**Esports Market 2022**

**Inside Esports**

NewZoo’s April 2022 Global Esports Report revealed the global esports audience will increase 8.7% during 2022 to a total of 532.0 million and revenues will increase 21.8% to $1.38 trillion.

KemperLesnik reports new Esports/video gaming stadiums and centers are opening or in the construction phase in Chicago, at the University of Texas, Detroit, Houston and Kansas City as more fans are less concerned about attending events because of the pandemic.

The following data from five of The Media Audit’s 2021 representative consumer/market surveys matches other sources that almost all Esports fans are Gen Zers and Millennials.

**Indices of eSports Fans, by Generation, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Generation | Tampa-St. Petersburg | Columbus | Milwaukee-Racine, WI | Denver | Monterey-Salinas, CA |
| Gen Z | * 218 | * 224 | * 124 | * 240 | 167 |
| Millennials | * 301 | * 131 | * 171 | * 196 | * 156 |
| Gen X | * 48 | * 89 | * 64 | * 48 | * 32 |
| Baby Boomers | * \* | * \* | * \* | * 3 | * \* |

Based on The Media Audit’s 2021 surveys \*insufficient data (See the note about the data on page 4)

**Esports Fans Insights**

The Media Audit reveal Millennials who are Esports fans over-indexed, on average, much more for having placed bets on Esports games than Gen Zers, or 217 and 60, respectively. This is most likely because Gen Zers have much less disposable income.

Gen Zers over-indexed more, on average, than Millennials for having attended an Esports event during the past year, or 268 and 164, respectively. Millennials, however, over-indexed for watching games on TV, on average, at 176, compared to 139 for Gen Zers.

Gen Zers Esports fans over-indexed as fans of college basketball at 143, the NBA at 142 and the NFL at 118 while Millennial Esports over-indexed for all 7 sports in the table below.

**Indices of Millennial eSports Fans Who Were Fans of Other Major**

**Professional Sports Teams and College Sports, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Sport | Tampa-St. Petersburg | Columbus | Milwaukee-Racine, WI | Denver | Monterey-Salinas, CA |
| MLB | * 109 | * 171 | * 174 | * 100 | 119 |
| MLS | * 38 | * 369 | * 423 | * 95 | * 467 |
| NBA | * 102 | * 195 | * 266 | * 117 | * 119 |
| NFL | * 109 | * 137 | * 173 | * 106 | * 99 |
| NHL | * 121 | * 144 | * 591 | * 104 | * 219 |
| College basketball | * 148 | * 204 | * 428 | * 90 | * 96 |
| College football | * 118 | * 174 | * 337 | * 94 | * 88 |

Based on The Media Audit’s 2021 surveys (See the note about the data on page 4)

**Esports Fans’ Media Choices**

According to The Media Audit’s five surveys, Gen Zers who are Esports fans over-indexed, on average, for heavy exposure to radio (180+ minutes during an average day) at 167, but under-indexed for the other four legacy media, with outdoor next at 70.

By comparison, Millennials who are Esports fans over-indexed for heavy exposure to four of five legacy media, on average: Newspaper at 142, direct mail at 129, outdoor at 127 and radio at 110, and slightly under-indexed on average for TV at 96.

For heavy exposure to digital media, Gen Zers who are Esports fans over-indexed on average, more than Millennials for the Internet, social media and audio streaming while Millennials over-indexed more for podcast listening and video streaming.

**Indices of Millennial eSports Fans Who Watched Major Video Streaming**

**Services During the Past 7 Days, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Video Streaming Service | Tampa-St. Petersburg | Columbus | Milwaukee-Racine, WI | Denver | Monterey-Salinas, CA |
| Amazon Prime | * 128 | * 114 | * 147 | * 108 | 101 |
| Apple TV | * 130 | * 109 | * 173 | * 108 | * 177 |
| Disney+ | * 127 | * 117 | * 120 | * 82 | * 92 |
| Hulu | * 131 | * 109 | * 152 | * 50 | * 56 |
| Netflix | * 94 | * 109 | * 113 | * 83 | * 86 |

Based on The Media Audit’s 2021 surveys (See the note about the data on page 4)

**Esports Fans’ Online Habits**

Gen Z Esports fans over-indexed the most for logging onto Snapchat during the past month at an average of 128 (among eight social media platforms). Interestingly, Pinterest was second at an average of 110, then YouTube at 107 and TikTok and Twitter tied at 105.

Among Millennial Esports fans, they only over-indexed for logging on to LinkedIn during the past month at 112, although Pinterest was 101. They under-indexed the most, on average for logging onto Snapchat at 86.

**Indices of Millennial eSports Fans Who Listened to Major Audio Streaming**

**Services During the Past 7 Days, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Audio Streaming Service | Tampa-St. Petersburg | Columbus | Milwaukee-Racine, WI | Denver | Monterey-Salinas, CA |
| Amazon Prime | * 118 | * 114 | * 134 | * 139 | 88 |
| Apple Music | * 106 | * 114 | * 146 | * 81 | * 93 |
| Google Play | * 108 | * 109 | * 136 | * 83 | * 132 |
| iHeartRadio | * 106 | * 117 | * 44 | * 22 | * 92 |
| Pandora | * 94 | * 110 | * 188 | * 141 | * 117 |
| SiriusXM Radio | * 111 | * 117 | * 156 | * 97 | * 201 |
| Spotify | * 101 | * 117 | * 89 | * 72 | * 96 |
| YouTube Music | * 125 | * 114 | * 77 | * 96 | * 105 |

Based on The Media Audit’s 2021 surveys (See the note about the data on page 4)

**Esports Fans’ Consumer Purchase Plans**

Although Gen Zers and Millennials over-indexed approximately the same as Esports fans in The Media Audit’s five surveys, 66.8% of adults 25–44 (essentially Millennials) are Esports fans compared to 24.6% of adults 18–24 (essentially Gen Z adults).

From a consumer perspective, Millennials who are Esports fans are the prime target audience for brands and retailers. Not only are many Gen Zers in college, but also others are earning less than Millennials. Gen Zers are becoming prime consumers, but not just yet.

The table below, therefore, shows Millennial Esports fans’ planned consumer purchases, in which they over-indexed in almost all categories and the five representative markets. By comparison, Gen Z Esports fans under-indexed in all of these categories, except two.

**Indices of Millennial eSports Fans and Their Planned**

**Consumer Purchasers, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Planned Purchases | Tampa-St. Petersburg | Columbus | Milwaukee-Racine, WI | Denver | Monterey-Salinas, CA |
| New car/van/truck/SUV/crossover | * 148 | * 119 | * 183 | * 140 | 205 |
| Used car/van/truck/SUV/crossover | * 148 | * 131 | * † | * 161 | * † |
| Any home improvements\* | * 132 | * 106 | * 164 | * 111 | * 103 |
| Personal computer/equipment\* | * 84 | * 116 | * 134 | * 100 | * 54 |
| Major household appliance\* | * 148 | * 111 | * 202 | * 121 | * 166 |
| New TV\* | * 148 | * 111 | * 195 | * 121 | * 155 |
| Tablet\* | * 76 | * 117 | * 188 | * 105 | * 116 |
| Personal home electronics\* | * 64 | * 129 | * 176 | * 93 | * 174 |
| A home (during next 2 years) | * 68 | * 122 | * 188 | * 119 | * 157 |
| New furniture\* | * 148 | * 127 | * 141 | * 126 | * 172 |
| Bed/Mattress\* | * 148 | * 115 | * 218 | * 90 | * 61 |
| 1 or more smart speakers\* | * 113 | * 114 | * 184 | * 123 | * 113 |

Based on The Media Audit’s 2021 surveys \*during next 12 months †insufficient data

(See the note about the data on page 4)

**More Valuable Insights**

**Note on The Media Audit Data of Esports and Its Fans**

The Media Audit and its proprietary database of consumer/market surveys are one of the few comprehensive sources about Esports fans by demographics, media usage and consumer buying habits. The Esports audience is quite small and almost entirely concentrated among adults 18–44 (and likely many teens). In the five market surveys presented in this Profiler, Esports fans averaged 3.1% of all adults 18+. For this reason, any indices of 300 or more are skewed because of the small numbers of Esports fans. These skewed indices still indicate a high likelihood of data correlation, but should be utilized carefully.

**Top 10 Most Played Esports Games of All Time, by Number of Tournaments**

|  |  |
| --- | --- |
| Game | Number of Tournaments |
| #1: Starcraft II | 6,422 |
| #2: Counter-Strike: Global Offensive | 6,166 |
| #3: League of Legends | 2,690 |
| #4: Super Smash Bros. Melee | 2,633 |
| #5: Rocket League | 1,982 |
| #6: Dota 2 | 1,630 |
| #7: Super Smash Bros. Ultimate | 1,587 |
| #8: WarCraft III | 1,426 |
| #9: Age of Empire II | 1,207 |
| #10: Counter-Strike | 1,018 |

Esports.net, April 2022

**The Media Audit: Heavy Exposure to Media, 2021**

|  |  |
| --- | --- |
| Media | Time |
| Radio | 180+ minutes during an average day |
| TV | 300+ minutes during an average day |
| Newspaper | 60+ minutes during an average day |
| Outdoor | 200+ miles during an average week |
| Direct mail | 75+ read weekly |
| Internet | 180+ minutes during a typical day |
| Social media | 180+ minutes during a typical day |
| Audio streaming | 180+ minutes during an average day |
| Podcast listening | 180+ minutes during a typical day |
| Video streaming | 180+ minutes during an average day |

*Sources:* Newzoo Website, 4/22; KemperLesnik Website, 4/22; The Media Audit Website, 4/22; Esports.net Website, 4/22.

*Updated*: April 2022

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**Local Market and Station Information**