

2020

European Esports: Digital Goods & Payment Consumer Behaviour

Summary report: key high-level insights into esports related spending



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UK - Esports: Digital Goods & Payment Consumer Behaviour



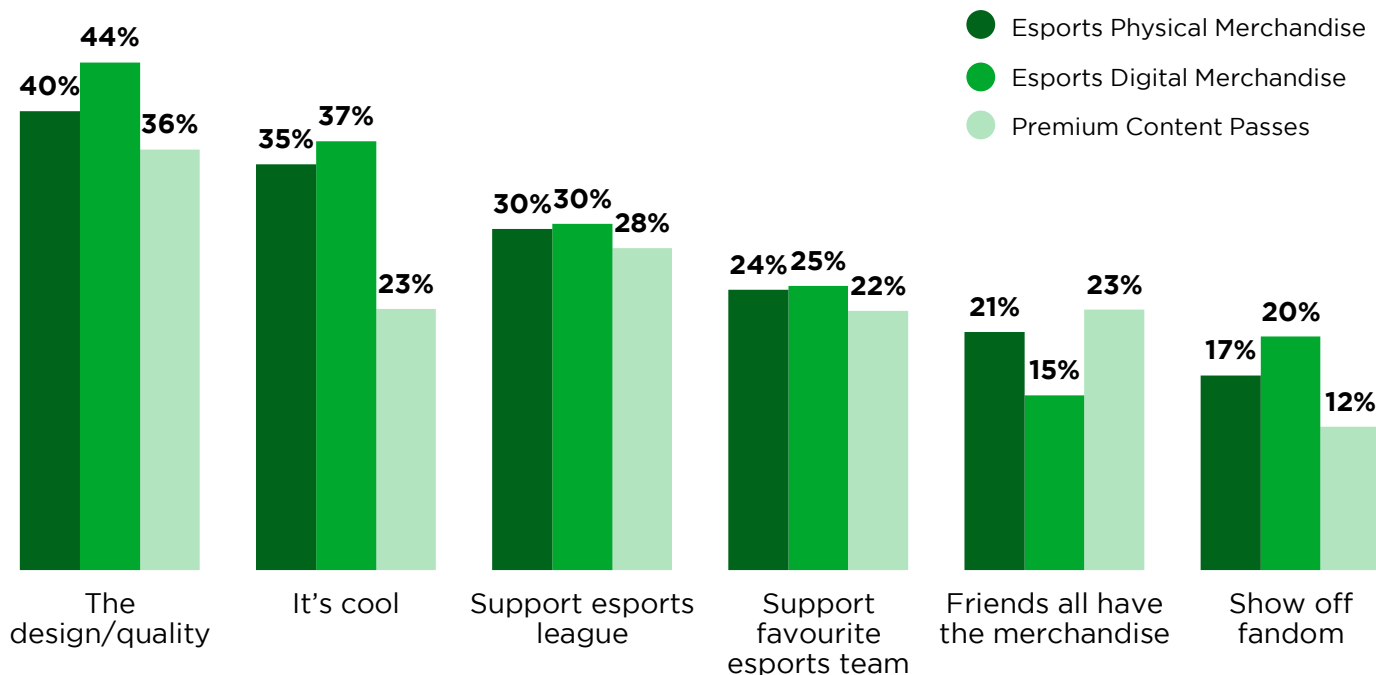
Digital and Physical Esports Goods

Product Quality and/or Design – most important reason to purchase digital and physical esports goods

Reasons for Purchase – Digital and Physical Esports Products

For the Esports Audience, supporting esports leagues and teams are important, but it does not take presidency over product quality and/or design. 44% of the Esports Audience who purchased digital merchandise in the UK indicated that product quality and/or design was the main reason for their purchase, as opposed to supporting an esports league (30%) or their favourite team (25%). Having friends that all had the merchandise was noticeably less often one of the reasons for purchasing digital (15%), rather than physical (21%) merchandise.

REASONS FOR PURCHASE – ESPORTS GOODS | ESPORTS AUDIENCE



Esports Goods

Esports Physical Merchandise: Includes apparel and/or accessories related to esports teams, tournaments and leagues.

Esports Digital Merchandise: Includes skins, stickers, banners and other digital goods that often exists within games.

Premium Content Passes: All paywalled OTT (Over The Top) viewing content related to esports.



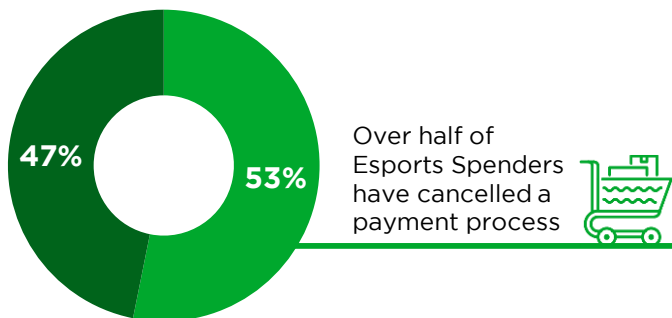
Purchasing Esports Digital Goods

Privacy concerns regarding personal data is the most common reason cited for cancelling a payment

Barriers to Purchasing Esports Related Digital Goods

Over half (53%) of Digital Spenders in the UK indicated they had cancelled or backed out of an online payment process. 27% of the Esports Audience who had cancelled a payment process indicated that privacy concerns relating to personal data was the main reason for doing so. Regarding important features of payment providers, 'feeling more secure' is the most important feature for both Esports Enthusiasts (46%) and Occasional Viewers (49%).

EVER CANCELLED PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS



IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS

	Esports Enthusiasts	Occasional Viewers
Feels more secure	46%	49%
Easy-to-use	38%	41%
Convenience	26%	27%
Speed of transaction	25%	29%
My information is saved	16%	11%

REASONS FOR CANCELLING PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS WHO HAVE CANCELLED A PAYMENT PROCESS



Privacy concerns about personal data (27%) was the main issue for spenders in the UK, out ranking functional issues such as limited or insufficient payment options (22%) and general lack of trust in the site (22%).



Netherlands - Esports: Digital Goods & Payment Consumer Behaviour



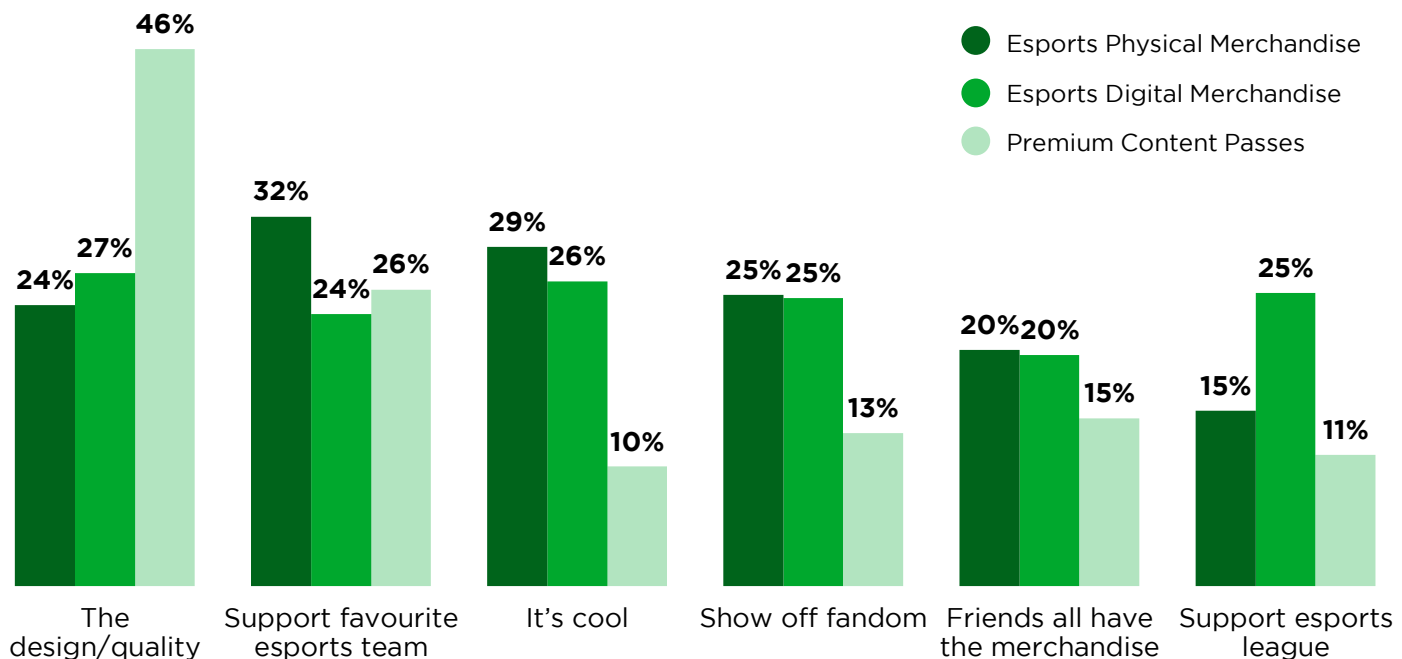
Digital and Physical Esports Goods

Product Quality – most important reason to purchase esports premium content passes

Reasons for Purchase – Digital and Physical Esports Products

For the Esports Audience in the Netherlands, supporting their favourite esports team (32%) is the most important reason for purchasing physical merchandise, more so than the product quality and/or design (24%). Although premium content passes were the least popular product category (purchased by 8% of the Esports Audience), 46% of those who purchased a content pass indicated the quality of the content pass was the main reason for their purchase. Support for a favourite esports league was more often a reason for purchasing digital (25%), rather than physical (15%) merchandise.

REASONS FOR PURCHASE – ESPORTS GOODS | ESPORTS AUDIENCE



Esports Goods

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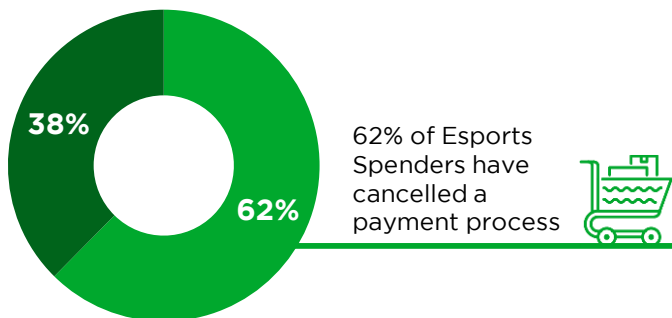
Purchasing Esports Digital Goods

Unhappy with final pricing is the most common reason cited for cancelling a payment

Barriers to Purchasing Esports Related Digital Goods

62% of Esports Digital Spenders in the Netherlands indicated they had cancelled or backed out of a checkout/payment process. 24% of the Esports Audience who had cancelled a payment process indicated that being unhappy with final pricing was one of the main reasons for doing so. Feeling more secure was the most important feature of an online payment provider for Esports Enthusiasts (45%), while convenience was most important for Occasional Viewers (44%).

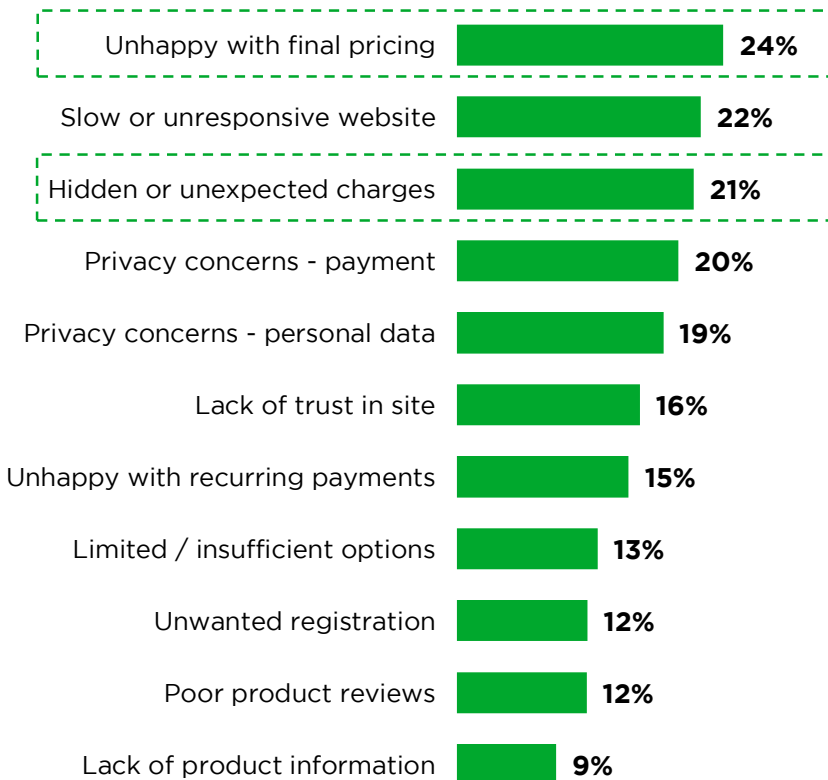
EVER CANCELLED PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS



IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS

	Esports Enthusiasts	Occasional Viewers
Feels more secure	45%	40%
Convenience	43%	44%
Speed of transaction	28%	26%
Easy-to-use	25%	28%
Familiarity with method	23%	22%

REASONS FOR CANCELLING PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS WHO HAVE CANCELLED A PAYMENT PROCESS



Issues with pricing, both being unhappy with final pricing (24%) and hidden or unexpected charges (21%), were the two issues most often identified by Esports Spenders as reasons for cancelling a payment process.



Belgium - Esports: Digital Goods & Payment Consumer Behaviour



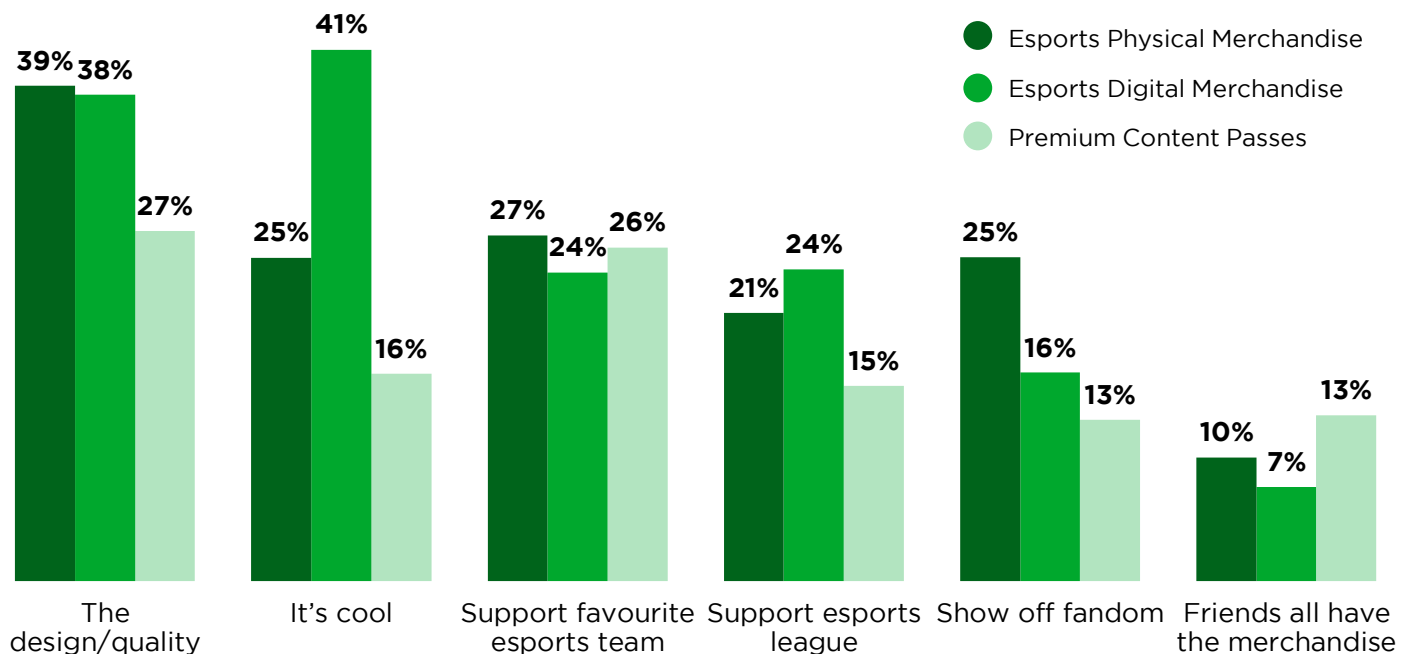
Digital and Physical Esports Goods

“Because it’s cool” – most often a main reason to purchase digital esports goods

Reasons for Purchase – Digital and Physical Esports Products

For the Esports Audience in Belgium, supporting esports teams and leagues are important, but it does not take presidency over product quality and/or design and the products appealing aesthetic or image (it’s cool). 41% of the Esports Audience who purchased digital merchandise indicated that being ‘cool’ was the main reason for doing so, compared to only 25% of the Esports Audience who purchased physical merchandise. Showing off fandom, however, was more often a reason for purchasing physical (25%) than digital (16%) merchandise.

REASONS FOR PURCHASE – ESPORTS GOODS | ESPORTS AUDIENCE



Esports Goods

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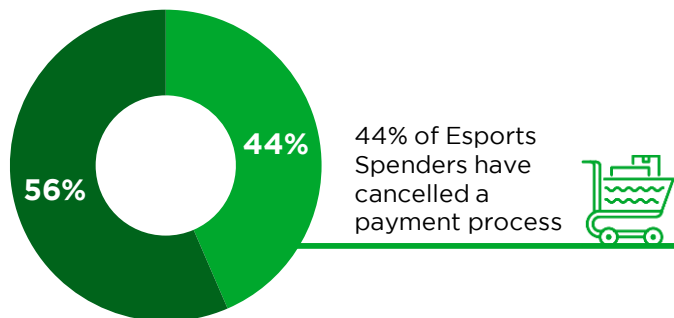
Purchasing Esports Digital Goods

Hidden or unexpected charges is the most common reason cited for cancelling a payment

Barriers to Purchasing Esports Related Digital Goods

44% of Esports Digital Spenders in Belgium indicated they had cancelled or backed out of a checkout/payment process. 31% of the Esports Audience who had cancelled a payment process indicated that hidden or unexpected charges was the main reason for doing so. Concerning important features of payment providers, 'feeling more secure' was the most important feature for both Esports Enthusiasts (44%) and Occasional Viewers (48%).

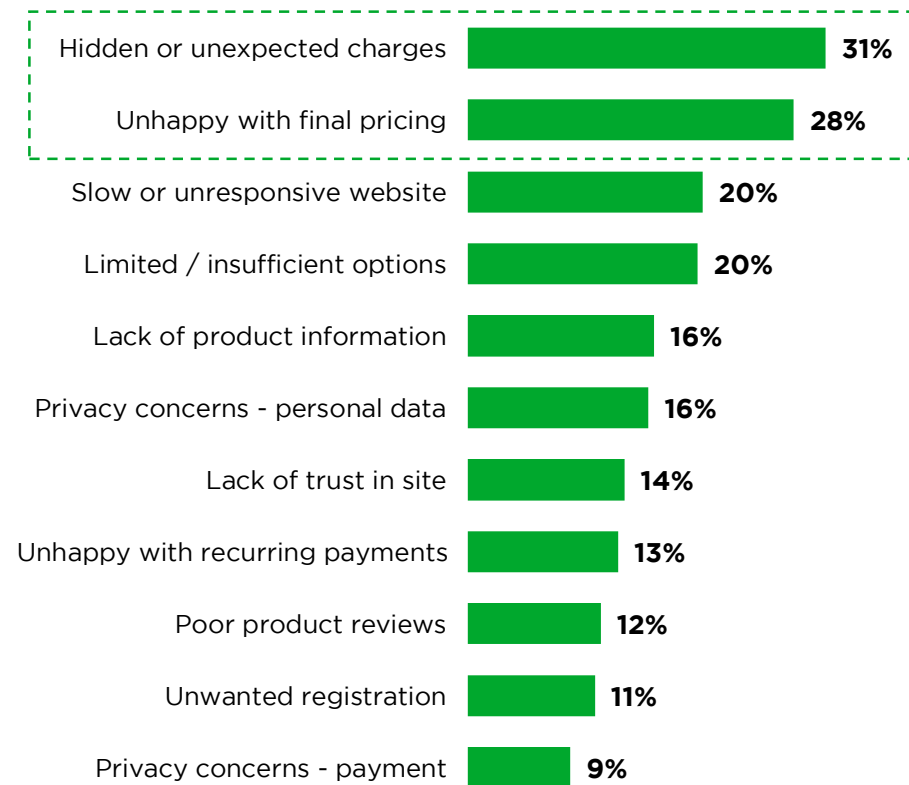
EVER CANCELLED PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS



IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS

	Esports Enthusiasts	Occasional Viewers
Feels more secure	44%	48%
Speed of transaction	35%	31%
Easy-to-use	35%	35%
Convenience	28%	33%
Familiarity with method	18%	18%

REASONS FOR CANCELLING PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS WHO HAVE CANCELLED A PAYMENT PROCESS



Price issues, such as hidden or unexpected charges (31%) and unhappy with final charges (28%), were most often the main reasons cited for cancelling a payment processes.



France - Esports: Digital Goods & Payment Consumer Behaviour



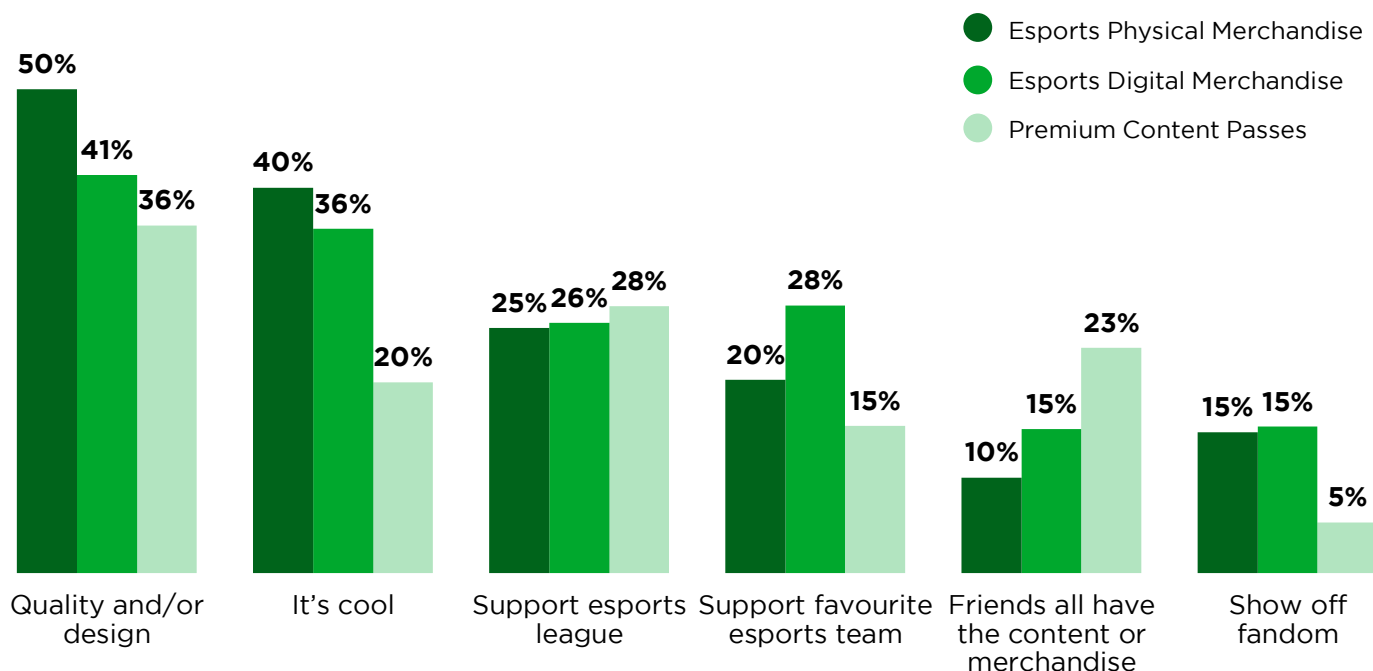
Digital and Physical Esports Goods

Product Quality and/or Design – most important reason to purchase all forms of digital and physical esports goods

Reasons for Purchase – Digital and Physical Esports Products

For the Esports Audience, supporting esports leagues and teams is important, but it does not take presidency over product quality and design. 50% of the Esports Audience who purchased physical merchandise indicated that product quality and/or design was a main reason for their purchase, as opposed to supporting an esports league (25%) or their favourite team (20%). Support for a favourite esports team was more often a main reason for purchasing digital (28%), rather than physical (20%) merchandise.

REASONS FOR PURCHASE – ESPORTS GOODS | ESPORTS AUDIENCE



Esports Goods

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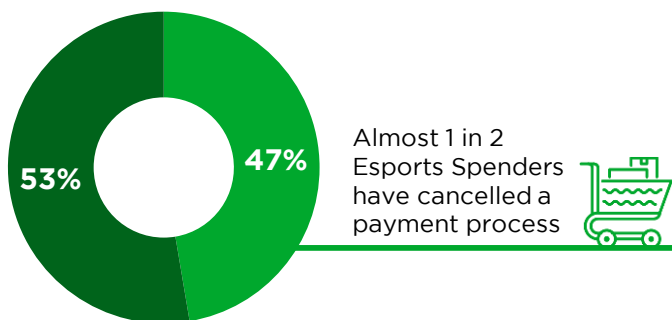
Purchasing Esports Digital Goods

Lack of product information is the most common reason cited for cancelling a payment

Barriers to Purchasing Esports Related Digital Goods

Almost half (47%) of Esports Digital Spenders in France indicated they had cancelled or backed out of an online checkout/payment process. 26% of the Esports Audience who had cancelled a payment process indicated that a lack of product information was the main reason for doing so. Concerning important features of payment providers, 'feeling more secure' is the most important feature for both Esports Enthusiasts (45%) and Occasional Viewers (54%).

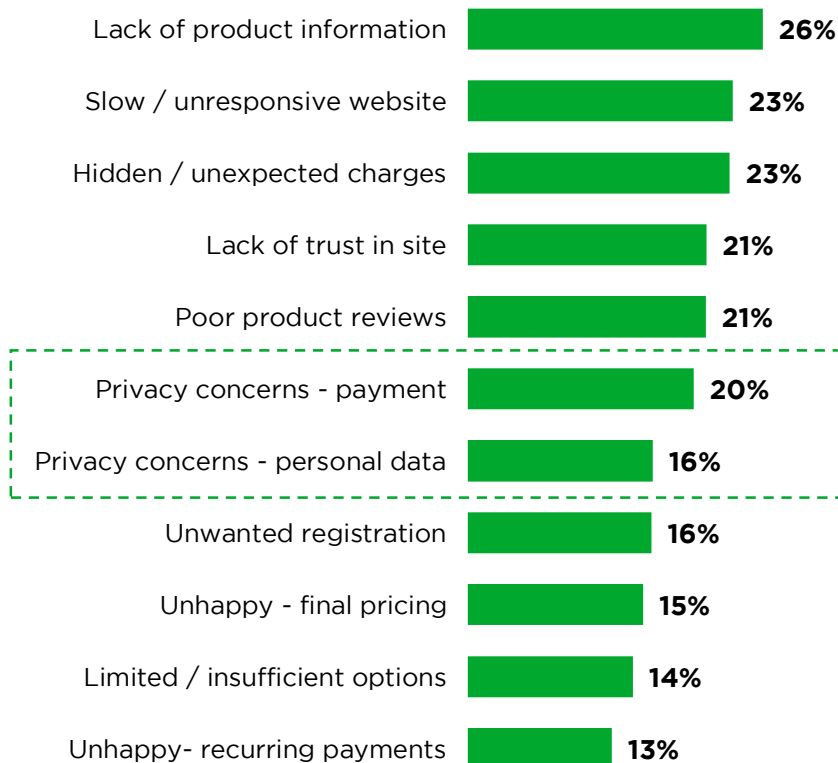
EVER CANCELLED PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS



IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS

	Esports Enthusiasts	Occasional Viewers
Feels more secure	45%	54%
Easy-to-use	39%	35%
Speed of transaction	33%	33%
Convenience	31%	23%
Familiarity with method	12%	16%

REASONS FOR CANCELLING PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS WHO HAVE CANCELLED A PAYMENT PROCESS



Privacy concerns about payment (20%) and personal data (16%) were important to spenders, but less so than more functional issues such as a lack of product information (26%) or a slow / unresponsive website (23%).



Spain - Esports: Digital Goods & Payment Consumer Behaviour



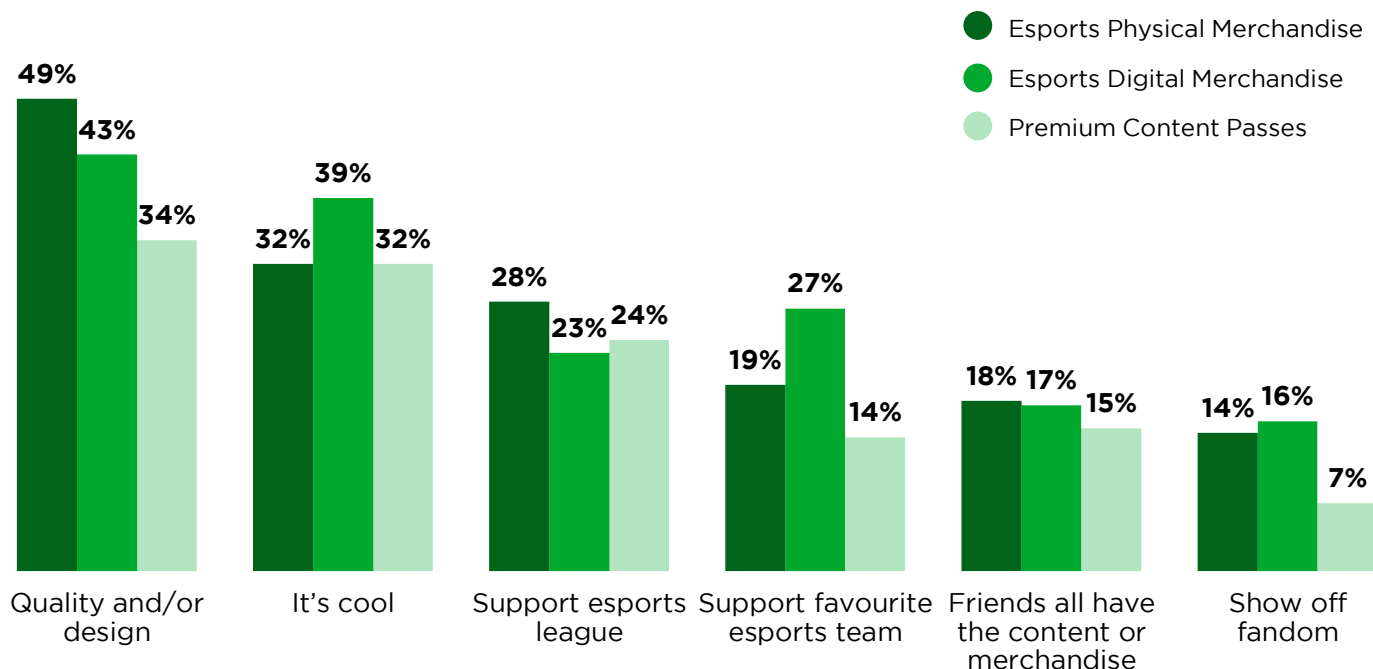
Digital and Physical Esports Goods

Product Quality and/or Design – most important reason to purchase digital and physical esports goods

Reasons for Purchase – Digital and Physical Esports Products

For the Esports Audience in Spain, supporting esports leagues and teams are important, but it does not take presidency over product quality and/or design. 49% of the Esports Audience who purchased physical merchandise indicated that product quality and/or design was the main reason for their purchase, as opposed to supporting an esports league (28%) or their favourite team (19%). Support for a favourite esports team was more often one of the main reasons for purchasing digital (29%), rather than physical (19%) merchandise, while the opposite was true for supporting an esports league.

REASONS FOR PURCHASE – ESPORTS GOODS | ESPORTS AUDIENCE



Esports Goods

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Esports Digital Merchandise: Includes skins, stickers, banners and other digital goods that often exists within games.

Premium Content Passes: All paywalled OTT (Over The Top) viewing content related to esports.

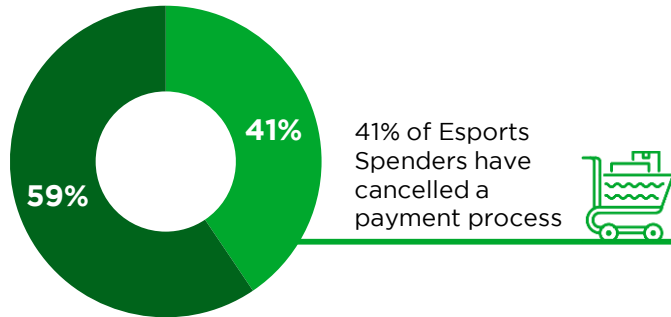
Purchasing Esports Digital Goods

Lack of trust in site is the most common reason cited for cancelling a payment

Barriers to Purchasing Esports Related Digital Goods

41% of Esports Digital Spenders in Spain indicated they had cancelled or backed out of a checkout/payment process. This was the lowest proportion of all the EU markets researched. 31% of the Esports Audience who had cancelled a payment process indicated that a lack of trust in the website was the main reason for doing so. Concerning features of payment providers, 'feeling more secure' is the most important feature for both Esports Enthusiasts (41%) and Occasional Viewers (49%).

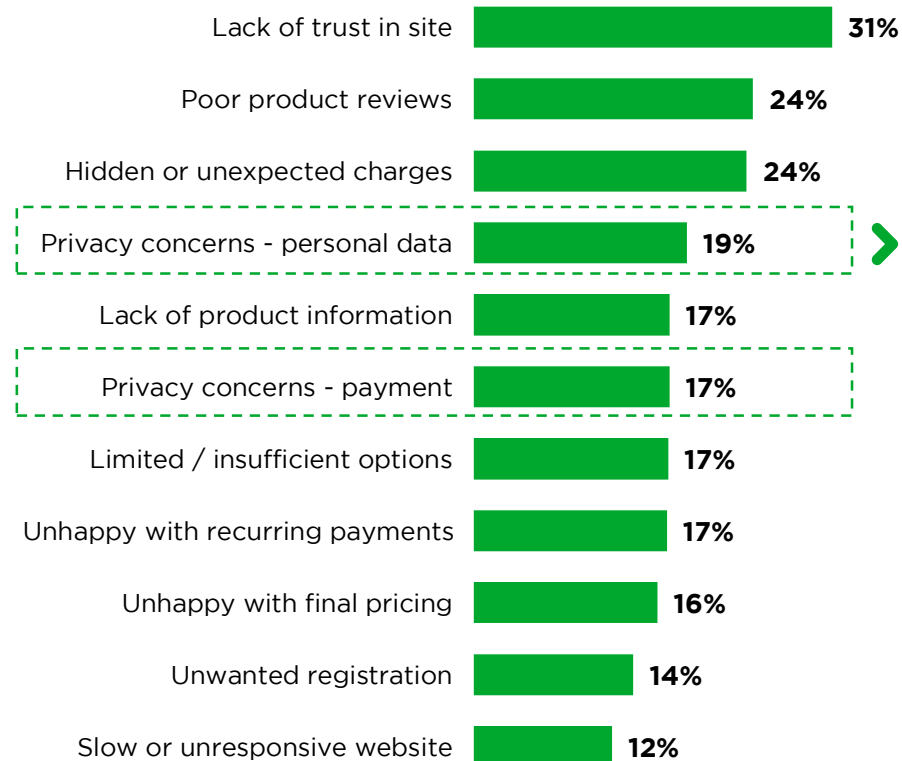
EVER CANCELLED PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS



IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS

	Esports Enthusiasts	Occasional Viewers
Feels more secure	41%	49%
Easy-to-use	40%	38%
Convenience	34%	32%
Speed of transaction	33%	36%
Familiarity with method	15%	14%

REASONS FOR CANCELLING PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS WHO HAVE CANCELLED A PAYMENT PROCESS



Privacy concerns about personal data (19%) and payments (17%) were important to spenders, but slightly less so than issues with product, such as poor product reviews (24%) or hidden or unexpected charges (24%).



Italy - Esports: Digital Goods & Payment Consumer Behaviour



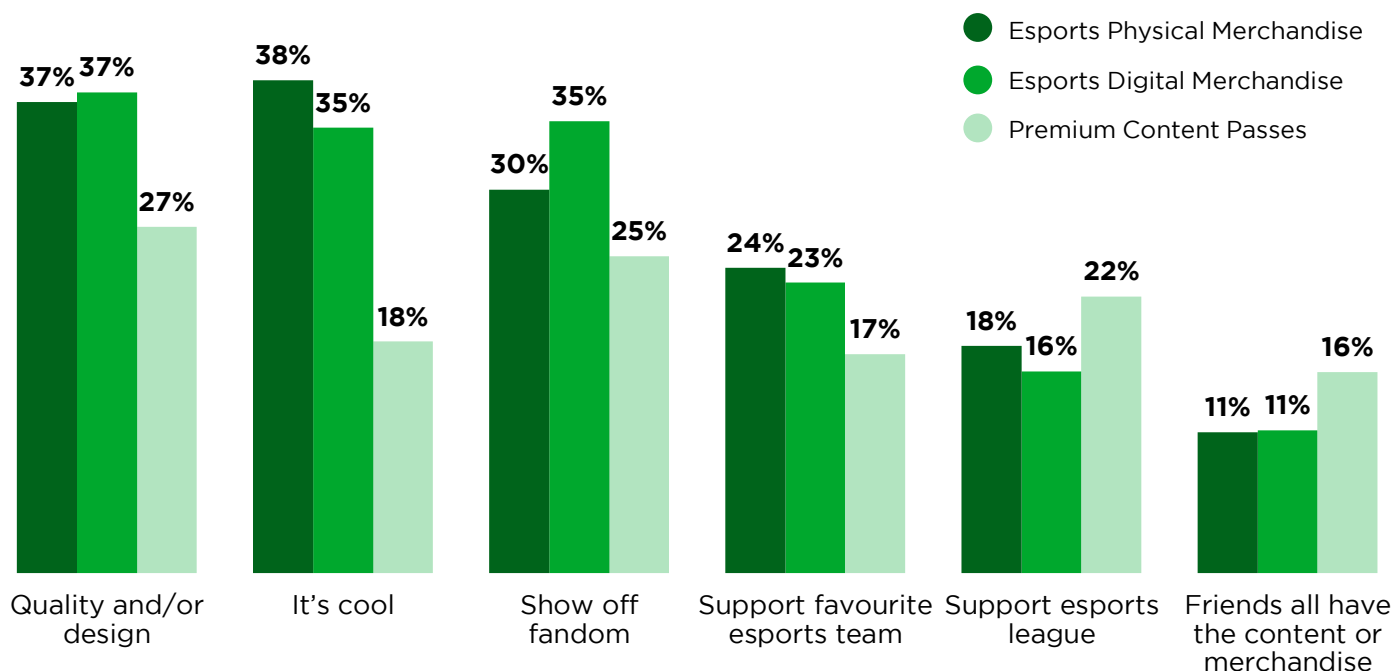
Digital and Physical Esports Goods

Product Quality and/or Design – most important reason to purchase digital and esports goods

Reasons for Purchase – Digital and Physical Esports Products

For the Esports Audience in Italy, supporting esports leagues and teams are less important than product quality and/or design and image. 37% of the Esports Audience who purchased both physical and digital merchandise indicated that product quality and/or design was the main reason for their purchase. Showing off fandom was more often the main reasons for purchasing digital merchandise (35%), compared to physical (30%), while perceptions of the product as 'cool' was more often a motivation when purchasing physical (38%), as opposed to digital (35%) merchandise.

REASONS FOR PURCHASE – ESPORTS GOODS | ESPORTS AUDIENCE



Esports Goods

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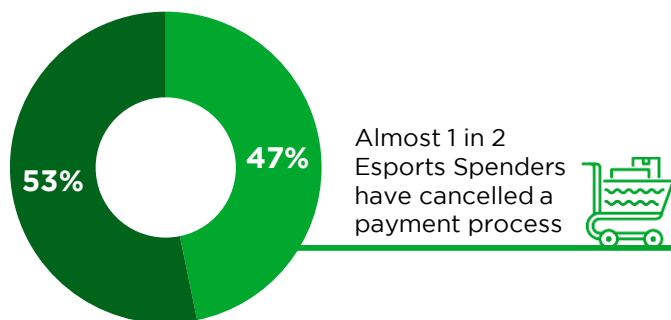
Purchasing Esports Digital Goods

A slow or unresponsive website is the most common reason cited for cancelling a payment

Barriers to Purchasing Esports Related Digital Goods

Almost half (47%) of Esports Digital Spenders in Italy indicated they had cancelled or backed out of a checkout/payment process. 25% of the Esports Audience who had cancelled a payment process indicated that a slow or unresponsive website was one of the main reasons for doing so. Regarding important features of payment providers, 'feeling more secure' is the most important feature for both Esports Enthusiasts (45%) and Occasional Viewers (50%).

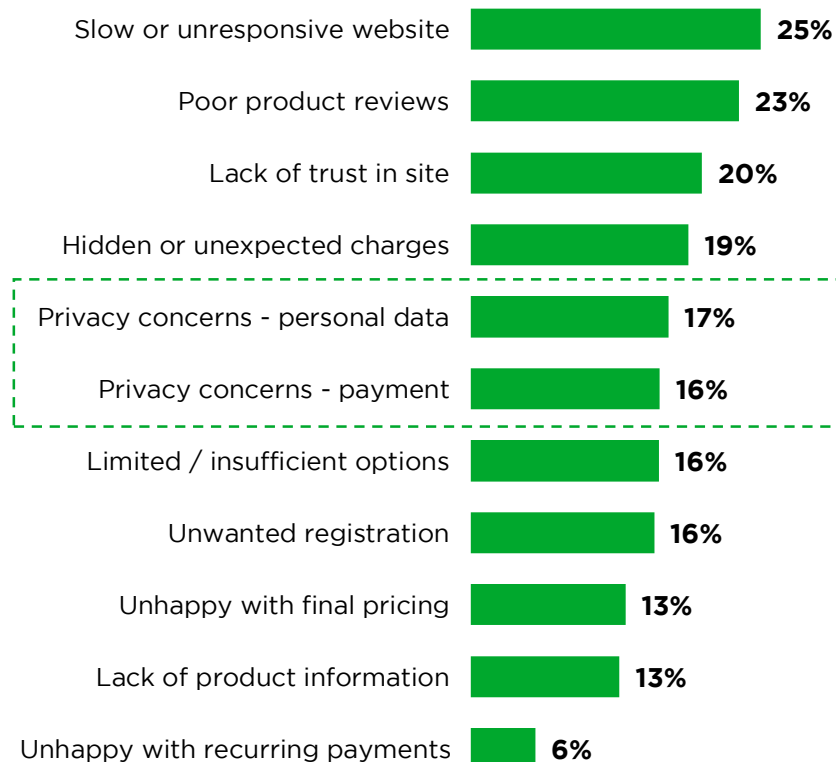
EVER CANCELLED PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS



IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS

	Esports Enthusiasts	Occasional Viewers
Feels more secure	45%	50%
Easy-to-use	41%	38%
Convenience	30%	30%
Speed of transaction	27%	29%
Familiarity with method	17%	13%

REASONS FOR CANCELLING PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS WHO HAVE CANCELLED A PAYMENT PROCESS



Privacy concerns about personal data (17%) and payment (16%) were important to spenders, but less so than issues with the website, such as a lack of trust with site (20%) or a slow / unresponsive website (25%).



Germany - Esports: Digital Goods & Payment Consumer Behaviour



Digital and Physical Esports Goods

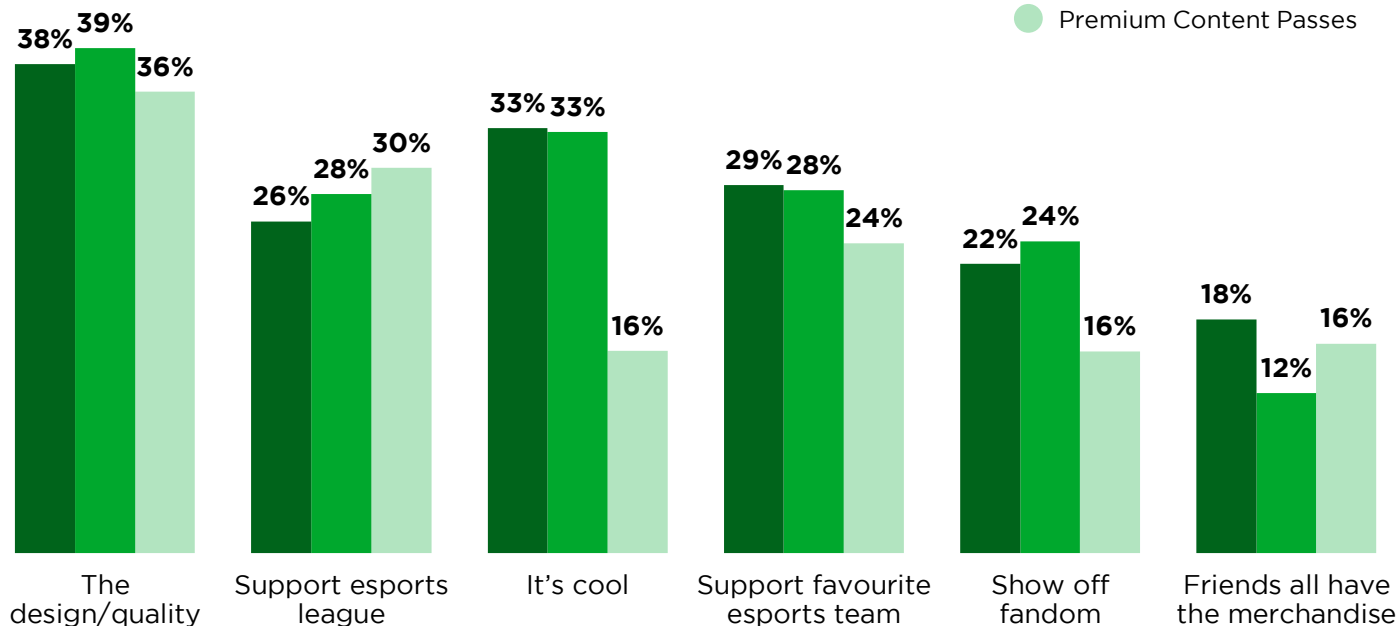
Product Quality and/or Design – most important reason to purchase all forms of digital and physical esports goods

Reasons for Purchase – Digital and Physical Esports Products

For the Esports Audience in Germany, supporting esports leagues and teams are important, but it does not take presidency over product quality and/or design. 38% of the Esports Audience who purchased physical merchandise indicated that product quality and/or design was the main reason for their purchase, as opposed to supporting an esports league (26%) or their favourite team (29%). Support for a favourite esports league was slightly more often a reason for purchasing digital (28%), rather than physical (26%) merchandise.

REASONS FOR PURCHASE – ESPORTS GOODS | ESPORTS AUDIENCE

- Esports Physical Merchandise
- Esports Digital Merchandise
- Premium Content Passes



Esports Goods

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Premium Content Passes: All paywalled OTT (Over The Top) viewing content related to esports.



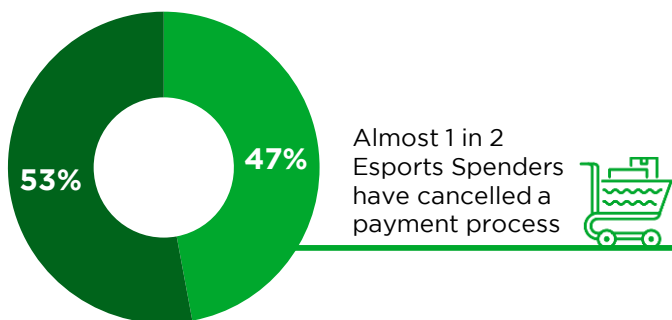
Purchasing Esports Digital Goods

Unhappy with final pricing is the most common reason cited for cancelling a payment

Barriers to Purchasing Esports Related Digital Goods

Almost half (47%) of Esports Digital Spenders in Germany indicated they had cancelled or backed out of the checkout/payment process. 22% of the Esports Audience who had cancelled a payment process indicated that being unhappy with the final pricing was the main reason for doing so. Concerning important features of payment providers, convenience is much more important for Esports Enthusiasts (37%) than Occasional Viewers (26%).

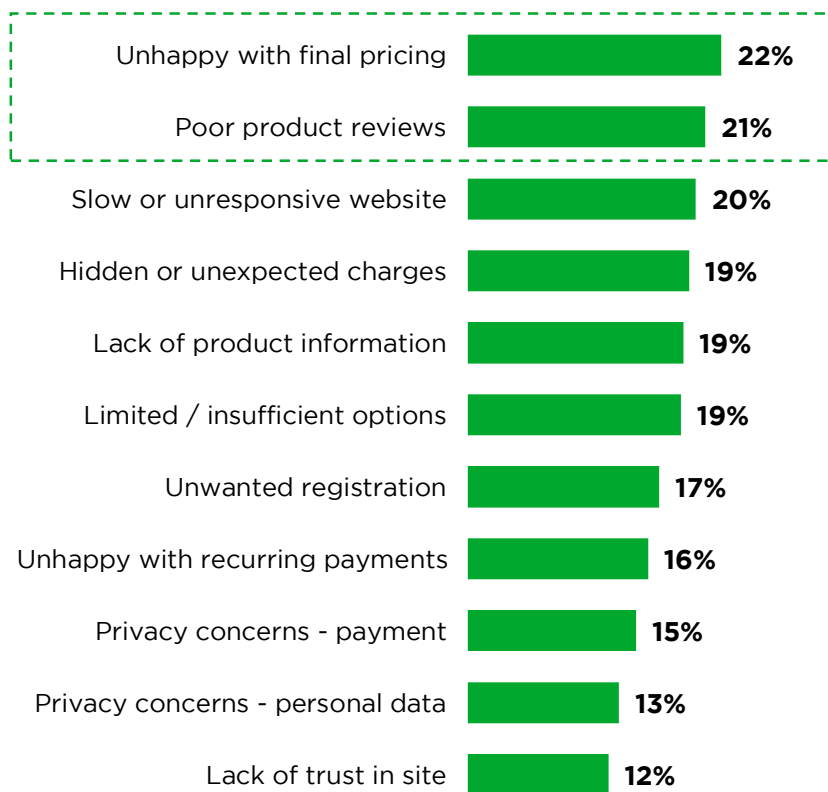
EVER CANCELLED PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS



IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS

	Esports Enthusiasts	Occasional Viewers
Convenience	37%	26%
Feels more secure	36%	36%
Easy-to-use	34%	38%
Familiarity with method	27%	26%
Speed of transaction	25%	32%

REASONS FOR CANCELLING PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS WHO HAVE CANCELLED A PAYMENT PROCESS



Issues with product, both pricing (22%) and reviews (21%), were the two issues most often identified by spenders who had cancelled a payment process.



Norway - Esports: Digital Goods & Payment Consumer Behaviour



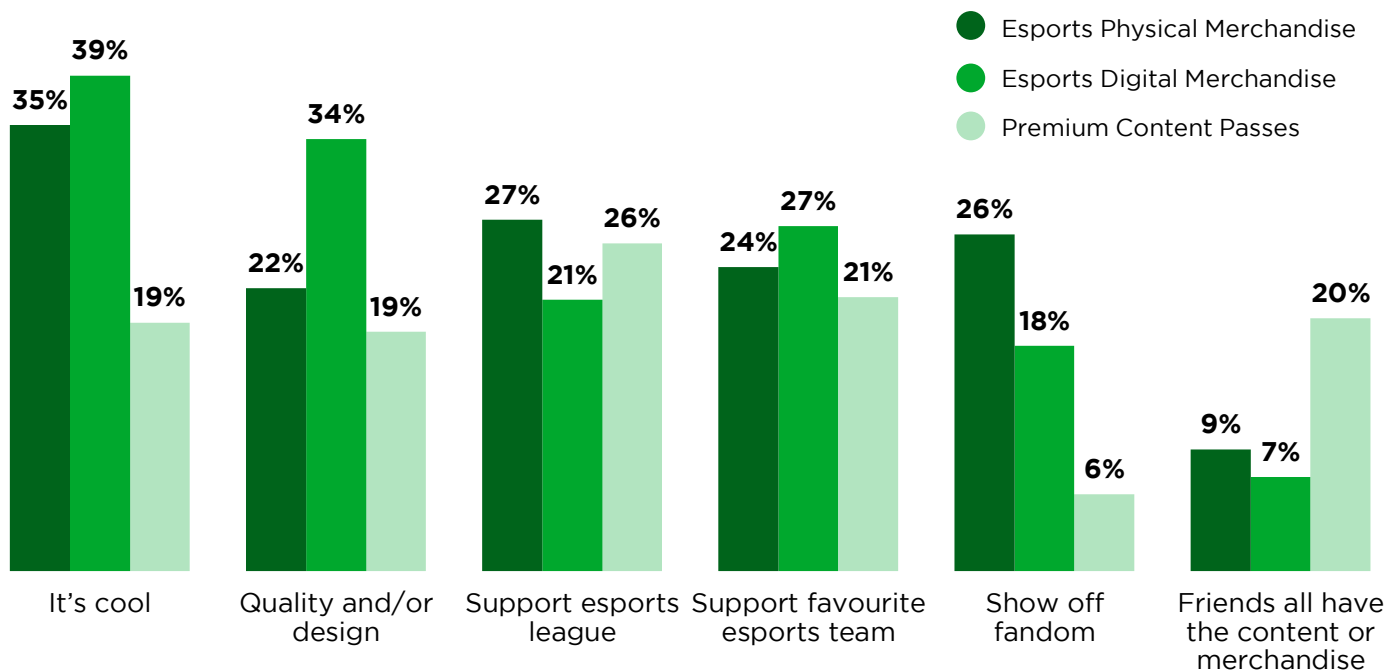
Digital and Physical Esports Goods

'Because it's cool' – most cited reason to buy both digital and physical esports merchandise

Reasons for Purchase – Digital and Physical Esports Products

For the Esports Audience, supporting esports leagues and teams are important, but it does not take presidency over image (it's cool) or product quality and/or design. 39% of the Esports Audience who purchased digital merchandise and 35% of the Esports Audience who purchased physical merchandise indicated that they did so because the products were 'cool'. Support for a favourite esports team was more often a reason for purchasing digital (27%), rather than physical (24%) merchandise, while supporting the esports league was more often a reason for purchasing physical merchandise (27%).

REASONS FOR PURCHASE – ESPORTS GOODS | ESPORTS AUDIENCE



Esports Goods

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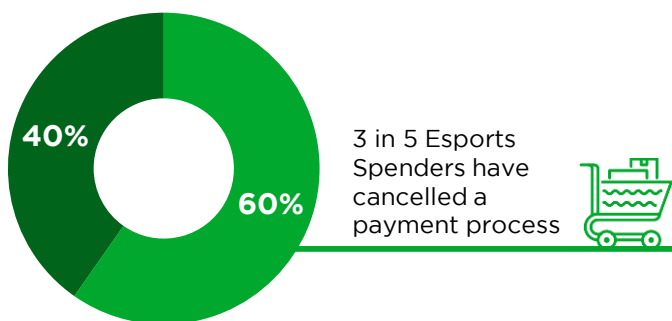
Purchasing Esports Digital Goods

Unhappy with final pricing - the most common reason cited for cancelling an online payment

Barriers to Purchasing Esports Related Digital Goods

60% of Esports Digital Spenders in Norway indicated they had cancelled or backed out of an online checkout/payment process. 28% of the Esports Audience who had cancelled a payment process indicated that being unhappy with the final pricing was the main reason for doing so. Concerning important features of payment providers, 'ease-of-use' was the most important feature for both Esports Enthusiasts (52%) and Occasional Viewers (59%).

EVER CANCELLED PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS



IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS

	Esports Enthusiasts	Occasional Viewers
Easy-to-use	52%	59%
Feels more secure	48%	57%
Speed of transaction	37%	31%
Familiarity with method	20%	13%
Convenience	10%	11%

REASONS FOR CANCELLING PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS WHO HAVE CANCELLED A PAYMENT PROCESS



Being unhappy with the final pricing of products (28%) and a lack of trust in the website (23%) were the two most cited reasons for Digital Esports Spenders in Norway to have cancelled an online payment.



Sweden - Esports: Digital Goods & Payment Consumer Behaviour



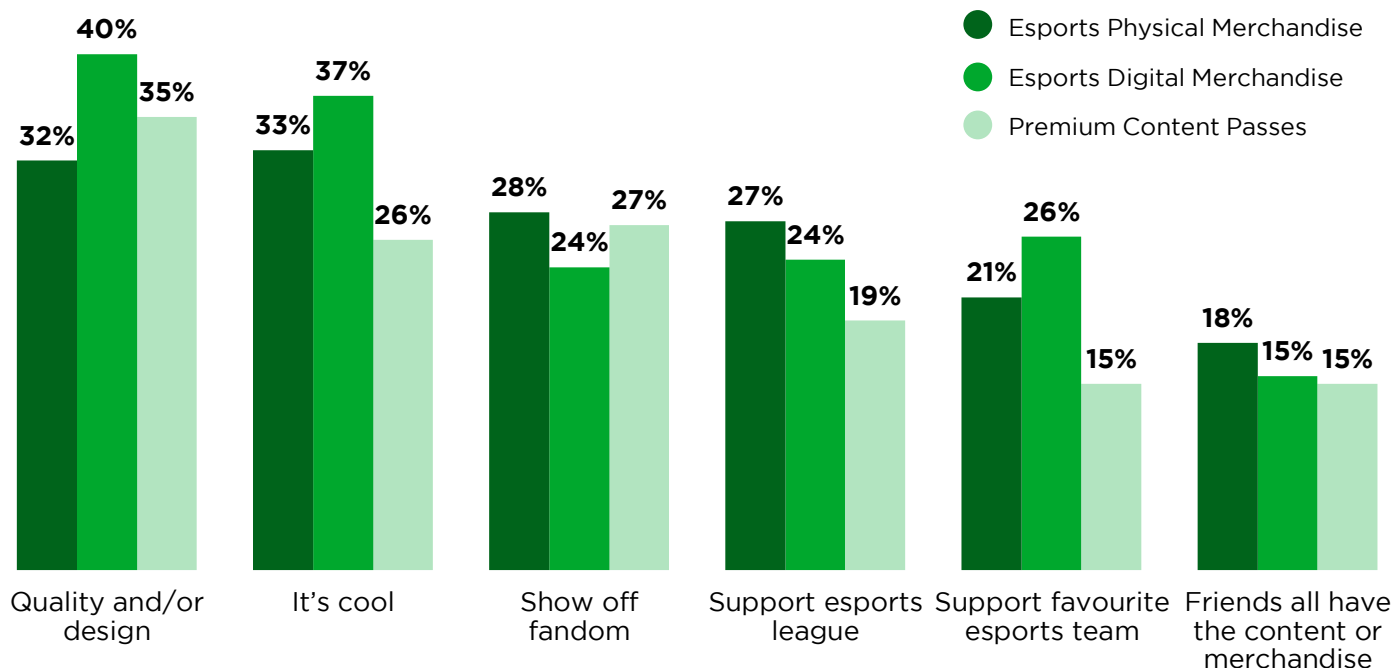
Digital and Physical Esports Goods

Product Quality and/or Design – most important reason to purchase digital (but not physical) esports goods

Reasons for Purchase – Digital and Physical Esports Products

For the Esports Audience, supporting esports leagues and teams are important, but it does not take presidency over product quality and/or design. 40% of the Esports Audience who purchased digital merchandise indicated that product quality and/or design was the main reason for their purchase, as opposed to supporting their favourite team (26%) or an esports league (24%). Perceptions of the product as ‘cool’ was the most often cited reason for purchasing physical merchandise (33%). Support for a favourite esports league was more often a main reason for purchasing physical (27%), rather than digital (24%) merchandise.

REASONS FOR PURCHASE – ESPORTS GOODS | ESPORTS AUDIENCE



Esports Goods

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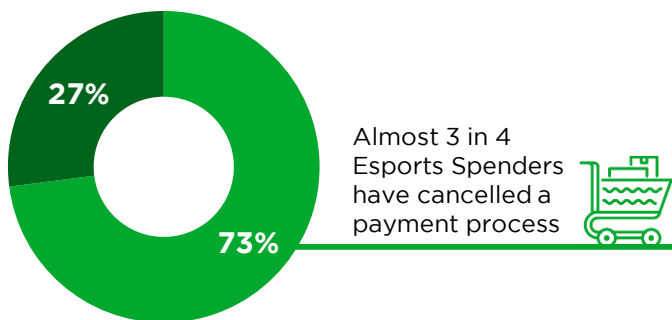
Purchasing Esports Digital Goods

Slow or unresponsive website is the most common reason cited for cancelling a payment

Barriers to Purchasing Esports Related Digital Goods

73% of Esports Digital Spenders in Sweden indicated they had cancelled or backed out of an online checkout/payment process, the most out of all EU markets researched. 29% of the Esports Audience who had cancelled a payment process indicated that a slow or unresponsive website was the main reason for doing so. Concerning important features of payment providers, 'feeling more secure' was the most important feature for both Esports Enthusiasts and Occasional Viewers (51%).

EVER CANCELLED PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS



IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS

	Esports Enthusiasts	Occasional Viewers
Feels more secure	51%	51%
Easy-to-use	41%	49%
Speed of transaction	25%	19%
Convenience	23%	29%
Familiarity with method	22%	17%

REASONS FOR CANCELLING PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS WHO HAVE CANCELLED A PAYMENT PROCESS



Issues with the website, such as a being slow or unresponsive (29%), hidden or unexpected charges (24%), were the primary reasons Esports Digital Spenders cancelled an online payment process.



Finland - Esports: Digital Goods & Payment Consumer Behaviour

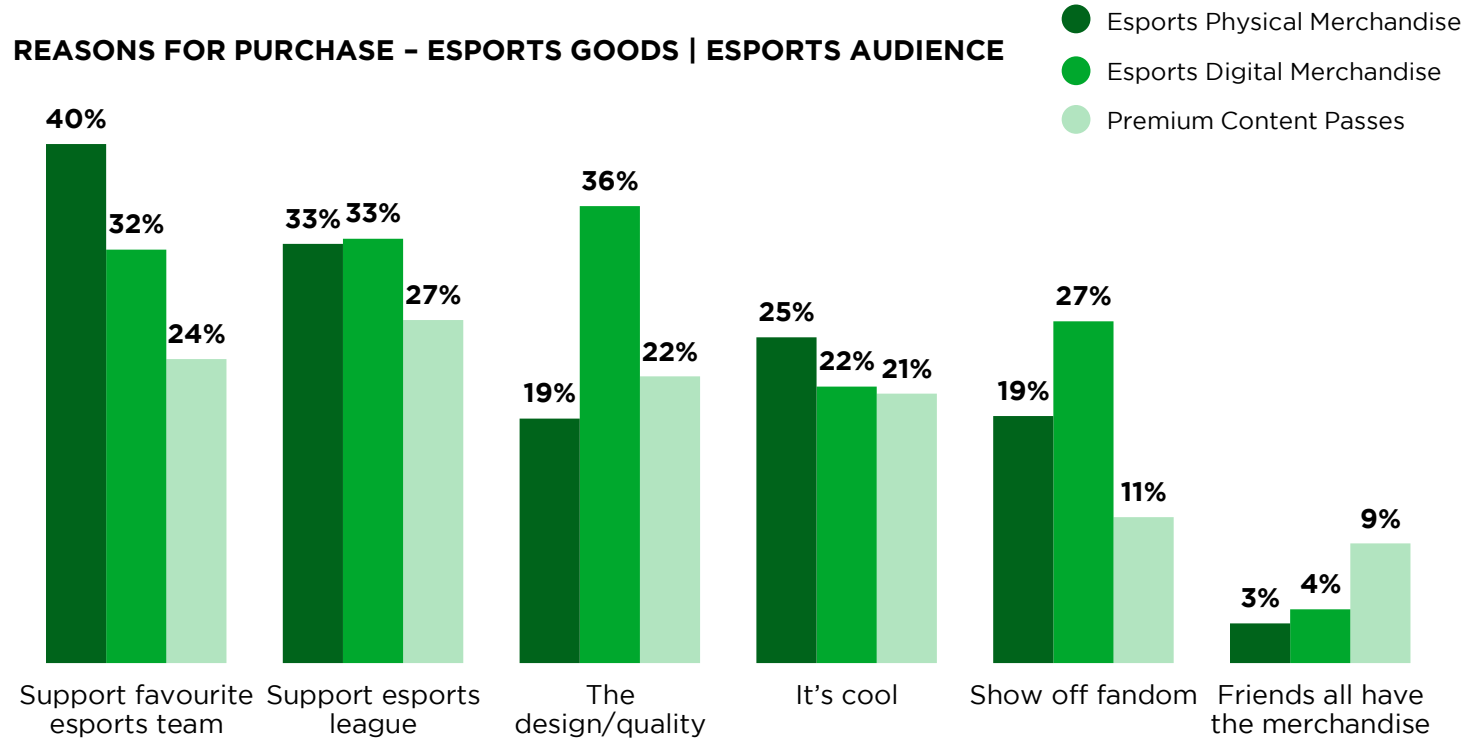


Digital and Physical Esports Goods

The design and/or quality – most important reason to digital esports goods

Reasons for Purchase – Digital and Physical Esports Products

For the Esports Audience in Finland, supporting esports leagues and teams are important when purchasing both digital and physical esports merchandise, but when it comes to digital merchandise, product quality and/or design was crucial. 36% of the Esports Audience who purchased digital merchandise indicated that product quality and/or design was the main reason for their purchase. Support for a favourite esports team was more often the main reason for purchasing physical (40%), rather than digital (32%) merchandise.



Esports Goods

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Esports Digital Merchandise: Includes skins, stickers, banners and other digital goods that often exists within games.

Premium Content Passes: All paywalled OTT (Over The Top) viewing content related to esports.



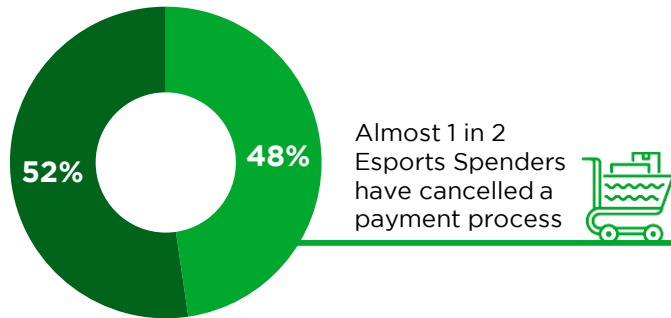
Purchasing Esports Digital Goods

Issues with final pricing were the most common reasons cited for cancelling an online payment

Barriers to Purchasing Esports Related Digital Goods

Almost half (48%) of Esports Digital Spenders in Finland indicated they had cancelled or backed out of an online checkout/payment process. 29% of the Esports Audience who had cancelled a payment process indicated that a hidden or unexpected charges was the main reason for doing so. Concerning important features of payment providers, 'ease-of-use' was the most important feature for Esports Enthusiasts (43%) while for Occasional Viewers feeling secure (57%) was the most important feature.

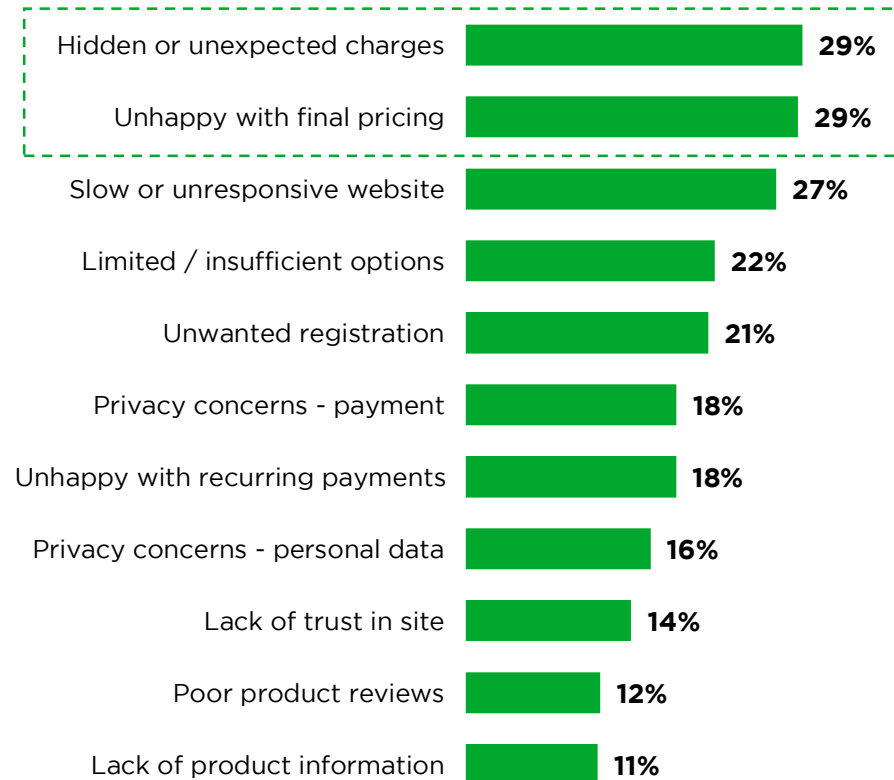
EVER CANCELLED PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS



IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS

	Esports Enthusiasts	Occasional Viewers
Feels more secure	41%	57%
Easy-to-use	43%	44%
Speed of transaction	35%	31%
Convenience	37%	32%
Familiarity with method	15%	15%

REASONS FOR CANCELLING PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS WHO HAVE CANCELLED A PAYMENT PROCESS



Issues with pricing, such as 'hidden or unexpected charges' (29%) or 'being unhappy with final pricing' (29%), were the most often the main reasons why digital spenders cancelled a payment process.



Thank you!

