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Italian Interactive Digital Entertainment Association

2024 Italian Esports Report:

Market & Streaming Trends

November 2024

MAKING AN IMPACT THAT MATTERS since 1845

Contents

Preface

Dear Readers,

We are pleased to present the Deloitte study 'The Italian Esports Market' in collaboration with IIDEA, which describes the status quo of esports in Italy in terms of consumption and value creation

This report analyzed the Italian esports landscape through a consumer survey and a stakeholder survey.

We conducted a consumer survey in September and October 2024 to obtain reliable consumer data. The survey involved 1,000 consumers in Italy. Additionally, we asked representative stakeholder organizations from the Italian esports ecosystem to share their thoughts on current topics and industry developments.

The aim was to understand the market and its evolution better, focusing on current trends and emerging opportunities.

This research was carried out in collaboration with IIDEA, aiming to provide comprehensive insights into the dynamics of the Italian esports sector.

During the COVID-19 pandemic, esports increased its visibility among the public and experienced a surge in audience numbers. Over the past four years, esports term awareness has remained high, while regular esports engagement has remained relatively constant after a high in 2020, and definition awareness has steadily increased. Although overall esports reach peaked in 2022, it has returned to its 2020 level in 2024, highlighting both growth and volatility of audience engagement.

Esports viewers are different from fans of other sports or entertainment areas. They are significantly younger, more urban and have a higher percentage of male viewers. In addition, they are characterized by the fact that they frequently go shopping, have a positive attitude toward advertising and often pay for subscriptions.

The opportunity for relationship-building with such an open-minded audience makes esports a premier space to activate sponsorships and advertisements in order to create long-lasting connections.

Participating esports stakeholders' most relevant revenue streams include prize money and advertising and sponsorship sales. The stakeholders tend to refinance parts of their esports-related expenses through business- and media-related revenues beyond their revenues in the esports space.

For the future, this research also shows a trend towards a greater concentration of stakeholders on their core esports business.

We want to thank all who have supported this report, especially IIDEA, for their excellent cooperation. Finally, we hope you find our study an informative read.

Key Takeaway

'The Italian Esports Market' report includes insights into consumer characteristics as well as stakeholders' assessments of the market

01 **The most relevant revenue streams for participating esports stakeholders include** advertising and sponsorship sales, consulting, content creation and influencer marketing as well as entry fees for tournaments and events

02 The stakeholders tend to **finance parts of their esports-related expenses through business- and media activities**. However, in the future, they will put a stronger focus on esports-related activities

03 **The two most relevant game titles** in terms of overall involvement and revenue contribution **are League of Legends and Valorant**

04 **The most important markets** regarding current presence and future relevance besides Italy **include Saudi Arabia and Switzerland**

05 **7.3 million fans follow esports** in Italy in 2024, while **3.3 million watch regularly**

06 **Esports viewers tend to come from smaller cities** and are more likely to be employed full-time than video gamers. **They often have a background in business/economics** when compared to video gamers and the overall sample

07 The **majority of collaborations** are currently in the **computer hardware and entertainment & sports sectors**, there appears to be **potential for growth in terms of partners from other industries**

08 The opportunity for relationship-building with an open-minded audience makes **esports a premier space to activate sponsorships and advertisements**

09 **Hardcore viewers tend to spend more on esports-related products** than any other type of viewer. Occasional viewers spend significantly less than any other type of viewer

10 The **most important reason for choosing esports content** for passive consumption **is the specific game**

01

Methodology

01 | Methodology

1,000 participants in Italy were surveyed in September and October 2024 regarding their video gaming and esports consumption

Consumer survey:

Representative survey among **1,000 participants in Italy,** conducted in September and October 2024

Historical consumer surveys from 2020 and 2022 with 1,000 participants in the Italian market[2]

Video **gaming**, **esports** and game **streaming** consumption

Stakeholder survey:

16 stakeholders[1] from the Italian market

Survey among selected stakeholders
Teams | **League & Event Hosts** | **Further stakeholders**

- Involvement regarding **game titles** and **business activities** as well as **financials** of stakeholders
- Assessment of current **market trends**

Note: 1) Not all stakeholders responded to all questions. Accordingly, we have only used the relevant responses for each result. Please note that due to the relatively small number of stakeholders, the results may be biased towards certain developments.2) Deloitte conducted an extensive survey in early summer 2020 and summer 2022 to obtain reliable consumer data.

02

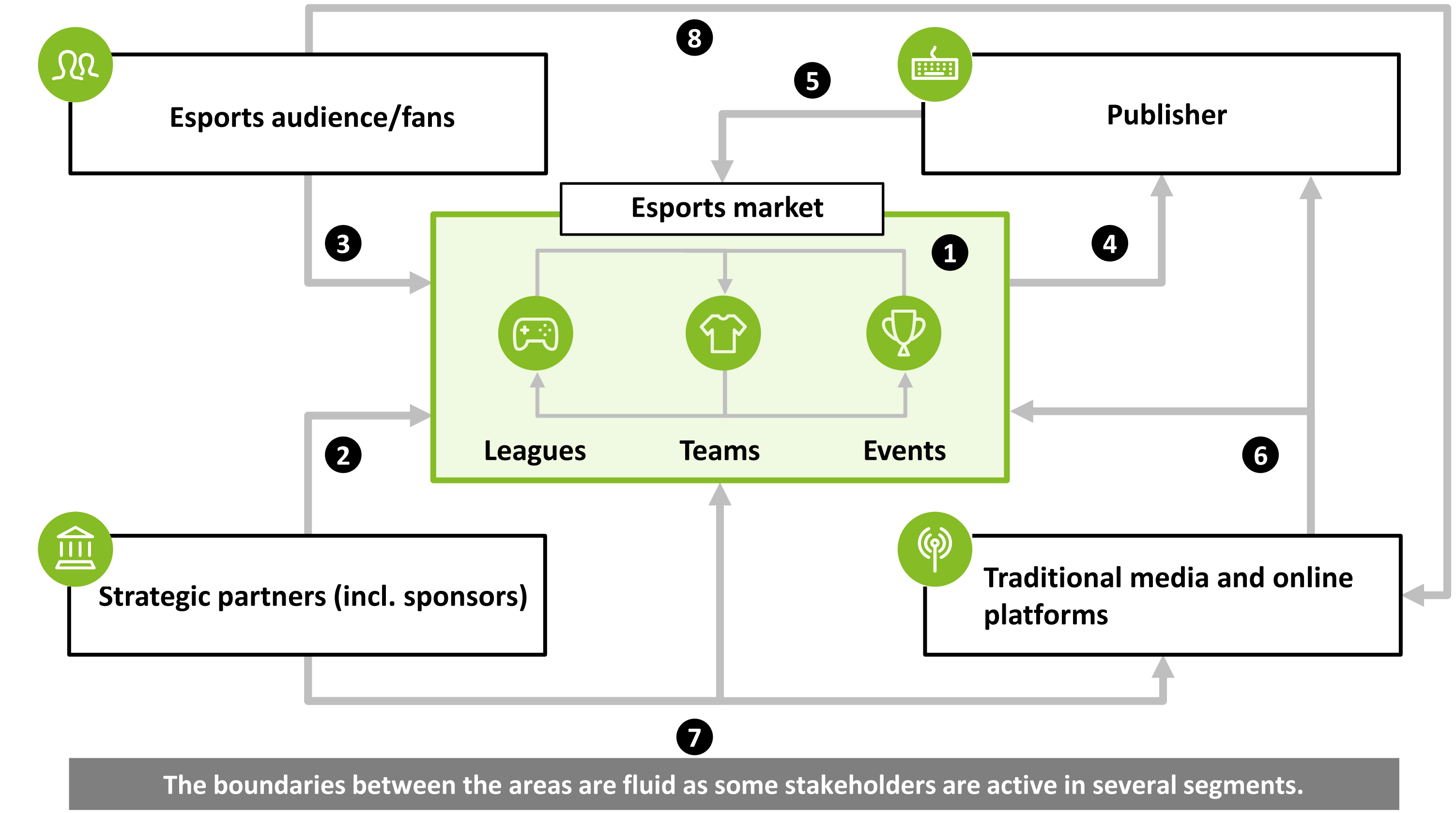
Creating Value in Italian Esports

02 | Creating Value in Italian Esports – Esports Ecosystem & IIDEA Stakeholders

The esports market is at the heart of the wider esports ecosystem, which includes audiences and organizations that contribute to the further development of the esports market, such as media and partners

Fig. 1 – Esports Ecosystem (simplified)

Ecosystem



Revenue streams from professional competitions

1. Participation fees and prize money

Sales flows between market and external parties:

2. Sponsorship revenues
3. Ticketing and merchandising
4. Fees for using the game titles
5. Publisher payments to organizers

Sales flows with partial inclusion of the market:

6. Acquisition of media rights
7. Advertising revenues

Sales streams outside the market:

8. Streaming content fees

Sources: Deloitte analysis
Deloitte 2024

02 | Creating Value in Italian Esports – Revenues and Expenses

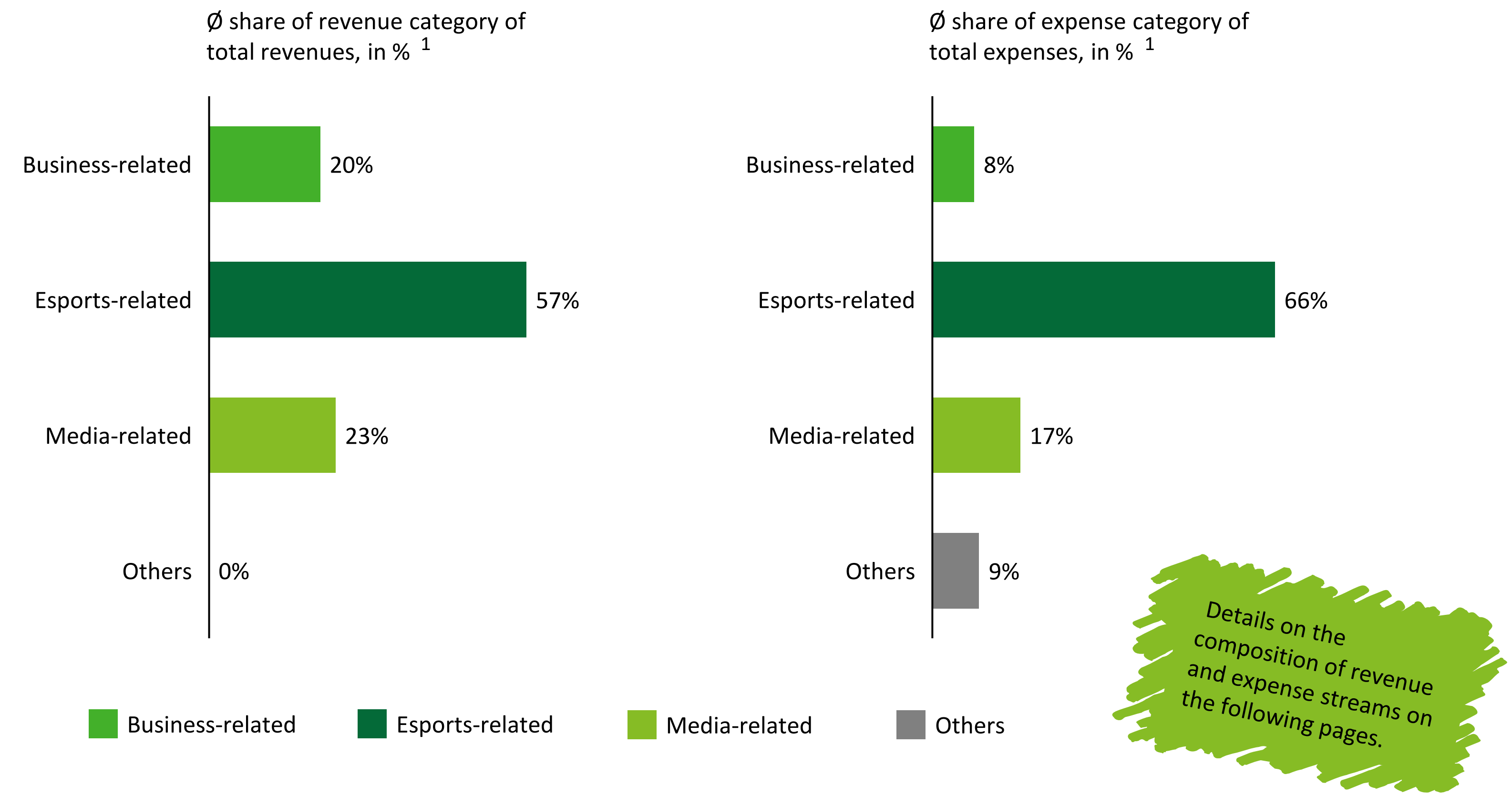
There are four main categories of revenue streams and expenses for esports stakeholders. The stakeholders tend to finance parts of their esports-related expenses through business- and media-related revenues beyond their revenues in the esports space. Thereby, they are very creative in refinancing their esports activities through other streams

Stakeholder Financials | Key observations

- The strongest revenue categories include esports- (57%), media- (23%), and business-related revenues (20%) that nearly **distributed evenly through all revenue streams**.
- In turn, the **esports**-related category is **the most relevant expense** item (66%).
- When comparing revenue and expense categories, differences in the most relevant categories appear.
- Noteworthy, stakeholders tend to **finance their esports-related expenses partially through business- and media-related revenues** beyond their revenues in the esports space.
- This indicates that the **profitability of esports is still at a lower level**, while it is noticeable that esports organizations (similar to sports organizations) clearly **prioritize sporting success over economic success**. Esports success is primarily determined by the cost of professional players, leading to lower profitability in this business segment.

Fig. 2 – Revenues and Expenses of Italian Esports Stakeholders (clustered)

Illustrative, not exhaustive



Notes: 1) Values may not add up to 100% due to rounding.
Source: Stakeholder information, Deloitte Analysis

02 | Creating Value in Italian Esports – Revenues

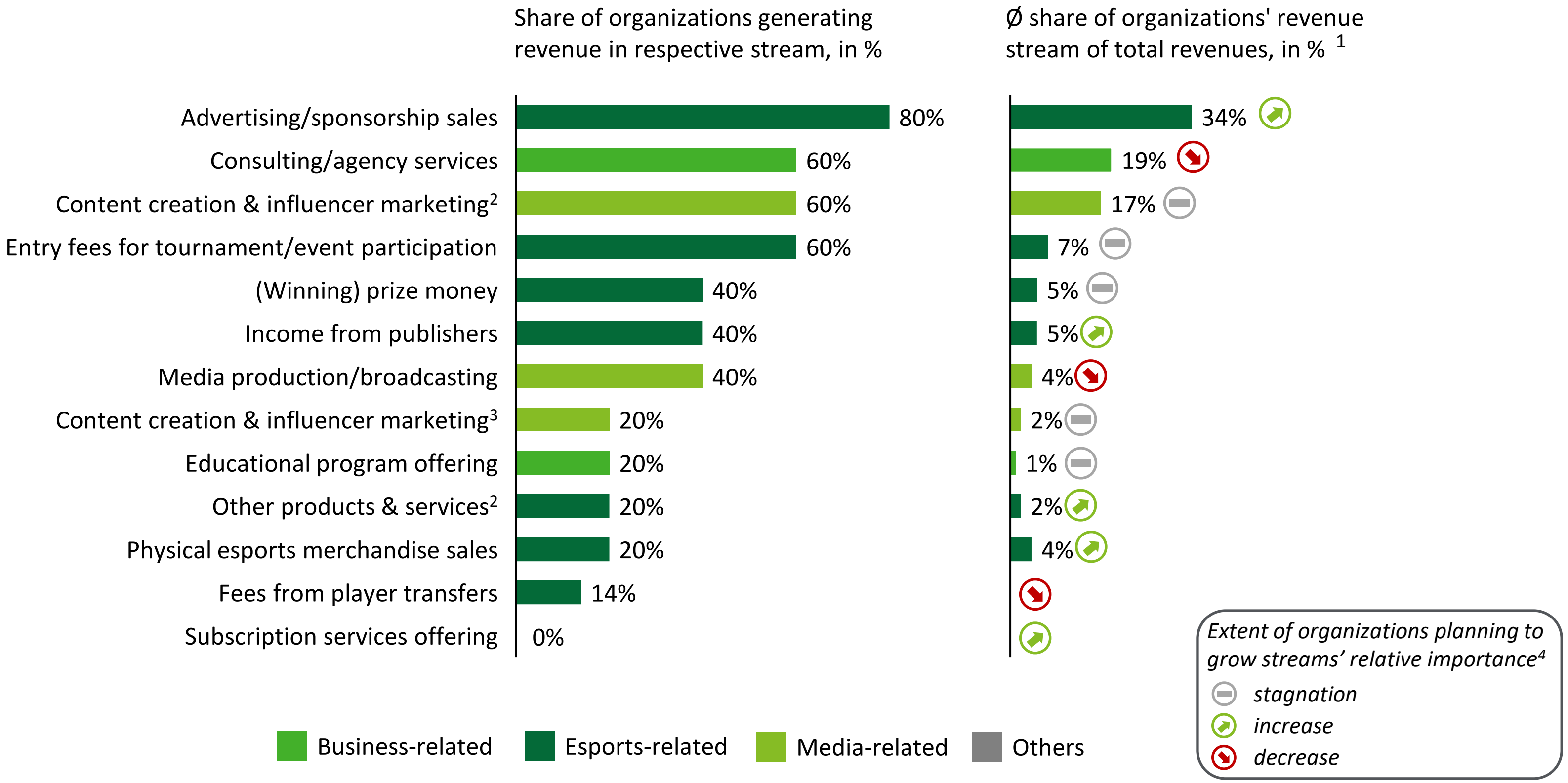
The most relevant revenue streams for participating esports stakeholders include advertising and sponsorship sales, consulting, content creation, influencer marketing and entry fees for tournaments and events. In the future, esports stakeholders expect most growth in streams related to their esports business

Stakeholder Revenues | Key observations

- Based on the stakeholders’ assessment, revenue streams related to the **category esports are most relevant** regarding appearance and revenue contribution.
- Specifically, **most relevant streams** encompass advertising/sponsorship sales, consulting/agency services, content creation & influencer marketing, and entry fees for events.
- Plans for **projected growth refer mainly to esports-related revenues**, such as advertising/ sponsorship sales, income from publishers and physical esports merchandise sales.
- This shows that esport organizations **are focusing more on their core business while planning to further increase the importance of esports in their revenue mix** to support their esport potential and, thus, their esporting success.

Fig. 3 – Revenues of Italian Esports Stakeholders across Streams (specified)

Illustrative, not exhaustive



Notes: 1) Values may not add up to 100% due to rounding; other selected revenue streams without revenue numbers: media rights income, ticket sales, digital esports merchandise sales; 2) Related to video gaming/esports; 3) Unrelated to video gaming/esports; 4) Increase: # organizations with expected growth > # organizations with expected decrease; stagnation: equal numbers; decrease: organizations with expected growth < # organizations with expected decrease.

Source: Stakeholder information, Deloitte Analysis

02 | Creating Value in Italian Esports – Expenses

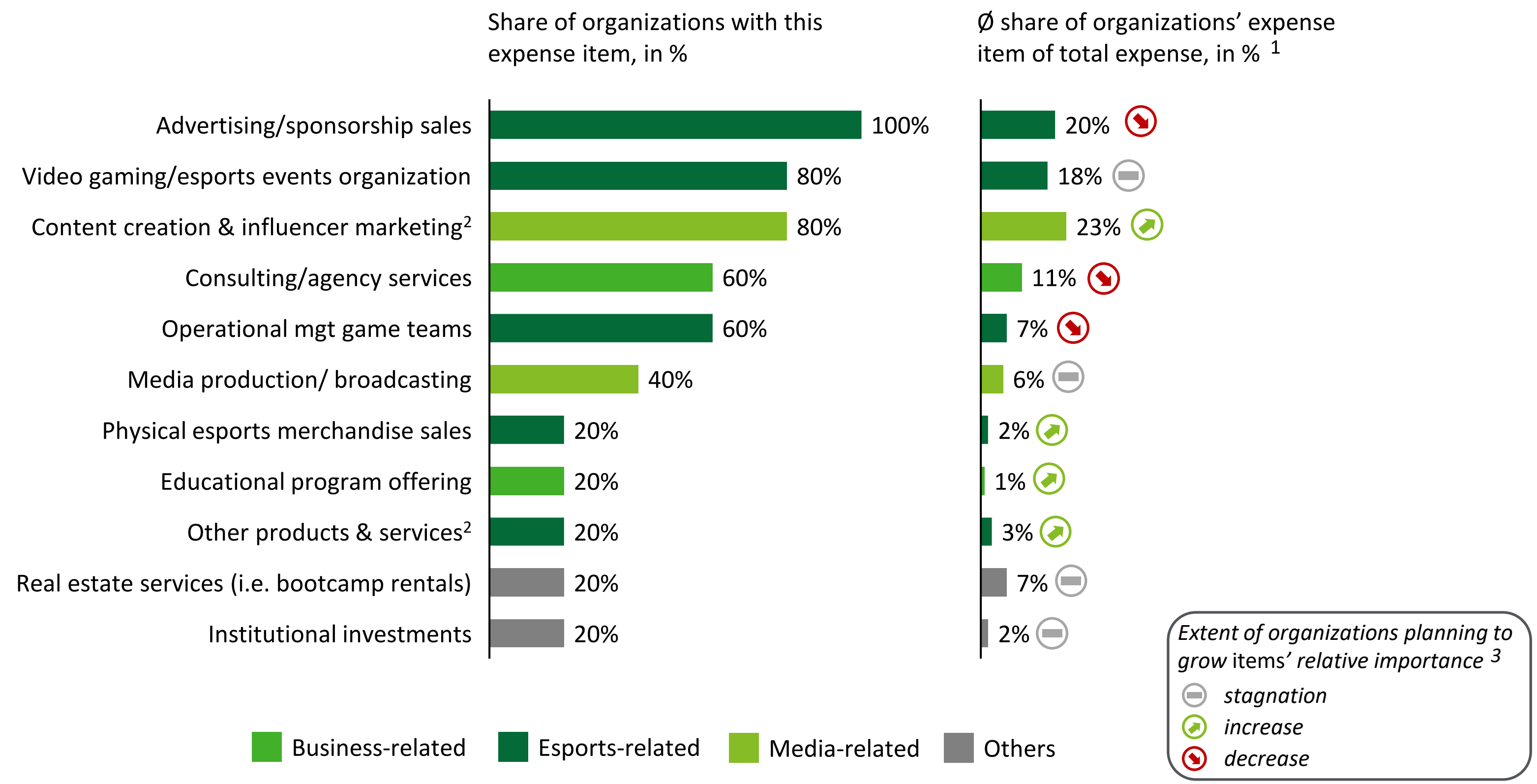
The most relevant expense items of the participating esports stakeholders include the operational management of the teams, advertising and sponsorship sales, events organization, and content creation

Stakeholder Expenses | Key observations

- The participating stakeholders **identify esports-related expenses as most relevant** for their organization.
- Specifically, in the esports space, advertising/ sponsorship sales, video gaming/esports events organization, and operational management of game teams belong to the most occurring and contributing items.
- Interestingly, **almost all of the above-mentioned expense items belong to those items in which stakeholders expect a decrease of significance in the future** (exception: video gaming/esports events organization). This indicates a **general effort to decrease further expenses in major esports contributing items** rather than the other categories to lower total expenses.

Illustrative, not exhaustive

Fig. 4 – Expenses of Italian Esports Stakeholders across Items (specified)



Notes: 1) Values may not add up to 100% due to rounding; 2) Related to video gaming/esports; 3) Increase: # organizations with expected growth > # organizations with expected decrease; stagnation: equal numbers; decrease: # organizations with expected growth < # organizations with expected decrease.

Source: Stakeholder information, Deloitte Analysis

02 | Creating Value in Italian Esports – Business Activities (1/2)

The operational management of the game teams, events organization, and content creation belongs to the most performed business activities of the Italian esports stakeholders

Fig. 5 – Business Activities of Italian Esports Stakeholders

Figure 5 provides an indication of the importance of business activities among stakeholders. The range of stakeholders in the sample needs to be considered when analyzing results and drawing conclusions.

Illustrative, not exhaustive

Ø Share of company resources dedicated to activity

Relevance[1]	Very low (<1%)	Low (1-5%)	High (>5-10%)	Very high (>10%)
Very high (76-100%)				○ Operational mgt. game teams ○ Video gaming/esports events organization ○ Content creation & influencer marketing[2]
High (51-75%)			○ Advertising/sponsorship sales ○ Media production/broadcasting	
Low (26-50%)		○ Educational program offering ○ Phy. esports merchandise sales	○ Consulting/agency services	
Very low (0-25%)	○ Subscription services offering ○ Digital esports merchandise sales ○ Real estate services ○ Other products and services[2]	○ Content creation & influencer marketing[3] ○ Esports/video gaming research ○ Other products and services[3]		

Business-related · Esports-related · Media-related · Others

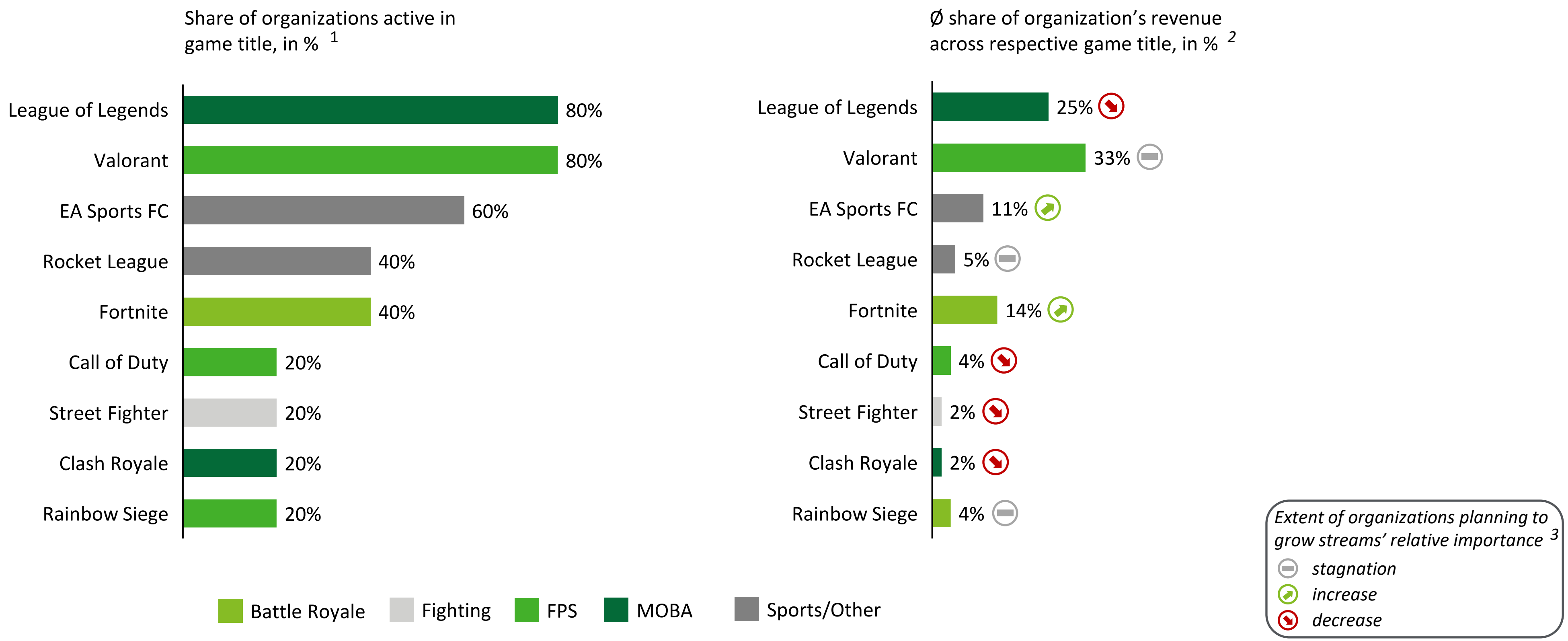
Notes: 1) Share of organizations performing this activity; 2) Related to video gaming/esports; 3) Unrelated to video gaming/esports.
Source: Stakeholder information, Deloitte Analysis

02| Creating Value in Italian Esports – Business Activities (2/2)

The two most relevant game titles in terms of overall involvement and revenue contribution are League of Legends and Valorant. Organizations anticipate growth in EA Sports FC and Fortnite

Illustrative, not exhaustive

Fig. 6 – Involvement of Italian Esports Stakeholders in selected Game Titles



Note: 1) Active organizations in a game title relate to those who indicated to make revenue in the title; 2) Values may not add up to 100% due to rounding; data on title activity and revenue streams were captured via separate questions; organizations didn't necessarily provide data on revenue streams for all game titles; 3) Increase: # organizations with expected growth > # organizations with expected decrease; stagnation: equal numbers; decrease: # organizations with expected growth < # organizations with expected decrease.

Source: Stakeholder information, Deloitte Analysis

02 | Creating Value in Italian Esports – Cross-over Products

The most relevant cross-over products for the Italian esports stakeholders are league-wide sponsoring & partnerships, league partnerships with shared revenues, and the influencer portfolio

Fig. 7 – Cross-Over Products of Italian Esports Stakeholders

Cross-over products refer to products additionally offered by organizations usually outside their core and traditional esports offering.

Illustrative, not exhaustive

Relevance[1]	Business-related	Esports-related	Media-related	Other
Very high (76-100%)		○ League-wide sponsoring & partnerships ○ League partnerships with shared revenues	○ Influencer portfolio	
High (51-75%)	○ Esports fantasy leagues ○ Educational programmes			○ Fashion
Low (26-50%)	○ Game matchmaking platforms ○ Video gaming hardware		○ Media rights for team-owned content	○ Others[2]
Very low (0-25%)			○ Movies/TV shows	○ Insurance services ○ Trading cards

Notes: 1) Share of organizations offering the respective cross-over product; 2) Others include following cross-over products: customer loyalty programmes, membership programmes, metaverse, real estate services, sports apparel.
Source: Stakeholder information, Deloitte Analysis

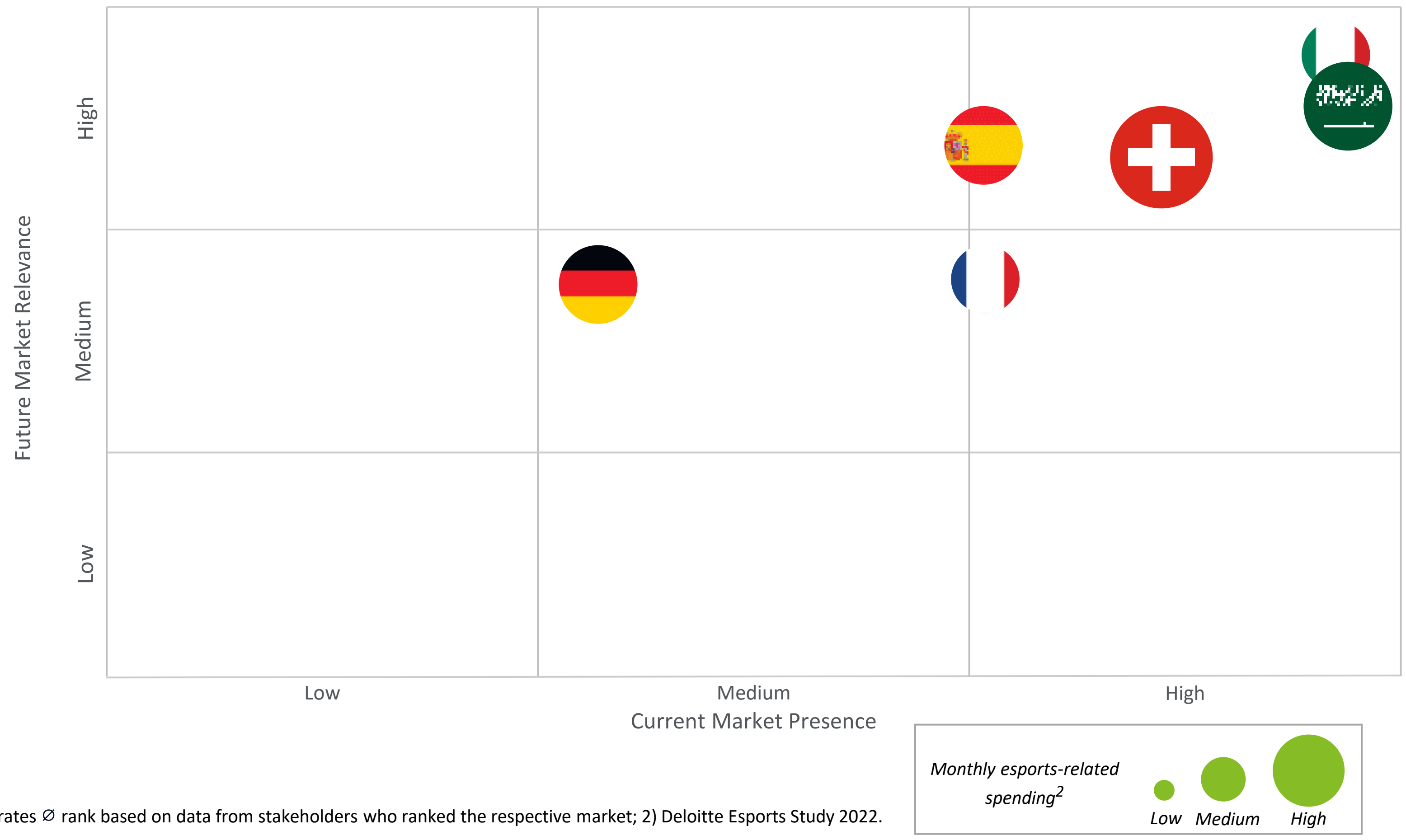
02 | Creating Value in Italian Esports – International Markets

Besides Italy, Saudi Arabia and Switzerland are the most essential markets in terms of current presence and future relevance. At the same time, these two markets can be characterized by the highest esports-related consumer spending

Markets | Key takeaways

- The stakeholders revealed **six markets as most important** in their **current and future business activities**: France, Germany, Italy, Saudi Arabia, Spain, and Switzerland.
- The most relevant markets regarding **current market presence** include **Italy and Saudi Arabia followed by Switzerland**. Stakeholders are least present in Germany among the stated six markets.
- Regarding projected **future relevance Italy, Saudi Arabia, Spain, and Switzerland** belong to the most focused markets.
- **Switzerland and Saudia Arabia** are the markets where consumers show **strongest monthly esports-based spending**.[2]
- Overall, the findings highlight **Saudia Arabia as emerging region given its Vision 2030's objectives** to diversify the domestic economy. Spain and Germany, traditionally strong esports markets, are still targeted by Italian stakeholders. Switzerland and Spain remain relevant, most likely due to geographical closeness among others.

Fig. 8 – Current and Future Relevance of selected Esports Markets[1]



Notes: 1) Stakeholders assessed market relevance by assigning ranks (1 and 15); graph illustrates ⌀ rank based on data from stakeholders who ranked the respective market; 2) Deloitte Esports Study 2022.
Source: Stakeholder information, Deloitte Analysis

03

Esports Consumption in Italy – Consumer Engagement Maturity

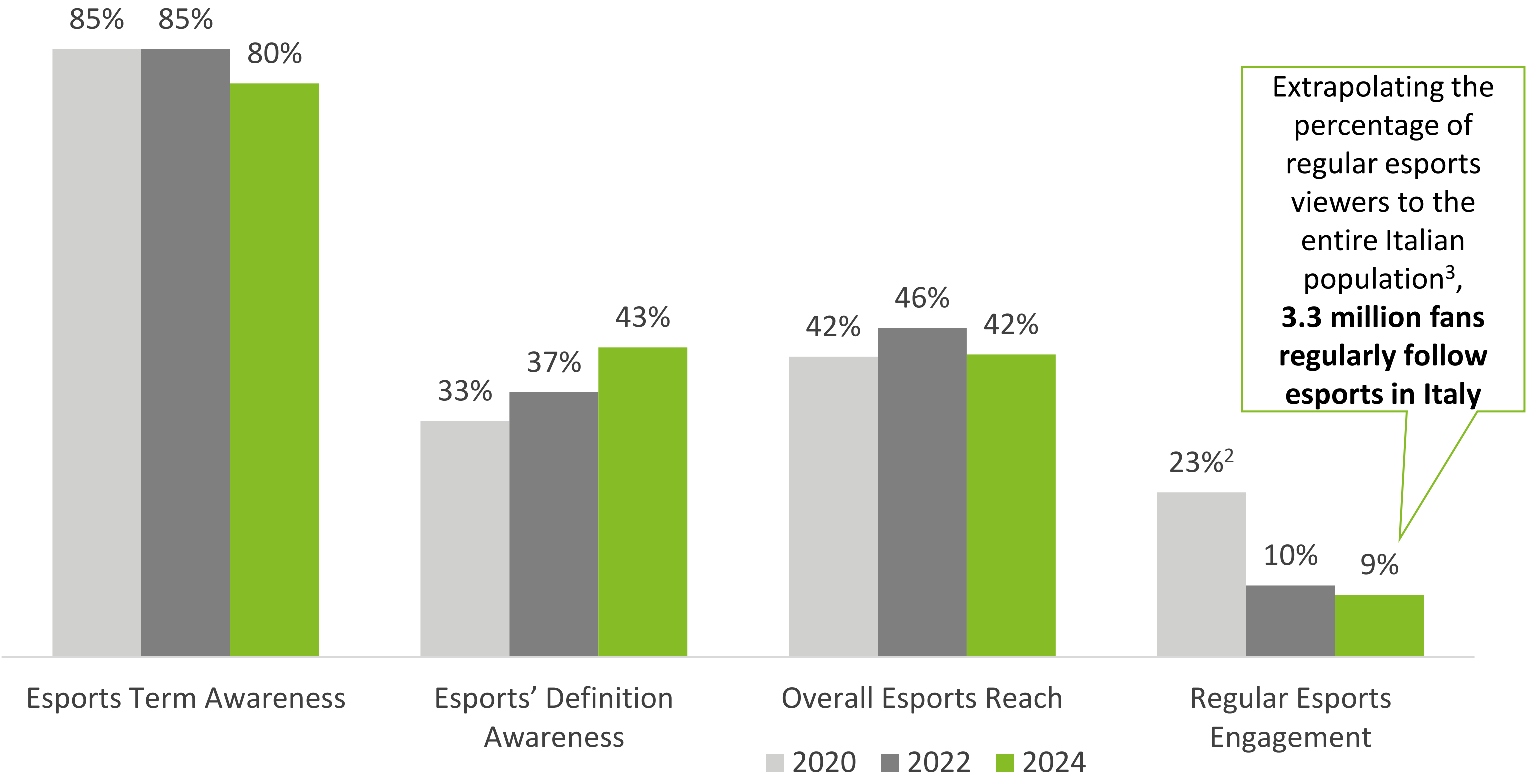
03 | Esports Consumption in Italy – Consumer Engagement Maturity

Over the past four years, esports term awareness has remained high, while regular esports engagement has remained relatively constant after a high in 2020, and definition awareness has steadily increased. Although overall esports reach peaked in 2022, it returned to its 2020 level by 2024, highlighting both growth and volatility of audience engagement

Consumer Engagement Maturity | Key observations

- When comparing esports awareness and reach over the last four years (see Figure 9), **esports term awareness has remained consistently high**, though it declined slightly from 85% in both 2020 and 2022 to 80% in 2024.
- **Awareness of the definition of esports** has shown steady growth, increasing from 33% in 2020 to 43% in 2024.
- **Overall esports reach** peaked at 46% in 2022 but returned to 42% in 2024, **aligning with the level recorded in 2020.**
- **Regular esports engagement is relatively constant** in 2022 and 2024 at around 10%, with a **comparatively higher figure in 2020** (23%). The latter could be due to the Covid-19 restrictions, which are likely to have had a major impact on regular esports participation.
- These trends indicate **growing familiarity with esports concepts**, although engagement levels have fluctuated over time.

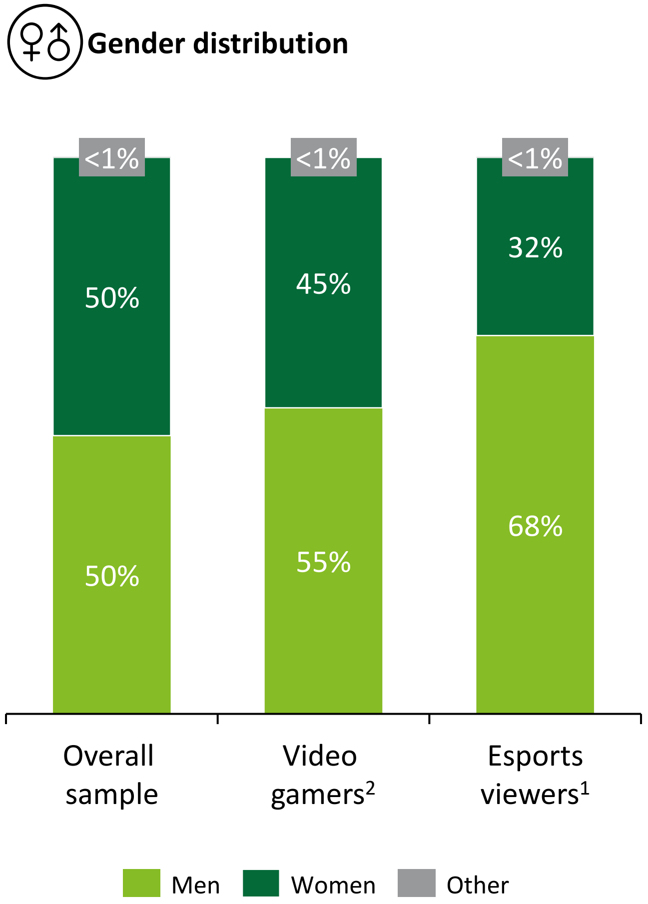
Fig. 9 – Development of Esports Engagement Maturity[1]
Average of overall sample; 2020/22 vs. 2024

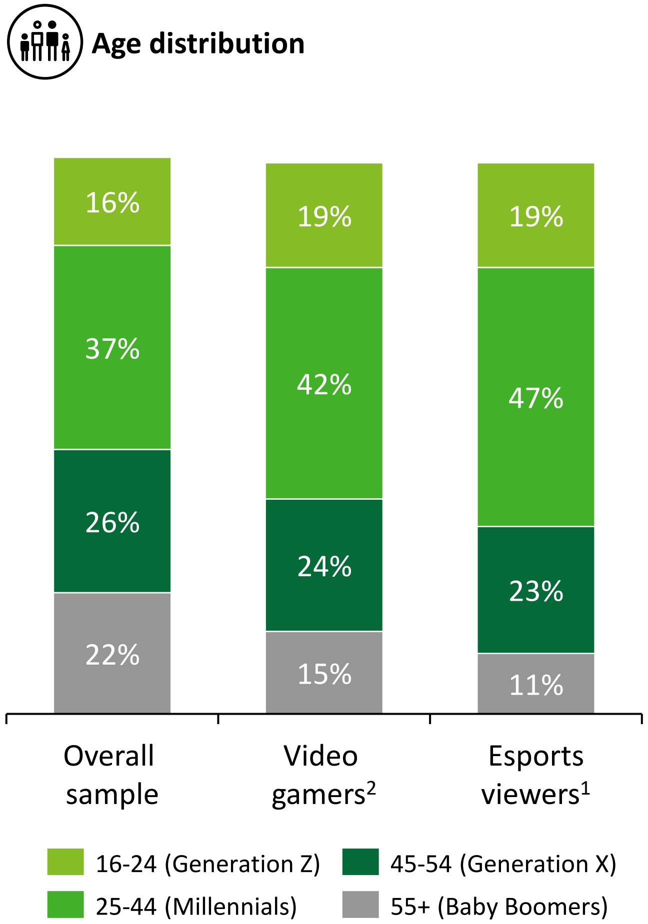


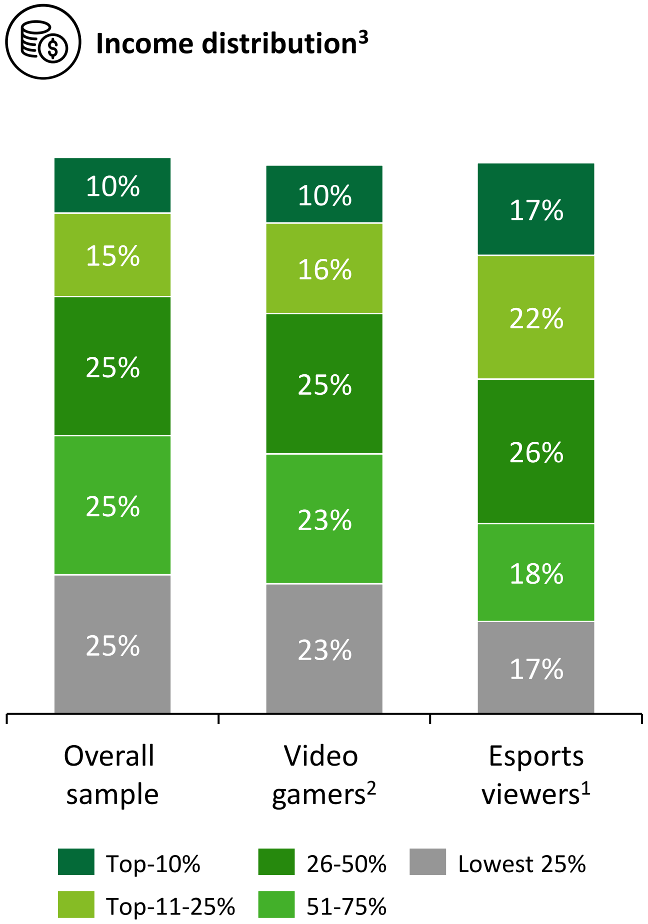
Notes: 1) For a definition of the respective categories, see 'Glossary' in the Appendix; 2) Period of Covid-19 restrictions, which likely had a major impact on regular esports participation. 3) Only inhabitants between the ages of 15 and 64 were considered.
Source: Deloitte analysis

03 | Esports Consumption in Italy – Target Group (1/2)

The most frequent consumers of esports are male and from the Millennial or Generation Z age groups. In addition, more than a third of esports viewers are in the top 25% of the income distribution, which is higher than the average





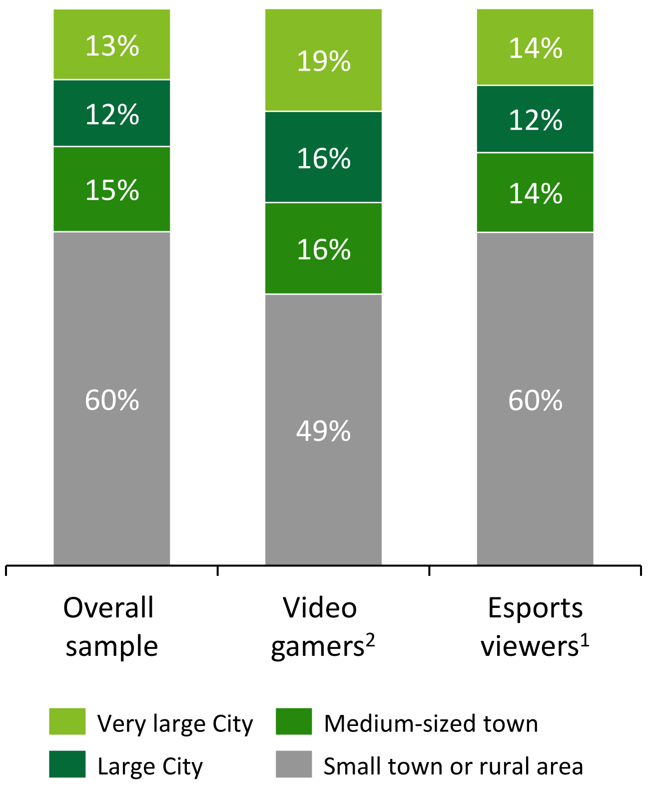


Note: 1) Refers to respondents who have followed esports in the last 6 months before the survey period, n = 195; 2) Refers to respondents who engaged in video gaming in the last 6 months before the survey period; 3) Data from consumer research in summer 2022.
Source: Deloitte analysis

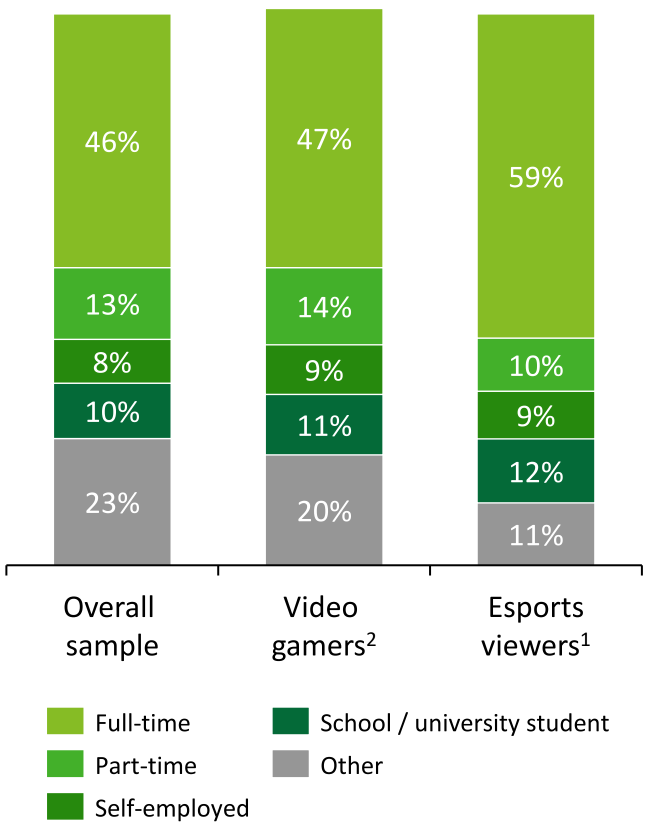
03 | Esports Consumption in Italy – Target Group (2/2)

Esports viewers tend to come from smaller cities and are more likely to be employed full-time than video gamers. They have a background in business/economics comparatively often

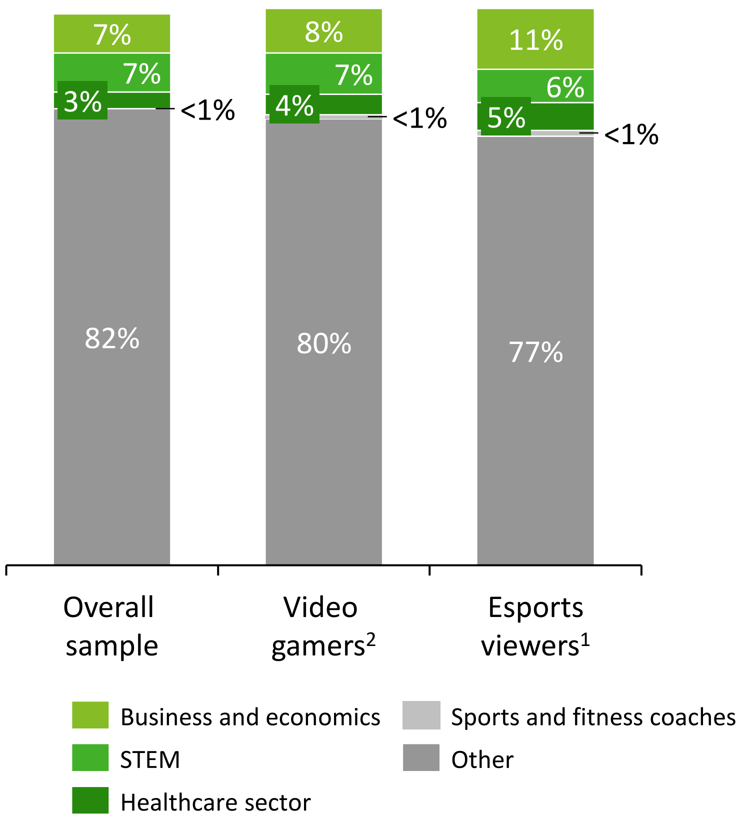
Hometown size



Employment status[3]



Professional background[3]



Note: 1) Refers to respondents who have followed esports in the last 6 months before the survey period, n = 195; 2) Refers to respondents who engaged in video gaming in the last 6 months before the survey period; 3) Data from consumer research in summer 2022.
Source: Deloitte analysis

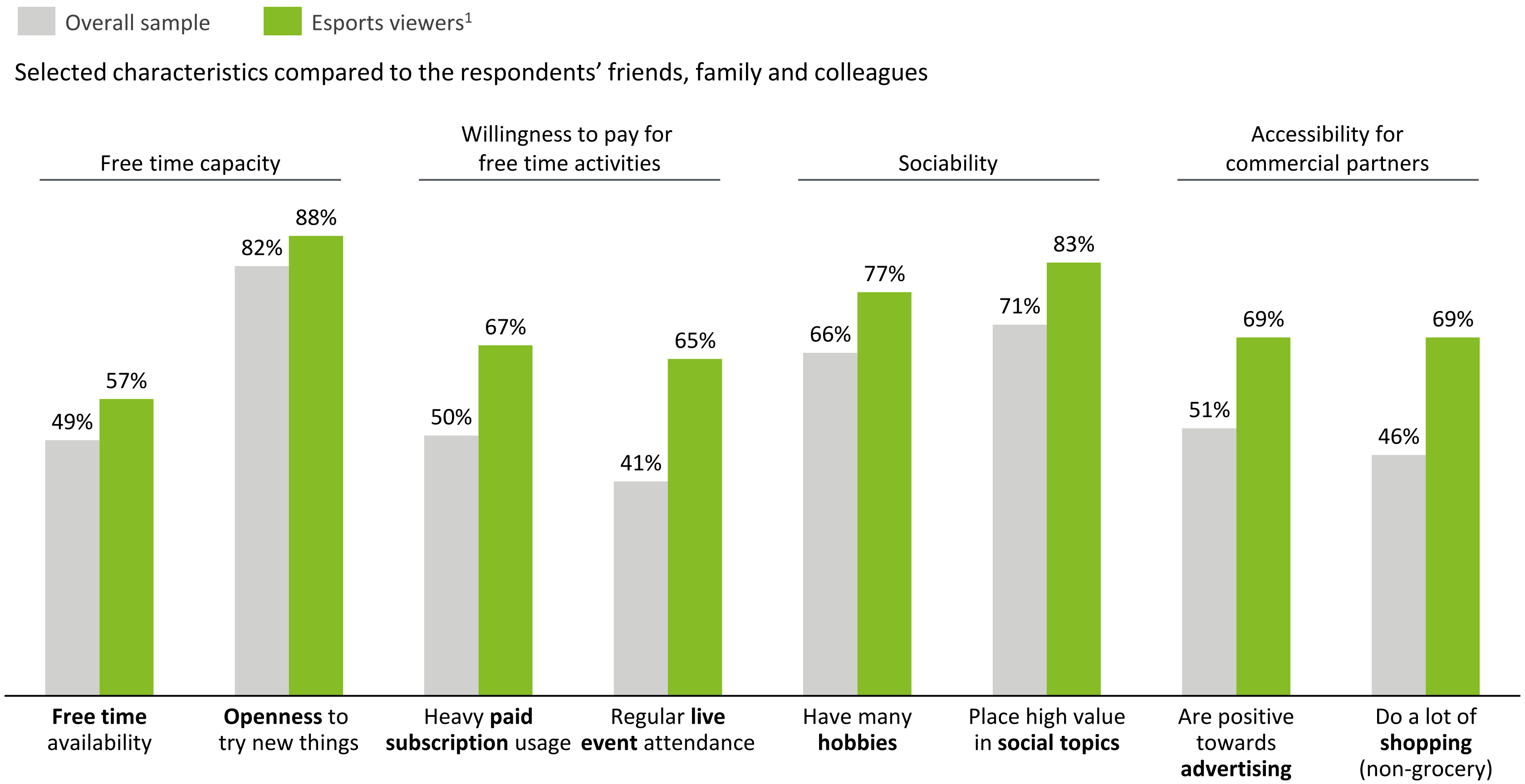
03 | Esports Consumption in Italy – Characteristics of Italian Esports Viewers

Compared to the overall population, esports viewers are characterized above all by the fact that they frequently go shopping, have a positive attitude toward advertising, and often pay for subscriptions

Characteristics | Key observations

- Compared to the population as a whole, **esports consumers** have a **greater amount of free time** and use it more frequently **to try out new things and activities**
- **Esports viewers** are disproportionately **willing to spend money on their leisure time** (attending live events and using paid subscriptions)
- Esports viewers have a **large number of hobbies**, with the **importance of social topics** also playing an **above-average role**
- A **very interesting** and **young target group** (see demographics) that is not only **very receptive to advertising**, but also **enjoys shopping** itself

Fig. 10 – Distribution of Selected Characteristics among the Italian Esports Viewers



Note: 1) Refers to respondents who have followed esports in the last 6 months before the survey period, n = 195.
Source: Deloitte analysis

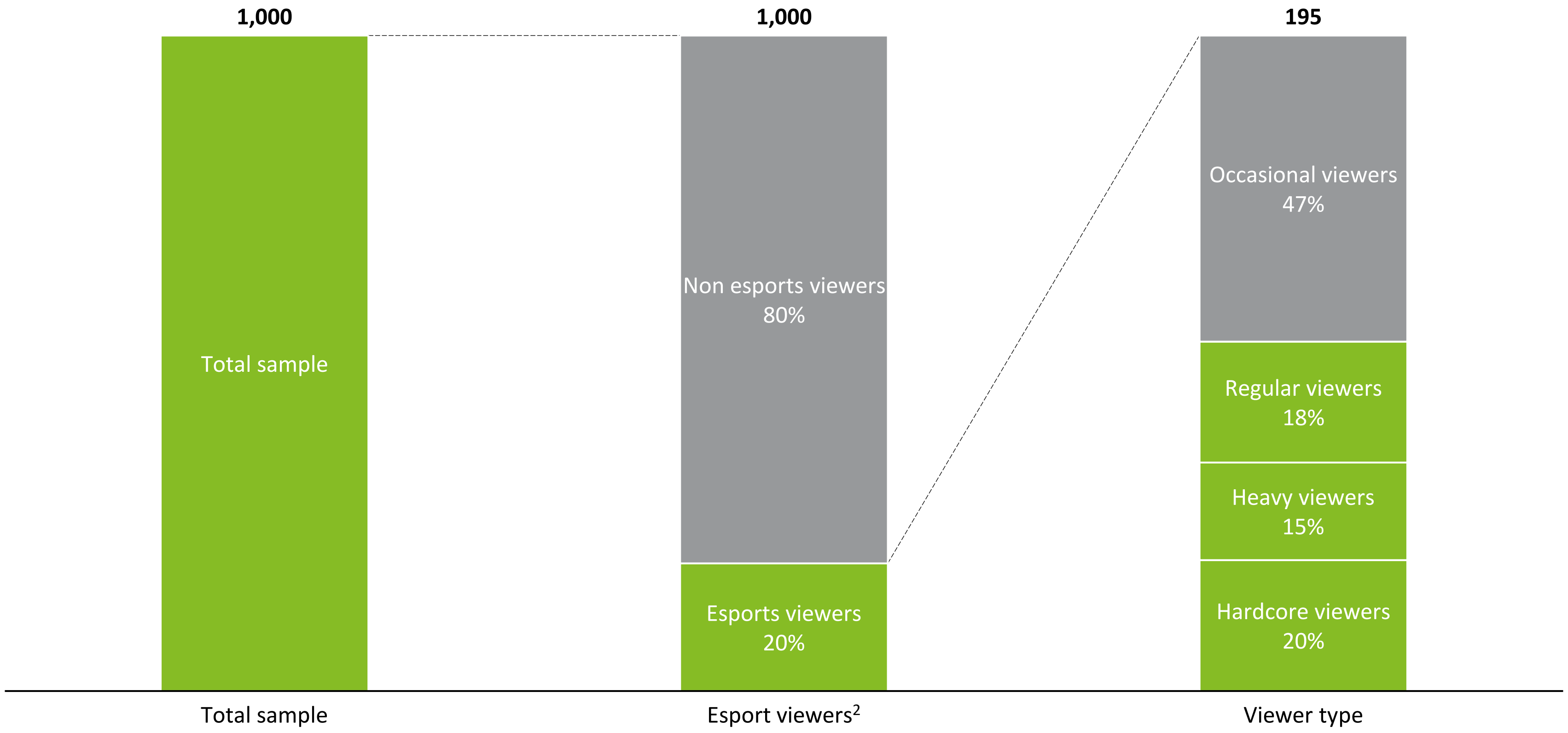
03 | Esports Consumption in Italy – Viewer Types

Esports viewers accounted for 20% of the total sample, with the majority watching esports for 1-3 hours per week. Hardcore viewers watch more than 10 hours per week and make up the second-largest share of esports viewers

Esports viewers | Key observations

- The total sample consists of both esports and non-esports viewers, with 80% being non-esports viewers and **20% being esports viewers**.
- Extrapolating the percentage of esports viewers to the entire Italian population[3], **7.3 million fans follow esports in Italy.**
- **Regular esports viewers**, who watch 1 to 3 hours per week, have the highest average age of all esports viewers, making them the **oldest group among all viewer types**.
- **Hardcore esports viewers**, who watch more than 10 hours per week, make up 15% of esports viewers and have the **lowest percentage of female viewers** among all viewer types, at just 18%.

Fig. 11 – Distribution of Selected Characteristics among the Italian Esports Viewers

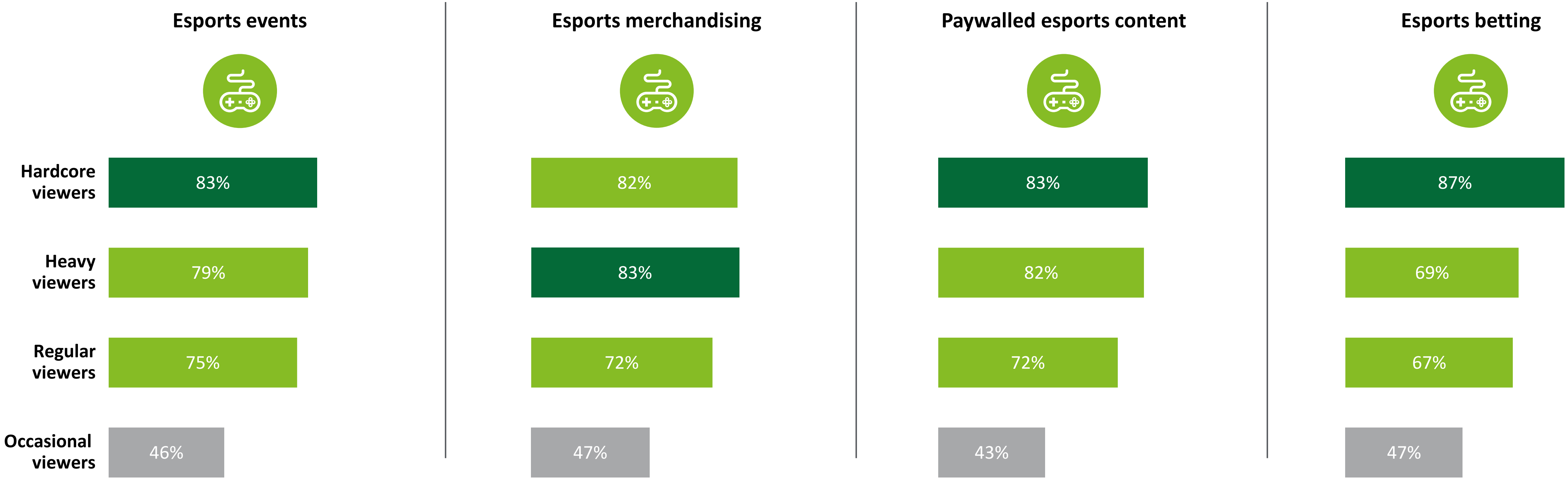


Notes: 1) For a definition of the respective categories, see 'Glossary' in the appendix; 2) Refers to respondents who have followed esports in the last 6 months before the survey period, n = 195. 3) Only inhabitants between the ages of 15 and 64 were considered.
Source: Deloitte analysis

03 | Esports Consumption in Italy – Commercial Conversion (1/2)

Hardcore viewers account for the highest percentage of viewers who have spent money on various categories, with the exception of merchandising where heavy viewers account for the highest percentage

Fig. 12 – Esports Spending by Esports viewer Types[1]
"I have spend money on esports-related products…"

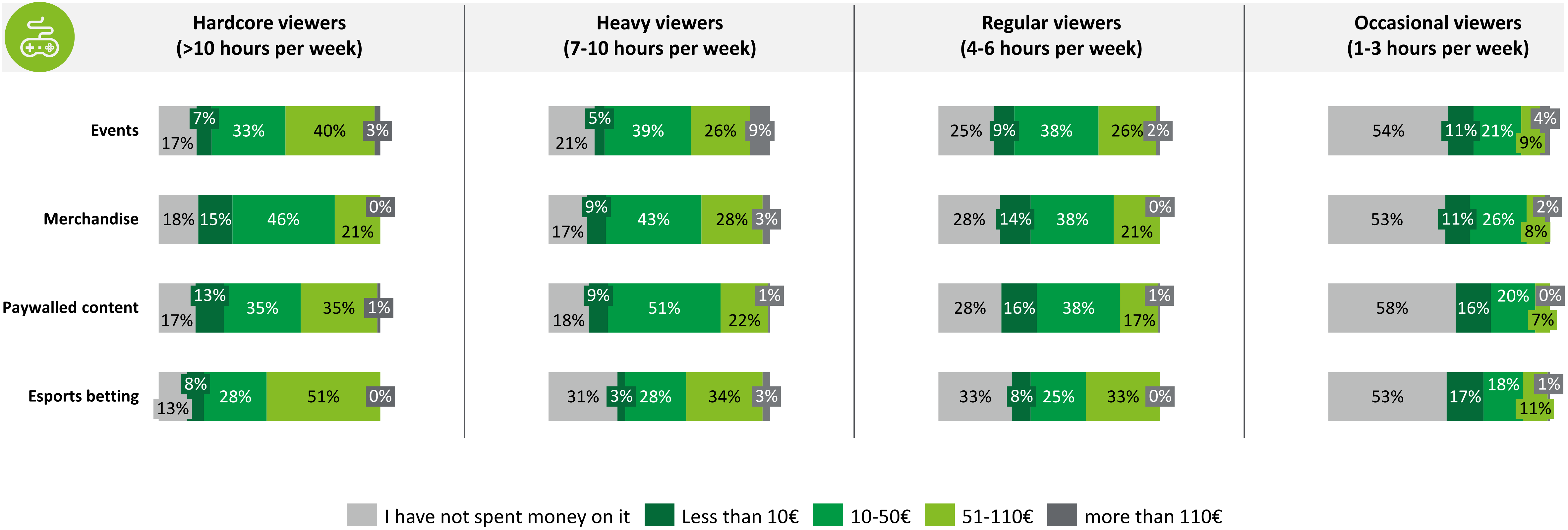


Notes: 1) Esports viewers were asked if they had spent money on esports-related products, content and services in the last 6 months.
Source: Deloitte analysis

03 | Esports Consumption in Italy – Commercial Conversion (2/2)

Across all categories, hardcore viewers tend to spend more in each area than any other type of viewer. Occasional viewers spend significantly less than any other type of viewer

Fig. 13 – Esports Spending and Spending Distribution by Consumer Type[1]
over the last six months



Notes: 1) Esports viewers were asked to indicate on which esports-related products, content and services they spent the most money on in the past 6 months.
Source: Deloitte analysis

03 | Esports Consumption in Italy – Regular Engagement and Interaction

Consumers' criteria for selecting content when consuming esports vary, although the specific game emerges as the main motive. In addition, for many consumers, viewing esports is a suitable way to unwind from everyday life

Engagement & Interaction | Key observations

- The **most important reason** for choosing esports content for passive consumption is the **specific game**.
- The importance of whether **access** is **paywalled, restricted or free** is also very important to esports viewers.
- **Strong attachment to a team**, as seen in football for example, is **not as prevalent in esports** and is only cited as a reason for watching content by 19% of e-sports viewers.
- Esports viewers are most likely to use content to **unwind from everyday life**, with a slightly higher percentage **doing so in company** than alone.

Fig. 14 – Reasons for Esports Content Selection[1]
"What esports content I watch depends primarily on…"

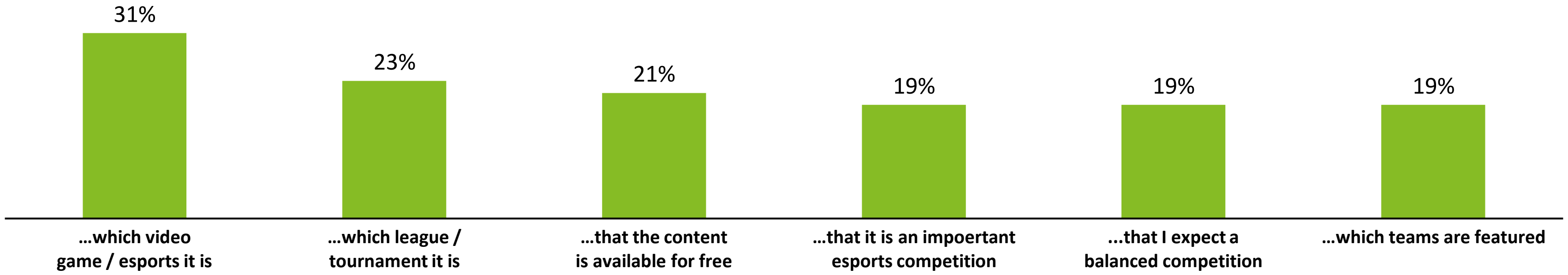
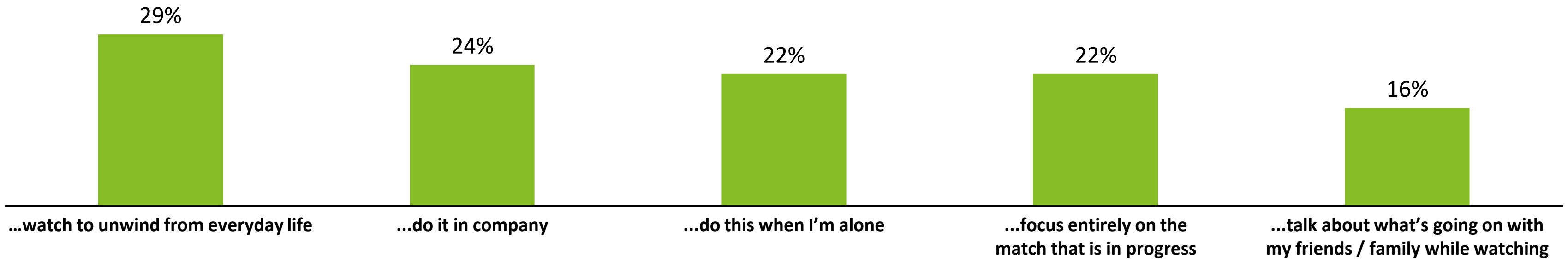


Fig. 15 – Viewing Habits[1]
"When I watch esports, I usually..."

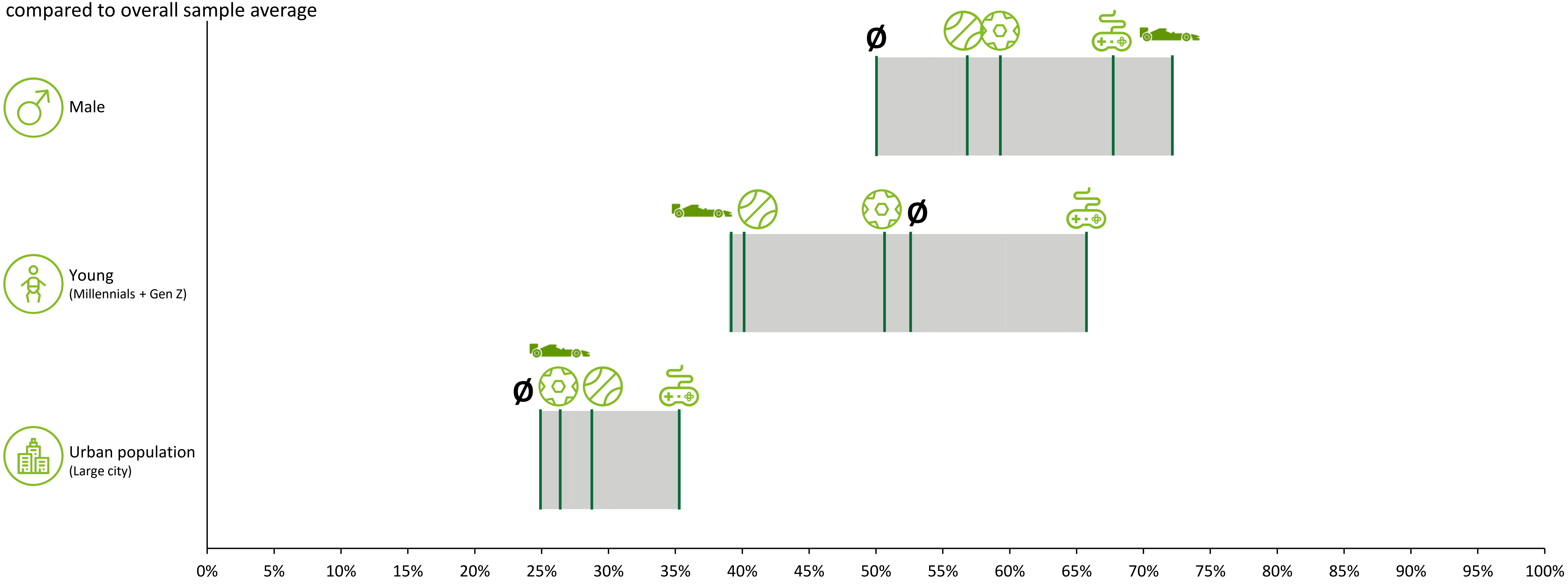


Notes: 1) Refers to respondents who have followed esports in the last 6 months before the survey period, n = 195.
Source: Deloitte analysis

03 | Esports Consumption in Europe – Demographic Distribution of Different Sports Audiences

Esports viewers are different from fans of other sports. They are significantly younger, more urban and have a higher percentage of male viewers

Fig. 17 – Demographic Distribution of Different Sports Audiences in Italy[1]
compared to overall sample average



Notes: 1) Refers to respondents who have followed one of the following sports in the last 6 months before the survey period, respectively: esports viewers, football, formula one, tennis.
Source: Deloitte Analysis

04

Enabling Value Delivery in Italian Esports

04 | Enabling Value Delivery in Italian Esports – Broadcasting Channels

Esports content is brought to remote audiences by media and online platforms through live streams, video-on-demand, and linear TV. This content spans entire tournaments, highlights from events, and even discussions on subjects outside of the competitions

Broadcasting Channels | Key takeaways

Streaming platforms are the primary means of enhancing interaction between esports organizations and their audiences

Esports consumers are engaging with a variety of options, including live streams, video-on-demand, free and pay TV, as well as live events. Although all of these channels are valid, YouTube Gaming and Twitch remain the most significant platforms for esports broadcasts (refer to Figure 18).

Esports viewers show a slightly lower inclination toward social media, with 76% identifying as heavy users compared to 83% in the general sample. In terms of platform usage, esports viewers engage more than the overall sample. Moreover, their activity varies across different social platforms (refer to Figure 19), prompting esports stakeholders to develop customized social media strategies that align with this distinct usage pattern.

Fig. 18 – Most Important Access Points for Esports Consumption

Usage of different platforms/channels for accessing esports content by esports viewers[1]

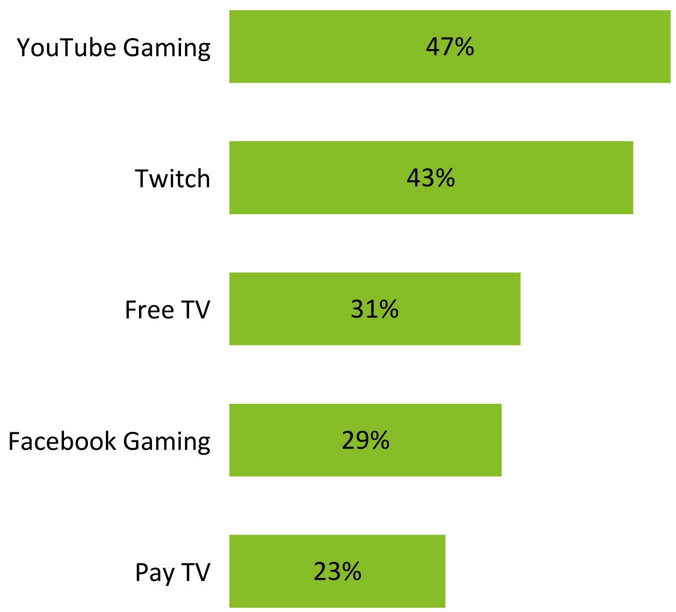
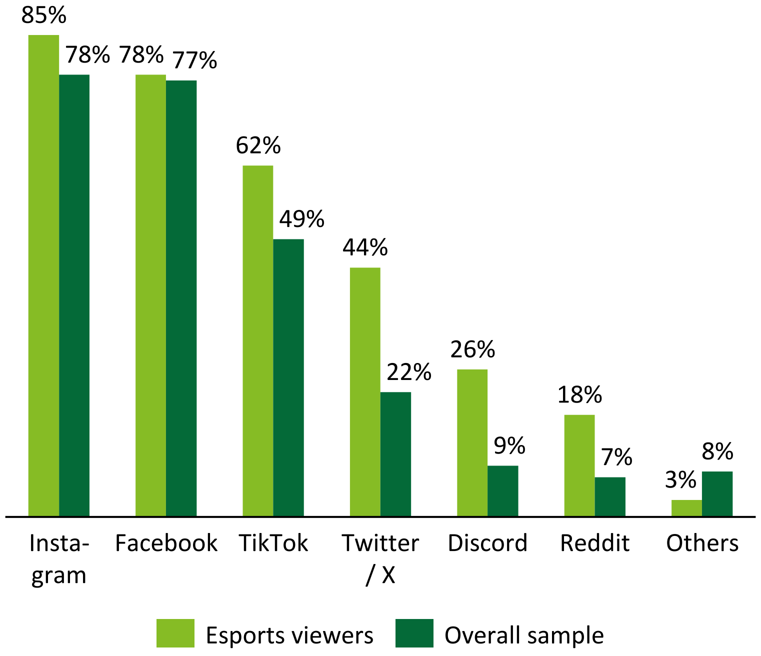


Fig. 19 – Selected Access Points for Esports Consumption

Usage among esports viewers[1] vs. overall sample



Notes: 1) Italians who have watched esports content in the last six months were asked to indicate which channels/platforms they have accessed content on esports competitions the most in the last 6 months; 2) Esports viewers were asked to name the social media channels they have used in the last 6 months.
Source: Deloitte analysis

04 | Enabling Value Delivery in Italian Esports – Strategic Partners

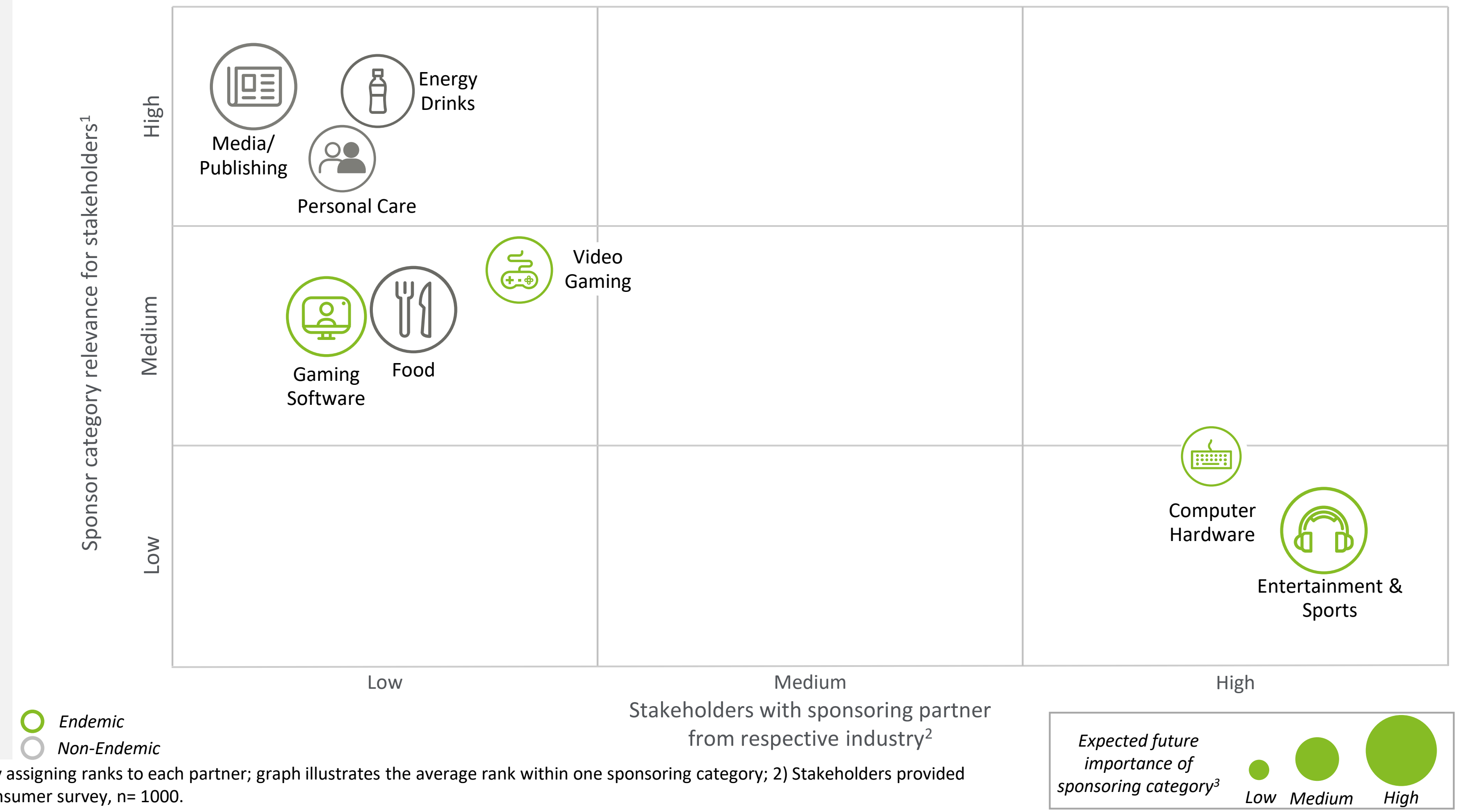
The opportunity for relationship-building with an open-minded audience makes esports a premier space to activate sponsorships and advertisements. With currently the majority of collaborations in the Computer Hardware and Entertainment & Sports space, there seems to be growth potential regarding partners from further industries

Strategic Partners | Key takeaways

The established partners and sponsors network shows a reliance on both endemic and non-endemic partners:

- Endemic hardware companies in the **Computer Hardware and Entertainment & Sports** industries are the **primary sponsors of Italian esports stakeholders**.
- Partnerships with companies in the food, energy drink, media/publishing and personal care industries have played a role in the collaboration with non-endemic sponsors. Aside from that, there remains sizable **untapped potential with non-endemic sponsorship categories**.
- According to the stakeholders, there are **no collaborations** with companies from **crypto exchanges, retail, internet and telecommunication providers, and automotives** industries. Hence, these industries may indicate further growth potential and partners with which esports stakeholders could engage

Fig. 20 – Prevalence and Relevance of selected Sponsoring Partner Categories



Notes: 1) Esports stakeholders assessed the relevance of the sponsor category by assigning ranks to each partner; graph illustrates the average rank within one sponsoring category; 2) Stakeholders provided brand partner, Deloitte conducted sponsoring clustering; 3) Based on esports consumer survey, n= 1000.
Source: Deloitte analysis

05

Appendices

05 | Appendices – Glossary

Baby Boomers
Respondents aged 54+

Battle Royale
In a Battle Royale match, multiple players compete on the same map, starting with minimal equipment. The object is to be the last remaining player on the map after all other players have been eliminated either by combat or by being ‘trapped’ outside a shrinking ‘safe zone’ on the map.

Commercial Conversion
Share of respondents who have paid money for esports-related content, products or services in the last six months, either for themselves or for someone else (for example, as a gift or paying a fee for friends and family).

Endemic companies
Companies whose core products and services are related to video gaming and/or esports.

Esports
This study defines esports as playing computer, mobile and console video games on a professional competitive level, with teams or individuals playing each other within leagues or tournaments. Aside from the competitions, esports is primarily a spectator product and is watched by audiences on the internet, on TV and on-site at live events. Esports are a subcategory of the overall gaming industry, which includes the active and leisure playing of video games.

Esports Ecosystem/Sector (Stakeholders)
The esports ecosystem revolves around key value drivers and orchestrators of esports competitions, products, services, and content. Besides the core value-creating stakeholders (league organizers, event hosts and esports teams, and players), it includes stakeholders from the publisher segment, traditional media and online platforms, and strategic partners. Also, the esports audience is a key stakeholder in the esports ecosystem.

Esports’ Definition Awareness
Share of respondents who know the term ‘esports’ and can define it correctly.

Esports Engagement Maturity
Developmental stage of individual esports markets regarding term and definition awareness, overall reach, meaningful reach, regular reach and commercial conversion.

Esports Genres
Category of games classified by structure, design and goals of the specific games.

Esports Term Awareness
Share of respondents who know the term ‘esports,’ independent of the ability to define the term correctly.

Esports Titles
Individual game titles in which the competitions are held. Therefore, in the esports context, they are comparable to ‘disciplines’ in sports.

Esports viewers
Respondents who have watched professional esports in the last six months on the internet, on TV or at a live event.

Fighting
In fighting games, two or more players engage in battle, mainly featuring hand-to-hand combat elements.

05 | Appendices – Glossary

FPS / First-Person Shooter
FPS games focus on weapon-based combat between teams or individuals from a first-person perspective. There are different matches with distinct goals, for example, occupying the home base of the opponent.

Generation X
Respondents aged 45-54

Gen Z
Respondents aged 16-24

Hardcore viewer
Esports viewers who watched esports content for more than 10 hours per week in the last six months.

Heavy viewer
Esports viewers who watched esports content between 7-10 hours per week in the last six months.

Occasional viewer
Esports viewers who watched esports content between 1-3 hours per week in the last six months.

Overall Esports Reach
Share of respondents who have watched professional esports content at least once in the past.

Meaningful Esports Reach
Share of respondents who have watched professional esports content at least once in the last six months.

Medium-sized town
A medium-sized town is defined as having a population between 50,000 and 99,999 inhabitants.

Millennials
Respondents aged 25-44

MOBA / Multiplayer Online Battle Arena
In MOBA, two teams compete against each other from a home base on different maps with distinct features. The players, who each control a character with specific strengths and weaknesses, collaborate as a team to execute their overall strategy. The objective is to destroy the opposing team's home base.

Non-endemic companies
Companies whose core products and services are unrelated to video gaming and/or esports.

Non-viewers
Respondents who have never watched professional esports.

Large City
A large city is defined as having a population between 100,000 and 499,999 inhabitants.

Regular Esports Engagement
Share of respondents who have watched professional esports content at least once per week in the last six months.

Regular viewer
Esports viewers who watched esports content between 4-6 hours per week in the last six months.

Small town or rural area
A small town or rural area is defined as having a population of 50,000 or less.

Very Large City
A large city is defined as having a population of 500,000 or more.

05 | Appendices – Basis of Preparation

Basis of Preparation

Deloitte conducted a consumer survey in September and October 2024 to obtain reliable consumer data. The survey involved some 1,000 consumers in Italy. We also asked representatives of stakeholder organizations from the Italian esports ecosystem to provide their thoughts on current topics and sector developments.

The consumer survey is representative with regards to the online population of Italy in terms of age (16-65), gender and urbanisation rates.

For the expert survey, Deloitte contacted numerous Italian sector representatives in cooperation with the Italian Interactive Digital Entertainment Association (IIDEA).

In the first part of the survey, experts provided information about their organization's business activities and economic situation. Then, in the second part, they had the opportunity to discuss overall trends and matters that impact the development of the esports sector in Europe.

Please note that figures in this report are typically rounded. Therefore, it may not be possible to recreate sums, shares and growth rates based on other stated figures, as the underlying calculation is based on precise (non-rounded) values.

This report contains information derived from publicly available or other direct sources. We have not performed any verification work for this report or audited any of this externally sourced information.

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