

# ESPORTS – GERMANY – 2023

Esports continue to provide opportunities for brands to engage a younger audience. By sponsoring content that delves into players' personal lives, brands can increase their potential for making a lasting impression.



Katharina Kirsch, Analyst



# Esports - Germany - 2023

## This report looks at the following areas:

- Which demographics watch esports in Germany, and their watching frequency
- Platforms used to watch esports
- Reasons for and barriers to watching esports
- Motivations to follow or view content from esports players on social media
- Attitudes towards esports, including if consumers feel more connected to brands supporting gender equality in esports

## Overview

Following their popularity and success, esports viewers also show an appreciation for esports players who personally engage with their fans, offer giveaways and post content about their personal lives. Brands can resonate with esports viewers by using their sponsorships with esports players to **enable these valued forms of content or interactions**.

Consumers are still finding themselves in challenging economic times, and their budgets remain strained; **37% of esports viewers** find themselves in a **tight or worse situation**. It is therefore even more important for brands to transmit value and authenticity with their marketing.

Esports are in strong competition with gaming; **68% of consumers who have played video games but didn't watch any gaming content** are **not interested in watching others** play



Esports continue to provide opportunities for brands to engage a younger audience. By sponsoring content that delves into players' personal lives, brands can increase their potential for making a lasting impression.

**BUY THIS REPORT NOW**


**€2600.00 | £2195.00 | \$2995.00\***

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

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**



video games. While this makes it hard to acquire them as viewers, brands can incentivise watching with raffles, and can reach those watching non-esports content via co-streaming.

Moving forward, brands can consider **capitalising on gender-inclusive esports marketing** by including messaging around **gender equality**, which will not only resonate with the smaller share of female viewers, but can **raise brand affinity** among a large share of viewers of all genders. A brand supporting gender equality in esports would make **53% of esports viewers** feel more connected to it.

**BUY THIS REPORT NOW**

**€2600.00 | £2195.00 | \$2995.00\***

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

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**



# Report Content



## EXECUTIVE SUMMARY

- 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 three months to June 2022 and August 2023 (NET), by age, 2023
- Gender-inclusive initiatives could drive more female consumers into the esports industry

### Opportunities

- Up the esports engagement of 16-24s through co-streaming
- Make use of YouTube's popularity to advertise to esports fans
- Take into account gender-inclusive esports marketing to resonate with viewers
- Lean on the community aspect to target female esports fans

## MARKET DRIVERS

### The German economy

- Stagnation follows a technical recession
  - Graph 2: key economic data, in real terms, 2019-24
- Inflation slows down – but remains at a higher level
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and consumer expenditure
  - Graph 3: financial confidence index, 2022 – 23
- The impact of the economy on the market

### Social media

- The social media landscape is changing...
  - Graph 4: TikTok usage in the last three months, by generation, 2021-23
  - Graph 5: Instagram usage in the last three months, by generation, 2021-23
- ...which can impact how esports are consumed

### Gaming

- Video games engage Germans across age groups
- Younger consumers' engagement with smartphone gaming offers opportunities to expand the esports market
  - Graph 6: frequency of playing video games, by device used, 16-24s, 2023

## Esports – Germany – 2023

---

- Reach new esports audiences, such as 45-54s, via smartphone gaming
  - Graph 7: consumers who have played video games at least a few times a week, by device, 45-54s, 2022-23
- VR headsets can give esports viewers a more-immersive experience
- Virtex showcases its virtual stadium viewing experience

### Government support

- Social acceptance of esports can drive growth

### Gender equality

- Initiatives towards inclusivity can up female consumers' interest in esports
- What it's really like to be a woman in gaming

## WHAT CONSUMERS WANT AND WHY

### Esports consumption

- Secure more esports fans beyond gaming
- Young men remain the key viewership for esports
  - Graph 8: respondents who have watched esports in the last three months, by gender and age, 2023
- Tap into younger male consumers' esports engagement
- Consider capitalising on the gender-inclusive esports marketing
- Mercedes supports gender equality in esports
- Consider non-esports gaming content for marketing activities
  - Graph 9: consumers who have watched gaming content/esports at least once a week, by age, 2023
  - Graph 10: consumers who have watched gaming video content/esports in the last three months, by age, 2023
- Capitalise on the reach of non-esports gaming content among 16-24s
- Collaborate with esports viewers' idols

### Platforms used to watch esports

- YouTube the number-one place where Germans watch esports
  - Graph 11: platforms used to watch professional video game competitions (ie esports), 2023
- Leverage different video formats to maximise ad reach
- YouTube is the most popular platform on which to watch esports, regardless of viewing frequency
  - Graph 12: platforms used to watch esports in the last three months, by frequency of watching esports, 2023
- Use influencer collabs to circumvent the issue of ad annoyance
- Sponsor individual players to leverage the reach of multiple platforms
- Appeal to male esports fans with interactive placements on Twitch

### Reasons for watching esports

- Relaxation the number-one reason for watching esports
  - Graph 13: reasons for watching esports, "I watch eports to...", 2023

## Esports – Germany – 2023

---

- Orientate direct marketing activities around skill
- Sponsor training programs to reach highly invested esports fans
- Drive esports engagement by pushing the community element

### Barriers to watching esports

- Counteract barriers to watching esports to expand viewership
- Incentivise non-watchers with raffles
- Cooperate with streamers that co-stream esports events

### Motivations to follow/view content from esports players

- Importance of players being popular among friends shows community aspect of esports
  - Graph 14: motivations to follow/view content from professional video game (ie esports) players on social media, 2023
- Take collaborations with esports players beyond esports
- Use giveaways to foster community engagement
- Push esports' social element to increase appeal among female consumers
- Use personal content to resonate beyond esports

### Attitudes towards esports

- Technology as a measure to make esports more engaging
  - Graph 15: attitudes towards esports, 2023
- Monitor advances with VR to drive immersion in esports experiences
- Xtadium makes sports events immersive
- Food brands can tap into gamers' demand for energy-enhancing snacks
- Support gender equality to resonate with esports fans
- Engage esports audiences with gamified fitness approaches
- Sphery AG blends gaming with fitness

## LAUNCH ACTIVITY AND INNOVATION

- Brands from outside the industry continue to tap into esports
- Bayer 04 eSports x Bepanthen Augentropfen
- FIFAe raises awareness for mental wellbeing
- Casio taps into the esports market with its LoL-themed watch
- CocaCola picks up on the community aspect of watching esports

## APPENDIX

### Appendix – products covered, abbreviations, consumer research methodology and language usage

- Abbreviations
- Consumer research methodology

- A note on language

# About Mintel Reports: Germany

Access our reports now and get the most accurate, credible and powerful data, insights and analysis. Mintel Reports Germany gives you everything you need to know about what German consumers want and why.

In each report, we're analysing the market, new product innovations and the competitive landscape, as well as consumer behaviours across Germany. Our local analysts, supported by our team of global experts then translate it into what it means for you.

## What makes us unique?

- ✔ A 360-degree view of German markets
- ✔ Experienced analysts based in Germany
- ✔ Expert-led support from global category experts

## How Mintel Reports Germany will help your business grow:



Identify future opportunities by understanding what German consumers want and why



Make better decisions faster by keeping informed on what's happening across your market



See the trends and innovations impacting Germany both on a local and global level

## BUY THIS REPORT NOW

€2600.00 | £2195.00 | \$2995.00\*

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

Americas: +1 (312) 932 0400  
China: +86 (21) 6032 7300  
Germany: +49 (0) 211 3399 7411  
India: +91 22 4445 1045  
Singapore: +65 6653 3600  
Thailand: +66 2 821 5122  
UK: +44 (0) 20 7606 4533

\*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

**MINTEL**



### Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a German licensed market survey agent ([See Research Methodology for more information](#)).

### Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

### Published by Mintel Group Ltd

[www.mintel.com](http://www.mintel.com)

### Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
Germany	+49 211 2409023
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850