

Esports - US - 2022

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This report looks at the following areas:

- Key players in the gaming market for esports
- Who watches esports, how viewership has trended and who participates in esports
- Why gamers watch esports and opportunities for brands to engage them
- How gamers discover esports events and the best channels for discoverability
- Gamers who are most likely to be influenced by esports sponsorships and advertising
- Gamers' attitudes toward esports and opportunities for enhancing coverage

40% of gamers have watched esports content in the last year and 30% of them watch at least on a monthly basis. That's a lot of gamers who are very passionate and excited esports viewers. Top motivations for watching esports tend to focus around games that viewers play themselves, but there is also strong attachment to specific teams and players. Interest extends beyond the typical younger male competitive players that may come to mind. Gamers of all types have interests in esports that can be catered to.

Globally, esports revenue for 2022 is estimated to grow more than 20% over 2021, indicating continued interest despite relaxation of pandemic restrictions. Esports largely operate separately from the traditional gaming industry, drawing value from sponsorships, licensing agreements and media rights as opposed to hardware and software sales. This adds a layer of insulation from supply chain issues and inflationary concerns; as the COVID-19 pandemic and subsequent lockdowns proved, gaming in general does well when people are staying home.

That being said, returning to in-person events got off to a rocky start in the beginning of 2022 with the CDL Kickoff Classic in Texas upsetting participants over safety measures and a 24% loss of viewers online vs the previous year.



"Esports is a billion-dollar industry that continues to grow and create new opportunities. At this rate, developing young gamer skills will soon be as common as pee-wee league football. Even parents seem to have come around and learned to accept that playing video games professionally can be a legitimate career."

– **Brian Benway, Gaming and Entertainment Analyst**

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Tournament organizers for upcoming events remain tentatively hopeful for in-person events to resume on schedule, if health and safety guidelines permit. It's important to remember, especially for global competition, that staff, players and attendees are exposed to risks from areas beyond just the location of an event.

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