

ESPORTS – GERMANY – 2022

The strong engagement of esports viewers beyond gaming provides a multitude of touch points for brands. However, seeking ways to combat scepticism about authenticity of sponsors, eg by adding value for viewers, is key to maximising marketing impact.



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Esports – Germany – 2022

This report looks at the following areas:

- Which demographics watch esports in Germany, including the frequency and genres watched
- Ways of watching esports
- Important factors when deciding which esports match to watch
- Behaviours regarding esports, including talking about esports online and buying brands' products due to partnerships with esports players/teams
- Attitudes regarding esports, including the importance of rivalry for esports and the perceived authenticity of brands sponsoring esports

Overview

Sponsorships are the most essential driver of revenue in the esports market, **but viewers express scepticism towards the authenticity of brands sponsoring** esports. **36% of German esports viewers** agree that most brands sponsoring esports don't care about esports and its community, peaking at 48% for those watching at least once a week. As frequent viewers also hold particular revenue potential for brands, their critical view underpins how important it is for brands to focus on authenticity. For example, 54% of Germans watching esports at least once a week agree that giveaways/promotions, based on what is happening during a match,



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make esports more exciting. Proving commitment by adding value for viewers is expected to help build esports marketing placements in an authentic way.

Esports viewers are highly engaged with esports, its community and its players/teams, providing a multitude of touch points for brands to capitalise on. For instance, **57% of esports viewers** follow professional video game players on social media and 54% watch video content from esports players/teams that is unrelated to gaming. The latter **provides great sponsorship opportunities for brands across categories**, particularly for those that want to capitalise on the popularity of esports but lack the budget to sponsor entire leagues or teams.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for esports

Market context

- Video games engage consumers across age groups in Germany
 - Graph 1: consumers who have played video games in the last three months (NET), by age, 2022
- Facilitate technological advances to enhance the esports experience

Opportunities

- Amend authenticity concerns among high-priority targets
- Put authenticity over quantity
- Cater to the preferences of key audiences
 - Graph 2: important factors when deciding which esports match to watch by frequency of watching esports, 2022
- Maximise the impact of giveaways
- Capitalise on the popularity of gaming-unrelated content
- Grow your audience by leveraging social media
 - Graph 3: ways to watch esports, by frequency of watching esports, 2022
- Quick download resources

MARKET DRIVERS

- Strong post-COVID-19 bounceback followed by a period of slower growth
 - Graph 4: key economic data, in real terms, 2019-24
- Economic slowdown fuelled by the conflict in Ukraine
- Inflation is the key concern in 2022 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure
- The impact of the economy on the esports industry

Gaming

- Video games engage consumers across age groups in Germany
- Gaming and esports to grow in popularity
- Gaming to become increasingly income-inclusive
 - Graph 5: devices used to play video games in the last three months, by net monthly household income, 2022
- Gender differences in video gaming engagement...

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- Graph 6: highest frequency of playing video games on any device (NET), by gender, 2022
- Graph 7: devices used to play video games in the last three months, by gender, 2022
- ...limit uptake of esports among females
- Esport competes with gaming

Online media

- Leisure time has been shifting online in Germany
 - Graph 8: online media consumption (in mins), by age, 2018-21
- Standing out in the competitive media landscape

Governmental support

- German government plans support of esports

Technological advances

- Metaverse technologies on the move
- Technological advances can intensify the viewing experience and promote growth
 - Graph 9: household ownership of entertainment and smart home devices, by having watched esports, 2022

WHAT CONSUMERS WANT AND WHY

Esports consumption

- Esports is highly popular among German gamers
- Young males remain the key audience for esports in Germany
 - Graph 10: respondents who have watched esports in the last three months, by gender & age, 2022
- Use more than one touch point to consistently engage young males via esports
- Even frequent female gamers fall behind in watching esports
 - Graph 11: watching esports at least a few times a week, by playing video games on selected devices, by gender, 2022
- Unlock a wider female audience...
- ...by going beyond the action-appeal of esports
- Riot Games enhances League of Legends with characters' stories
- Don't overlook non-esports gaming for your marketing...
 - Graph 12: respondents who have watched gaming content daily in the last three months, 2022
 - Graph 13: respondents who have watched gaming content in the last three months, 2022
- ...especially when targeting a diverse audience
 - Graph 14: 16-24s who have watched gaming content daily in the last three months, by type of content and gender, 2022
- Milka untaps non-competitive gaming content to reach beyond males
- Esports viewers don't limit themselves to esports content
 - Graph 15: frequency of watching gaming video content, by frequency of watching esports, 2022
- Use non-esports gaming content as an additional or alternative touch point

Esports game genres watched

- Sports games are most popular among German esports viewers
 - Graph 16: esports game genres watched in the last three months, 2022
- Choose the genre based on your target group
 - Graph 17: esports game genres watched in the last three months, by gender, 2022
- Cater to the preferences of your audience
- The majority of esports viewers watch multiple genres
 - Graph 18: repertoire of esports genres watched, by age, 2022
- Prioritise authenticity over quantity
 - Graph 19: repertoire of esports genres watched, by frequency of watching esports - NET, 2022

Ways of watching esports

- Make the most of the various esports channels
- Engage with esports fans via in-person events
 - Graph 20: attitudes towards esports, by ways of watching esports, 2022
- Mind the preferences of less-frequent viewers
 - Graph 21: ways to watch esports by frequency of watching esports, 2022
- Use video clips on social media to resonate with less-engaged fans
- Cater to the viewers' endeavour to improve at gaming

Important esports match factors

- Watching esports is about every facet of the experience
- Seek ways to promote the competitive thrill
- Frequent viewers are most engaged with the entertainment surrounding esports matches
 - Graph 22: important factors when deciding which esports match to watch by frequency of watching esports, 2022
- Put on a show to drive engagement
- LEC embraces live audience and entertainment
- Attract the high-priority esports targets with giveaways
- Tie in giveaways with the thrill of esports

Behaviours regarding esports

- Esports viewers are keen on competitive thrill
 - Graph 23: behaviours regarding esports, 2022
- Tap into the strong engagement of esports viewers
- Capitalise on the popularity of gaming-unrelated content
- Draw inspiration from AT&T-sponsored 100 Thieves Creator Camp...
- ...and from the content of individual creators and players
- Cater to the appeal of virtual and physical sports
- Gaming meets real-world football

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- Get inspired by Netflix's competitive strategy
- Foster esports as a multidimensional experience

Attitudes regarding esports

- Align with the passion of esports viewers
 - Graph 24: attitudes towards esports, 2022
- Authenticity is vital to build brand affinity among esports fans
- Make gaming a part of your brand identity
- Ways how brands can strive for authentic esports marketing
- Increasing appeal of national leagues
- Esports Derby: Eintracht Spandau vs Berlin International Gaming
- Tap into esports fans as a key target group for luxury products
- Capitalise on first mover advantages
- L'Oréal x FNATIC
- Enhance your luxury brands with associations of success and pleasure
 - Graph 25: associations with luxury, by having watched esports, 2022
- Convey success to resonate with esports viewers
- Mercedes-Benz designs the League of Legends Worlds Championship Ring

LAUNCH ACTIVITY AND INNOVATION

Advertising and marketing activity

- Medion x Team FOKUS
- The Deutsche Telekom is committed to closing the esports gender gap
- REWE becomes shareholder of SK Gaming
- Rewe becomes shareholder of SK Gaming
- Engelbert Strauss as title partner of the Prime League in 2022

MARKET SIZE AND SEGMENTATION

- Esports revenue is carried by sponsorships
 - Graph 26: esports revenue streams, 2022

APPENDIX

Appendix – abbreviations, consumer research methodology and language usage

- Abbreviations
- Consumer research methodology
- A note on language

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