

# 2026 Italian Esports Report

Market & Streaming Trends

June 2026

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# Executive Summary

Italy is entering a decisive phase for esports.

The country is currently the **5th esports market in Europe**, with an **estimated value of €32-35M in 2025**, and shows one of the strongest growth outlooks, with an **expected CAGR of around +11%** and a potential market size of approximately €60M by 2030. The audience is already present: esports reaches younger generations with particular strength, with around **1 in 5 Gen Z Italians following esports**, and Italy shows a fanbase comparable to more mature European markets.

However, the Italian market has not yet fully translated audience potential into commercial scale. Sponsorships account for almost **70% of revenues**, while media rights, ticketing and merchandising remain marginal. This points to a structural gap: Italy has attention, but still limited infrastructure, recurring live formats and integrated commercial models to monetize it consistently.

The same dynamic emerges from the fanbases analysis.

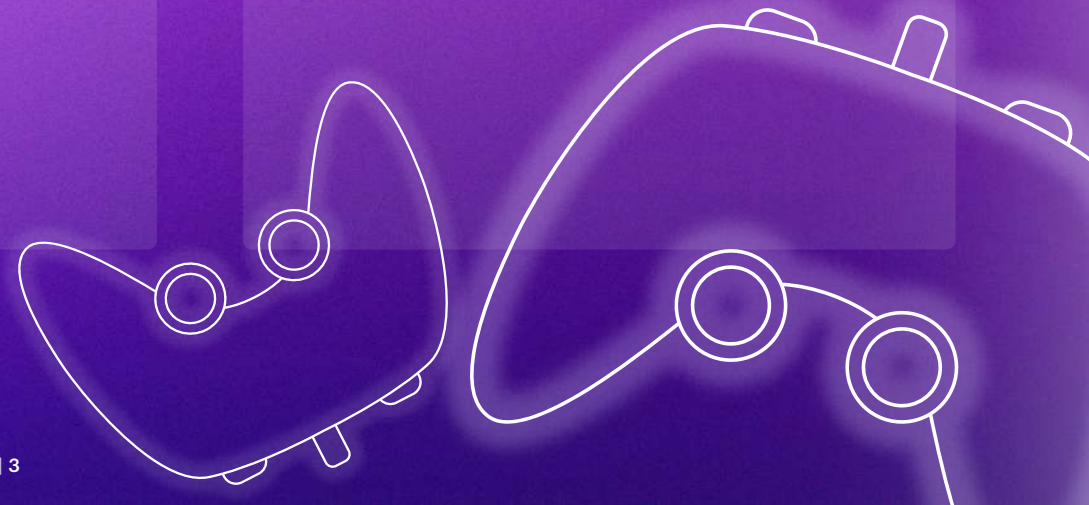
The video games community is highly receptive - **68%** of the surveyed community considers *video games as its primary entertainment activity* - but proximity to video games does not automatically become esports engagement.

**Under 25 audiences** are already highly connected to creators, live streaming and competitive content, with **83% playing** and following esports content. Among **25+ video game players**, however, only **49%** play and follow esports, while **41% play video games but do not follow esports content**, revealing a significant conversion opportunity.

To unlock the next stage of growth, esports in Italy needs to become easier to access, more social and more experience-driven.

Multi-platform content, creators, pro players, live events and brand activations can work together as one connected journey: from discovery, to engagement, to community, to monetization.

The opportunity is not only to grow esports as a media vertical, but to **build a broader entertainment ecosystem** where brands, clubs, publishers, creators and events create measurable value around a culturally relevant audience.








# Entering the Arena

The Italian Esports Landscape and Market



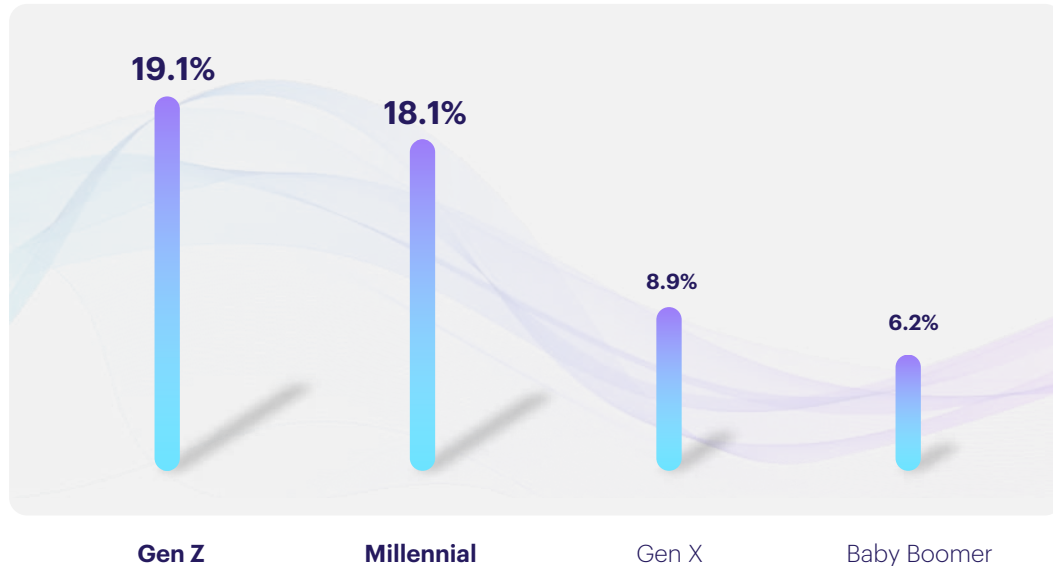
# While still emerging, Europe's esports market is gaining momentum, with Italy emerging as a key growth hotspot

Country	Est. Market size (EUR M)	CAGR 2025-2029	% People Following esports by Country	
 Germany	€157-170M	~7%	11.9%	Home to <b>IEM Cologne, ESL One and LEC</b> headquarters in Berlin; Granted esports clubs <b>non-profit tax status</b> in 2026
 UK	€88-106M	~9%	9.9%	Hosted <b>LoL Worlds 2024</b> Final at The O2 Arena in London; HQ of one of the most established esports org, <b>Fnatic</b>
 France	€61-75M	~7%	14.6%	<b>Recurring host of major international esports finals</b> - RLCS World Championship 2025 (LDLC Arena) and VCT Masters Paris LFL is among Europe's <b>most-watched regional leagues</b>
 Spain	€50-55M	~8%	15.0%	<b>Hosts Madrid Games Week at IFEMA</b> , one of Europe's largest video games festivals; <b>regional hub for Southern Europe</b> : hosts VCL Spain: Rising (incl. Italy and Portugal)
 Italy	€32-35M	~11%	11.3%	<b>Distinctive Serie A football club involvement</b> including Juventus, Napoli, Torino, Roma, Como; <b>strong esports tournaments presence at major comics and video game venues</b> incl. COMICON Napoli (eSerie A Finals), Milan Games Week, Lucca Comics & Games

Source: Accenture elaboration based on AEVI (Asociación Española de Videojuegos), The esports Radar (2025) German industry report, Omdia, PwC E&M Outlook. Esports Followers: YouGov Consumer Panel - Profiles Country 2026-04-12 N=8566. Which, if any, of the following Esports games/franchises do you watch or follow? Please select all that apply. esports refers to competitive video games competitions between professional/sponsored gamers or teams; this does not include amateur/personal gameplay. By watch / follow, we mean that you either actively read about esports on a regular basis, watch live broadcasts or highlights of leagues/competitions/events online or TV, or attend leagues/competitions/events in person.

# Esports remains a niche compared to traditional M&E but disproportionately attracts Gen Z and Millennials

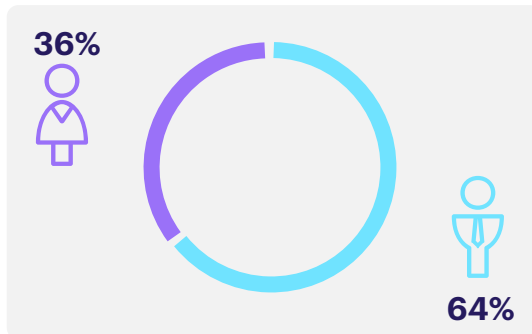
## % People Following esports by Generation (Italy) **Total 11.3%**



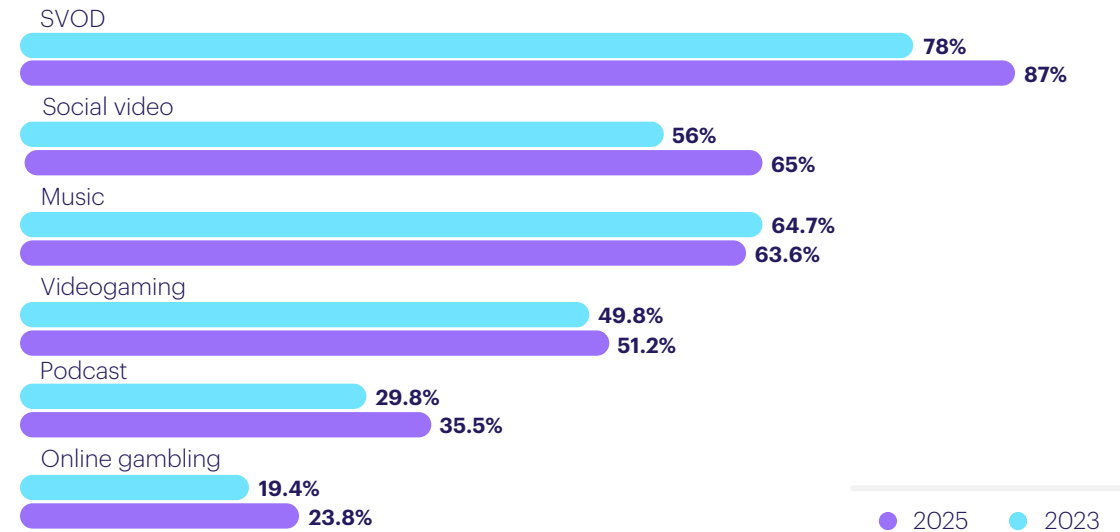
Source: Followers - YouGov Consumer Panel - Profiles Country 2026-04-12 N=8566.

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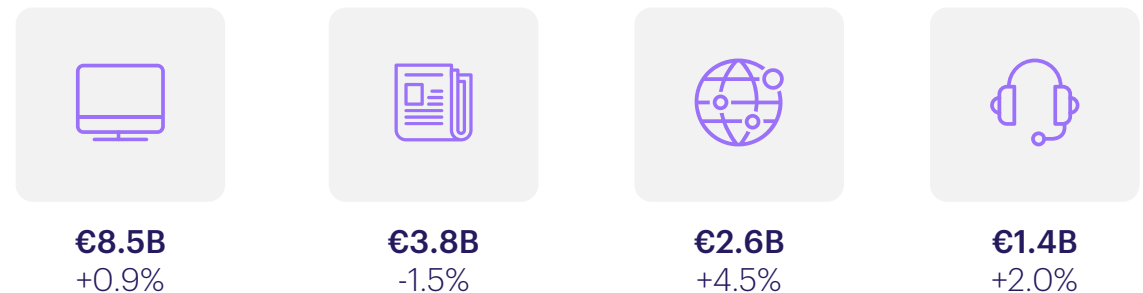
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## Digital Entertainment Penetration in Italy - Age 18-44

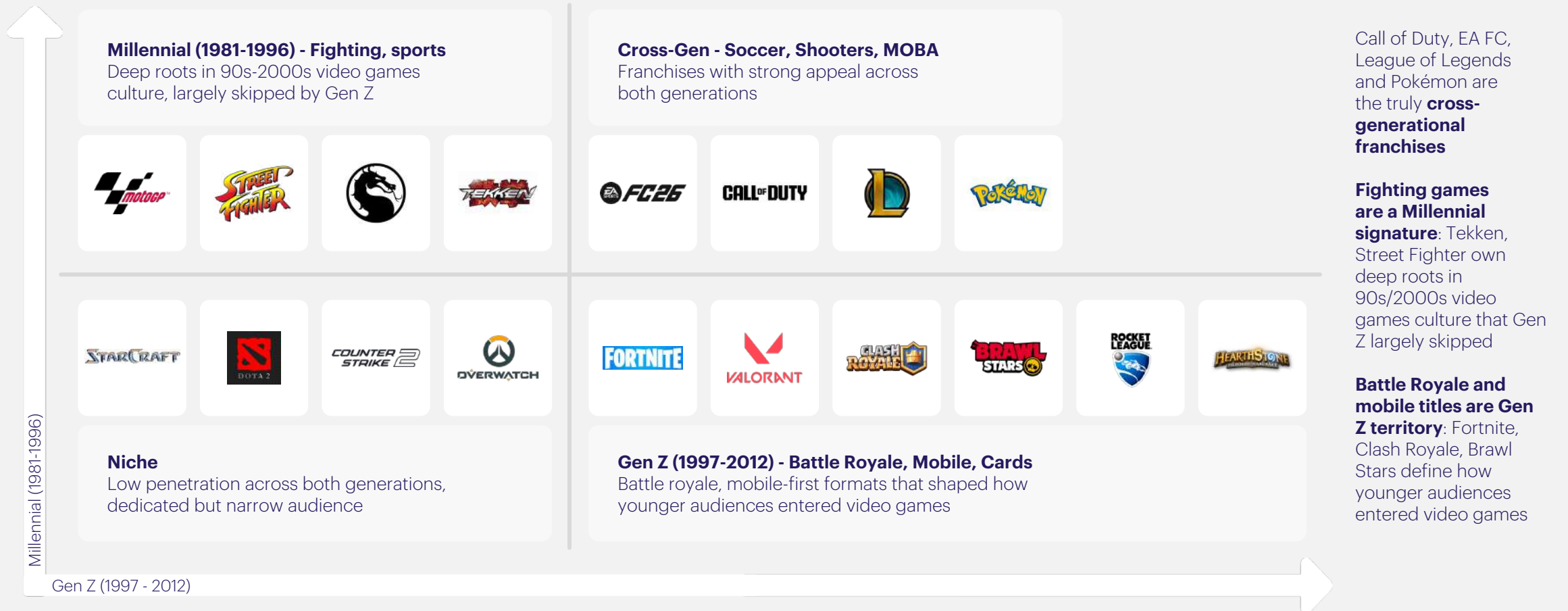


## Italy M&E Market Size & CAGR 2024-2029 (€B, 2025)



Source: Accenture Media Consumer Study 2025 n=500 Age 18-44; PwC Global E&M Outlook 2024.

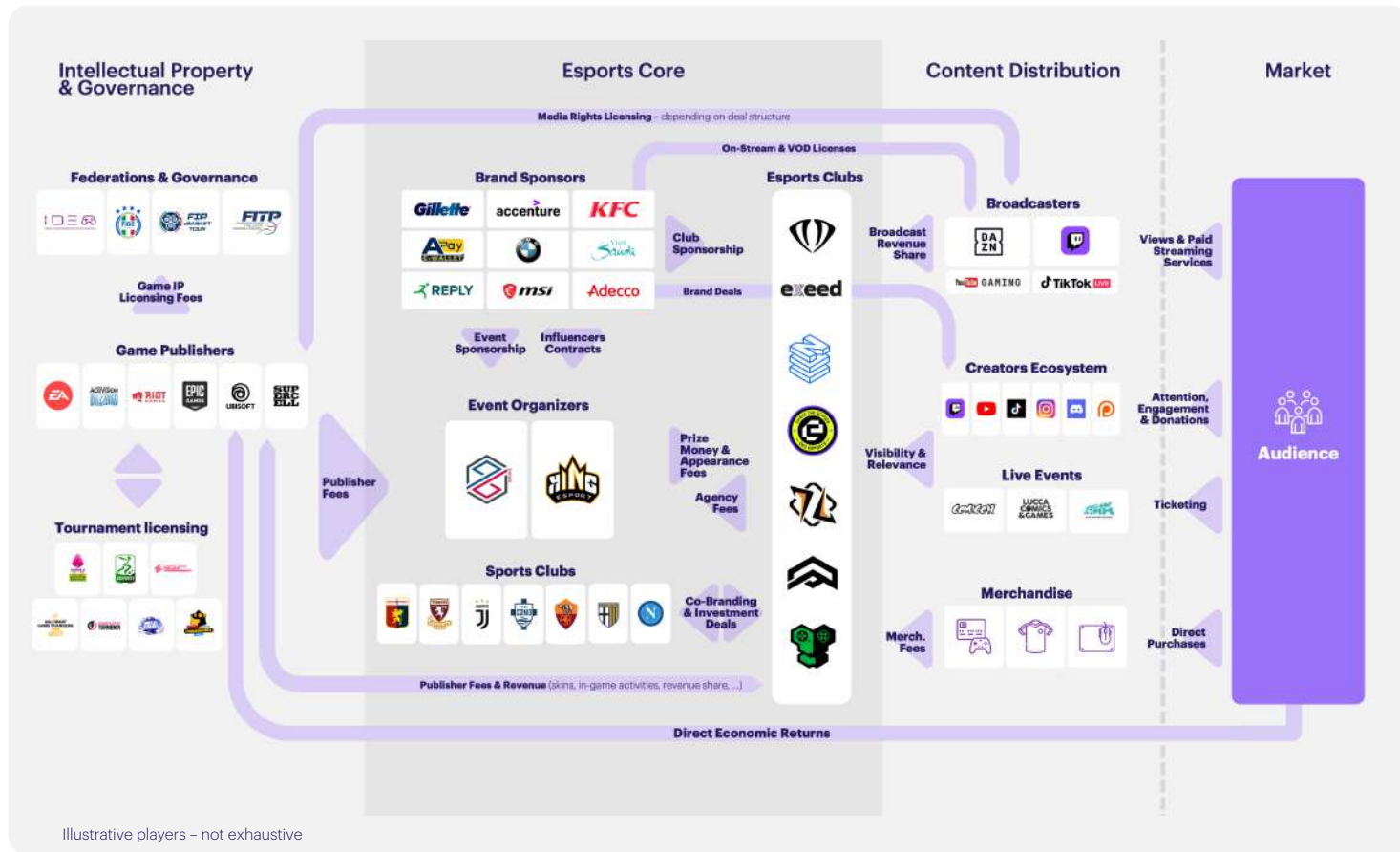
# Reaching esports fans means differentiating by generation, with only a handful of titles speaking to both



Source: YouGov Consumer Panel - Profiles Italy 2026-05-10 N=844 (only who follows at least 1 esports games/franchise).  
 Which, if any, of the following esports games/franchises do you watch or follow? Please select all that apply.  
 Esports refers to competitive video games competitions between professional/sponsored gamers or teams; this does not include amateur/personal gameplay. By watch/follow, we mean that you either actively read about esports on a regular basis, watch live broadcasts or highlights of leagues/competitions/events online or TV or attend leagues/competitions/events in person.

# Italian esports is a hybrid entertainment ecosystem where competitive video games, creator economy, live events, traditional sports and community activation merge into a richer way of consuming the experience

## Italian esports ecosystem



Source: Accenture elaboration based on several independent sources and publicly available data including articles Italy-specific researches, analysts' publications, Omdia.

## Italian esports market share by segment (est.)

**60-65%**

**Sponsorship & Advertising** is the commercial engine of Italian esports, carrying the entire ecosystem, driven by football clubs, consumer goods, services companies and electronics

**15-20%**

**Publisher fees** are mainly driven by Riot Games, Konami and EA, which directly fund the national leagues (e.g. eSerie A, Coppa eFootball Italia)

**5-10%**

**Streaming & Media Rights** constrained by the lack of dedicated broadcast programming therefore concentrated in digital platforms (Twitch, YouTube Gaming) DAZN as outlier on eSerie A


























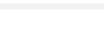
**3-5%**

**Merchandise & Ticketing** Italy has no permanent, fully dedicated esports venue comparable to the LEC Arena in Berlin or the Movistar Arena in Madrid. Live events happen inside existing video games/comics festivals

Note: Segment ranges.

# Sponsorships are the engine of esports, with Italian non-endemic brands increasingly adopting esports as a strategic marketing channel

## Relevant Sponsorships – Sponsors & Organizations

 <b>PG ESPORTS</b>	 <b>Gillette</b> 2025	<b>Event title rights</b> and <b>production partnership</b> to generate branded content. ROI model is <b>cost-per-engagement</b>	 <b>Action</b> 2025	<b>Sponsorship of the League of Legends ecosystem</b> , development of a proprietary product, <b>dedicated brand activations</b> at Italy's leading consumer fairs
 <b>DNSTY</b>	<b>Accenture Song</b> 2026	Accenture paid for the <b>logo jersey placement</b> at the 2025 <b>VALORANT Ascension EMEA</b> at the <b>Riot Games Arena</b> in Berlin	 <b>W</b> 25/26	Framework agreement as <b>Entertainment &amp; Commercial Partner</b> that also included logo positioning in the 2025/2026 esports jersey
 <b>exeed</b>	 <b>A Pay</b> 2026	<b>Title sponsorship</b> to drive <b>user acquisition</b> of the payment tool Targeted <b>performance marketing</b> channel model	 <b>JBL QUANTUM</b> 2026	<b>Multi-year integrated partnership</b> leveraging <b>jersey placement</b> , in-game branding (EA SPORTS FC), Twitch activations and live event presence to drive Gen Z engagement through competitive gaming and creator ecosystem
 <b>KING ESPORT</b>	 <b>KFC</b> 2025	<b>One-off payment</b> for the setup of the KFC Gaming Arena, tournaments and content production to build <b>brand preference</b>	 <b>BOSS</b> 2025	<b>Phygital activation</b> , leveraging live commerce technology to monetize viewers through <b>exclusive product drops</b> , <b>tournament integration</b> and <b>shared digital sales</b> .
 <b>NOVO ESPORTS</b>	 <b>Visit Saudi</b> 2025	<b>Promotion of tourism packages for the esports World Cup</b> in Riyadh and on-site content creation on Saudi Arabia's attractions	 <b>Giro d'Italia</b> 2025	A <b>fully integrated Fortnite project</b> , including a custom map, communication campaign, influencer marketing and on-site activation at COMICON Napoli, engaging over half a million players
 <b>EKO ESPORTS</b>	 <b>CORSAIR</b> 2026	<b>Hardware supply</b> to players and logo placement. The business model logic is <b>performance credibility</b>	 <b>Opera GX</b> 2026	Ongoing <b>gaming creator marketing activation</b> , including influencer marketing and creator-led content production for campaigns targeting gaming and Gen Z audiences.
 <b>HMBLE</b>	 <b>msi</b> 2026	Payment for logo placement on HMBLE's <b>jerseys and hardware supply</b> (video game laptops and accessories)	 <b>Deloitte</b> 2026	<b>Multi-year main sponsorship</b> with <b>logo jersey placement</b> and dedicated content across all HMBLE social media platforms
 <b>OUTPLAYED</b>	 <b>Adecco</b> 2024	Payment to run <b>branded tournaments for Gen Z</b> , where soft skills are assessed and converted into <b>job-ready talent</b>	 <b>bwin.tv</b> 2025	Creation of <b>esports videos</b> , <b>articles</b> , and <b>trade show coverage</b> for the official bwin.tv pages
 <b>REPLY TOTEM</b>	 <b>REPUBLIC OF GAMERS</b> 2026	Since 2022 <b>Jersey</b> and <b>Technical partner for Gaming House</b> , pro teams and creators	 <b>nubia</b> 2026	<b>Jersey</b> and <b>Technical partner</b> for mobile pro teams and creators

- **Non-endemic brands increasingly adopting esports sponsorships** as a strategic Gen Z marketing channel
- **Sponsorships are evolving** from badge placement to branded tournaments, content IP and physical activations
- **Employer branding is the emerging acquisition driver** for recruiting Gen Z talent, not merely selling products

Sources: sponsorship statements, press releases, corporate websites.

# One of the distinctive features of the Italian sponsorship is the depth of Serie A club involvement in esports to reach younger generations

Sport Club	Esports Club	Season	
	 <b>NOVO ESPORTS</b>	25/26	Multi-year partnership signed Nov 2025; <b>NOVO Esports manages the eSerie A roster</b> (Anonymus). Club historically won the first eSerie A ever (2021)
	 <b>eXeed</b>	25/26	Competes in official eSerie A; <b>Multi-year partnership</b> renewed for eSerie A Goleador 2025/26. Exeed manages the competitive roster
	 <b>DNSTY</b>	24/25	Combines competitive esports ( <b>EA Sports FC, Rocket League</b> ) with entertainment/content partnerships (OpTic deal incl. content and merchandising)
	 <b>DNSTY</b>	25/26	New entrant leveraging both competitive esports (eSerie A) and <b>hybrid formats (Kings League Italy</b> via FC Zeta Milano ownership)
	 <b>eXeed</b>	25/26	Re-entered esports in 2025 (eSerie A) after 2024 exit; supported operationally by Exeed for player management and competitive activities
	 <b>REPLY TOTEM</b>	25/26	Managed directly by Parma Calcio, with Reply Totem as partner for competitive, social content production and events in esports. Competes on EA FC 26 (eSerie A Goleador) and <b>Valorant (women's team)</b> .
	 <b>NOVO ESPORTS</b>	25/26	Main esports partner with NOVO Esports, which <b>manages pro player Danipitbull (Danilo Pinto)</b> . Multi-year deal since July 2024 with EA Sports replacing former Konami partnership
	 <b>REPLY TOTEM</b>	23/24	Annual partnership based on <b>multiple influencer marketing activations</b> and premium <b>content creation</b> .

## Italian clubs are beginning to extend their esports identity beyond football simulators:

Inter's Gaming League tested Fortnite and non-football titles, Juventus's OpTic content partnership, Como's dual presence in the Kings League

## KONAMI (e.g. Milan & Inter) vs EA Sports licensing war is splitting Serie A

For brands considering football esports activations in Italy, which publisher ecosystem a club sits in now defines the entire commercial opportunity

## The agency model is Italy's structural shortcut:

Most Italian clubs (excl. Como and Torino) has not built an in-house esports department comparable to Manchester City's dedicated unit

## Esports is no longer a marketing experiment

It is an explicit response to the younger generations' attention. Gianmarco Pino, Brand Manager of Juventus FC, stated when launching the club's Rocket League team: "... this reflects our commitment to engage the new generations in a way that mirrors their passion for video games and for Juventus"

Source: Press releases.

# Italian esports has built a structured all-year-round competitive tournament framework across multiple top-tier titles

## TIER 1 Italian leagues/tournaments

Game/Title      Tournament Name      Organizer      Period      Viewers

	eSerie A 2025 Besports		18 Feb–2 May 13 May–21 June	13K (Peak) N/A
	LIT 2025 (Winter, Spring, Summer) Circuito Tormenta 2025 - MGW + Lucca comics		22 Jan–9 Mar Nov 27–29 Oct 29–Nov 2	718K cumulated
	Circuito Tormenta 2025 MGW + Lucca comics VGT GC Italy – Genesi Split 1 & 2	 	Nov 27–29 Oct 29–Nov 2 H1 & H2 25	24.8K (Views)
	IRC S12 – Split 1-4		Jan–Dec (Playoffs multiple events)	4K+ (Peak)
	Fortnite - Gillette Bomber Cup		Apr–Nov	500K (cumulative in 2023)
	Brawl Stars - Challengers		Apr–Jun	N/A

## Emerging/community games



**Tournaments supported by federations**



**Bologna Special Championships**  
Large physical attendance of Italian esports event (~2,000 competing players + families)



Macko Esports (Apulia) reached the Europe MENA League 2025, the first Italian organization in the top European R6 league

Sponsorships/Publisher fund operate every structured circuit in Italy - there is no commercially independent national league

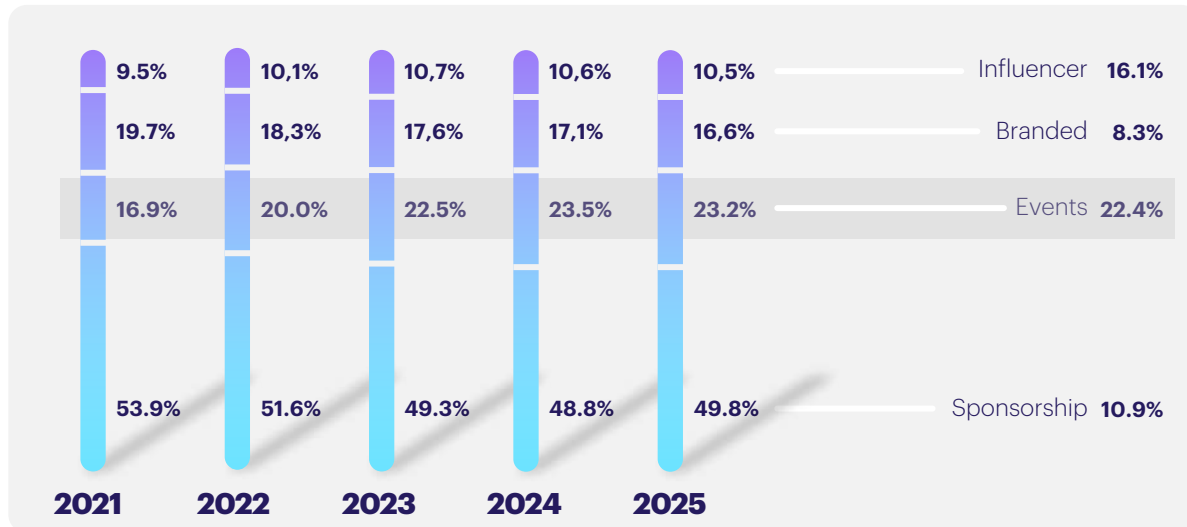
Italy's competitive calendar runs all year long, but lacks a dedicated event capable of concentrating brand attention, the equivalent of **an LEC Finals or a BLAST Major**

Source: Press release, Liquipedia, esports Charts, EgamersWorld, Leaguepedia, GosuGamers, EsportsMag.

# Live in-person entertainment events are becoming critical to building community and credibility in Italy, even if still concentrated within major existing events

Share of experiential market %

CAGR 2021-2025



**Events**

**Data & Visitors**

Month	Visitors	Stage	Streaming	Arenas
May	180K+ visitors +8%	Esports Stage 40K visitors 3M views	Streaming 45K viewers 25K uniq. views	
Jun	38K+ visitors +10%	Hyperstage ~8K		
Sep	1K+ spectators			
Oct-Nov	280K+ visitors +2%	Esports Arenas ~58K		
Nov	130K+ visitors +4%	Gillette Arena ~30K		

**Main Esports Tournaments**

**54%**

of agencies report rising client demand for physical events

## Entertainment events

moved from ~25% of total event revenue in 2021 to ~40% in 2024

## Main European Esports-only events

- IEM Cologne** 39k spectators, **LEC Finals Munich** 12k spectators
- BLAST Premier Spring Final Wembley** 18k spectators, **LoL Worlds Grand Final** 15k spectators
- VCT Masters Madrid** 12k spectators
- LFL Days Nice** (9k participants)

Source: Politecnico di Milano - Osservatorio Eventi & Live, Press release, Liquipedia, esports Charts, EgamersWorld, Leaguepedia, GosuGamers, EsportsMag.

# Decoding the Fanbases

From Video Games Passion to Active Esports Engagement

# Methodology & research objectives

A **mixed-method** research approach **to understand esports maturity, engagement drivers and barriers** within video games and esports communities

## Research approach



### Quantitative online survey

Measure habits, perceptions, and levels of involvement of respondents **aged 14–55+**

**~1,000**

### Respondents

From video games and esports communities



### Qualitative focus groups

Explore motivations, barriers, and expectations about



**3**

### Focus groups

- Latent **interest** and **conversion** of active gamers into engaged esports audiences
- **Brand activations**, including formats and channels, that generate value for communities, and ways for a brand to communicate through creators
- The role of **events as a strategic lever** for brand engagement and monetization

Methodological note: The survey is not representative of the Italian population. It provides an in-depth read of selected video games and esports communities.

# A video games-first community with different levels of esports maturity

**68%** consider video games their **#1 entertainment activity**



The sample is best interpreted through two key dimensions: **generational profile** and **esports maturity**

## Generational profile

**49%**

### Under 25

Closer to creator culture, live streaming and esports discovery

**51%**

### 25+

Still video games-first but with a lighter esports relationship

## Esports maturity

**26%**

### Player non-viewer

Play video games, but don't follow esports content

**29%**

### Light esports viewer

Watches official esports competitions occasionally in the last six months

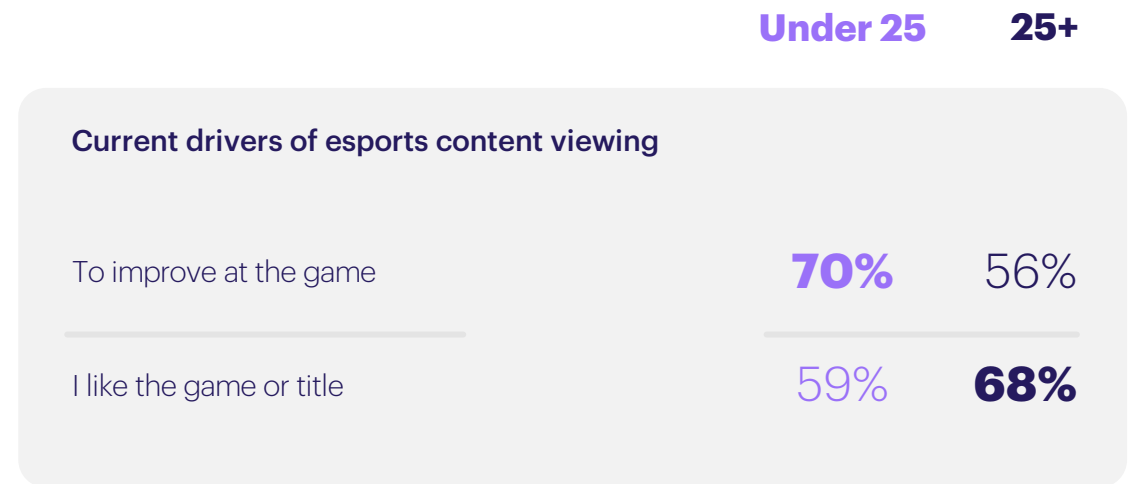
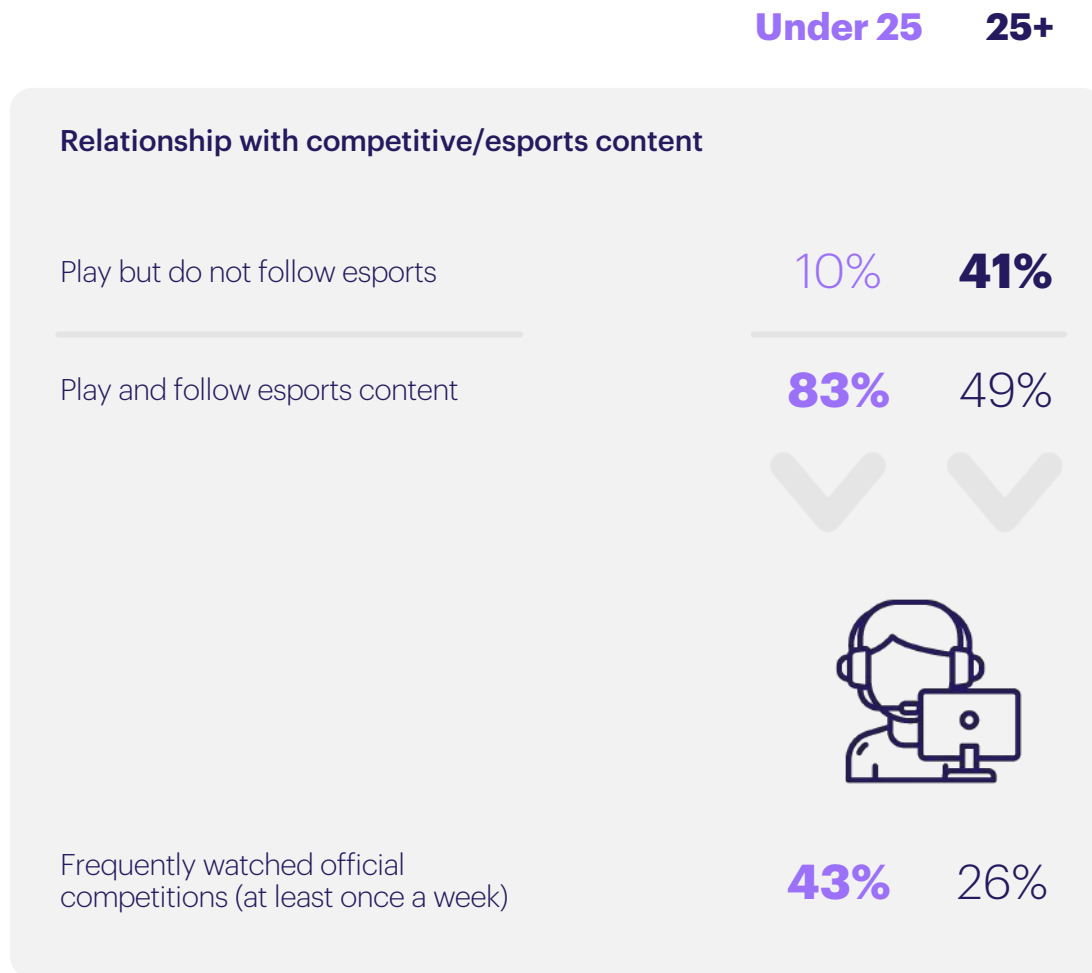
**45%**

### Engaged esports

Frequently follows esports content or official competitions

Methodological note: Accenture esports quantitative online survey n=964 respondents. Generational profile is based on age groups; maturity segments are derived from three survey dimensions used here as a synthetic framework: description as player/viewer, frequency of competitive content viewing and official esports competition viewing in the last six months.

# Video game proximity does not automatically translate into esports engagement





>



Insight: Even in a highly engaged community, **esports maturity varies**

The **challenge** is to turn **interest into sustained engagement**

Methodological note: Accenture esports quantitative online survey n=964 respondents. Some percentages calculated within age segments: Under 25 n=476; 25+ n=488. "Frequently watched official competitions" = at least once a week in the last six months and is calculated on the "play and follow esports content" subgroup within each age segment. Current drivers are based on top 3 selections; percentages are calculated within valid respondents for each age segment and do not sum to 100%.

# Time, perceived value, and accessibility remain key barriers

What Focus Groups Revealed

What is holding back esports content viewing?



## Limited time and competition with playing time

"Time is the main issue. I don't mind following casters or streamers, but it takes time. Between playing and watching, I'd rather play" **Alex**



## Viewing remains functional rather than emotional

"I go on Twitch to keep up with the games I play, see how others move, get inspired and understand the game better" **Giovanna**



## Complexity and lack of knowledge limit active discovery

"I usually come across highlights in my feed, but it's not something I actively look for" **Gabriel**



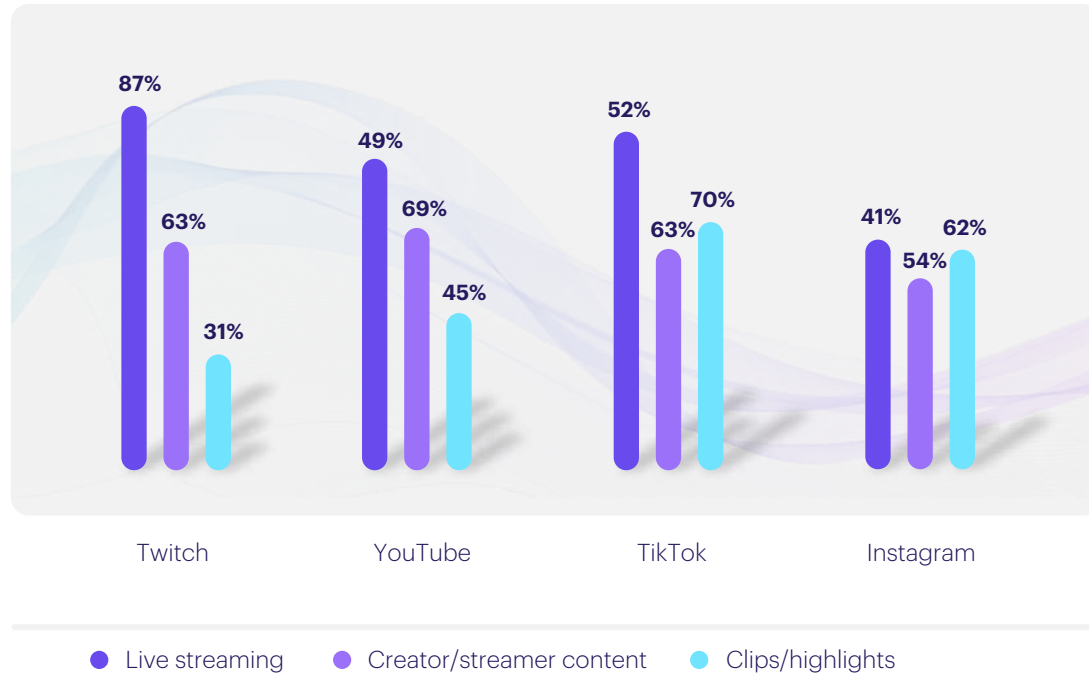
## Without social push, viewing remains fragile

"If following esports doesn't come naturally, you probably need an external push" **Sara**  
"If I had friends talking to me about it, I'd probably feel more encouraged" **Ilaria**

Methodological note: Focus group quotes are qualitative and illustrative.

# Growing esports engagement requires a multi-format and multi-channel content strategy

Content types by preferred platform



Methodological note: Accenture esports quantitative online survey n=964 respondents. Content types are calculated within each Rank 1 platform base: Twitch n=426, YouTube n=358, TikTok n=27, Instagram n=37. Multi-response question; percentages do not sum to 100%. Under 25 n=476; 25+n=488. Focus group quotes are qualitative and illustrative.

Creators as an access and credibility layer

**Under 25** **25+**

Influence esports interest

**54%** **24%**

Trust creators on brands/products

**75%** **37%**

What Focus Groups Revealed

## What drives engagement?



### Credible creators make esports more accessible

"If you're a general video games player, a creator can be the entry point into a world you may not know. I need someone to tell me in five minutes what to do: once I get it, I can apply it to the game with my own tactics." **Elia**



### Recognized esports figures make the activation feel authentic

"It all starts with someone you admire and who inspires you. Through their style, what they do and how they work, they can influence and encourage you to enter this world."

"Authenticity is absolutely key in every respect." **Luca**

# Live events and communities turn content consumption into shared experience and belonging

## Event participation

## Overall

Have never attended live events

**66%**

## Drivers that would increase participation in live events

## Overall

Meeting creators

**48%**

Seeing pro players

**46%**

Experiencing the community

**40%**

## What Focus Groups Revealed

## What can reduce initial barriers and make live esports more desirable?



### Esports should be the core experience, not a side activity

"Live esports is often treated as an add-on. But it should be the opposite: the esports event should be the core experience, with booths and entertainment built around it" **Marco**



### Sociality and community create new viewing occasions

"Only meaningful added value - social, experiential or linked to a favorite creator - could shift the balance toward more regular viewing" **Giorgia**



### Live events become more desirable when they go beyond the match itself

"Special challenges, competitions or audience interaction could make the experience more immersive than simply watching live on Twitch!" **Ilaria**

"The League of Legends World Finals are basically concerts. To make people passionate, you need to give them a reason to become passionate" **Matteo**

"Creators, pro players and dedicated community areas. Then music and entertainment: these are probably the strongest elements" **Simona**

Methodological note: Accenture esports quantitative online survey n=964 respondents. Event participation = respondents who have never attended live video game/esports events. Event drivers are Top 3 selections; percentages do not sum to 100%. Focus group quotes are qualitative and illustrative.

# Deeper engagement unlocks brand value and monetization opportunities

## Money spent

### Overall

Spent on video games/esports in the last 6 months

69%

## Willingness to pay

### Under 25

### 25+

For premium esports content (e.g., access to exclusive content, event passes, tournament streams with advanced features or educational content)

41%

22%

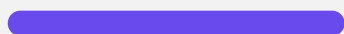
Top spending triggers in the future

Live or online events

Exclusive content

## Willingness to pay for premium esports content by intensity

Frequent viewers



49%

Occasional viewers



28%

Rare / non-viewers



13%

## Brands: visible, but value creation is still limited

### Overall

Noticed brand advertising

70%

Neutral brand perception

58%

What Focus Groups Revealed

### How can brands increase positive perception in esports?

#### Contribute, not interrupt

"If it's advertising for the sake of advertising, it bothers me. To me, it becomes like banners: after a while you stop noticing them, because they turn into background noise." **Alex**  
 "You can tell when a brand is not aligned with the target audience's values. It feels like an activation built without really understanding the community" **Stefano**

#### Create tangible value

"For me, it becomes interesting when it is relevant to me as a video games player - for example, if it gives me something for my character." **Elisa**  
 "A brand needs to interact with the audience: at Lucca, KitKat was giving out mini KitKat. Just putting a logo somewhere doesn't do anything for me." **Matteo**

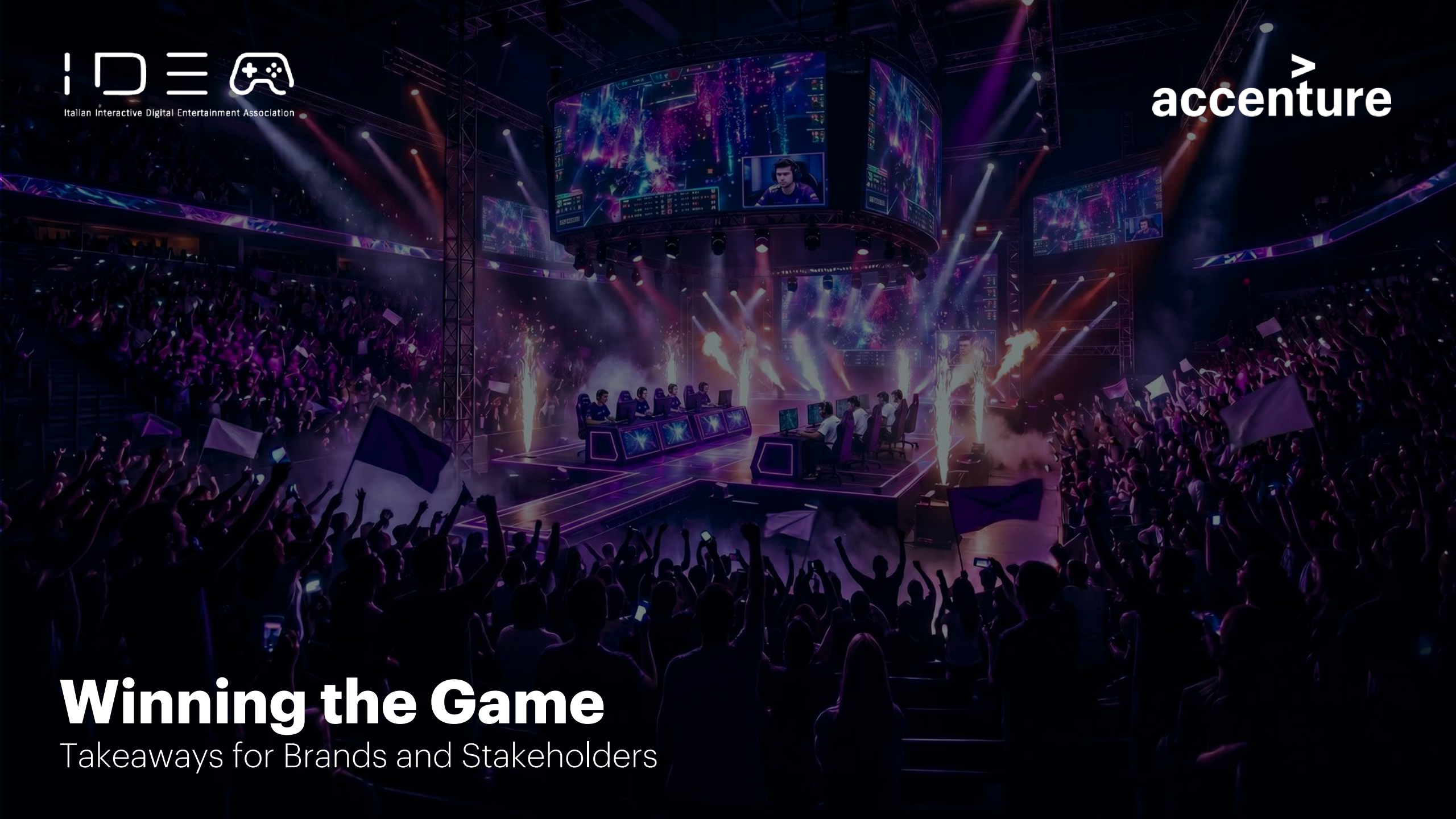
#### Move from sponsorship to experience

"Today, I increasingly see more concrete requests to create a real experience, rather than simply relying on a standard sponsored activation." **Umberto**

Methodological note: Accenture esports quantitative online survey n=964 respondents. Money spent = spend on video games/esports in the last six months. Willingness to pay = "definitely/probably yes" to premium esports content. Viewing intensity based on frequency of esports content viewing. Brand metrics refer to respondents who noticed brand presence in esports. Focus group quotes are qualitative and illustrative.

# Winning the Game

Takeaways for Brands and Stakeholders



# Italy has the audience, yet lags commercially – the gap is structural: limited event infrastructure, and a brand ecosystem yet to fully commit

## Re-purposing existing offering infrastructure into a cohesive brand ecosystem

- Italian brands are increasingly engaging with esports through one-off activations, branded tournaments, and annual partnerships with influencers or teams, but **long-term multi-year commitments with a specific partner remain limited**
- Many brands still require **education on how the esports ecosystem works**, including clearer performance metrics and a more familiar **language around conversion, audience value, and monetization models**
- The market is moving toward **integrated engagement models where esports is packaged** alongside football, traditional sports, video games, creator economy, trade fairs, pop culture, and cosplay - combining cross-entertainment reach with measurable business outcomes and culturally relevant fan engagement opportunities

## Rethinking live event infrastructure to meet esports demands

- Italian esports clubs have **limited ticketing and TV-rights revenues**, structurally pushing monetization toward **short-cycle influencer deals** rather than owned, scalable revenue streams
- Live esports events happen **inside existing fairs and conventions** - not purpose-built arenas - making it hard to generate a **repeatable commercial calendar** of tickets, hospitality, and on-site brand activations

## Turn video games affinity into recurring esports engagement

- Turn the audience's existing videogames affinity into more **stable and recurring esports engagement**, using simple narratives, accessible formats and consistent content journeys
- Design **content strategies around different levels of esports maturity**, not only demographics: younger audiences are closer to creators and live formats, while older gamers need more context, relevance and reasons to engage
- Integrate **creators to lower entry barriers and pro players and casters** to build credibility and **make esports initiatives feel more authentic, expert-led and legitimate**
- Make **live events a core engagement lever**, not a side activation: they can transform esports from content to shared experience, creating community moments, direct interaction with talent and stronger emotional connection with brands

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# Authors & Methodology

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## About the research

Our research adopts a multi-method approach that integrates a quantitative survey, qualitative focus groups and secondary desk research to provide a comprehensive view of the video games and esports landscape in Italy.

**1. Quantitative online survey:** In April 2026, Accenture conducted an online survey of 1,000 gamers, with the objective of measuring habits, perceptions and levels of involvement among respondents aged 14–55+, with a focus on the esports ecosystem. The study examined key strategic drivers, challenges and the critical enablers and barriers that influence audience engagement and brand relevance within gaming communities.

It is important to note that the sample was drawn from internal and external video games communities rather than from a fully representative panel of the broader Italian video games and esports respondents.

**2. Qualitative focus groups:** In May 2026, Accenture conducted 3 focus groups to explore latent interest and conversion of active gamers into engaged esports audiences; brand activations, including formats, channels and the role of creators that generate value for communities; the role of live events as a strategic lever for brand engagement and monetization.

**3. Desk and secondary research:** To enrich our primary findings, we conducted an extensive desk research effort covering multiple dimensions of the esports ecosystem including Market size and growth dynamics; ecosystem overview, mapping the key players across the value chain, including teams, tournament organizers and sponsors and their respective roles and relationships; event landscape, analyzing the dynamics and emerging trends shaping both physical and digital esports events; case studies from European markets with a high level of maturity drawing on best practices and strategic lessons applicable to the Italian context.

# About IIDEA

**IIDEA** is the trade association representing the **video game industry in Italy**. Founded in the early 2000s, its aim is to represent and unify the sector with a consistent approach. It currently has **over 90 members, including console manufacturers, video game publishers and developers, and esports operators.**

IIDEA is **part of an international network of industry associations**, and at a **European level** it is a **member of Video Games Europe** and the **European Game Developers Federation**.

The association's **mission** is to foster an environment that **supports the growth of the industry in Italy** and to **emphasise the significance** of video games in the country's economy, society, and culture.

To achieve these goals, the association publishes market reports, conducts surveys of industry operators, collaborates with public institutions, and promotes video game culture through events and initiatives across the country.

Furthermore, **IIDEA is dedicated to supporting businesses**, particularly in terms of **internationalisation**, and to **promoting** the responsible use of video games.

It does this by providing consumers with useful information regarding the European video game rating system (PEGI) and parental control systems.

**Website:** [iideassociation.com](http://iideassociation.com)

 [www.linkedin.com/company/iideassociation](https://www.linkedin.com/company/iideassociation)

 [www.facebook.com/IIDEAssociation](https://www.facebook.com/IIDEAssociation)

 [www.instagram.com/iideassociation](https://www.instagram.com/iideassociation)

 [x.com/IIDEAssociation](https://x.com/IIDEAssociation)



# About Accenture

Accenture is a **leading global professional services company** that helps the world's leading businesses, governments and other organizations build their digital core, optimize their operations, accelerate revenue growth and enhance citizen services - creating tangible value at speed and scale.

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We **combine our strength in technology and leadership in cloud, data and AI** with unmatched industry experience, functional expertise and global delivery capability. Our broad range of services, solutions and assets across **Strategy & Consulting, Technology, Operations, Industry X and Song**, together with our culture of shared success and commitment to **creating 360° value**, enable us to help our clients reinvent and build trusted, lasting relationships.

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# About Accenture Research

Accenture Research creates thought leadership about the most pressing business issues organizations face. Combining **innovative research techniques**, such as data science led analysis, with a deep understanding of industry and technology, our team of **300+ researchers in 20 countries** publish hundreds of reports, articles and points of view every year.

Our thought-provoking research developed with world-leading organizations helps our clients embrace change, create value and deliver on the power of technology and human ingenuity.

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