



Just a game?

Understanding the existing and future eSports market in the UK

August/September 2017

Report

YouGov[®]

Background, objectives and sampling

Why we did the study and who we spoke to









Background and objectives

- eSports has a global revenue of £565 million and an audience of 385 million this year (2017). This has continually increased from £264 million and an audience of 235 million in 2015. By 2020, its estimated that eSports will generate more than £1 billion in global revenue and nearly double its audience to 600 million.*
- YouGov wanted to find out more about the eSports market. We ran a study to understand attitudes towards this market – who currently watches eSports, what they are watching and where, and also if and how they plan to watch eSports again. It also looked at the prospective market – those who haven't watched eSports before, but are interested in doing so in the future.
- More specifically, the main objectives of the study were to:
 - Measure awareness of the market
 - Assess the market size and potential market size of eSports in the UK, and how it compares to other markets
 - Understand watchers and prospects of eSports, including where and what types of games they are watching/ will watch
 - Evaluate the role of betting on eSports
 - Size the potential for sponsors of eSports
- Given YouGov's ability to run fast turnaround, nationally representative Omnibus re-contact surveys in six countries from across the globe, using its own panel (c. 5 million worldwide), YouGov is well-placed to provide insight into both the current and future eSports market, which presents clients the opportunity to understand this growing market and its potential.



Sampling

- To understand this market and provide detailed insight YouGov ran **nationally representative** studies in the UK, as well as in Germany, the US, Australia, China and Singapore. This was done using YouGov’s Omnibus re-contact service.
- Fieldwork was undertaken between August and September 2017. All interviews were conducted online with YouGov’s panellists. Total sample size was **9,473** adults. The figures have been weighted and are representative of all adults (aged 18+) in each country.*
- Respondents were asked questions on whether they have ever watched eSports and if they are interested in watching eSports at some point in the future – breakdown below:

	 UK	 Germany	 US	 Australia	 China	 Singapore
Total	2,087	2,052	2,289	1,032	1,009	1,004
Watched before and interested in watching again	73	142	163	107	348	197
Not watched before, but interested in watching in the future	81	175	187	96	101	187



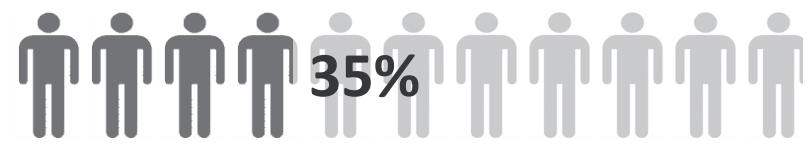
*Online rep in China and Singapore

Executive summary

The overall picture



The numbers



Over a third of UK adults are aware of eSports. That accounts for 18.3m people

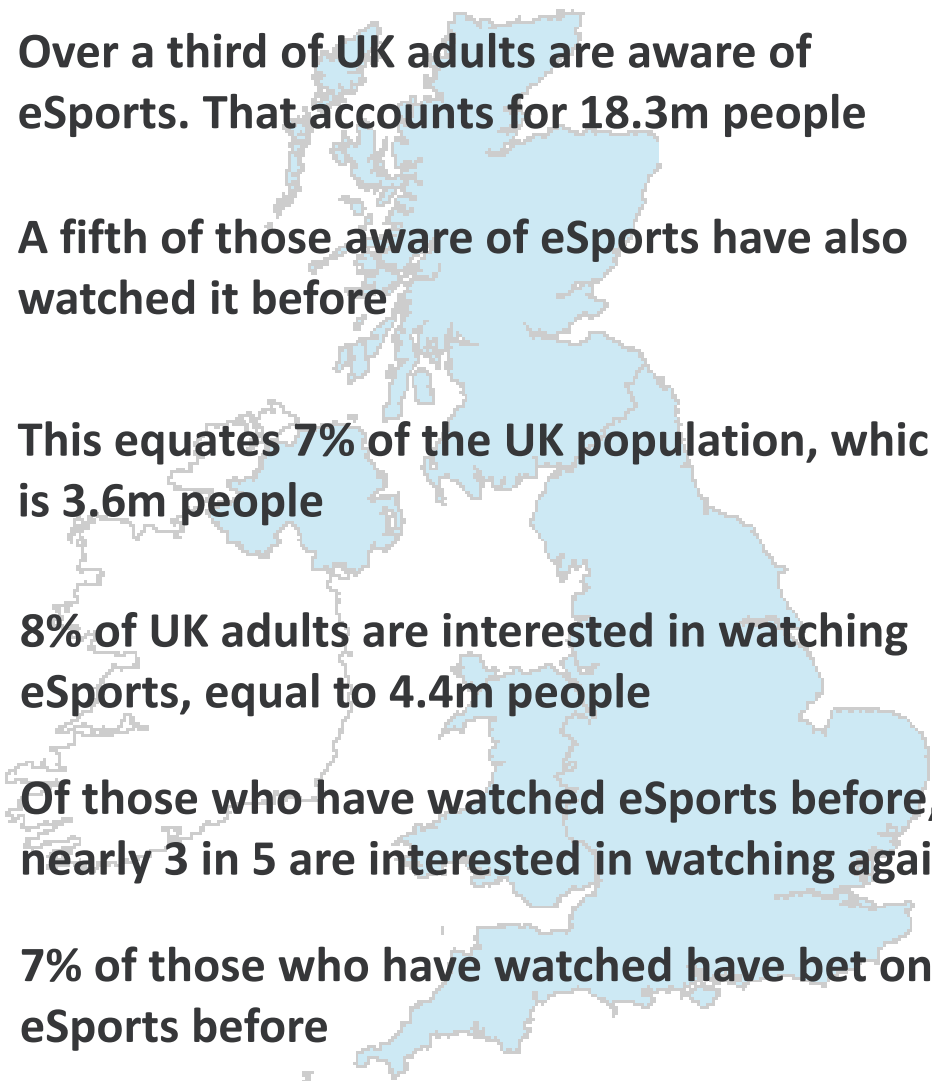
A fifth of those aware of eSports have also watched it before

This equates 7% of the UK population, which is 3.6m people

8% of UK adults are interested in watching eSports, equal to 4.4m people

Of those who have watched eSports before, nearly 3 in 5 are interested in watching again

7% of those who have watched have bet on eSports before



**Based on 51.8 million adults in the UK (ONS mid-year estimates 2016)*

Summary

- eSports has a good basis in the UK in terms of awareness (35%), as well as the number who have watched eSports before (7%) and are interested in watching in the future (8%). This includes a core group of viewers who have watched before and are interested in watching again (57%).
- Demographics of both watchers and prospects tend to be young, male and heavy video gamers, particularly when it comes to those aware of eSports and who have watched it before. However, older age groups, females and lighter gamers do show an interest in watching eSports in the future.
- The UK lags behind all other markets covered in this study in all areas of awareness, watched before and interest in watching, while China leads the pack. Awareness and viewership in similar markets, like Germany and the US, show that there is room for similar growth in the UK.
- A majority of current viewers watch eSports online (72%). Appetite for watching on TV rises significantly from where people have watched before (40%) to where people would like to watch in the future (63%).
- Sports games are popular amongst viewers and, in particular, future viewers – they are the third most popular type of game and the most popular type people are interested in watching. FIFA tops the most watched game and the one people are most interested in watching. Racing games also increases in popularity amongst future viewers.
- A small proportion (7%) of those who have watched eSports have bet on it in the past. There is an appetite for betting on eSports in the future, with nearly a fifth (17%) of those interested in watching saying they would bet, including 26% of those who have watched before.
- eSports does face some barriers. There's a perception that eSports doesn't deserve the same recognition as traditional sports. However, appreciation is higher among those who have watched eSports, so there is an opportunity to improve perceptions if the industry is able to lure more people into watching.

Awareness, watched and interested in

Who knows what eSports is, and how big is the market?



eSports definition within the survey

The definition of eSports used within this study is as follows – this is the definition that was provided to respondents before taking the survey:

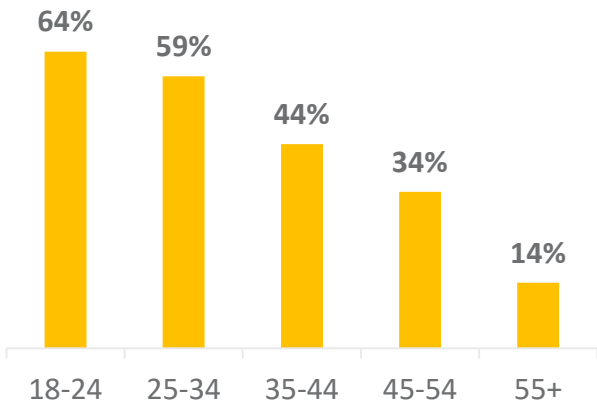
eSports are organised, multiplayer video game competitions, typically between professional players (one-on-one or in teams), which can be staged in front of a live audience and streamed online or broadcast on TV. Examples of these video games include League of Legends, Counter-Strike and FIFA.

eSports has a good basis for awareness in the UK, with younger people and males much more likely to know what it is

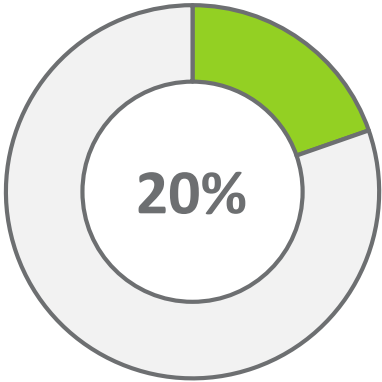
Over a third of UK adults are aware of eSports, rising to **64%** of 18-24s and nearly half of males



LOADING

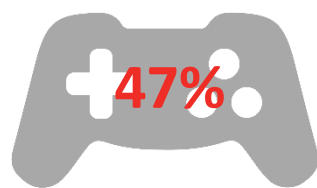
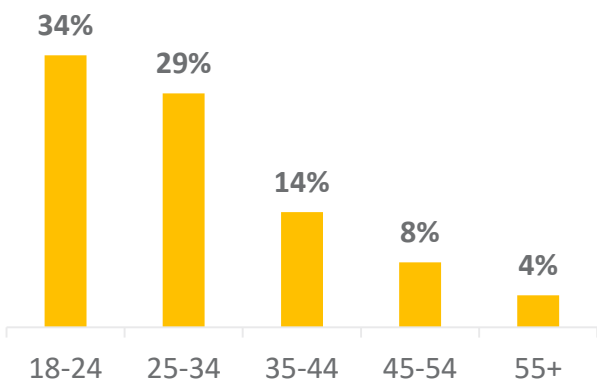


A relatively good proportion of those aware have watched eSports, with conversion rates better amongst younger people and males



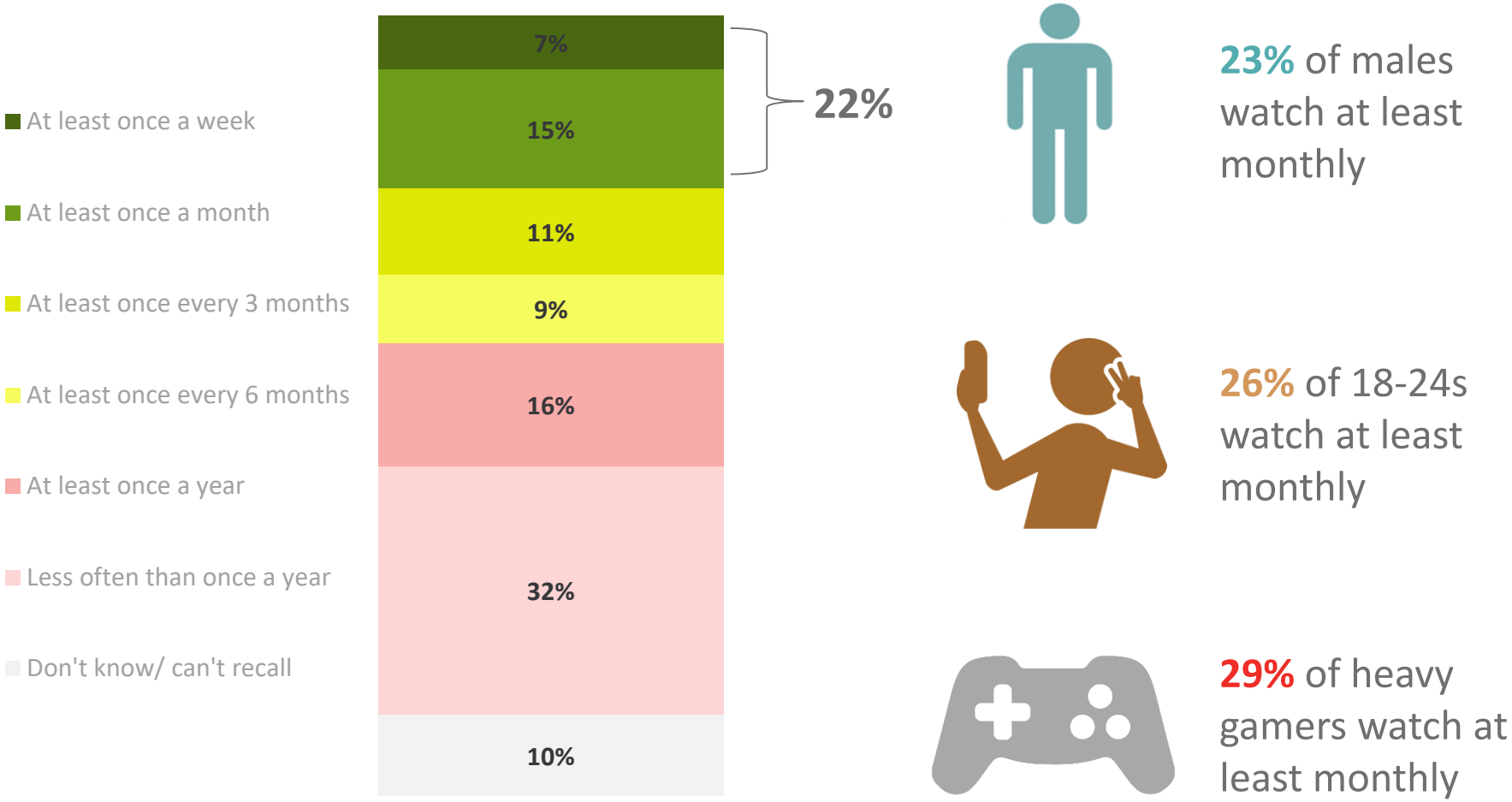
A fifth of those aware have watched eSports.
This equates to **7% of the UK population**

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

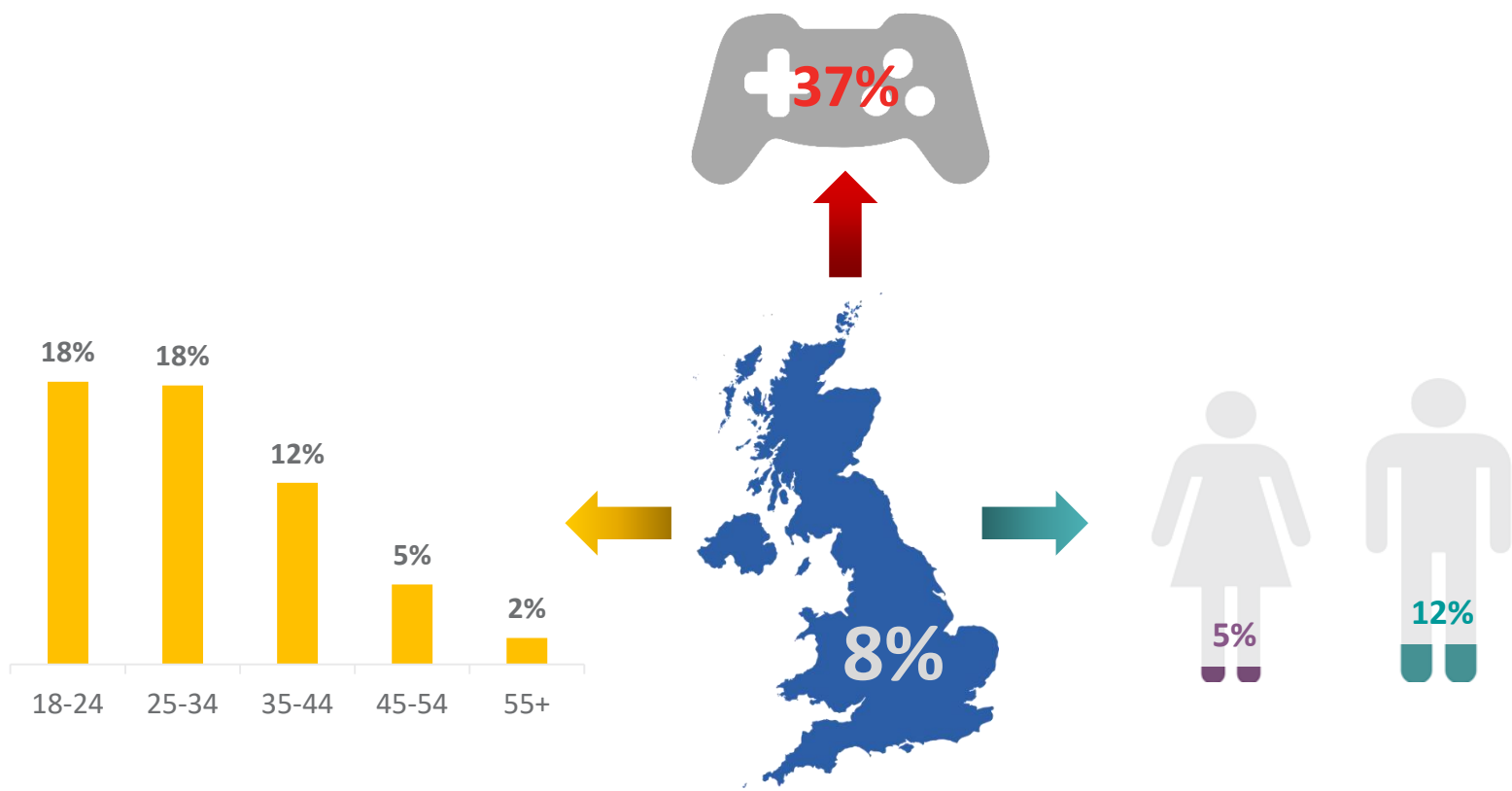


**defined a hardcore and keen gamers (10% of the UK population)*
Base: All UK adults aware of eSports (701)
Q2a_es. Have you EVER watched eSports?

More than a fifth of those who have seen eSports watch it on at least a monthly basis, again higher among its key demographics



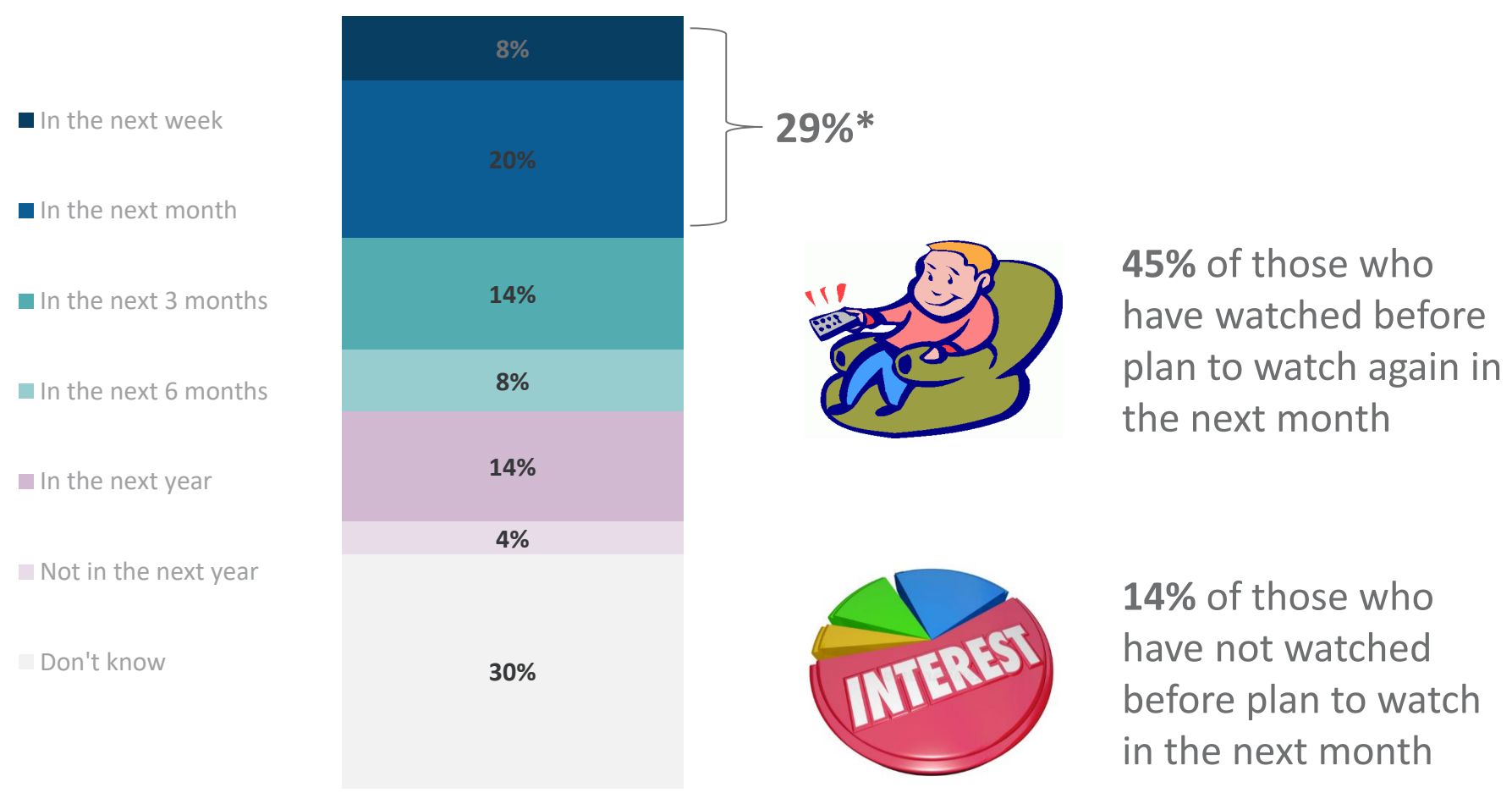
8% of all adults are interested in watching eSports in the future, including a core group of previous viewers



Almost 6 in 10 (**57%**) of those who have watched eSports before would be interested in doing so again – a core group of viewers



Nearly 3 in 10 who are interested in watching eSports are likely to do so in the next month, up to almost half of those who have watched before

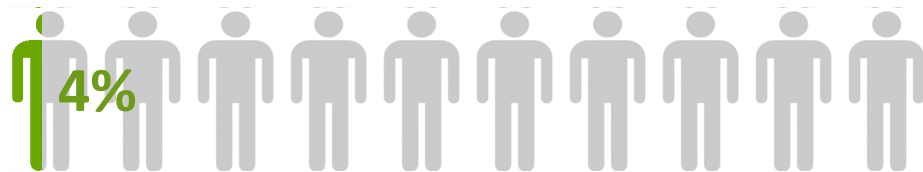


Profiles of watchers and prospects

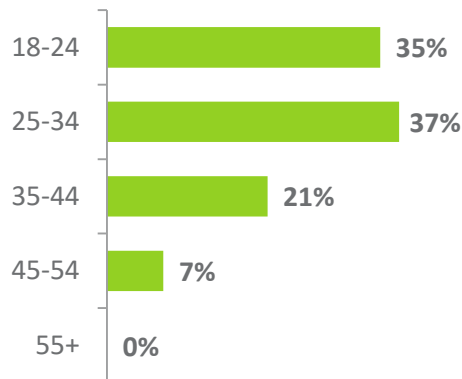
What is the make-up of these groups?



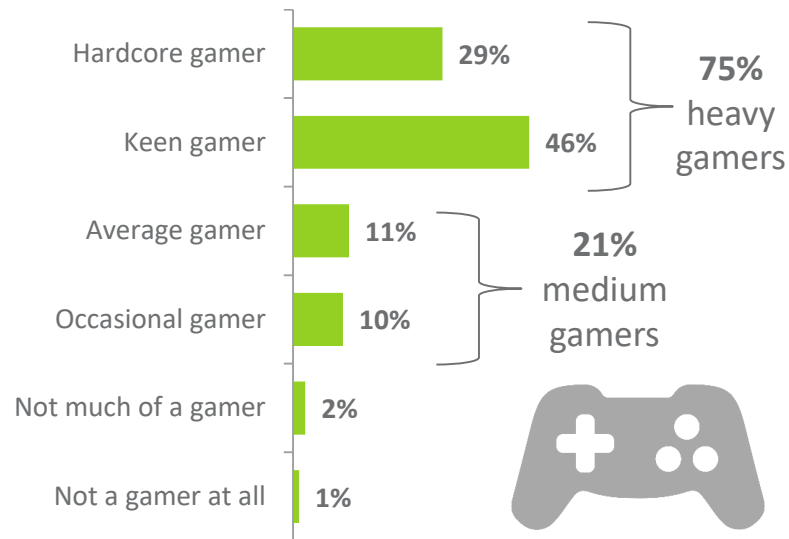
Profile of eSports watchers



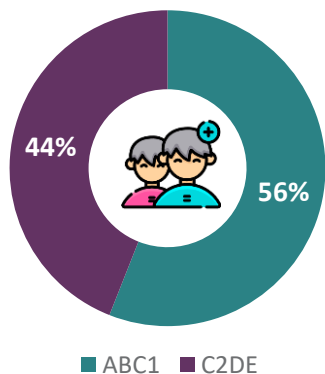
Gender and age



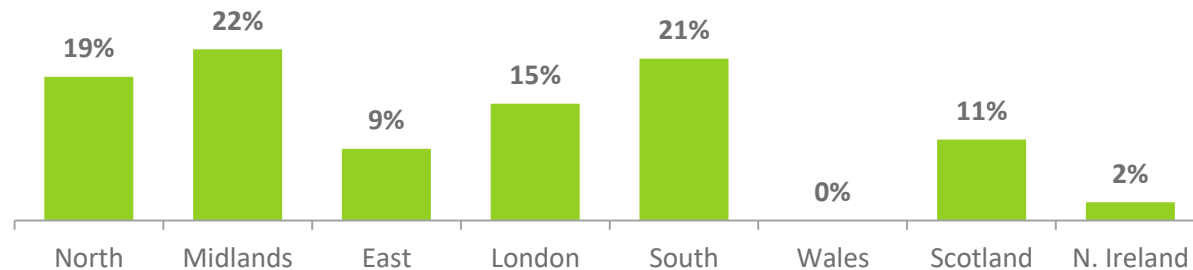
Video gaming



Social grade



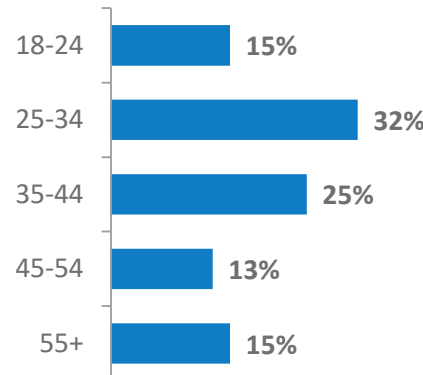
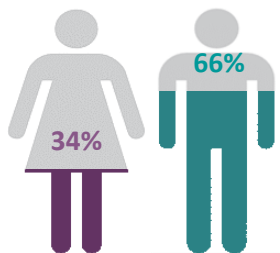
Region



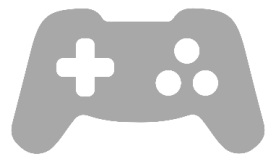
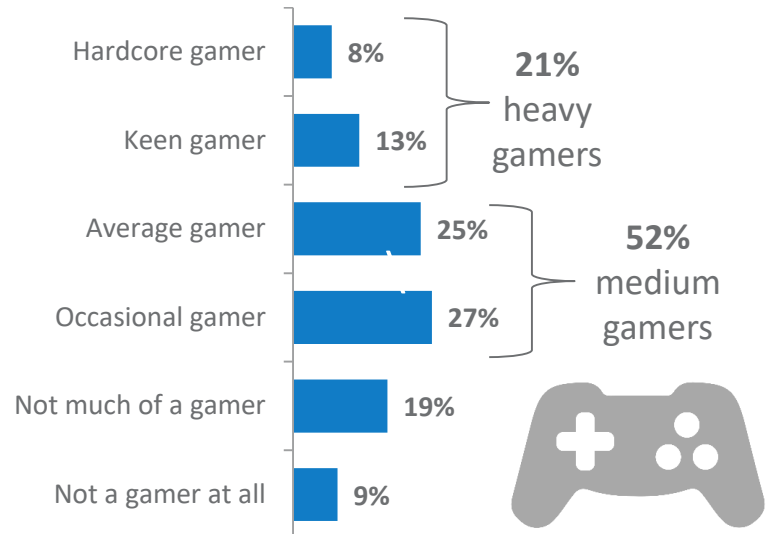
Profile of eSports prospects



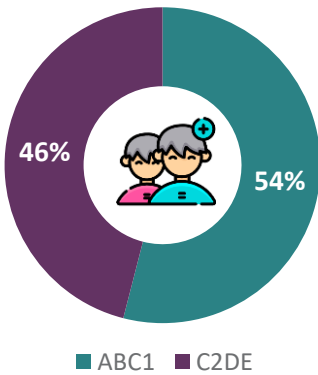
Gender and age



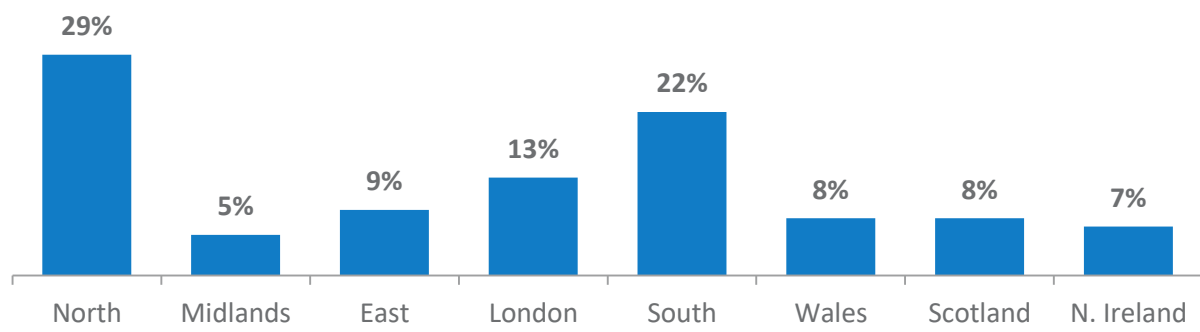
Video gaming



Social grade



Region









Country comparison

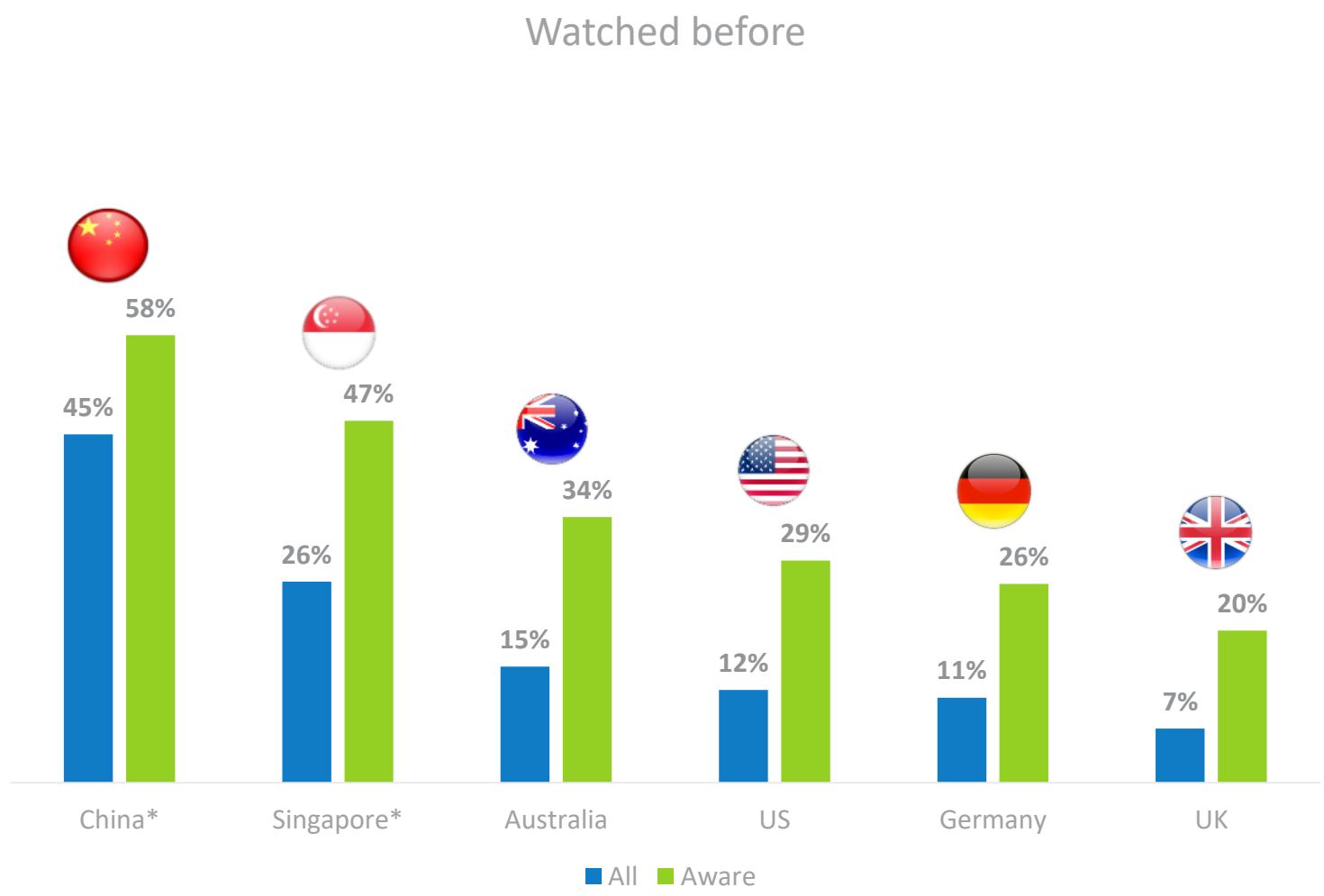
How does the UK compare to other markets?



UK at the bottom of the table of awareness of eSports, which is more than double in China. More needs to be done to raise awareness in UK

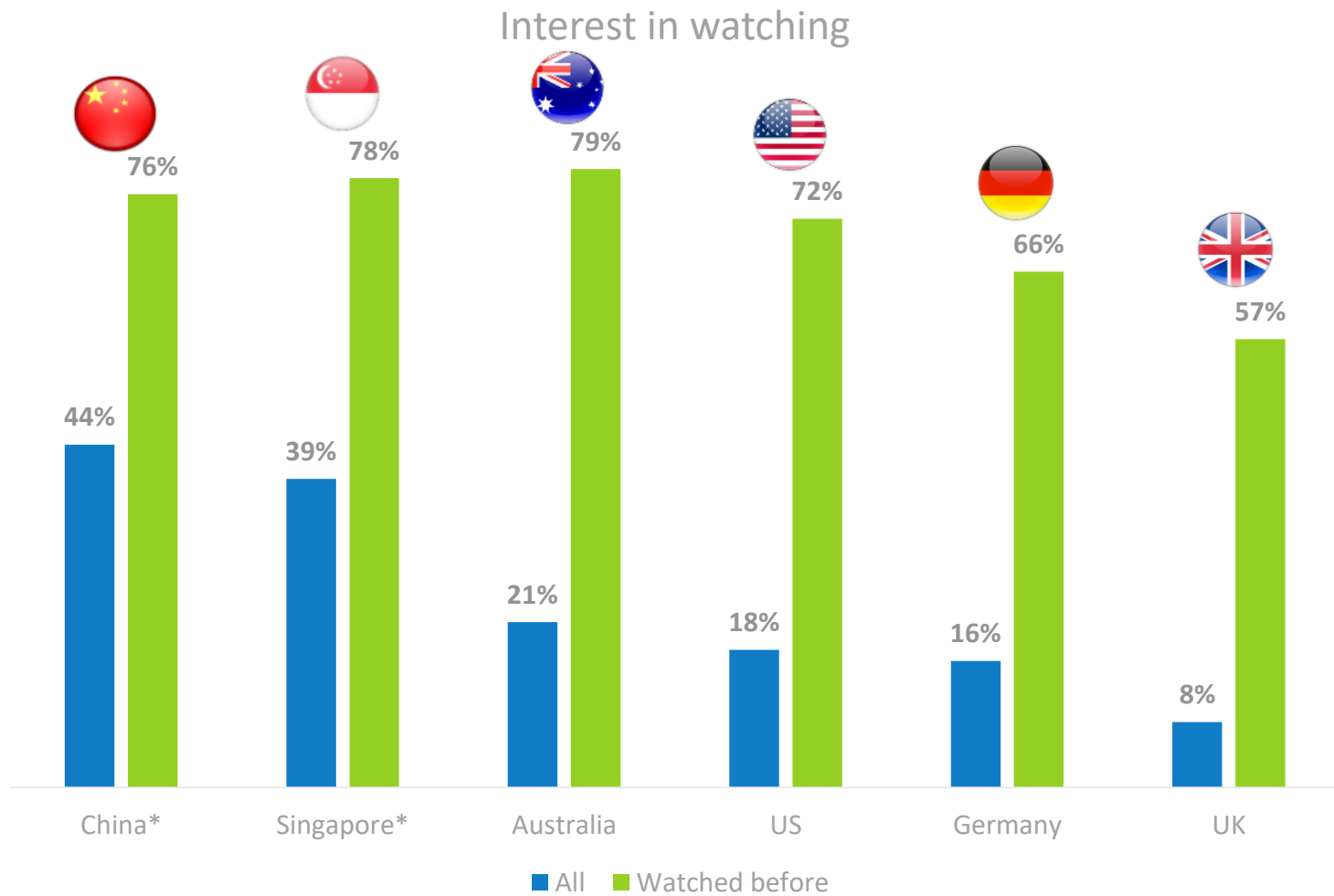
Rank		Country	Awareness
1		China*	77%
2		Singapore*	55%
3		Germany	44%
=		Australia	44%
5		US	41%
6		UK	35%

UK also lags behind in numbers who have watched eSports, on a total level and among those aware. Need to convert more aware into viewers



**online rep*
Base: All adults / All adults aware of eSports – China (1,009/786), Singapore (1,004/548), Australia (1,032/433), US (2,289/871), Germany (2,052/896), UK (2,087/701)
Q2a_es. Have you EVER watched eSports?

Interest lowest in the UK, less than half of Germany. Also lowest amongst those who've watched before – need to keep viewers better



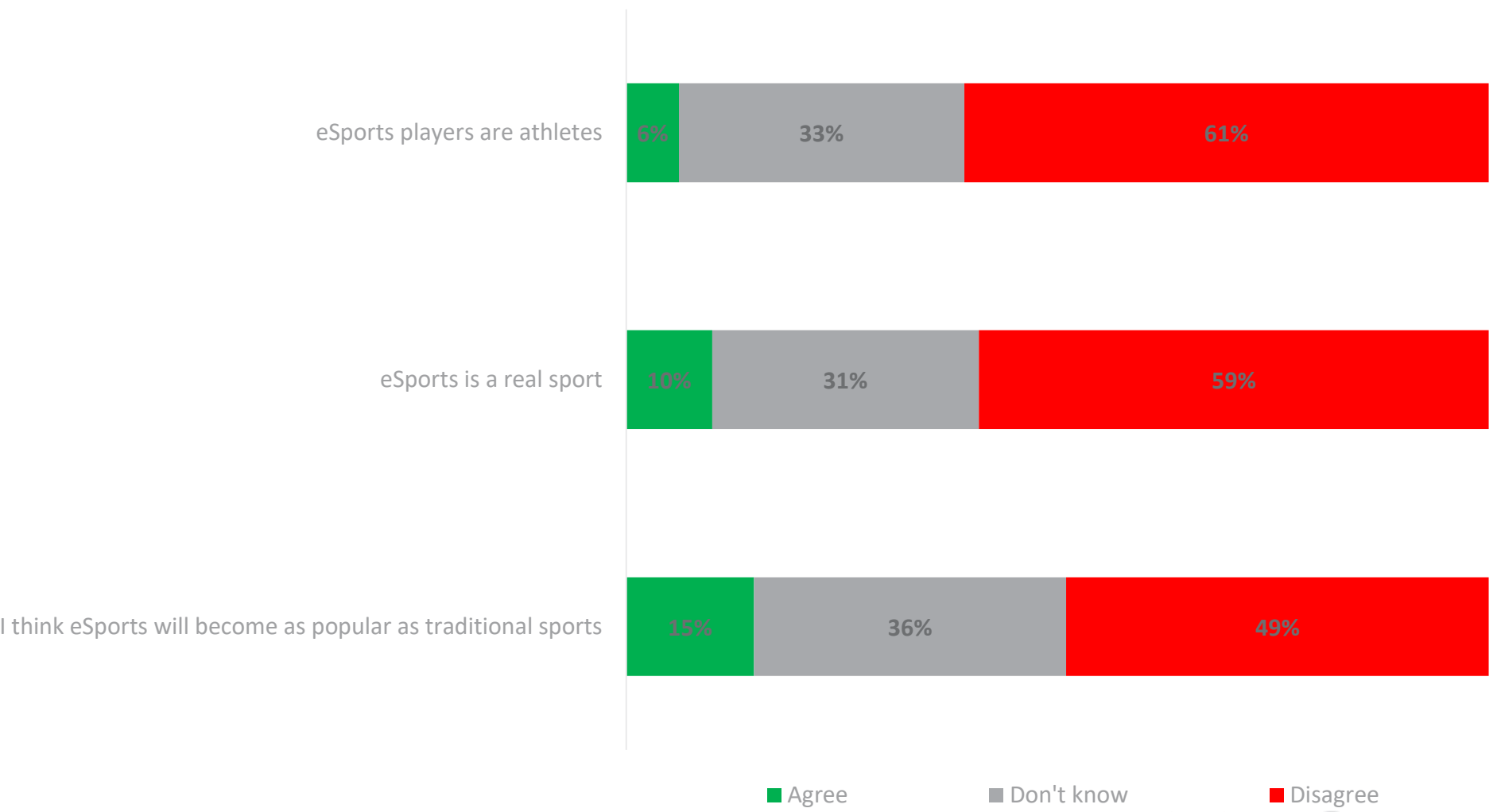
**online rep*
Base: All adults / All adults who have watched eSports before – China (1,009/786), Singapore (1,004/251), Australia (1,032/137), US (2,289/231), Germany (2,052/219), UK (2,087/130)
Q3a_es. How interested, if at all, are you in watching eSports at some point in the future?

Barriers and opportunities

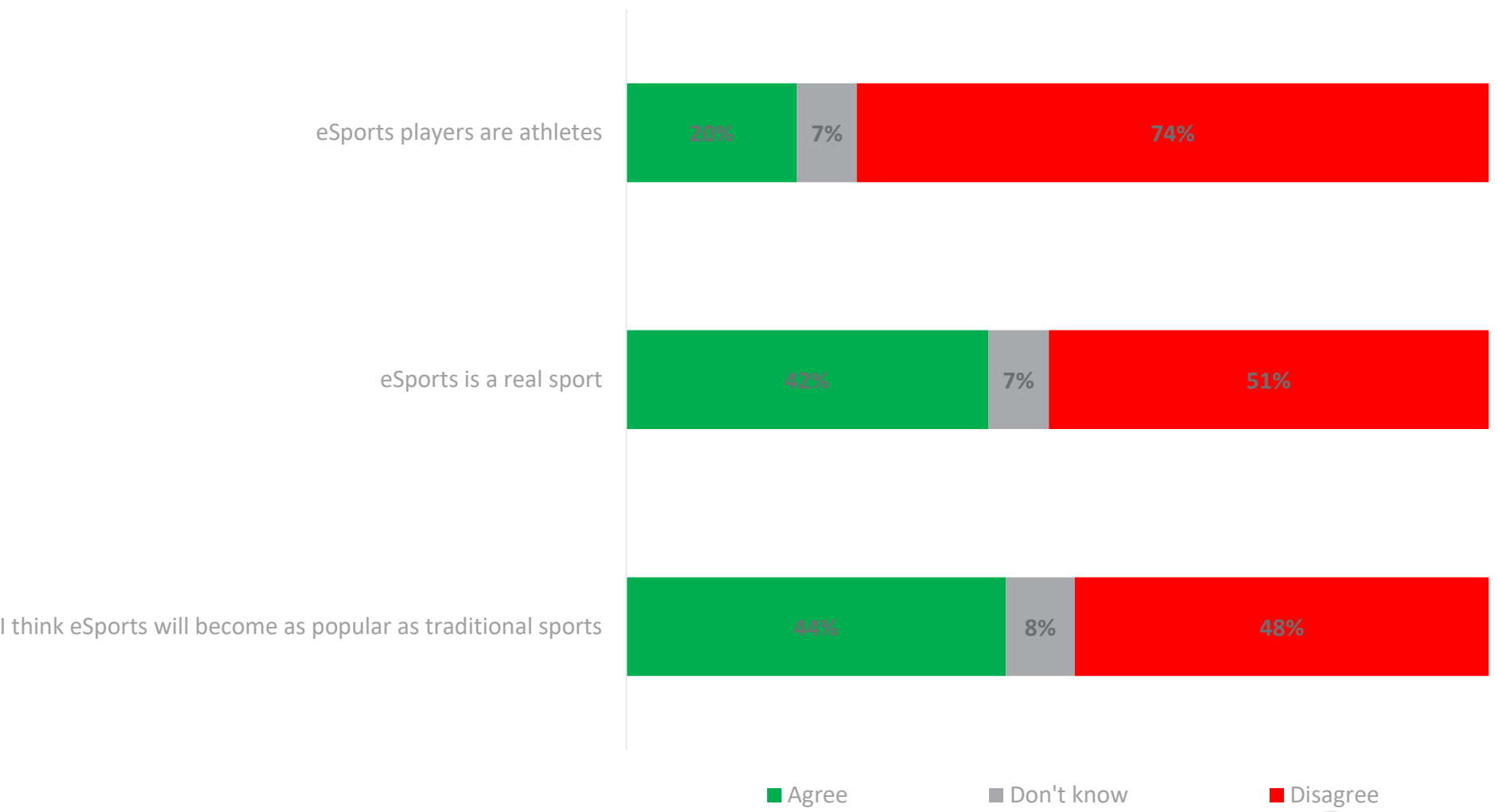
What are barriers to and opportunities for the growth of eSports in the UK?



There's a perception that eSports doesn't deserve the same recognition as traditional sports, with a high number unsure about what eSports is



However, previous eSports viewers are more positive about it, their attitudes softening after watching. They're also surer of their answers



Key takeaways

Recommendations



Key takeaways

- Whilst eSports is still very much a minority pursuit in the UK, there is a sizeable chunk of the population that industry can use as a base from which to grow.
- A solid proportion of existing spectators are reasonably enthusiastic about watching again and the scale of viewership in countries like China and the US show how it could develop in this country in the coming years, if certain barriers can be broken down.
- One such barrier to eSports entering the mainstream is the perception that it does not deserve the same recognition as traditional sports. Even those that review the eSports in positive terms are unlikely to see it replacing traditional sports, so the onus is on the eSports to industry to allow it to work alongside familiar favourites. Persuading doubters of the sporting merits is a big hurdle as the majority of people do not currently regard eSports as 'real sport'.
- However, this study suggests that when people do get round to watching eSports, their attitudes soften. If more can be done to drive awareness and entice people into viewing eSports at least once, such as making it more readily available on TV, then this will likely go a long way to increasing overall viewership and thus improving perceptions.
- YouGov will continue monitoring this market as it evolves and re-visit these findings, new developments and challenges.

About YouGov

Our credentials



YouGov

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 turnaround re-contact surveys for client specific research.



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