

Omnibus Reports

Just a game?

Understanding the existing and future eSports market in Australia



Introduction

This report investigates eSports, analysing a market with estimated global revenue of US\$745 million and an audience of 385 million this year (2017)*. And these figures are forecast to grow – by 2020, it is estimated that eSports will generate more than US\$1 billion in global revenue and nearly double its audience to 600 million.*

This eSports Australia report examines who currently watches eSports, what they are watching and where, and also if and how they plan to watch eSports again. It also considers the prospective market – those who haven't watched eSports before, but are interested in doing so in the future. For this report, YouGov ran a Re-contact survey in order to fully understand attitudes towards this market.

For the purposes of this report, the definition of eSports is as follows; eSports are organised, multiplayer video game competitions, typically between professional players (one-on-one or in teams), which can be staged in front of a live audience and streamed online or broadcast on TV. Examples of these video games include League of Legends, Counter-Strike and FIFA.

This definition was provided to respondents before they took the Re-contact survey.

Key findings:

Over four in 10 are aware of eSports in Australia.

A third of adults who are aware of eSports have watched them.

Awareness of eSports is not exceptional, how it is also not exceptionally low.

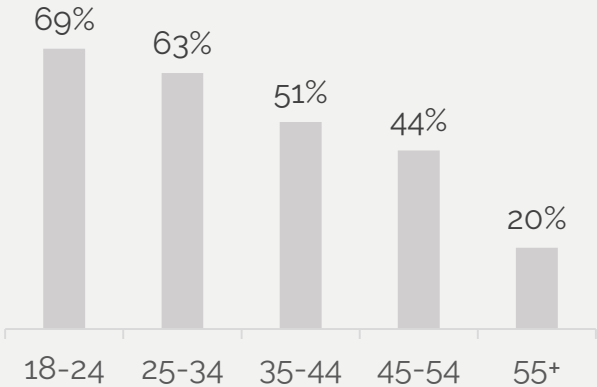
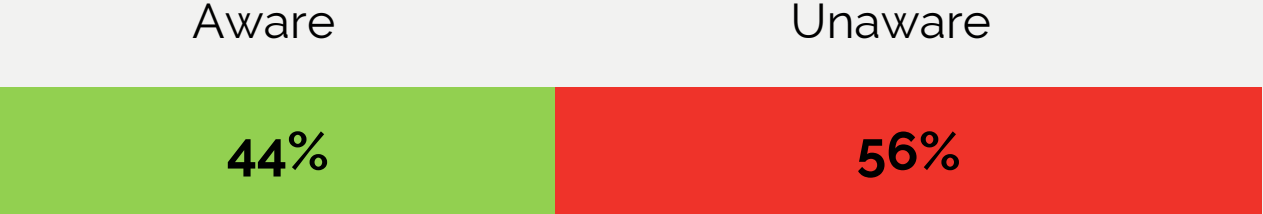
Over half of those who have seen eSports watch it on at least a monthly basis.

21% of all adults are interested in watching eSports in the future.

The state of eSports in Australia

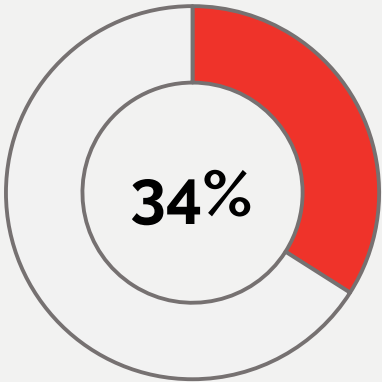


Over four in 10 adults are aware of eSports in Australia



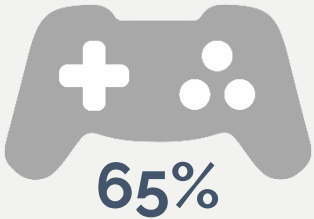
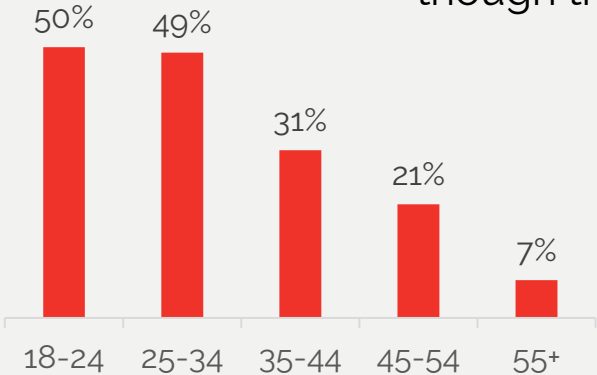
Base: All AUS adults (1,032)
Q1_es. Before taking this survey, had you heard of eSports?

Over a third of those who are aware have watched eSports



Have watched eSports

This is higher among younger people and males, as well as heavy gamers*, though the gender divide is less pronounced

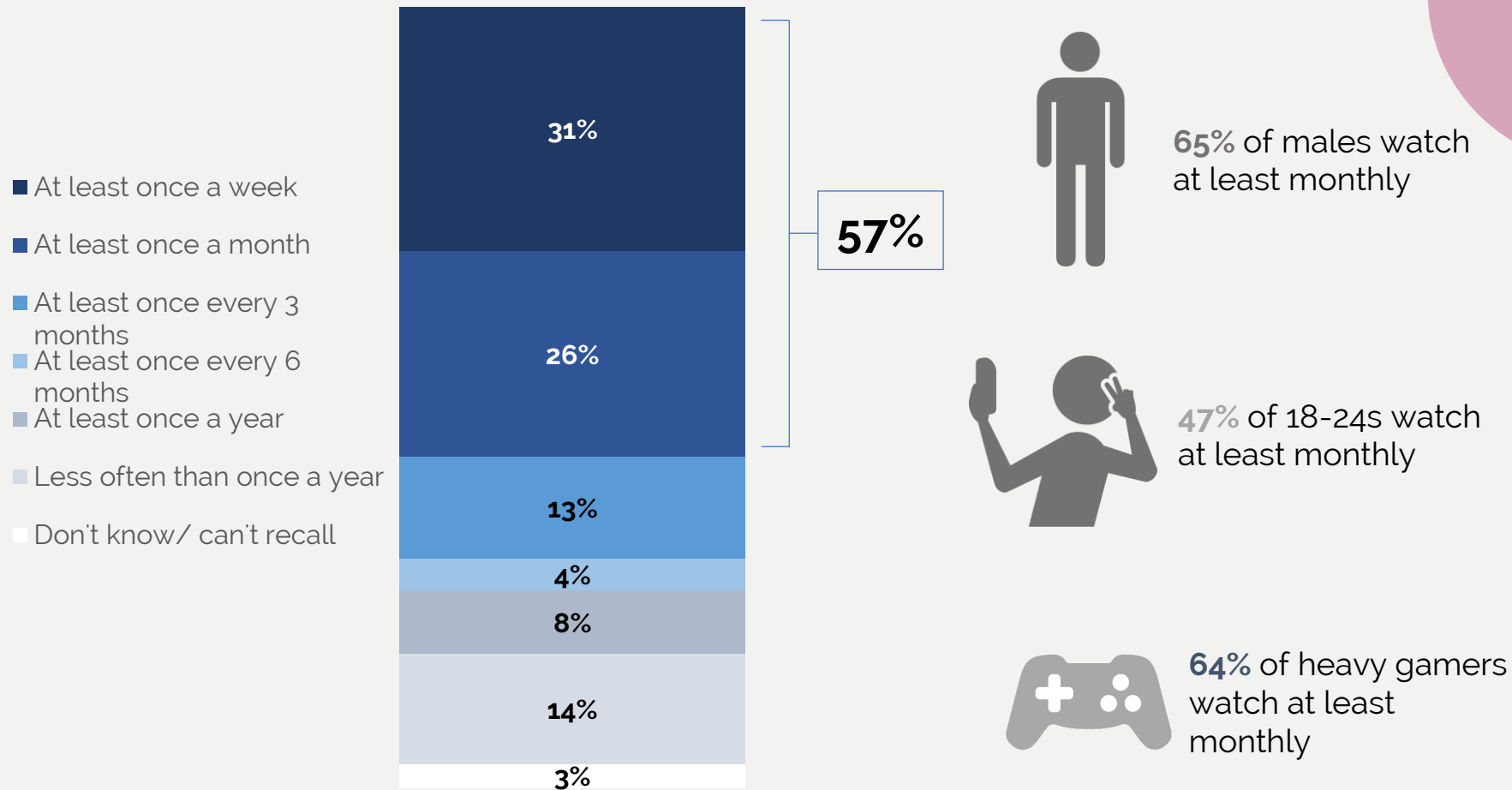


**defined as 'hardcore' and 'keen' gamers (of the AU population)*

Base: All AUS adults aware of eSports (450)

Q2a_es. Have you EVER watched eSports?

And more than a half of those who have seen eSports watch it on at least a monthly basis



Base: All AUS adults who have watched eSports before (155)

Q2b_es. How often do you watch eSports? (Please select the option that best applies)

Awareness of
eSports is relatively
low



Australia lags behind some countries for awareness

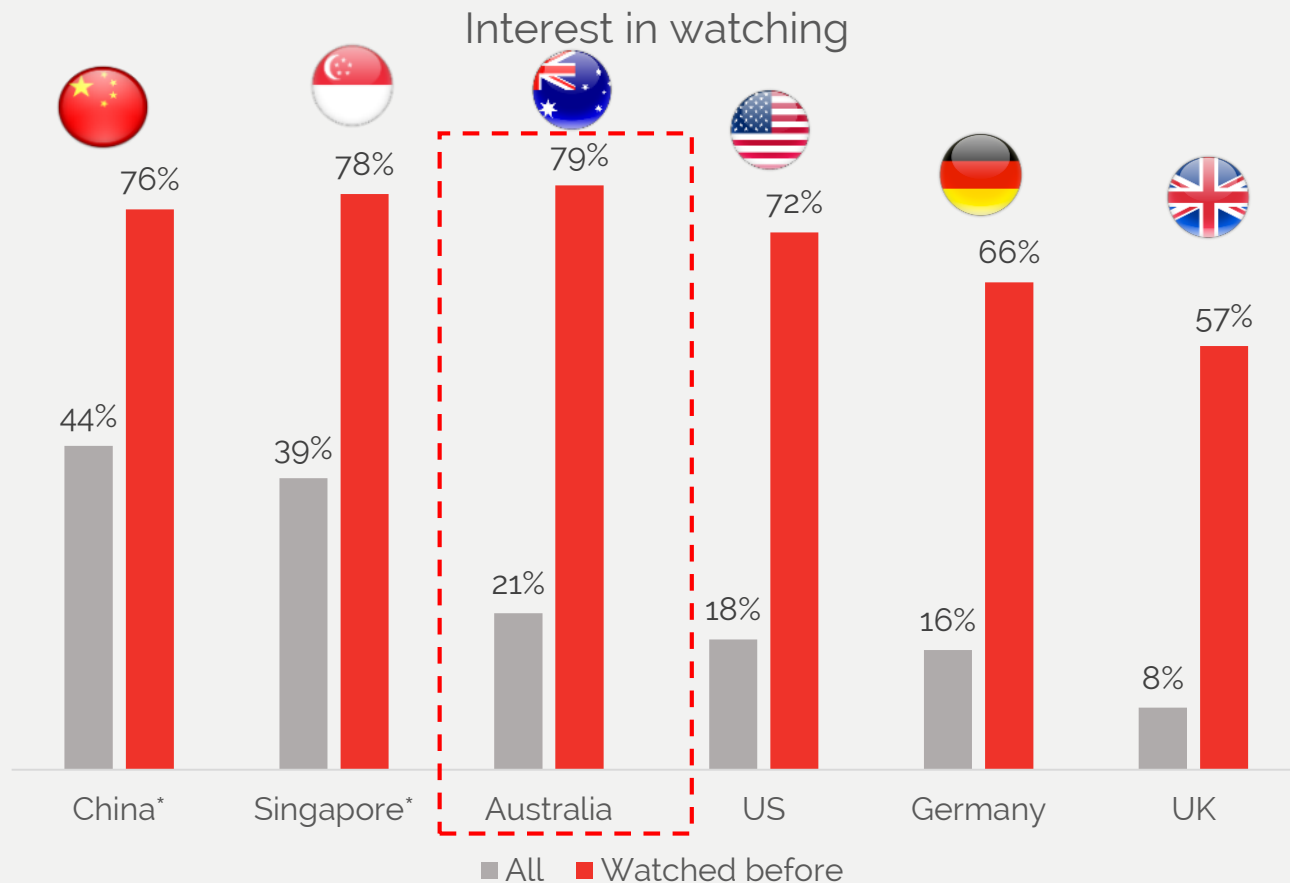
Rank	Country	Awareness
1	China*	77%
2	Singapore*	55%
3	Germany	44%
4	Australia	44%
5	US	41%
6	UK	35%

*online rep

Base: All adults – China (1,009), Singapore (1,004), Germany (2,052), Australia (1,032), US (2,289), UK (2,087)

Q1_es. Before taking this survey, had you heard of eSports?

Interest is still relatively low in Australia if they haven't watched before

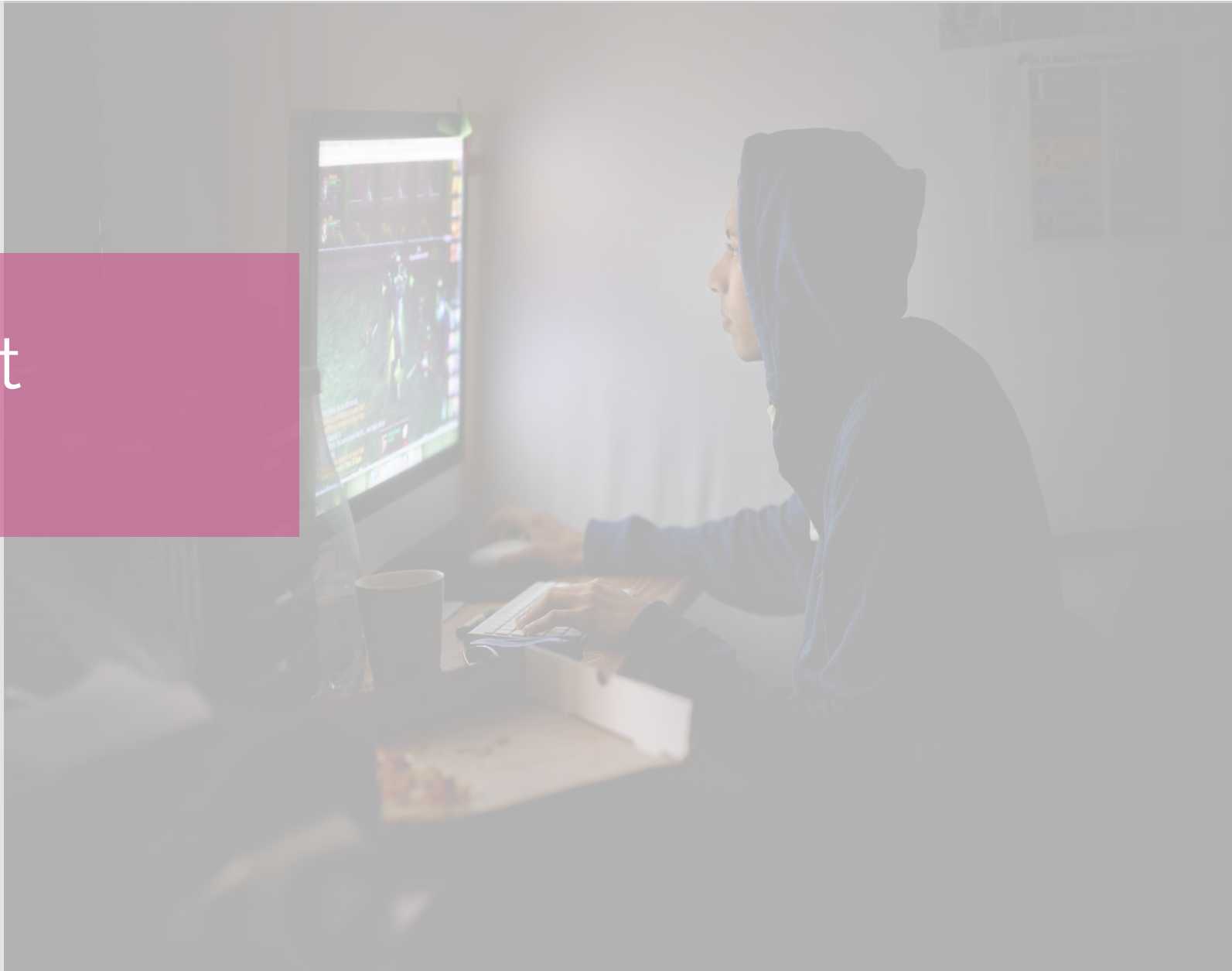


*online rep

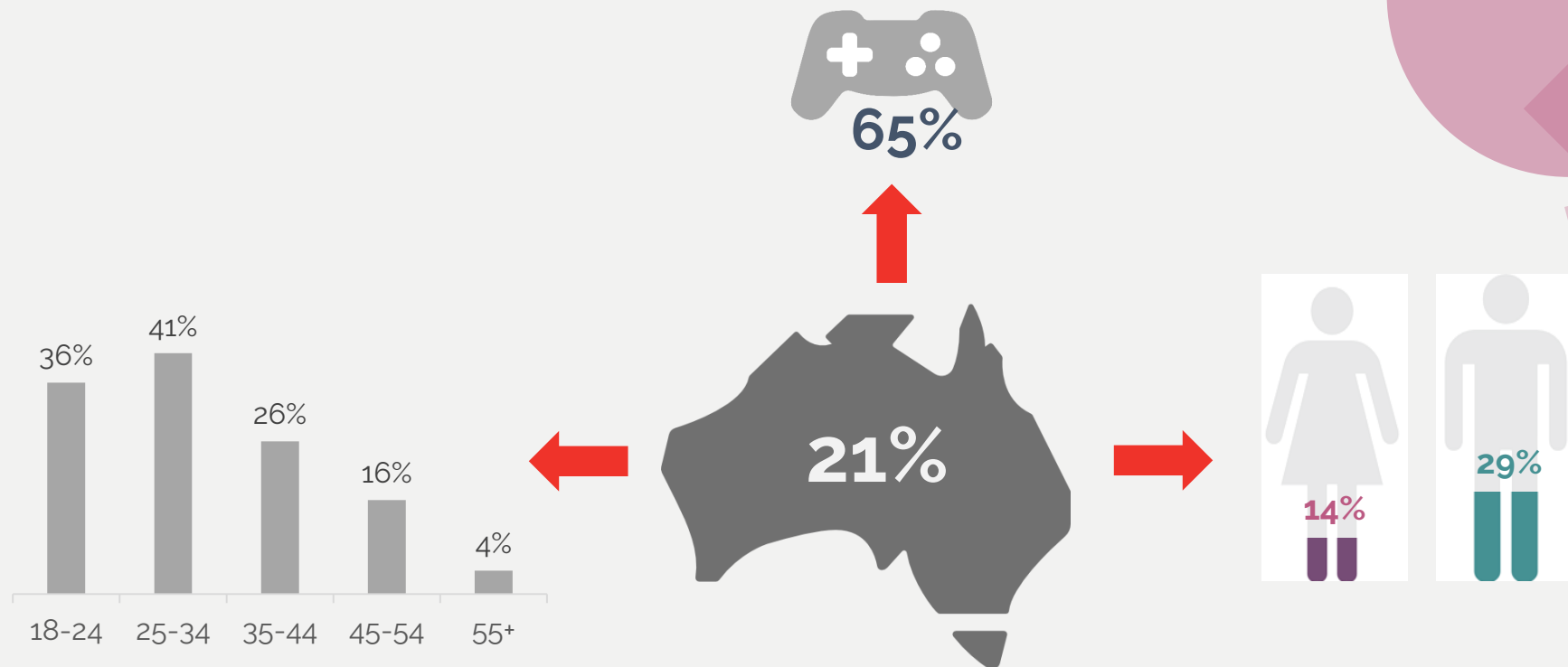
Base: All adults / All adults who have watched eSports before – China (1,009/786), Singapore (1,004/251), Australia (1,032/137), US (2,289/231), Germany (2,052/219), UK (2,087/130)

Q3a_es. How interested, if at all, are you in watching eSports at some point in the future?

Who to target



Be aware that **21%** of all adults are interested in watching eSports in the future



9% of those who have never watched eSports before but would be interested in doing so in the future – a core group of viewers

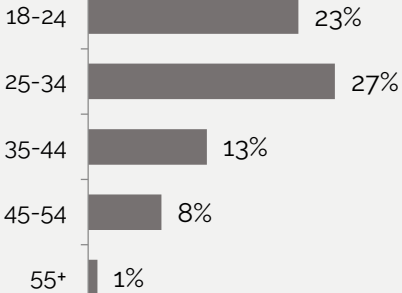
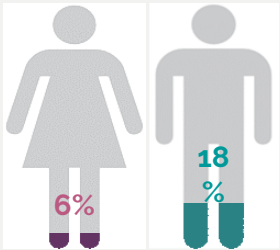
Base: All AUS adults (1032)

Q3a_es. How interested, if at all, are you in watching eSports at some point in the future?

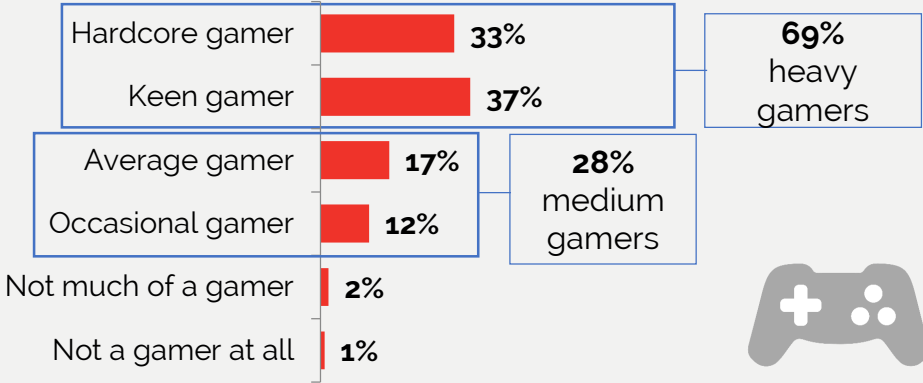
Current eSports watchers are...

12% of those who have watched eSports before are interested in watching it again

Gender and age



Video gaming

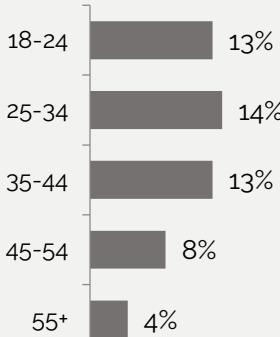
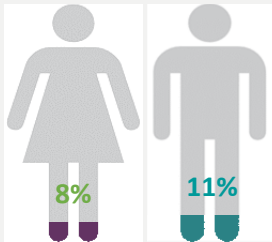


Base: All AUS adults who have watched eSports before and are interested in watching again (122)
Source: YouGov Profiles

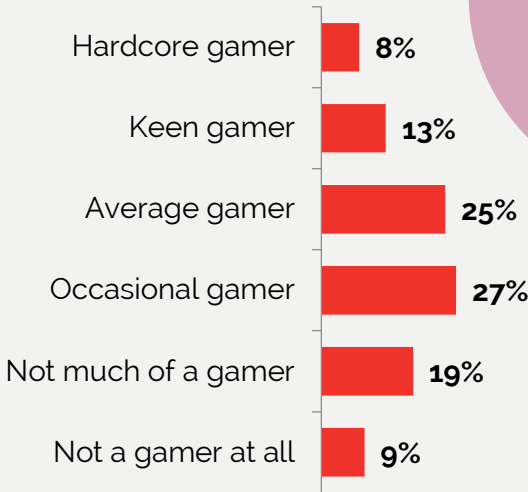
And those interested in watching eSport are...

9% of those who have never watched eSports before are interested in doing so in the future

Gender and age



Video gaming

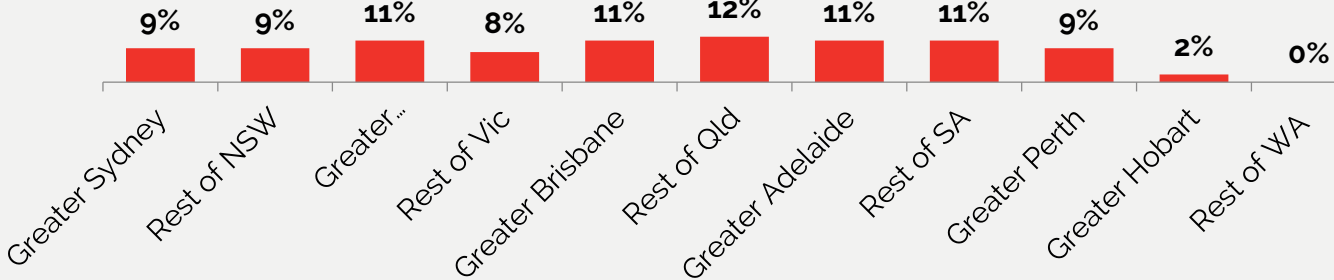


21% heavy gamers

52% medium gamers



Region



Base: All AUS adults who have not watched eSports before, but are interested in watching in the future (96)

Source: YouGov Profiles

Summary

- Over four in 10 are aware of eSports in Australia.
- A third of adults who are aware of eSports have watched them.
- Awareness of eSports is not exceptional, how it is also not exceptionally low.
- Over half of those who have seen eSports watch it on at least a monthly basis.
- 21% of all adults are interested in watching eSports in the future.

About YouGov

YouGov is an international data and analytics group. Our core offering of consumer data is derived from our highly participative panel of 5 million people worldwide. For each panelist we have tens of thousands of connected data points so can answer the vast majority of research questions by interrogating existing data. Where we don't have the answers already, we can perform quick turn-around re-contact surveys for client specific research.

**For a free, no obligation,
discussion about YouGov Re-
contacts, please contact:**

Sej Patel

Tel: +61 (0)416 252 853

Email: sej.patel@yougov.com