

# Esports - UK - 2022

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## This report looks at the following areas:

- Viewership of esports or game streams and the impact of the cost-of-living crisis on the sector.
- Devices and platforms used to watch esports and the differences in the type of viewers.
- Measures to improve the diversity of esports and to make women feel more comfortable entering the community.
- Engagement with esports, including buying merchandise, attending events in person and donating to game streamers.

30% of gamers watch esports, rising to 43% among Younger Millennial gamers. Meanwhile, 59% of esports viewers engage with sponsored posts from video game streamers, indicating the highly-engaged nature of esports viewers and the potential for brand tie-ups.

Ticket sales for esports events will prove resilient during the cost-of-living crisis. In September 2022 26% planned to go to a concert, sporting event or theatre in the next three months, which is similar to the 24% in September 2021. The affordability of tickets to esports events means that sales will prove resilient in this period, for example pricing for Epic37 starting at £15.50 and £26 for the Insomnia Gaming Festival.

The esports industry remains male-dominated, with women (30%) more likely than men (17%) to say that streams do not provide a sense of community. Esports player Alixxa said in an interview with *Forbes* that women are "scared" to become players over the online reaction they could get. This results in fewer female role models and discourages women from watching esports, presenting a significant barrier to the success of the industry.

40% of Generation X who have a console or desktop play video games; however just 19% of them watch esports. Running esports alongside traditional sports at events like the Olympics and Commonwealth Games will bring esports



"Esports continues to be a male-dominated industry, but scaling back the 'win at all costs' mentality could prove an effective way of making the industry more inclusive and getting more women involved in watching gaming content. Women-only tournaments with exhibition matches can provide a better sense of community."

– **Zach Emmanuel,**  
**Consumer Technology Analyst**

## Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

to Generation X's attention more and can help to expand the viewership of this content.

### What's included

Executive Summary

---

Full Report PDF

---

Infographic Overview

---

Powerpoint Presentation

---

Interactive Databook

---

Previous editions

---

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

---

EMEA +44 (0) 20 7606 4533

---

Brazil 0800 095 9094

---

Americas +1 (312) 943 5250

---

China +86 (21) 6032 7300

---

APAC +61 (0) 2 8284 8100

---

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### OVERVIEW

- **Key issues covered in this Report**
- **Products covered in this Report**

### EXECUTIVE SUMMARY

- **The five-year outlook for esports**  
Figure 1: Category outlook for esports, 2022-27
- **The market**
- **Merchandise and tickets contribute to significant growth in esports market revenue**  
Figure 2: Newzoo global revenue for esports, 2018-22
- **Cost-of-living crisis to boost interest in free-to-play esports gaming**
- **Companies and brands**
- **Netflix's mobile gaming offering could point towards esports coverage in the future**
- **Yesports' NFT platform can access over 30 million esports fans**
- **Commonwealth Games runs first Commonwealth Esports Championship**
- **Burberry and Gen. G release video series on esports and gaming diversity**
- **The consumer**
- **Interest in social activities and mobile gaming steers some Older Millennials away from gaming**  
Figure 3: Frequency of gaming, 2020-22
- **Game viewing habits have declined marginally following pandemic boost**  
Figure 4: Video game viewing and playing habits, 2022
- **Smartphones provide key point of entry into watching esports**  
Figure 5: Device used to watch esports, 2022
- **Advertising merchandise and tickets could be more successful on Facebook than YouTube**  
Figure 6: Platform used to watch esports, 2022
- **Building a more welcoming community for women**  
Figure 7: Attitudes towards esports communities and sponsored posts from gamers, 2022
- **Gaming venues can be a key spot for esports merchandise**
- **Funding towards esports training programmes can build the next generation of players**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 8: Attitudes towards esports events and merchandise, 2022

## ISSUES AND INSIGHTS

- **Affordability ensures esports ticket sales will prove resilient during cost-of-living crisis**
- **Use mobile adverts to entice casual gamers into esports**
- **Reduce the 'win at all costs' mentality to attract more women to esports**

## MARKET SIZE

- **The five-year outlook for esports**

Figure 9: Category outlook for esports, 2022-27

- **Merchandise and tickets contribute to significant growth in esports market revenue**

Figure 10: Newzoo global revenue for esports, 2018-22

Figure 11: Western Europe esports revenue breakdown, 2021-22

- **Ticket sales will prove resilient during cost-of-living crisis**

## MARKET DRIVERS

- **Nearly four in ten consumers have a static games console**  
Figure 12: Ownership of static games consoles, 2018-22
- **Cost-of-living crisis to boost interest in free-to-play esports gaming**
- **Rollout of high speed broadband makes esports accessible to more consumers**
- **NFTs and metaverse could bring fans closer to esports teams in the coming years**

## COMPETITIVE STRATEGIES

- **Netflix's mobile gaming division could point towards esports coverage in the future**
- **Yesports' NFT platform can access over 30 million esports fans**

## LAUNCH ACTIVITY AND INNOVATION

- **Commonwealth Games runs first Commonwealth Esports Championship**
- **Guild of Guardians starts partnership with eight major esports brands**
- **Broadening esports audience is a key objective of Sky and Guild Esports' partnership**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Santander becomes lead sponsor for League of Legends European Championship**
- **Burberry and Gen. G release video series on esports and gaming diversity**

**FREQUENCY OF PLAYING VIDEO GAMES**

- **Interest in social activities and mobile gaming steers some Older Millennials away from gaming**
- **Social aspect of gaming is key to getting Older Millennials back on board**

Figure 13: Frequency of gaming, 2020-22

Figure 14: Frequency of gaming for Older Millennials, 2021-22

**WATCHING AND PARTICIPATING IN ESPORTS OR GAME STREAMS**

- **Game viewing habits have declined marginally following pandemic boost**
- **Esports coverage on TV can tap into the idea of watching gaming as a family activity**

Figure 15: Video game viewing and playing habits, 2022

**DEVICES USED TO WATCH ESPORTS**

- **Use growth in mobile games to advertise esports**
- **Smartphones provide key point of entry into watching esports**

Figure 16: Device used to watch esports, 2022

Figure 17: Buying merchandise, crossed by device used to watch esports, 2022

**PLATFORMS USED TO WATCH ESPORTS**

- **Advertising merchandise and tickets could be more successful on Facebook than YouTube**

Figure 18: Platform used to watch esports, 2022

Figure 19: Attitudes towards merchandise and events, by platform used to watch esports, 2022

- **Families are a key audience for esports on Facebook**

Figure 20: Platform used to watch esports for dual parent families, 2022

**ATTITUDES TOWARDS ESPORTS AND GAME VIEWING**

- **Build a more welcoming community for women**
- **Reduce competitive aspect to encourage a more inclusive experience**

**What's included**

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

**Did you know?**

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

**Buy this report now**

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 21: "I think esports streams provide a sense of community for fans, by gender, 2022

- **Social media giveaways can be a powerful tool for spreading brands' name**

Figure 22: Attitudes towards sponsored posts from video game streamers, 2022

- **Gaming venues can be a key spot for esports merchandise**
- **Funding towards esports training programmes can build the next generation of players**

Figure 23: Attitudes towards esports events and merchandise, 2022

#### APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

#### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

#### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

#### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.