highly educated, of which are predominantly males (Allenstein *et al.* 2020).

Companies have recognised how this unique demographic which was previously challenging for traditional sporting brand campaigns to reach, can now be easily targeted through esports (Gawrysiak *et al.*, 2020).

However, gamers have a reputation for being a tough crowd to please, to the extent that brand credibility in the esports sphere can easily be ruined from one simple slip up (McCarthy, 2020).

Agencies working with esports therefore need more than simply knowing what to advertise, but also where to run it (McCarthy, 2020). Despite this massive global industry already being saturated with brands, as the burgeoning industry continues to evolve at a rapid pace, industry stakeholders and external companies have strived to

find ways to penetrate the esports ecosystem and maximise their opportunities for branding (Influencer Marketing Hub, 2020).

For instance, THECE is an innovative solution attempting to fill the billions of dollars that is being missed out by the esports industry. THECE is an advertising tool that is currently being developed, specifically for the streaming platforms that gamers use. (Wootton, 2020). For example, the popular streaming platform known as *Twitch* attracts an audience of over 100 million viewers on a monthly basis (Foster, 2016).

In essence, this advertising tool has set up make-shift ad breaks during gaming streams, and has developed a second screen ad unit that works incongruence with the game structure. In other words, the tournament or game being streamed does not stop on account of the ad. Instead, the ad breaks are inserted into event itself while the tournament is taking place. Content of the game is also incorporated into the ad in order to prevent losing engagement from the audience (Wootton, 2020).

From a brand perspective, THECE presents an opportunity to buy into all tournaments involved under a single preferred game title. In this regard, the media buy will be satisfied. It will not matter if one tournament did not go well or had a low viewership, because there will be hundreds of others tournaments under that game title umbrella.

All things considered, the esports audience is not homogenous across the game spectrum involved in esports. It is therefore imperative for brands to understand the esports categories, as by segmenting the games and the audiences that go with it, distinctive lifestyle interests are often revealed (Allenstein *et al.* 2020). In this context, audiences could be pooled together according to different games, and brands can choose specific audiences (Wootton, 2020).

Research Methodology

Worldview

Every existing phenomenon has an underlying structure that is unique to that particular phenomenon. While using the core concept as a useful point of reference, the interpretivist paradigm values a multiple theories approach, in that it is strategically welcoming to all the differing aspects which characterise the theoretical concept at hand, rather than merely seeking out the *best* explanation (Schulz & Cobley, 2013).

For instance, brand awareness is one of the key underlying themes of the study, and will be investigated by illuminating factors of this phenomenon specifically within the context of esports, and how various types of brand involvement may either deviate from, or resemble the ideal type (Schulz & Cobley, 2013).

Henceforth, the methodology employed will be premised on an interpretivist paradigm, as it is largely used for the process of theory building. In this context, interpretivism implies that of an inductive nature, in that the process itself is informed by analytical principles rather than grounded rules. The details of the data served the salient purpose of identifying important inter-relations, patterns and themes; and these specifics that were both explored and gathered were used to confirm the findings (USC Libraries, 2020).

The interpretivist paradigm was selected based on the fact that the research required data that was derived from real life experience, and served the salient purpose of identifying important inter-relations, patterns and themes that were relevant to the overarching phenomenon of the study (Schulz & Cobley, 2013).

The phenomena of esports was therefore also interpreted according to its connecting network with the broader society, essentially introduces a diverse range of dimensions that, in turn, provided a more comprehensive understanding of brand involvement in the context of esports (Schulz & Cobley, 2013).

The larger, general patterns identified within pre-existing abstract theories were used to guide the starting point, interpretation then served the function of identifying patterns. Specifically, by exploring existing patterns and thereafter, intentionally placing context-relevant notions to those existing abstract theories in order to interpret unprecedented patterns based on existing orientations between concepts (Schulz & Cobley, 2013).

The ontology of the research design acknowledged the subjective reality as being an internal and relativist phenomenon. With regards to the epistemology, the researcher was viewed as the subjective participant, and while the researcher was merely the mediator, knowledge was co-constructed by both the researcher and the participants.

Lastly, the axiology encouraged and respected values, and most importantly, stood to contribute to the overall process of theory building (Graham, 2018).

Research Design

Qualitative implies the processes and meanings associated with the qualities of particular entities, that which is similarly not experimentally measured as typically found in that of a quantitative study. The difference is that the essence of a qualitative study is to emphasise the social reality, and highlight how this experience ultimately gives meaning to, and shapes the nature of enquiry. Qualitative stresses the value-laden approach which underlies the nature itself (Denzin & Lincoln, 2005).

The study had a uni-disciplinary design, that was guided by a pre-established theoretical framework and current literature. All of which were collectively related back to the esports phenomenon.

On the other hand, the research design was non-controlling. The data that was collected was studied as it occurred naturally during the telephonic interviews. In this context, the researcher attempted to avoid manipulation, predetermined constraints, and remain open to accepting whatever emerged (USC Libraries, 2020).

Fittingly, an inductive qualitative approach was adopted as it acknowledged the significance of subjectivity and therefore assumed the subjective reality of esports participants as a means to gain knowledge and understanding through interaction and interpretation (Graham, 2018). Based on this approach, the enquiry was able to adapt as new discoveries emerged, and the general understanding of the enquiry itself deepened throughout this process (USC Libraries, 2020).

Likewise, the nature of this study was therefore non-empirical and exploratory, focusing on understanding the perceptions attached to brands involved in esports, by analysing the human condition of esports consumers within that context (Bengtsson, 2016).

Population and Sampling Method

The purpose of population parameters is to enable the researcher to establish the sample design for the study, through a process of identifying distinguished parameters relevant to the population of interest. More specifically, by describing the predominant characteristics of the particular population under investigation (Kothari, 2004).

The population parameters of the study are as follows:

The unit of analysis were people. Moreover, the nature of the population refers to esports consumers, both male and female, ranging from an amateur to a competitive level of gaming experience.

The target population identifies the entire set of units that fit the population parameters (Lavrakas, 2008). In this context, referred to all the people involved in the study that fitted the following characteristics:

- Young esports consumers: between the ages of 18-30;
- Participates in esports gaming on a regular basis;
- Has an adequate understanding of the esports industry;
- Identifies as being an esports consumer.

The researcher was able to identify which esports consumers were appropriate for the study as the participants involved were known to the researcher.

Furthermore, sampling is a research method that serves the purpose of describing the particular segment of the population selected for investigation. Sampling involves a process whereby an appropriate sample is selected from the identified population. It can be considered a representative sample as it is premised on the sharing of similar characteristics to the rest of that population, and therefore reflects the population accurately (Nieuwenhuis, 2020).

In light of this, the sampling technique that was chosen for this study was non-probability sampling.

More specifically, purposive sampling, in order to ensure that participants had basic knowledge of, and experience with, esports. The study also made use of convenience sampling, in that the population elements were determined according to what was most accessible and convenient to the researcher (Nieuwenhuis, 2020).

Notably, purposive sampling differs from convenience sampling, as it is contrastingly identified as being selective, judgmental and subjective. The nature of this particular type of sampling avoided the use of random selection, and instead, selected participants based on particular characteristics of the desired population. That which also directly correlated with the main objective of the study (ThoughtCo, 2013).

The sample size consisted of 4 participants.

Notably, the sample enabled the researcher to draw inferences in a way that contextualised an understanding of the phenomena of interest (Nieuwenhuis, 2020).

All things considered, the purpose of the research question aimed to investigate the most effective form of esports advertising for non-endemic brands to get involved with, specifically by exploring the perceptions of esports consumers towards the aforementioned enquiry. Participants were purposively chosen by the researcher on account of their accessibility, and ability to fulfil the purpose of this study.

Data Collection Method

The qualitative approach implied a unique case orientation, in that the details of every individual respondent was respected and captured appropriately (USC Libraries, 2020).

Notably, the phenomena of esports, endemic and non-endemic brands, as well as the perceptions of esports consumers were central themes to this research. This study therefore had an underlying phenomenological approach as the aforementioned phenomena was used to formulate the questions that were posed during the interview.

Phenomenology is a common philosophical approach when dealing with matters that are concerned with social sciences, as it is concerned with appointing meaning to lived experiences. The participants therefore remained the key point of reference. It was up to the researcher to provide a comprehensive description of the experience, as it was expressed by the participants (Nieuwenhuis, 2020).

The most appropriate method of data collection when dealing with phenomenology is in-depth interviews, as it allows the researcher to gather detailed descriptions of the participants experiences (Simon & Goes, 2011).

The data for the study was therefore collected using a qualitative data collection method. A series of voice call interviews were conducted using Zoom. More specifically, a total of 4 interviews were conducted by the researcher.

The researcher constructed a set of 8 open-ended questions that remained consistent with the overarching aim of the study. The open-ended nature allowed for further

clarification of responses, which ultimately enabled the researcher to gain a detailed description of esports, and the perceptions of esports consumers toward brands involved the industry.

The questions were premised on Aaker's Brand Equity model (1991), with specific reference to brand awareness and brand associations, and were furthermore guided by relevant literature that outlined and discussed esports and esports consumers.

A Zoom meeting was scheduled with each participant. In an attempt to reduce data constraints, the video aspect of the interview was not included. The voice call interviews were recorded on the Zoom platform. All of the interviews were completed in one day. At the end of every interview, each recording was given a unique case dependent title, corresponding with the participant involved, for documentational purposes. Once all the interviews were concluded, the researcher transcribed every recording verbatim. All of which were stored in a specific folder in preparation for the data analysis.

The data collection method that was used was specifically to entice participants to share their opinion, views and beliefs regarding the esports industry, esports consumers, brands involved in esports, particularly non-endemic brands, and their perception thereof.

The use of in-depth interviews was useful in collecting rich data. The data collected yielded an in-depth understanding of esports consumers personal perspectives regarding the phenomena of enquiry.

Data Analysis Technique

Within the specific context of a qualitative study, validity refers to the certainty that the findings truthfully reflect the phenomena being studied. Whereas reliability refers to the notion that the same results would be obtained should the study be replicated by another (Nieuwenhuis, 2020).

The element of self-reflection therefore remained an essential part, if not the most important part, of the data analysis process (Bengtsson, 2016). In this sense, the researcher was able to minimise any bias that may have influenced the interpretations and findings; and in doing so, the findings presented a trustworthy, rigorous and credible analysis of the data.

Phenomenology is widely considered as one of the most popular qualitative methodologies used to analyse data of this particular nature (Simon & Goes, 2011). Interpretivism and phenomenology alike, attempt to gain an understanding of a specific phenomenon. Both of which accomplish this by valuing the lived experience of the people involved in the study, and similarly by using interpretivism to form an understanding of interaction between humans.

This particular worldview is aligned with the notion that constructions and perceptions are essentially grounded within a specific perspective, which is relevant to a particular time and space. Phenomenology does not emerge from a theory, but rather begins with the particular phenomena under investigation (Simon & Goes, 2011).

In accordance with the salient phenomena under consideration: esports, esports consumers, and endemic and non-endemic brands in the context of esports; the researcher was able to reflect on essential themes that emerged throughout the analysis process.

The research problem was focused on the complex structure of the esports ecosystem. The purpose of the study was to explore the presence of non-endemic brands advertising in the context of South African esports. The objective was achieved by exploring the perceptions of esports consumers towards the aforementioned enquiry.

Notably, the interpretive philosophy values the symbolic and meaningful content presented within the data. Through this interpretivist qualitative approach to analysis, data was translated into findings. The analysis essentially determined the perceptions of the participants, which both related to, and made meaning of, the phenomena under investigation, namely, esports, endemic and non-endemic brands, advertising, and the perceptions of esports consumers.

Henceforth, this study made use of thematic analysis to analyse the data. The fundamental purpose of thematic analysis is essentially to organise the data collected, and thereafter elicit meaning from it. In doing so, the researcher was able to infer realistic conclusions (Maguire & Delahunt, 2017).

Fittingly, qualitative thematic analysis is originally premised in fields concerning social research. Data within this context is primarily focused on words and themes, essentially allowing for inferential interpretation of the findings (Bengtsson, 2016).

A detailed account of the steps involved in thematic analysis, and how each stage was planned and performed will now be discussed. The analysis began with a general familiarisation of the data, followed by a process of breaking it down into smaller units that signified meaning (Maguire & Delahunt, 2017).

The researcher analysed and interpreted the meaningful units found within the raw data for the purpose of thematic coding. Each meaning unit contained an insight that seemed significant to the researcher. This was achieved through the process of identifying and connecting certain words and paragraphs, that relate both to each other, as well as the overall aim of the study (Maguire & Delahunt, 2017).

Considering the inductive nature of this study, the codes established during the analysis process changed throughout. The researcher performed this open coding process repeatedly in order to increase reliability, ensuring that each meaning unit was assigned an appropriate code that was relative to the context it was placed. Moreover, the codes facilitated the identification process of concepts, by which specific patterns became apparent (Maguire & Delahunt, 2017).

Once the meaning units had been extended and condensed, the researcher was able to create specific themes. In other words, the number of words were reduced, however maintained the essence of the content within each unit. The researcher then revisited all the key concepts, themes and appropriate literature in relation to the overarching aim of the study.

Notably, the use of colour was helpful in identifying each meaning unit. The unmarked text that did not provide insight relative to the research question was thereafter excluded.

Responses of participants were reduced into specific statements, which then identified predominant themes (Simon & Goes, 2011). The researcher then clustered themes together based on close reflection; this process availed the researcher to interpret and understand what was emerging from the data collected (Nieuwenhuis, 2020).

The researcher organised the coded material into two separate domains for clarification. The first domain pertained to the general questions of enquiry: defining an esports consumer, and understanding the esports world from the perspective of the participant. The second domain focused on theoretical assumptions derived from literature, namely, brand awareness and brand associations from Aaker's Brand Equity model (1991). This way, coded material was clearly grouped according to different attentions of the study (Bengtsson, 2016).

The researcher ensured that the themes identified did not fit into more than one of the groups, or fall between two. This way, they remained externally heterogenous and internally homogenous (Bengtsson, 2016). On the other hand, the researcher observed which themes did in fact fall within different categories, for example, how the discussion surrounding esports events matched the benefits received from esports on a whole, both largely pertaining to social aspects. This in itself provided rich data that developed some useful insights, highlighting the significance of community amongst esports consumers.

After the themes were identified, thus began the process of writing up the analysis. The researcher immersed herself in the data but ensured a neutral perspective of the data, by consistently considering one's own objectivity in the analysis process. Each theme that was discussed in the analysis was supported by specific quotations from the data, allowing for a clear overview and integration of the results.

As a final assessment, the researcher checked whether or not the findings appeared logical and reasonable, and also ensured that the results corresponded with the literature appropriately.

All things considered, the data analysis stage served an interactive process and required discipline and creativity during interpretation, and a systematic approach to the data analysis (Nieuwenhuis, 2020).

Thematic analysis was a useful technique in terms of ascertaining the salient themes that pertained to the phenomena central to the study, and added value thereof. More specifically, by identifying the evident and non-evident similarities observed within the data that was collected. Through this process, the researcher was able to provide meaning to the lived experiences of the participants by understanding and interpreting the different meanings (Nieuwenhuis, 2020).

The researcher reflected on the lived experiences of esports consumers. Remaining free from prejudicial, theoretical and suppositional biases, and rather, focused on the fascination of meaning, that which is fundamental to phenomenology. Despite using thematic analysis as the method to analyse the data that was collected, phenomenology goes beyond thematic analysis and encourages an immersive experience in order to gain a nuanced understanding of the lived experience from another person's perception (Nieuwenhuis, 2020).

Research Findings

Presentation and Interpretation

Herein is a comprehensive presentation and interpretation of the research findings. The researcher used thematic analysis to derive meaning from the particular experiences and perceptions that were expressed by the participants, specifically by identifying and uncovering themes found within the data that was collected (Maguire & Delahunt, 2017).

The study pertains to the context of South African esports. The data collected was interpreted according to the broader context of the research problem, pertaining to how many non-endemic brands have resisted capitalising on the brand building opportunities that esports presents (Gawrysiak *et al.*, 2020).

The study aimed to explore the influence of brand involvement within the esports scene, specifically in terms of brand awareness and brand associations; and moreover, focused on the perspective of esports consumers towards non-endemic brands that are involved in the esports industry.

The first objective of the study was to define an esports consumer. The second objective was to gain an understanding of the esports ecosystem in South Africa. The third objective was to explore the perceptions of esports consumers towards brand involvement, with specific reference to the distinction between endemic and non-endemic brands. Lastly, the study aimed to determine the most effective form of advertising for non-endemic brands to get involved with.

The data was collected through in-depth voice call interviews that took place on Zoom. The data set consisted of 4 participants. Using an inductive approach (Crossman, 2019), the following themes were derived.

Theme 1: Dedicated Consumer

Interpretation of Findings

The defining characteristics found within the data were not consistent amongst the participants and how they seemingly define an esports consumer. While some identified competitive play as being what distinguishes an esports consumer from a casual gamer, others identified simply taking a keen interest in the industry itself as being the key factor that defines an esports consumer.

However, the researcher found that from a characteristic's perspective:

“Keeping up to date with new stats, player movements, organisation updates” –

Participant 2

It is clear that an esports consumer is someone that: is both interested and invested in the industry itself enough to actively watch streamers play online, and attend esports events.

“Take the time and effort to get better at the game” – Participant 4

Another distinct similarity is that esports consumers, regardless of their gaming status, are commonly seen to both analyse the games and train on a daily basis (Annasilvia *et al.*, 2018), even if it is simply for leisure.

There was a consistent expression of enthusiasm, dedication and pride surrounding the esports consumers and the games that they played, even those that do not compete.

Findings in Context

The aforementioned description differs slightly from that of Annasilvia *et al.*, (2018) which defines an esports consumer as a player that typically belongs to a gaming team or identifies with a club or organisation.

Even though esports refers to the professional activity of electronic sports (Bányai *et al.*, 2019), esports consumers extend past the vocational aspect of the sport itself, and

are inclusive of any player that is both enthusiastic about the industry, and places emphasis on improving their gaming skills.

Theme 2: Competitive yet Supportive Landscape

Interpretation of Findings

Game preferences varied amongst participants. The participants offered an extensive list of games that they regularly play and watch, however there were some common and frequently named games.

“Recon if I had to support a team it would depend on the game” – Participant 3

Merely reiterating the favourability that esports consumers maintain with regards to preferences of particular games that they play, and in turn, are prepared to watch. Therefore, there is a significance of understanding the game, in order to appeal to the esports target audience that is invested in that particular game.

The world of esports presents an array of benefits, for both the brands as well as the players. First taking a look at the financial benefits:

“Millions of gamers and people out there watch online gaming” – Participant 4

Streaming platforms can be viewed as an innovative solution that works in favour of every party involved, namely, the tournament organiser, the audience, and most importantly, the brand (Wootton, 2020). Popular streaming platforms are therefore the most lucrative marketing platform for brands to invest in, as they represent a means to attract viewers and make money.

The teams and organisations involved in esports portrayed an exceptionally competitive landscape. Each organisation seemingly represents multiple teams belonging to various different gaming categories. Considering the notion that even amateur players consistently work at improving their gaming skills, with the objective of achieving a higher rank, the opportunity for brands to engage in player sponsorship is vast and endless.

Now delving into some of the social benefits involved:

“it’s a way to make new friends” – Participant 3

While the tournaments appeared to fulfil the purpose of monetary value, as well as a demonstration of one’s skills. The events served more of a sentimental purpose for

esports consumers, an opportunity to meet up with their online gaming friends, and a chance for them to both watch their favourite professional players play live, and see the latest hardware and technology, specifically for use of gaming.

Findings in Context

There is a direct interaction with the players and gaming communities, esports fans appear to offer loyalty to specific players, unlike traditional sports whereby fans extend their loyalty to entire teams (Allenstein *et al.* 2020).

It is also important to note that the key actors that both dominate and sustain the esports industry are: the players, game publishers, clubs and teams, streaming platforms, event organisers, and the sponsors (Annasilvia *et al.*, 2018).

The latter essentially determine whether or not sponsors will be interested in investing. This notion is particularly significant as it sets the stage for *why* sponsorship is so important. The nature of the esports industry on a whole thus represents an environment for brands to make money and accumulate a profit (Annasilvia *et al.*, 2018).

Theme 3: Welcoming Environment

Interpretation of Findings

Esports consumers are generally unaware of the distinction between endemic and non-endemic, and are also seemingly unphased by the presence of non-endemic brands that are involved in esports. In fact, they promote and encourage the participation of non-endemic brands.

“we really try promote having non-endemic brands in our esports community” –

Participant 2

On this note, esports consumers are aware of the benefits that come with having more brands in the field, an increase in external entities investing in esports will lead to an increase in the interest surrounding esports, which will in turn, contribute towards the growth of esports on a whole.

Interestingly, endemic brands were actually viewed in a more negative light, in the sense that firstly, they rely on their relevance to the industry itself and can therefore afford to be overly focused on sales. Also, that they are misconceived, in that they frequently lack knowledge and understanding of the esports scene. Whereas on the other hand, non-endemic brands want to be part of the esports hype and therefore put in more effort by praising the esports community, in an attempt to fit in.

On that note, it is important that the value of a non-endemic brand is analysed according to specific desires and expectations relevant to an esports consumer, and most importantly, how it can translate into adding value to the life of the esports consumer.

Findings in Context

Annasilvia *et al.*, (2018) posits that brand involvement in esports can be used as an effective means to enhance brand awareness. It can also be used for the meaningful purpose of establishing favourable perceptions towards the brands products, specifically amongst supporters.

In line with this reasoning, Gawrysiak *et al.* (2020) confirm that there are in fact opportunities for both endemic and non-endemic companies through the esports market, enabling both to utilise as a means of obtaining brand extension.

Non-endemic brands are therefore essential to the esports industry, if not even more important than endemic brands, as they offer vast reach and a substantially larger budget (Wootton, 2020), and are able to attract a larger, more commercial audience than that of endemic brands.

Theme 4: Technologically Driven Market

Interpretation of Findings

Respondents were asked to recall the names of brands that were present at a particular esports event that they attended.

“Generally, they get praised a lot more in the local esports community” –

Participant 2

Almost all the brands that were recalled by the participants were endemic brands. The primary interest of esports consumers is therefore technologically driven, with their sole focus being directed towards hardware equipment for gaming.

Notably, any mention of non-endemic brands was financially driven, in that the non-endemic brands that were retrieved from memory were simply on account of that participant having been previously, or currently, sponsored by those brands.

“all of this new technology” – Participant 3

This point draws a distinction between a professional esports player and a general esports consumer, a professional esports consumer is able to recall non-endemic brands, unlike the general esports consumer that is primarily concerned with endemic brands and the latest hardware, or simply gaming related products.

“banners almost everywhere” – Participant 2

Furthermore, the visual aspect of brands featuring at esports events play a major role in the recognition of that brand, however, the most prominent factor remained whether or not that brand already had an established meaningful brand name within the esports industry.

“If people see more intel everywhere it gives them a bit more of a reason to go with intel” – Participant 2

In this regard, once again, only endemic brands were memorable enough to be identified by the participants.

Findings in Context

Brand awareness and brand associations remained central themes of this study. The aforementioned theme was therefore premised on, and related to, the concepts themselves. These concepts were specifically selected to investigate the research problem.

One way of analysing brand associations is by assessing the consumers capability to retrieve the brand from memory (Aaker, 1991), this can refer to the brand being recognised in an actual physical store, online or in the media, after having been exposed to it previously.

Part of brand awareness looks at instances whereby a usage situation or purchase decision is presented as a cue. In other words, when a particular product category arises, and the consumer needs are expected to be fulfilled by that category, will the consumer in fact think of that particular brand in order to fulfil the need (Aaker, 1991).

In order to build brand equity in an effective way, brands are required to, firstly, ensure a high level of brand awareness. Brand awareness is commonly achieved by integrating inherently memorable brand elements that specifically serve the purpose of promoting favourable brand associations (Keller, 2013).

In other words, brand elements that successfully grab the attention of consumers, are similarly seen to play a role in facilitating purchase decisions, specifically within consumption settings (Keller, 2013).

Sponsorship activities undoubtedly present brands, both endemic and non-endemic, with an opportunity to enhance brand awareness and gain visibility amongst consumers (Annasivia *et al.*, 2018). However, purchase decision based on recall for non-endemic brands is uncertain. This presumption is based on the observation of the participants failing to retrieve any memory of non-endemic brands involvement in esports. The data was suggestive that esports consumers do not take much notice of the presence of non-endemic brands, when it does not concern their gaming lifestyle or experience.

Allenstein *et al.* (2020) posit that the brand recall of brands involved in esports has increased substantially over the past decade, with an impressive 53% for the recall of non-endemic brands, and only 43% for endemic brands respectively.

On the other hand, the data suggests that achieving brand equity specifically through an extension of esports advertising may be slightly more restricting for non-endemic brands than that of endemic. Despite esports consumers appearing welcoming to non-endemic brands, their interest in a non-endemic brand is limited according to the extent that the brand itself is integrated into the gaming experience.

Conclusion

Discussion

A qualitative approach was effective for this study on account of its holistic nature. The whole esports phenomena was able to be viewed as more than merely the sum of its parts, including its complex system and interconnected counterparts. In this sense, the data analysis remained context sensitive, emphasising comparative outcomes with the main focus being to extrapolate patterns for the use of brands wanting to get involved in esports, and desiring to communicate with the esports audience in an effective and relatable way (USC Libraries, 2020).

The overarching purpose of this research was to determine the most effective advertising options for non-endemic brands. Specifically, by understanding the industry and audience involved in esports, and moreover how esports consumers in South Africa perceive the presence of non-endemic brands in esports.

All things considered, esports fans are a particularly demanding audience. In this context, brands must have an authentic approach in order to be able to connect with esports fans in an effective way (Allenstein *et al.* 2020).

Annasilvia *et al.* (2018) suggested that there is a sort of perceived resistance when it comes to marketing activities by non-endemic brands. However, the data findings suggested otherwise. It is not a case of having a perceived resistance, but rather, simply a lack of concern for brands involved that are not related to gaming.

Non-endemic brands should consider using an esports enthusiast on their brand-management team, in order to have an insider opinion for the purpose of developing an effective campaign idea. This way, the actual performance of the brand assets can be aligned with a rigorous analysis of emerging esports trends, and supported by individual knowledge (Allenstein *et al.* 2020).

Certain estimates posit that there are approximately 2.2 gamers in the world. Furthermore, it may still be in an infantile stage, but there is a growing portion of the aforementioned figure of those displaying an interest in esports (McCarthy, 2020).

In addition to this, one thing is clear: when brand equity rises, so too does brand loyalty, brand awareness and perceived quality. In addition to this, brand associations

become more positive- making them stronger, and the number of brand-related proprieties grow alike (Aaker, 1991).

Correspondingly, the appropriate tools to measure the effectiveness and impact of advertising through esports are still in the process of being developed; but what is known with certainty, is that the larger the audience, the larger the benefit, regardless of the brand strategy that has been adopted (McCarthy, 2020).

Furthermore, brands must have an understanding of the sheer breadth of gamers before attempting to advertise or invest in this space. Agencies are advised to pay attention to the teams and games themselves, in order for brands to develop creative solutions and appropriately position themselves according to specific characteristics relevant to the game or team itself (McCarthy, 2020).

Lastly, according to a thorough review of previous literature, the following avenues are arguably the best options for non-endemic brands:

There is massive opportunity for brands to get involved in terms of local esports teams, as well as current tournaments and leagues that are consistently taking place (Hultgren, 2019).

Sponsorship and partnership in esports have become an exceedingly popular advertising endeavour for brands to get involved with. In doing so, brands are able to utilise these partnerships or sponsorships as a means to promote products and services and attract the attention of new consumers. All of which essentially increases the number of the brands potential target audience, and more importantly, allows for an increase in brand awareness (Albert, 2020).

Additionally, digital and social media platforms have been reported as the most effective form of marketing with which to reach esports audiences (Hultgren, 2019). This type of marketing is not restricted to endemic or non-endemic brands, and thus social media marketing presents opportunities akin to all.

The data analysis revealed that event sponsorship or involvement is probably the least effective space for non-endemic brands to engage with. This being on account of the hype that is typically involved at esports events surrounding gaming related products and services.

Considering how the very nature of the qualitative approach being premised on that of interpretation, the researcher remained the key determinant of the data analysis process. It is important to point out that complete subjectivity undermines one's credibility, and on the other hand, pure objectivity is considered as being impossible (USC Libraries, 2020).

That being said, the researcher strived to understand the authentic esports world as it is presumably depicted, along with all of its complex counterparts, and find a balance between this and being self-analytical, reflexive and reflective in consciousness. In doing so, the analysis reflects that of a credible voice, similarly enhancing the trustworthiness and rigour of the study, specifically on account of the authentic analysis and perspective being demonstrated (USC Libraries, 2020).

Qualitative data implies that of an interactive process, involving an intertwined process of collecting data, processing, and analysing it. Maree (2020) identifies three essential elements of the qualitative data process as being, noticing, collecting and reflecting. These elements are not considered a mere number of successive steps to follow, but rather, are viewed as being cyclical and interlinked. The researcher ensured that all the aforementioned steps were maintained throughout the research process.

Implications of Findings for Future Practices

At first the researcher assumed that her lack of understanding regarding the esports industry would hinder the potential for the study itself. On the contrary, being an outsider essentially gave the researcher an outsider perspective, which enabled her to formulate the research problem: that non-endemic brands may share the same apprehension regarding how to approach the esports scene, in terms of how to communicate and where to advertise.

The researcher acknowledged her outsider status to the esports world, which in turn allowed her to consider many aspects from a different perspective, that may be useful to explore further.

Firstly, an endemic brand can be identified according to the way in which that particular brand is directly related to the industry itself (Annasilvia *et al.*, 2018). In this regard, the researcher noticed the blurred distinction between what is actually endemic and

what is non-endemic. For instance, Red Bull, does not produce hardware equipment for the use of gaming, yet food snacks and energy drinks are so deeply ingrained in the gaming experience that they are typically identified as being endemic to esports (Annasilvia *et al.*, 2018). In light of this, dependant on the specific product and service, non-endemic brands should explore how to transform their status of being non-endemic, into being endemic.

On the other hand, non-endemic brands could ultimately explore ways to establish favourable associations amongst esports consumers to the extent that it surpasses the objective reality of the product itself being offered. This would require rigorous consumer research into the esports audiences.

Ethical Implications

First and foremost, before conducting the telephonic interview, the researcher obtained and retained informed consent from all the participants involved. Additionally, the researcher avoided making any errors caused by personal bias (Bengtsson, 2016), specifically by avoiding the changing or altering of any perception expressed by the participants.

The researcher avoided misinterpretations (Bengtsson, 2016), by considering cultural factors (Jelsma & Clow, 2005) relevant to characteristics that are typically associated with being an esports consumer.

The researcher prepared for unexpected events to appear, and in spite of this, strived to establish the best possible research design. Considerate planning was carried out through every stage of the research. In order to ensure accuracy, available resources were recognised, and the essence of the research was based on existing circumstances. This is a process known as triangulation, that is commonly used to increase the rigour of the study. More specifically, this study used an integration of different sources (Bengtsson, 2016), which ultimately emphasised the element of credibility, and ensured a heightened sense of validity.

Most importantly, the researcher strived to establish a trustworthy and open environment with the participants (Jelsma & Clow, 2005), specifically by building rapport with casual discourse before the commencement of the interview. The participants were also informed that any information expressed and documented,

along with the identity of the participants remained anonymous and confidential. Lastly, the researcher ensured that every stage of thematic analysis was performed.

Limitations

The researcher encountered several limitations during the entirety of the research process.

Firstly, due to data constraints the video element of the interviews was not utilised. The researcher was thus unable to read the body language and visual cues of respondents.

Additionally, on account of the exploratory nature of the study, the focus of the study itself shifted slightly as the research progressed. As a result, the questions asked during the interview were not as accurate for the purpose of deriving meaning (relative to the overall research purpose) as the researcher had hoped for.

With regards to the data analysis, thematic analysis was limiting in the sense that the theoretical relationship between the sampling and analysis procedure proved difficult to infer findings between the various concepts. The challenge occurred when attempting to describe the lived experience of participants, and also align it with the development of the theory itself.

Notably, the limitations found in qualitative research can also be used to highlight the inherent strengths thereof. With the researcher being the primary instrument of investigation, the researcher thus had a unique opportunity to become imbedded in the experiences of esports consumers, in order to gain an understanding of the phenomena under enquiry. However, this also allowed for an increased possibility for conscious or unconscious assumptions to be formed regarding the perceptions of esports consumers (USC Libraries, 2020).

In this context, the researcher avoided bias being generated during every stage of the research process, more specifically, when the data was gathered, interpreted and reviewed. Taking into account the notion that participants may fail to express the whole truth, simply lack the ability to express themselves fully, or respond based on what they assumed the researcher wanted to hear (Bengtsson, 2016). The researcher also went out of her way to clarify every response given by the participants in order to ensure reliability.

Lastly, despite the nature of a qualitative sample not being able to apply the findings to make broader generalisations, on the other hand, a smaller sample size allowed for an in-depth analysis of the research problem (USC Libraries, 2020).

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Appendices

Appendix A: Consent Form

Consent form for participants	
I, _____, agree to participate in the research conducted by Yael Asoulin exploring the consumer perceptions of South African esports consumers towards brands involved in esports. This research has been explained to me and I understand what participation in this research will involve. I understand that:	
• I agree to be interviewed for this research.	
• My confidentiality will be ensured. My name and personal details will be kept private.	
• My participation in this research is voluntary and I have the right to withdraw from the research at any time. There will be no repercussions should I choose to withdraw from the research.	
• I may choose not to answer any of the questions that are asked during the research interview.	
• I may be quoted directly when the research is published, but my identity will be protected.	
Signature	Date

Consent form for participants	
I, _____, agree to allow Yael Asoulin to audio record my interviews as part of the research exploring the consumer perceptions of South African esports consumers towards brands involved in esports. This research has been explained to me and I understand what participation in this research will involve. I understand that:	
• My confidentiality will be ensured. My name and personal details will be kept private.	
• The recordings will be stored in a password-protected file on the researcher's computer.	
• Only the researcher, the researcher's supervisor and possibly a transcriber (who will sign a confidentiality agreement) will have access to these recordings.	
Signature	Date

Appendix B: Measurement Instrument

- 1) Please tell me a bit about your experience with esports, what games do you play? Which is your favourite? How much time do you spend playing?
- 2) Do you watch gaming or just play? Which teams do you follow?
- 3) How would you define an esports consumer? What do you consider an eSports person to be? (in terms of characteristics) What makes you an eSports consumer?
- 4) At what point would you say one becomes an esports consumer? At what point does one become a professional esports gamer?
- 5) What tournaments do you watch/play? Do you watch/ take part in the tournaments?
- 6) Have you attended any esports events? Why was it so exciting, why did you watch/attend that specific event?
- 7) Whether you have attended or played in an event, do you remember the brands involved? Can you name some of the brands? What was it about them that makes you remember them?
- 8) Do you know the difference between endemic and non-endemic sponsors? Does it make a difference to you?

Appendix C: Ethical Clearance Letter



12 October 2020

Student name: Yael Asoulin



Campus: Vega Bordeaux

Re: Approval of BA Strategic Brand Communications Proposal and Ethics Clearance

HONOURS/PGDIP ETHICAL CLEARANCE LETTER

Your research proposal and the ethical implications of your proposed research topic were reviewed by your supervisor and the campus research panel, a subcommittee of The Independent Institute of Education's Research and Postgraduate Studies Committee.

[Yael Asoulin] Your research proposal posed no significant ethical concerns and your supporting documents and instruments are in order to proceed. We hereby provide you with permission to proceed with your research.

In the event of you deciding to change your research methodology in any way, kindly consult your supervisor to ensure all ethical considerations are adhered to and pose no risk to any participant or party involved. A revised ethical clearance letter will be issued.

We wish you all the best with your research!

Appendix D: Final Research Report Summary Document Table

Provisional Title: A qualitative study exploring the perceptions of South African esports consumers towards non-endemic brands advertising through esports

Research Purpose	Research Question	Research Rationale	Seminal Author	Literature Review	Paradigm	Approach	Data Collection Method	Ethics	Anticipated Findings	References
Explore the most effective ways in which non-endemic brands can utilise esports as a means of brand extension.	What are the most effective forms of esports advertising for non-endemic brands to get involved with?	Esports is a massive global industry that is continuously growing. Opportunities for brands in esports are endless. New and innovative advertising solutions are constantly being developed for the purpose of esports marketing.	David Aaker – Brand Equity model (1993)	Non-endemic brands have the opportunity to get involved in: - Digital media marketing; - Player sponsorship; - Promotional activities related to esports; - Advertising on streaming platforms. Brand Awareness: investigating how esports consumers perceive the involvement of non-endemic brands in esports.	The study used an interpretivist paradigm to structure the research framework, essentially guiding how the data was both collected and analyzed. Ontology: acknowledged the subjective reality as being an internal and relativist phenomenon. Epistemology: the researcher was viewed as the subjective participant, and while the researcher was merely the mediator, knowledge was co-constructed by both the researcher and the participants. Axiology: encouraged and respected values, and most importantly, stood to contribute to the overall process of theory building.	This study took an exploratory qualitative approach. Population Young esports consumers: between the ages of 18-30; Participates in esports gaming on a regular basis; Has an adequate understanding of the esports industry; Identifies as being an esports consumer.	Voice calls on Zoom was the tool used to collect the data. A total of 4 in-depth interviews were conducted. Each interview consisted of 8 open-ended questions.	Informed consent from all participants was obtained and retained. Misinterpretations and errors caused by personal bias were avoided. A trustworthy and open environment was established. Every stage of thematic analysis was performed.	Non-endemic brands can use esports knowledge, specifically with regards to the games and the esports audiences (in terms of their lifestyle, values and behaviour) to position their brand in a favorable light amongst esports consumers, and on the appropriate advertising platforms.	Aaker, D. A. 1991. Managing brand equity: Capitalising on the value of a brand name. New York: The Free Press. Annasilvia, D.R., Daniel, G.V.J. and Emeline, V. 2018. How do sport and eSport enthusiasts differ in their perception of brand image? Master's Thesis. [Online]. Available at: https://pdfs.semanticscholar.org/89af/f78770fb500817f5fd1916f9cf065fde8130.pdf [Accessed 28 March].
Research Problem	Secondary Questions	Key Concepts	Key Theories			Sampling	Data Analysis Method	Limitations	Anticipated Contribution	
The industry itself has a complex ecosystem. For brands wanting to get involved, first they need to acquire esports knowledge, trends and developments on both the industry and the audiences	1)What is an esports consumer? 2)How does the esports ecosystem function in South Africa? 3)What is an endemic and a non-endemic brand in the context of esports? 4)What are the perceptions of esports consumers towards brands involved in esports?	Esports; Esports consumer; Endemic brand; Non-endemic brand; Brand Awareness; Brand associations.	Brand Equity model (1993)			Non-probability sampling was used: Purposive sampling to ensure that participants have basic knowledge and experience of esports; Convenience sampling to ensure availability of participants.	Thematic Analysis was used in this study to analyse the data that was collected.	Due to data constraints, the video call element was not included in the interview. Due to the current global pandemic, COVID-19, participants were not prepared to meet face to face.	Determine the most effective ways in which non-endemic brands can advertise through esports, and also, reveal how brands can use consumer knowledge to formulate effective means of communication with esports audiences.	Gawrysiak, J., Burton, R., Jenny, S. and Williams, D. 2020. Using Esports Efficiently to Enhance and Extend Brand Perceptions—A Literature Review. <i>Physical Culture and Sport. Studies and Research</i>, 86(1): 1-14.