

Press release

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Esports accelerates its development in Belgium

4 out of 5 people are aware of the term 'esports', although only 37% can correctly define it

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Belgium is still considered to be a developing esports market rather than a frontrunner in the European esports landscape, but consumer awareness and interest is growing, reveals Deloitte's Let's Play, Belgium! survey. The reach of esports in Belgium is 37%, which is a significant increase of more than 10 percentage points compared to last year. Yet, monetisation remains an issue. If esports companies work together, they can enhance Belgian consumer engagement and boost profits.

Esports awareness across European countries increased enormously in 2020 and 2021, with COVID-19-related lockdowns, but, contrary to Belgium, it plateaued at this increased level in 2022. Regarding regular engagement, 2022 saw lower levels of regular engagement, as opposed to Belgium.

Awareness reaches 81%

Esports awareness increased in Belgium with 81% of consumers aware of the term in 2022 compared to 78% in 2021, yet only 37% can correctly define it. This is slightly lower than the EU average of 86% term awareness and 41% definition awareness.

In the last six months, 20% of Belgian consumers have watched esports, with an average consumption of 473 minutes per week or 68 minutes a day, almost as long as is spent on social networks (105 minutes per day), but still lower than EU average (80 minutes per day).

64% of esports audience is male

Belgian esports viewers are mainly young men (64% being male, and 55% being millennials and 31% Gen Zs). They tend to use free and paid subscription services frequently, with 63% using paid digital services a lot compared to 33% of the general population. In addition, Belgian esports viewers watch other professional sports more often than the rest of the population (54% compared to 29%) and attend more live events (60% compared to 36%).

Commercially-engaged and regular viewers are often more educated, but the overall viewer base has very diverse education levels, highlighting the accessibility of esports for all.

Streaming platforms dominate in esports

Despite the efforts of traditional media, Belgian esports viewers increasingly use streaming platforms which become gatekeepers of esports content.

Twitch and YouTube Gaming are the most used platforms in Belgium, with a reach of 58%. Nevertheless, Twitch excels over YouTube Gaming with three times more usage time. TV broadcasts attract occasional viewers but score poorly in terms of viewing time, with an average consumption duration nine times lower than Twitch.

Monetisation lags behind

Belgian esports viewers spend €17 a month on average on esports-related activities. Almost half of their spend is on live events (incl. ticketing), while approximately 20% is spent on merchandising and 15% on paywalled content.

Vincent Fosty, TMT Industry Leader at Deloitte: *"European esports leagues and organisations estimate that audiences remain under-monetised, preventing them from reaching profitability. More work needs to be done to fully benefit from the market. Esports companies in Belgium should act together to create a more structured and fast-growing ecosystem, which would boost esports penetration and consumer engagement, and enable them to profit."*

Besides esports, gaming remains popular

Although the share of attention of esports in Belgium has grown, gaming remains popular. Seventy-nine percent of Belgians are aware of video games, 46% play them, and 33% do it on a regular basis. They play video games on average 648 minutes per week, or 92 minutes per day, almost as long as is spent on social networks (105 minutes per day), but still lower than EU average of 126 minutes per day. Belgians spend €18 on gaming-related purchases each month, with half of it being for full games copies.

Similarly to esports viewers, the audience is young, diverse, and consumes many paid digital services. However, 42% of Belgian gamers are women, compared to 36% for esports. Interestingly, only 43% of gamers watch esports, while 84% of esports viewers also practice gaming, highlighting the differences between these two sectors.

"While the increasing number of Belgian gamers will of course positively impact the market, we expect that the tax shelter extension to investments in video games, entering into force as from January 2023, will further fuel the industry development in Belgium," concluded Vincent Fosty.

Discover more here: www.deloitte.com/be/belgian-esports-market

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