

# **Esports Market Forecasts to 2032 – Global Analysis By Revenue Stream (Sponsorships, Advertising, Media Rights, Merchandise & Tickets and Other Revenue Streams), Game Type, Audience Type, Platform, Tournament and By Geography**

<https://marketpublishers.com/r/E0D1BDEB493AEN.html>

Date: May 2025

Pages: 150

Price: US\$ 4,150.00 (Single User License)

ID: E0D1BDEB493AEN

## **Abstracts**

According to Statistics MRC, the Global Esports Market is accounted for \$3.8 billion in 2025 and is expected to reach \$22.4 billion by 2032 growing at a CAGR of 28.8% during the forecast period. Electronic sports, or esports, are organised, competitive video games in which teams or individuals play multiplayer games at amateur or professional levels. League of Legends, Dota 2, Counter-Strike, and Fortnite are popular esports games. Tournaments often feature large audiences, both live and online, and offer significant prize pools. Esports blends gaming skill, teamwork, strategy, and entertainment, attracting global viewership. With sponsorships, streaming platforms, and international competitions, Esports has grown into a billion-dollar industry, recognized as a legitimate sport by many institutions and embraced by a diverse, digital-savvy audience.

Market Dynamics:

Driver:

Mainstream acceptance & sponsorships

Esports events are becoming increasingly well-known and visible as traditional media outlets and international businesses become more interested. Major corporate sponsorships offer resources and financial stability, allowing teams and competitions to expand. By integrating esports with popular culture, these collaborations also draw in a

wider audience by making it approachable by non-gamers. Prominent partnerships increase esports' legitimacy and encourage participation from younger generations. The industry's growth is ultimately accelerated by widespread participation, which raises investment, viewership, and market value overall.

#### Restraint:

##### Lack of standardization & regulation

In the absence of explicit rules, game publishers might enforce contradictory regulations, which would compromise tournament fairness. Sponsorship opportunities are further hampered by the lack of universal regulations because businesses are reluctant to invest in an unstable climate. Conflicts over revenue sharing, broadcasting, and intellectual property rights may result from this governance contradiction. Additionally, it limits long-term growth by making it more difficult for esports pros to establish career trajectories. All things considered, the market's potential is limited because of the ambiguous structure for investors and players.

#### Opportunity:

##### Education & scholarship programs

The knowledge and abilities required to succeed in competitive gaming are given to potential players through education and scholarship programs. Scholarships, in particular, encourage students to pursue professions in gaming by making esports more accessible. The talent pool for the industry is further expanded by universities that provide esports programs, which draw in a new generation of players. The programs guarantee a sustainable future for esports through qualified personnel by promoting educational development. Because of this, esports keeps becoming more and more well-known, which propels its expansion worldwide.

#### Threat:

##### Intellectual property & publisher control

The exclusivity rights that publishers frequently possess over game content prevent third-party tournaments and streamers from participating. This control may impede diversity and innovation by keeping smaller organisations out of the market. Tight IP limitations may also result in legal issues for fan-generated content or unapproved

events. Due to their reliance on publisher-controlled platforms, these limitations may also reduce players' chances of making money. As a result, there may be less opportunity for new players and fragmentation within the esports ecosystem.

### Covid-19 Impact

The COVID-19 pandemic significantly accelerated the growth of the esports market. With traditional sports and live entertainment halted, audiences turned to online gaming and virtual tournaments for entertainment. This shift boosted viewership, sponsorships, and investments in esports. Events moved online, expanding global accessibility and participation. Despite challenges in live event revenue, the industry adapted quickly, leveraging digital platforms. Overall, the pandemic highlighted esports' resilience and potential as a mainstream entertainment option in a socially distanced world.

The media rights segment is expected to be the largest during the forecast period

The media rights segment is expected to account for the largest market share during the forecast period by driving significant revenue through broadcasting and streaming deals. As esports gain popularity, media companies are keen to secure exclusive rights, allowing them to reach large, engaged audiences. These deals help establish esports as mainstream entertainment, attracting major advertisers and sponsors. Increased visibility on platforms like Twitch, YouTube, and traditional TV networks enhances the appeal of esports to a wider demographic. Ultimately, the growth in media rights contracts contributes to higher prize pools, improved infrastructure, and greater professionalization within the industry.

The franchise leagues segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the franchise leagues segment is predicted to witness the highest growth rate attracting top-tier teams, players, and sponsors. They give organisations and players steady financial streams by guaranteeing stability and long-term contracts. The league's exclusivity boosts viewership and opens up new sponsorship options by fostering fan involvement and brand loyalty. Franchises that have established league formats also draw a lot of investment, which enables better fan experiences and higher-caliber production. In the end, these franchises fuel the expansion of the esports industry by guaranteeing longevity and a larger, more devoted following.

### Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share by a large, tech-savvy youth demographic and high internet penetration. Countries like China, South Korea, and Japan are at the forefront, with thriving competitive gaming scenes and major tournaments. Increasing investment from global brands and media companies has further fueled the industry's expansion. In addition to traditional esports events, mobile gaming has seen significant growth in markets like India and Southeast Asia, creating new opportunities for players, sponsors, and game developers in the region's booming esports ecosystem.

### Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to increased viewership, sponsorships, and gaming-related revenues. Major esports events, like the League of Legends Championship and Overwatch League, attract millions of viewers and generate substantial revenue through advertising, media rights, and merchandise. Big tech companies and traditional sports organizations are investing heavily, further validating the industry's potential. As gaming continues to expand, esports in North America is expected to become a mainstream form of entertainment, blending gaming culture with professional sports.

### Key players in the market

Some of the key players profiled in the Esports Market include Activision Blizzard, Inc., Riot Games, Inc., Tencent Holdings Ltd., Electronic Arts Inc. (EA), Epic Games, Inc., Valve Corporation, Ubisoft Entertainment SA, Take-Two Interactive Software, Inc., Microsoft Corporation, Sony Interactive Entertainment, Nintendo Co., Ltd., ESL FACEIT Group (EFG), DreamHack, Team SoloMid (TSM), Cloud9, Fnatic and G2 Esports.

### Key Developments:

In April 2025, Riot Games announced the launch of Valorant Mobile in China, developed by LightSpeed. Pre-registration for playtesting is open, with exclusive in-game rewards for participants.

In September 2024, Riot Games partnered with Opera GX, the gaming browser, to enhance the League of Legends World Championship experience. Opera GX became an official sponsor, introducing features like a co-streaming hub and interactive

calendars for fans to follow the event in multiple languages.

In December 2023, Activision Blizzard partnered with Samsung in the EMEA region for a marketing campaign titled 'Embrace Your Game.' The initiative aimed to promote Samsung's gaming devices, including TVs, monitors, and smartphones, by leveraging popular Activision Blizzard games.

#### Revenue Streams Covered:

Sponsorships

Advertising

Media Rights

Merchandise & Tickets

Publisher Fees

Streaming & Subscription

Other Revenue Streams

#### Game Types Covered:

Powder

Tablets

Capsule

Gummies

Other Forms

#### Audience Types Covered:

Regular Viewers

Occasional Viewers

Participants

Platforms Covered:

PC

Console

Mobile

Tournaments Covered:

Online Tournaments

Offline

Franchise Leagues

Open Leagues

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

## Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

### **2 PREFACE**

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
  - 2.4.1 Data Mining
  - 2.4.2 Data Analysis
  - 2.4.3 Data Validation
  - 2.4.4 Research Approach
- 2.5 Research Sources
  - 2.5.1 Primary Research Sources
  - 2.5.2 Secondary Research Sources
  - 2.5.3 Assumptions

### **3 MARKET TREND ANALYSIS**

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Emerging Markets
- 3.7 Impact of Covid-19

### **4 PORTERS FIVE FORCE ANALYSIS**

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

### **5 GLOBAL ESPORTS MARKET, BY REVENUE STREAM**

- 5.1 Introduction
- 5.2 Sponsorships
- 5.3 Advertising
- 5.4 Media Rights
- 5.5 Merchandise & Tickets
- 5.6 Publisher Fees
- 5.7 Streaming & Subscription
- 5.8 Other Revenue Streams

## **6 GLOBAL ESPORTS MARKET, BY GAME TYPE**

- 6.1 Introduction
- 6.2 Multiplayer Online Battle Arena (MOBA)
- 6.3 First-Person Shooter (FPS)
- 6.4 Real-Time Strategy (RTS)
- 6.5 Battle Royale
- 6.6 Sports Games
- 6.7 Racing Games
- 6.8 Fighting Games
- 6.9 Other Game Types

## **7 GLOBAL ESPORTS MARKET, BY AUDIENCE TYPE**

- 7.1 Introduction
- 7.2 Regular Viewers
- 7.3 Occasional Viewers
- 7.4 Participants

## **8 GLOBAL ESPORTS MARKET, BY PLATFORM**

- 8.1 Introduction
- 8.2 PC
- 8.3 Console
- 8.4 Mobile

## **9 GLOBAL ESPORTS MARKET, BY TOURNAMENT**

- 9.1 Introduction
- 9.2 Online Tournaments

9.3 Offline

9.4 Franchise Leagues

9.5 Open Leagues

## **10 GLOBAL ESPORTS MARKET, BY GEOGRAPHY**

10.1 Introduction

10.2 North America

10.2.1 US

10.2.2 Canada

10.2.3 Mexico

10.3 Europe

10.3.1 Germany

10.3.2 UK

10.3.3 Italy

10.3.4 France

10.3.5 Spain

10.3.6 Rest of Europe

10.4 Asia Pacific

10.4.1 Japan

10.4.2 China

10.4.3 India

10.4.4 Australia

10.4.5 New Zealand

10.4.6 South Korea

10.4.7 Rest of Asia Pacific

10.5 South America

10.5.1 Argentina

10.5.2 Brazil

10.5.3 Chile

10.5.4 Rest of South America

10.6 Middle East & Africa

10.6.1 Saudi Arabia

10.6.2 UAE

10.6.3 Qatar

10.6.4 South Africa

10.6.5 Rest of Middle East & Africa

## **11 KEY DEVELOPMENTS**

- 11.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 11.2 Acquisitions & Mergers
- 11.3 New Product Launch
- 11.4 Expansions
- 11.5 Other Key Strategies

## **12 COMPANY PROFILING**

- 12.1 Activision Blizzard, Inc.
- 12.2 Riot Games, Inc.
- 12.3 Tencent Holdings Ltd.
- 12.4 Electronic Arts Inc. (EA)
- 12.5 Epic Games, Inc.
- 12.6 Valve Corporation
- 12.7 Ubisoft Entertainment SA
- 12.8 Take-Two Interactive Software, Inc.
- 12.9 Microsoft Corporation
- 12.10 Sony Interactive Entertainment
- 12.11 Nintendo Co., Ltd.
- 12.12 ESL FACEIT Group (EFG)
- 12.13 DreamHack
- 12.14 Team SoloMid (TSM)
- 12.15 Cloud9
- 12.16 Fnatic
- 12.17 G2 Esports

## List Of Tables

### LIST OF TABLES

- Table 1 Global Esports Market Outlook, By Region (2024-2032) (\$MN)
- Table 2 Global Esports Market Outlook, By Revenue Stream (2024-2032) (\$MN)
- Table 3 Global Esports Market Outlook, By Sponsorships (2024-2032) (\$MN)
- Table 4 Global Esports Market Outlook, By Advertising (2024-2032) (\$MN)
- Table 5 Global Esports Market Outlook, By Media Rights (2024-2032) (\$MN)
- Table 6 Global Esports Market Outlook, By Merchandise & Tickets (2024-2032) (\$MN)
- Table 7 Global Esports Market Outlook, By Publisher Fees (2024-2032) (\$MN)
- Table 8 Global Esports Market Outlook, By Streaming & Subscription (2024-2032) (\$MN)
- Table 9 Global Esports Market Outlook, By Other Revenue Streams (2024-2032) (\$MN)
- Table 10 Global Esports Market Outlook, By Game Type (2024-2032) (\$MN)
- Table 11 Global Esports Market Outlook, By Multiplayer Online Battle Arena (MOBA) (2024-2032) (\$MN)
- Table 12 Global Esports Market Outlook, By First-Person Shooter (FPS) (2024-2032) (\$MN)
- Table 13 Global Esports Market Outlook, By Real-Time Strategy (RTS) (2024-2032) (\$MN)
- Table 14 Global Esports Market Outlook, By Battle Royale (2024-2032) (\$MN)
- Table 15 Global Esports Market Outlook, By Sports Games (2024-2032) (\$MN)
- Table 16 Global Esports Market Outlook, By Racing Games (2024-2032) (\$MN)
- Table 17 Global Esports Market Outlook, By Fighting Games (2024-2032) (\$MN)
- Table 18 Global Esports Market Outlook, By Other Game Types (2024-2032) (\$MN)
- Table 19 Global Esports Market Outlook, By Audience Type (2024-2032) (\$MN)
- Table 20 Global Esports Market Outlook, By Regular Viewers (2024-2032) (\$MN)
- Table 21 Global Esports Market Outlook, By Occasional Viewers (2024-2032) (\$MN)
- Table 22 Global Esports Market Outlook, By Participants (2024-2032) (\$MN)
- Table 23 Global Esports Market Outlook, By Platform (2024-2032) (\$MN)
- Table 24 Global Esports Market Outlook, By PC (2024-2032) (\$MN)
- Table 25 Global Esports Market Outlook, By Console (2024-2032) (\$MN)
- Table 26 Global Esports Market Outlook, By Mobile (2024-2032) (\$MN)
- Table 27 Global Esports Market Outlook, By Tournament (2024-2032) (\$MN)
- Table 28 Global Esports Market Outlook, By Online Tournaments (2024-2032) (\$MN)
- Table 29 Global Esports Market Outlook, By Offline (2024-2032) (\$MN)
- Table 30 Global Esports Market Outlook, By Franchise Leagues (2024-2032) (\$MN)
- Table 31 Global Esports Market Outlook, By Open Leagues (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

## I would like to order

Product name: Esports Market Forecasts to 2032 – Global Analysis By Revenue Stream (Sponsorships, Advertising, Media Rights, Merchandise & Tickets and Other Revenue Streams), Game Type, Audience Type, Platform, Tournament and By Geography

Product link: <https://marketpublishers.com/r/E0D1BDEB493AEN.html>

Price: US\$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/E0D1BDEB493AEN.html>