

Esports: Inc Impact of COVID-19 - UK - July 2020

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“The COVID-19 lockdown is expected to have boosted viewership of esports and game streams, as consumers look for ways to stay entertained at home. During lockdown, sports organisations organised esports competitions featuring professional athletes, while esports replaced traditional sport on TV in some cases, which will have increased esports’ mainstream appeal.”
– Zach Emmanuel, Consumer Technology Analyst

This report looks at the following areas:

- The short, medium and long-term impact of COVID-19 on the esports market.
- Current viewership of esports and game streams and the amount of gamers who stream gameplay themselves.
- How professional sport franchises used the lockdown period to provide esports coverage for fans and how esports games would be in a strong position to succeed in another lockdown scenario.
- The role of esports and gaming in social environments such as esports studios and bars.

The extent to which the burgeoning esports market has already started to capture mainstream attention is evident from the fact that Mintel’s latest consumer research finds 32% of gamers in the UK watch game streams. However, the real scale of its potential is even clearer from the fact that more than half (58%) of Generation Z gamers are doing so. Watching professional esports is an activity that 23% of gamers do, and this is also higher for the younger generations, at 37% of Generation Z gamers and 34% of Younger Millennial gamers. Of the people who watch esports, there is clear interest in extending esports touchpoints into the real world, with 65% interested in going to esports studios and 62% to esports bars.

The COVID-19 pandemic has already caused the cancellation or postponement of several key esports events such as the *Fortnite World Cup*, while international sporting competitions have been cancelled in China – a key market for esports events – for the rest of the calendar year.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market

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Esports market set for full-year growth despite COVID-19

Esports players and competitive streamers likely to buy next-gen consoles despite economic uncertainty

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Coverage of sports games now well placed to appeal during any further lockdown

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Sponsorships generate over half of esports revenue for Western Europe

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Google Stadia now available but question marks over its impact on the esports market

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Further details arrive for next-generation consoles

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Esports players and competitive streamers likely to buy next-gen consoles despite economic uncertainty

Google Stadia now available but with question marks over its impact on the esports market

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Companies and Brands – What You Need to Know

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 Football players compete in ePremier League Invitational
 F1 runs Esports Virtual Grand Prix
 YouTube becomes new exclusive streaming platform for Activision esports
 GAME opens gaming and esports arena in partnership with Belong

Launch Activity and Innovation

Razer to host esports events at new flagship London store
 GAME opens gaming and esports arena in partnership with Belong
 Football players compete in ePremier League Invitational
 F1 runs Esports Virtual Grand Prix
 ATP and WTA host virtual Madrid Open
 Gareth Bale and David Beckham invest in esports teams
 Gareth Bale
 David Beckham
 YouTube becomes new exclusive streaming platform for Activision esports
 YouTube signs exclusive deals with former Twitch esports stars

The Consumer – What You Need to Know

Over a third of Generation Z play video games at least five days a week
 Younger consumers drive interest in game viewing and streaming
 Majority of consumers prefer to watch esports events at the venue
 Over four in 10 esports viewers have bought merchandise
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