INDUSTRIES & MARKETS

Esports: market data & analysis

Market Insights report

Market Insights

by statista

2023

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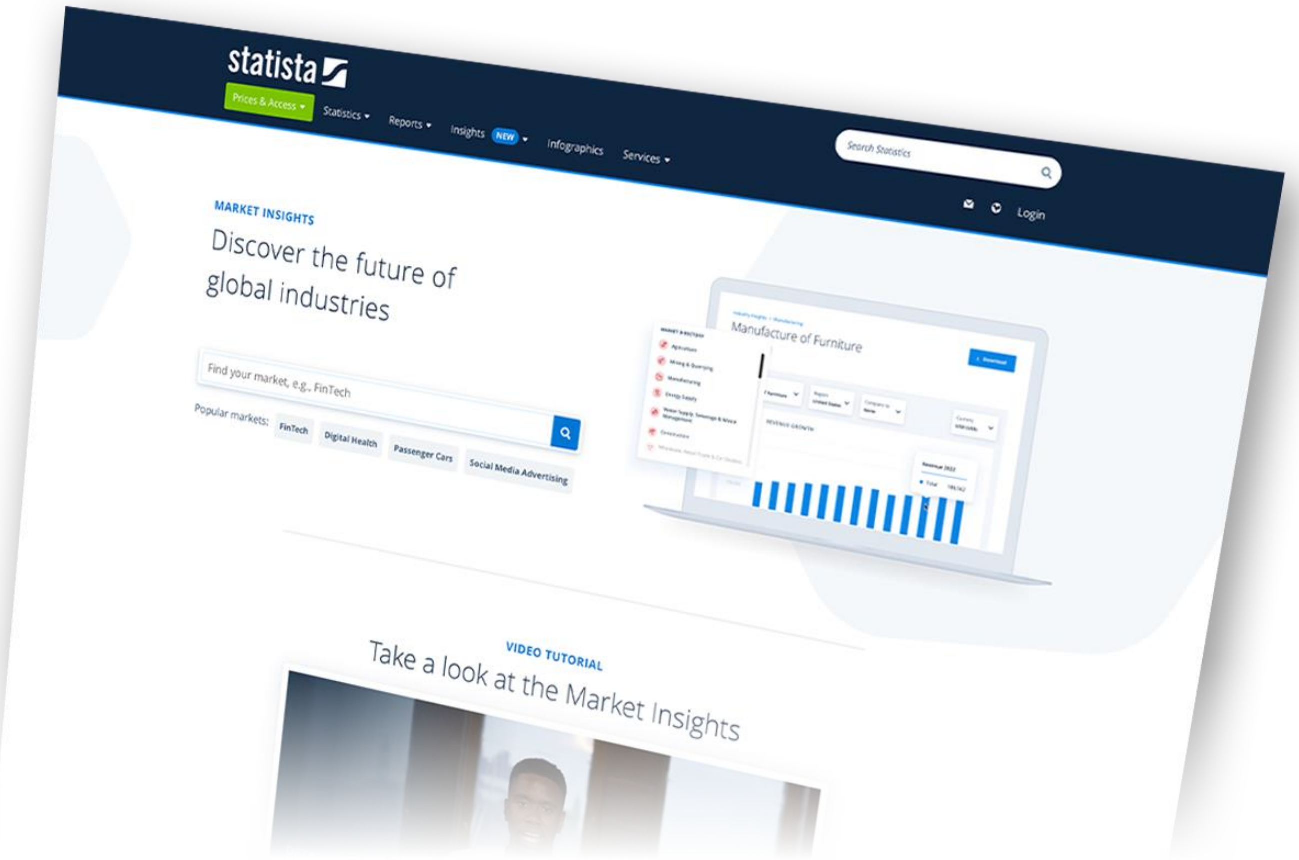

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CHAPTER 1

Overview

The Esports market is constantly evolving facing enormous growth opportunities in the upcoming years

Overview: Summary

Summary

Esports, also known as electronic sports, is a form of competitive video gaming that involves organized, professional players competing in video game tournaments or leagues. The Esports market refers to the industry surrounding the organization and competition of Esports tournaments, as well as the development of Esports leagues and teams, the broadcast of Esports events, and the creation and sale of related merchandise and sponsorships.

Esports has grown significantly in recent years, with millions of players and spectators around the world participating in and watching Esports events. Many of the most popular Esports games are played on personal computers or gaming consoles, such as League of Legends, Counter-Strike: Global Offensive, and Overwatch. Some Esports tournaments also feature mobile games, such as Clash of Clans and PUBG Mobile.

Esports tournaments can take many different forms, from small, local events to large, international competitions with prize pools in the millions of dollars. Many Esports tournaments are organized by game publishers or professional Esports organizations and are often broadcast online or on television. In addition to

traditional tournaments, many Esports leagues have also been formed, in which teams of players compete against each other in regular matches over an extended period of time.

Sources: Market Insights 2023

The Esports market can be divided into 6 different parts

Overview: Market Definition

Market definition

Esports, short for electronic sports, refers to competitive video gaming where professional players or teams compete in various multiplayer video games. These competitions are often organized into leagues, tournaments, and events, attracting both online and offline audiences. Esports has grown into a global industry, with players, sponsors, and spectators contributing to its popularity and economic significance.

The Esports market can be divided into 6 different parts. First, **Sponsorship & Advertising**, which refers to revenues made from sponsorship deals and advertising for events and tournaments. **Merchandise & Ticketing** refers to the revenues generated mainly from tournament tickets and the merchandise that comes with it. Additionally, **Streaming, Media Rights** and **Publisher Fees**, which all refers to the revenue that is associated with broadcasting Esports events accross various channels. Lastly, **Esports Betting** includes the betting on outcomes of Esport events.

The market comprises revenues, ad spendings, users, average revenue per user, and penetration rates. Revenues are generated through advertising spending and consumer spending. Sales channel data shows both online and offline revenues. Information on Esports betting can also be found in the Digital Market Insights. All monetary figures refer to the annual gross revenue.

Key players of the market include companies or teams such as FaZe, Cloud9 or TSM.

Sources: Market Insights 2023

The Esports market is poised to reach US$3.96bn in 2023 continuing a growth part up to US$5.43bn in 2027

Overview: Key Takeaways and in scope / out of scope

Key Takeaways

Revenue in the Esports market is projected to reach US$3.96bn in 2023.

Revenue is expected to show an annual growth rate (CAGR 2023-2027) of 8.21%, resulting in a projected market volume of US$5.43bn by 2027.

The largest market is Esports Betting with a market volume of US$2.34bn in 2023.

With a projected market volume of US$1,076.00m in 2023, most revenue is generated in the United States.

In the Esports market, the number of users is expected to amount to 720.8m users by 2027.

User penetration will be 7.5% in 2023 and is expected to hit 9.1% by 2027.

The average revenue per user (ARPU) is expected to amount to US$6.82.

In scope

This market includes:

- Professional and semi-professional gaming competitions, such as Semi-Pro League
- Tournaments and leagues, such as Dota 2 The International
- Sponsorship deals and advertising, such as FaZe and Steelseries
- Merchandise and ticketing for Esport tournaments
- Streaming of tournaments, such as streaming on Twitch

Out of scope

This market excludes:

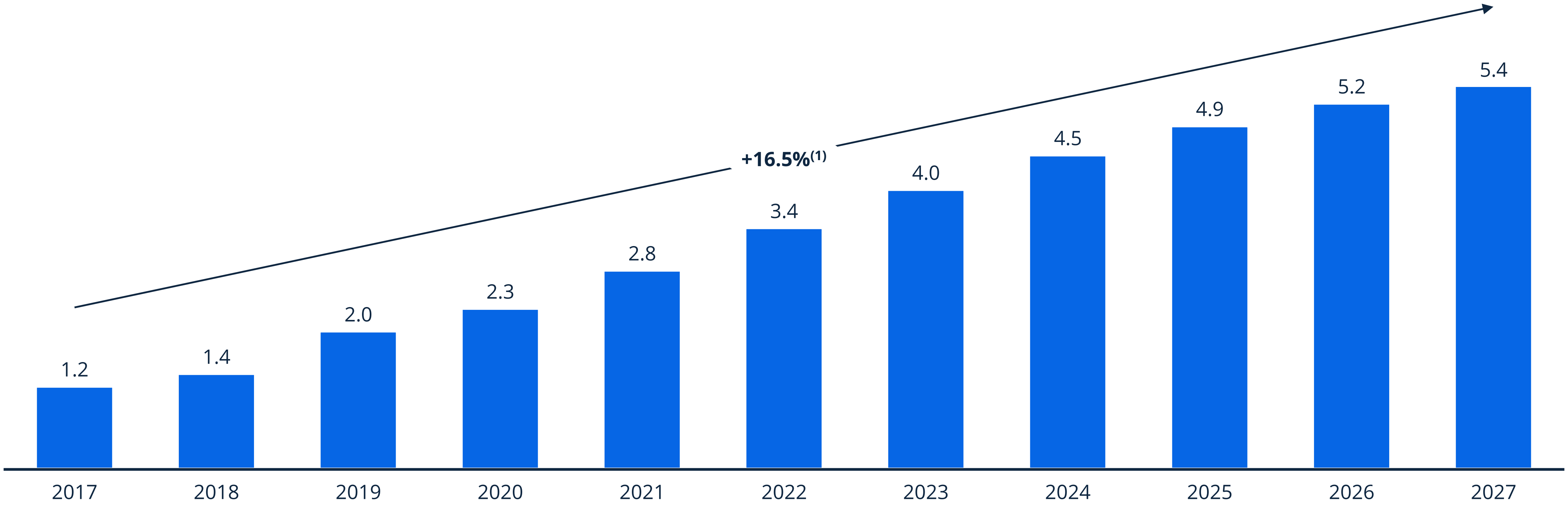
- Amateur competitions, such as Amateur Esports League
- Streaming revenues of non-organized competitive gaming, such as casual gaming on Twitch
- Digital and physical sales from video games, such as sales of Call of Duty
- Digital tools associated with revenues from Esports, such as Teamspeak or Discord

Sources: Market Insights 2023

Esports market revenues are estimated to increase at a CAGR[(1)] of 16.5% from 2017 to 2027

Market Size: Global

revenue forecast in billion US$

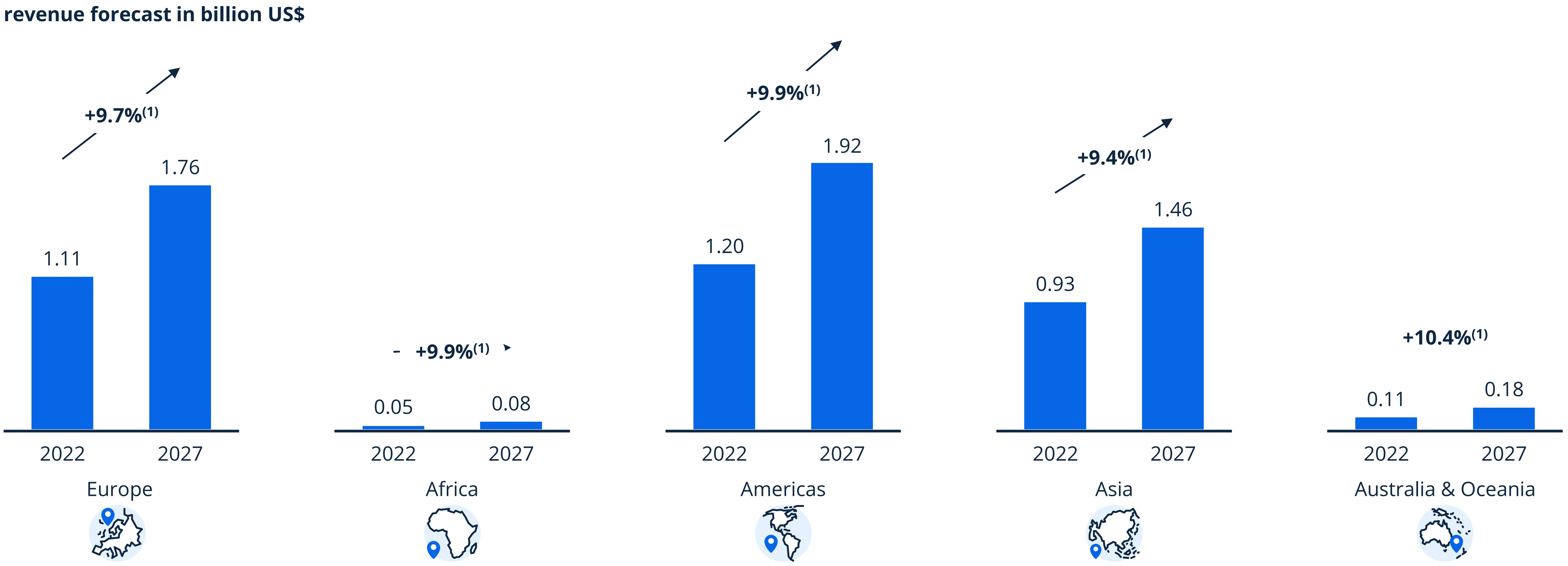


Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

With revenue of US$ 1.2 billion, Americas is the biggest market among selected regions in 2022

Market Size: Regional Comparison (1/2)

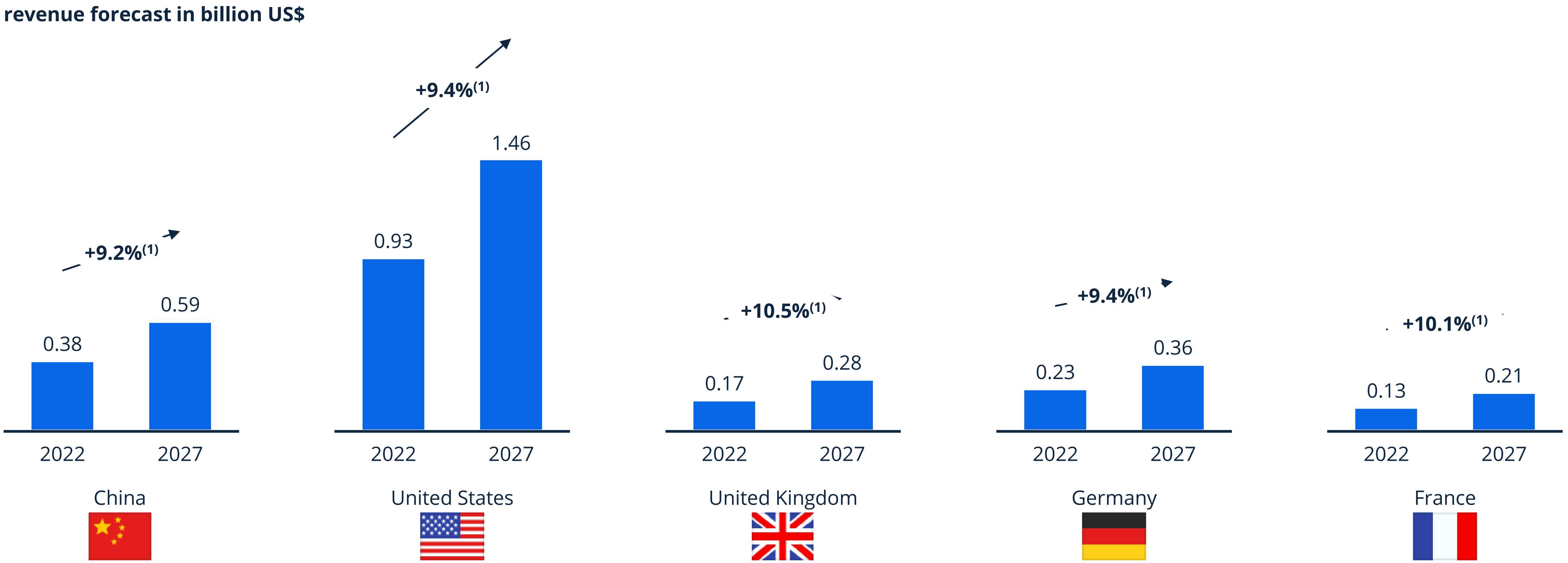


Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

With revenue of US$ 0.93 billion, the U.S. is the biggest market among selected countries in 2022

Market Size: Regional Comparison (2/2)



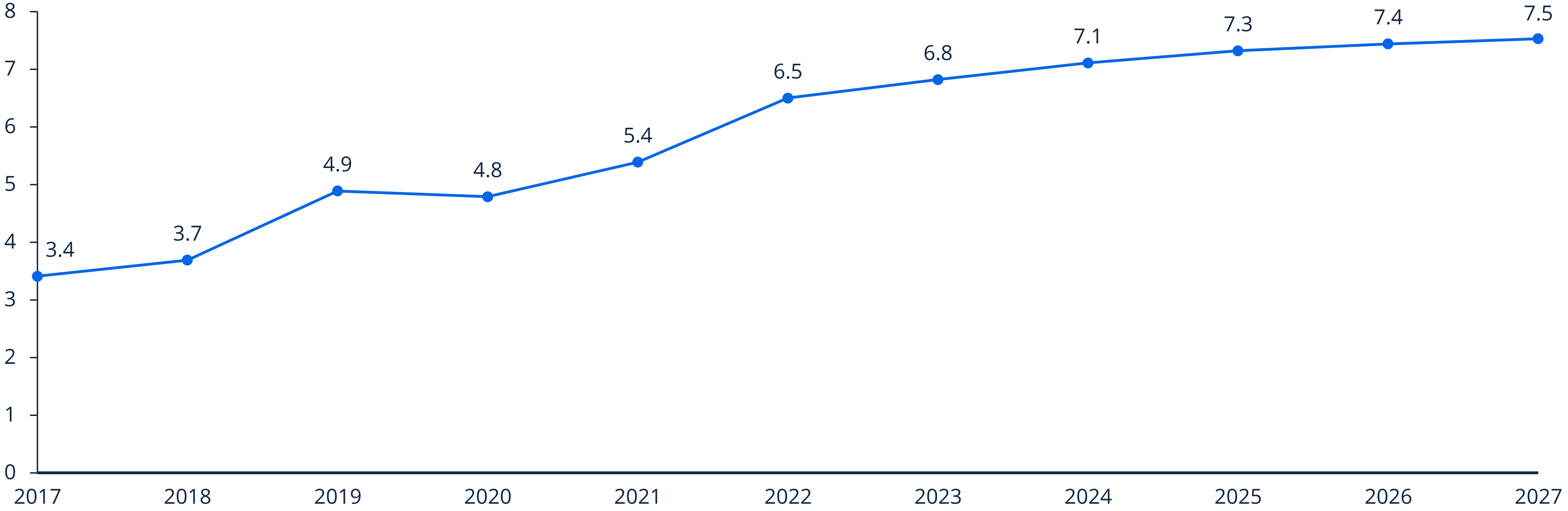
Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

Esports average revenue per user is estimated to increase from 2017 to 2027

Market Size: Global

arpu forecast in US$



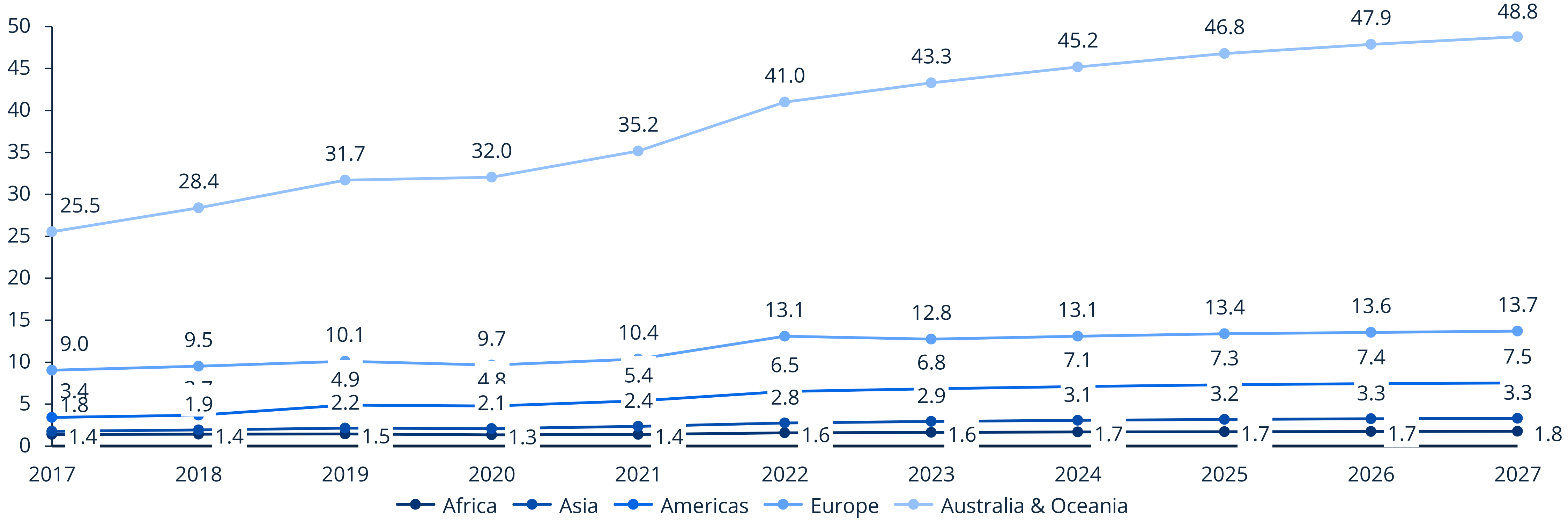
Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

Australia & Oceania spend on average the most for Sponsorship & Advertising per user in 2027

Market Size: Regional Comparison (1/2)

arpu forecast in US$



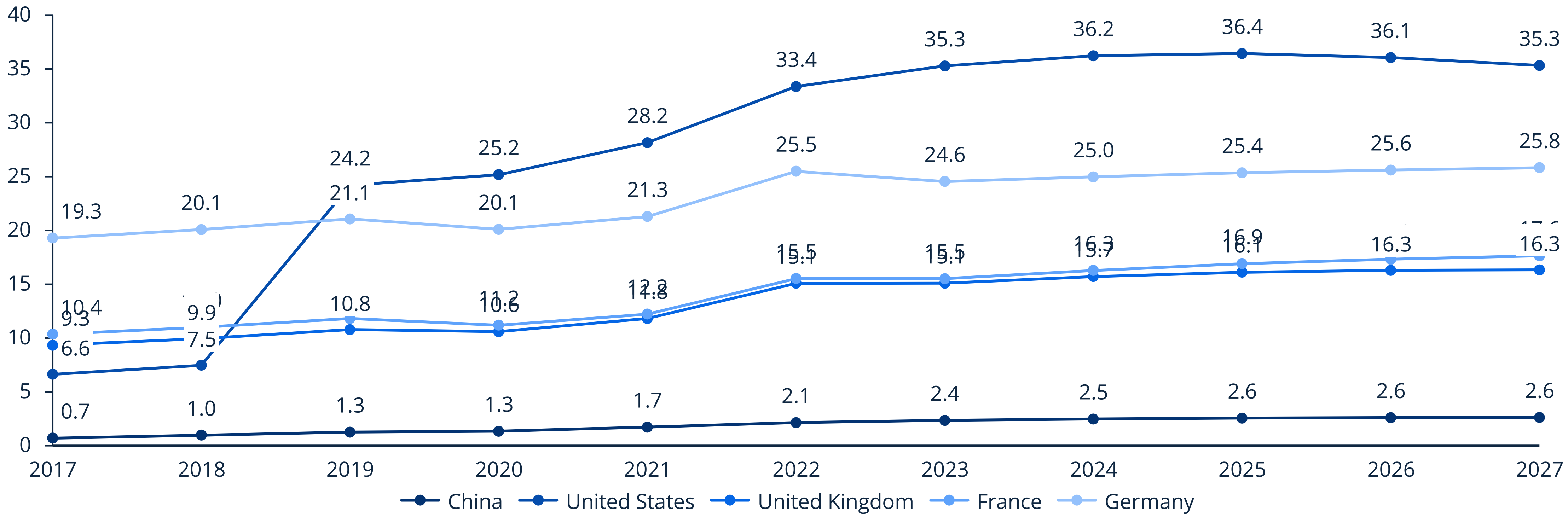
Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

With average revenue per user of US$ 33.4, the U.S. spend on average the most among selected countries

Market Size: Regional Comparison (2/2)

arpu forecast in US$



Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

Further engagement and rising viewership will be the key component to further market growth

Trends: 6 major trends

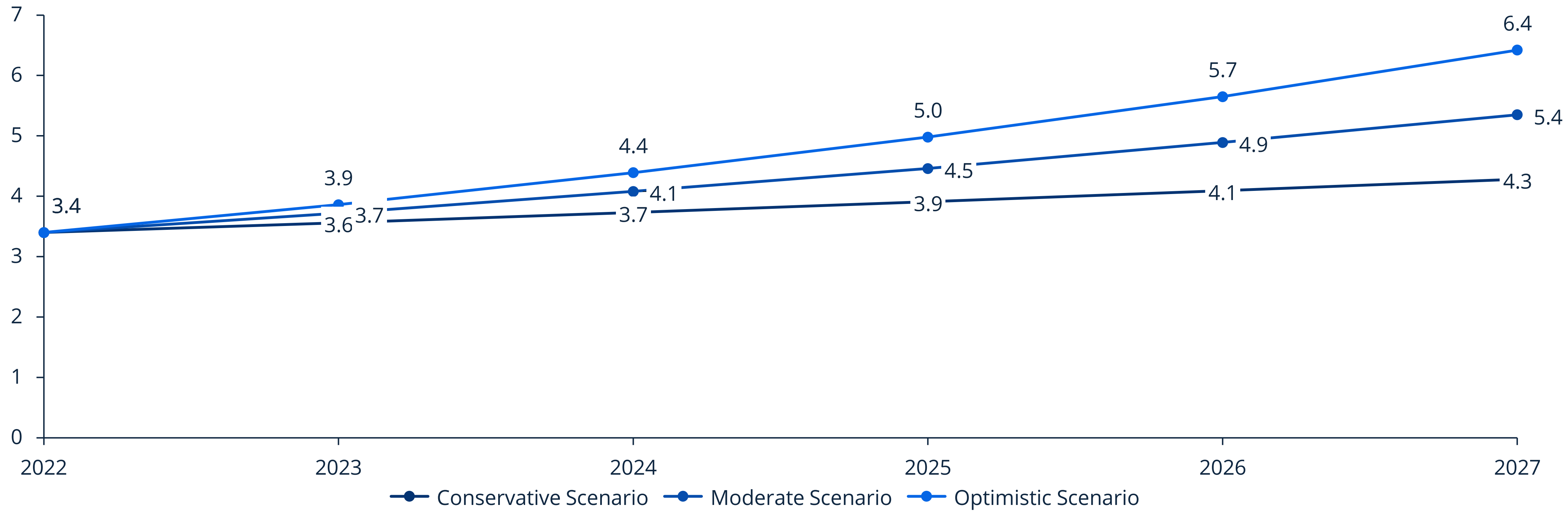
Live streaming	Game investments	Rising viewership	Ticket sales	Engagement	Tournaments
The live streaming market is witnessing high growth throughout the past years, with also new platforms entering the market, such as Kick	There has been a lot of investments and mergers and the past years, fueling the market wit new concepts, games and ideas. New investments lead to new and improved games for competitive purpose	Increasing popularity for live streaming among users is also fueling the Esports market as more and more users are visiting streaming platforms, such as Twitch and stumble across Esports streams	Ticket sales and prices are increasing, especially after the COVID-19 pandemic viewers are eager to follow events	Increasing engagement possibilities, such as live chats, fan engagements or content creation are making Esports more accessible for users and hence lead to a growing market	There is a rising demand for a tournament infrastructure, as viewers are highly interested in seeing competitive tournaments that are broadcasted around the world, holding enormous prize funds

Sources: Market Insights 2023

In the optimistic scenario, the Esports market could reach a market size of US$6.4bn by 2027

Deep Dive: Scenario Analysis

Scenario analysis in billion US$(1)



Notes: (1) The scenario analysis envisions the potential Esports Market by exploring diverse developments, considering factors such as internet access, hardware, community support, and societal attitudes. Scenarios range from a 20% decrease to a 20% increase in market size, derived from a meta-analysis of available data until 2027.

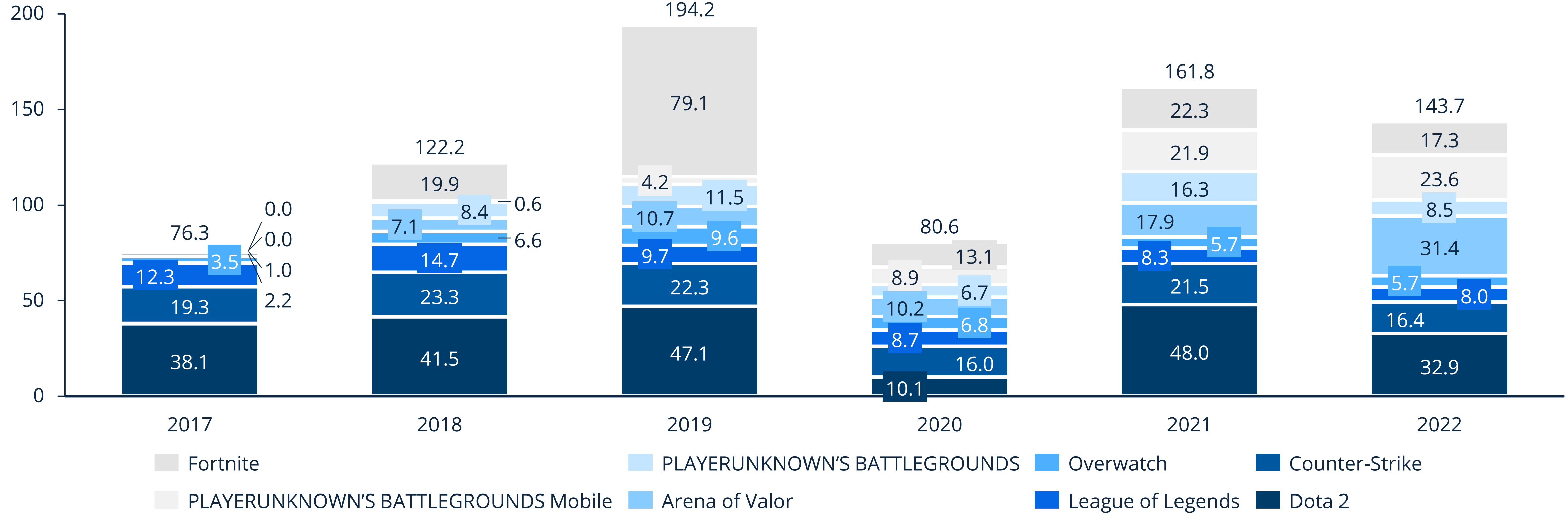
Sources: Market Insights 2023

Market Insights by statista

Dota 2 is still experiencing the highest pool of prize money in 2022, staying competitive over 5 years now

Deep Dive: Tournament prize money

Tournament prize money in million US$(1)



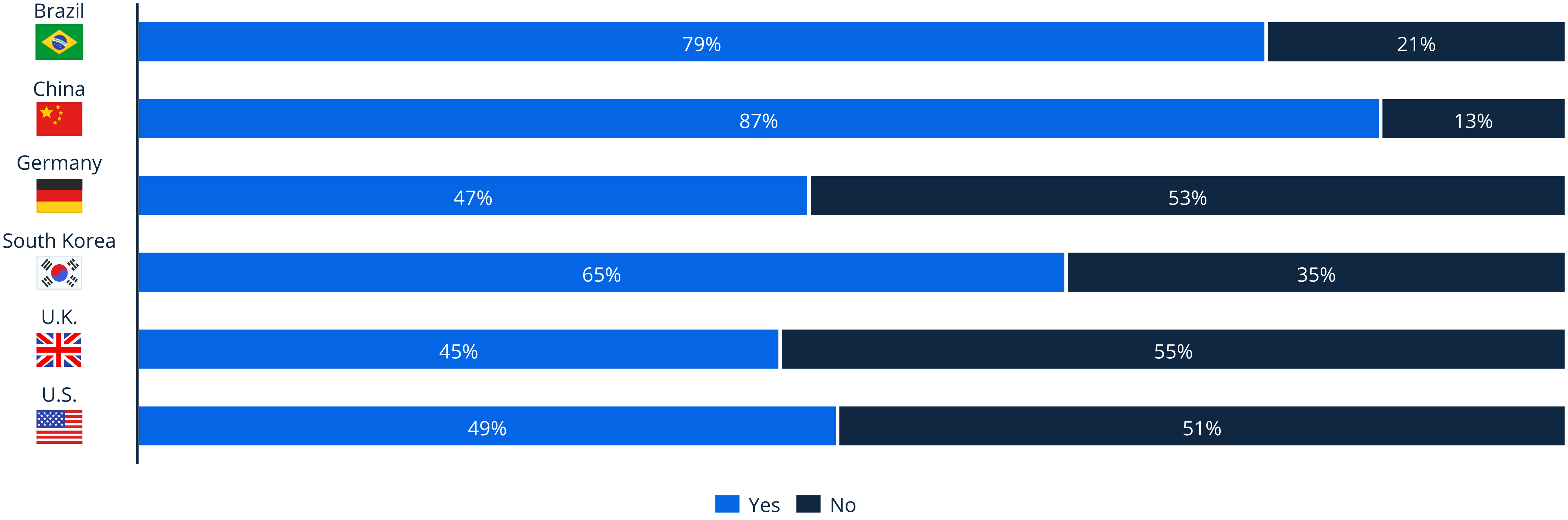
Notes: (1) The chart shows the prize money generated through Esports tournaments for the most prominent games, measured by revenues starting in 2017. The revenues solely consist out of total prize money in each of the tournaments.

Sources: Market Insights 2023

China has the highest interest in Esports at 87% followed by Brazil with 79%, whereas the U.K. has the lowest interest with 45% among selected countries

Deep Dive: Consumer insights

Interest in Esports in 2022(1)



Notes: (1) "Are you interested in Esports?"; Single Pick; U.S.: n=1035; China: n=1037; South Korea: n=1137; Germany: n=1045; United Kingdom: n=1031; Brazil: n=1090

Sources: Consumer Insights, as of November 2022

The world of Esports can mainly be divided in 5 components, whereas YouTube and Twitch are the most prominent platforms to view Esports

Deep Dive: Esports ecosystem

Overview of the Esports world

Events such as championships and other tournaments pay out massive prize money for teams, e.g., ESL One and World Championship

Publishers merge and enter the professional gaming market with their games, e.g., Activision Blizzard (Call of Duty) and Riot Games (League of Legends)

No longer just about gaming, Esports teams have become stock-listed companies with over US$50 million in revenue, e.g., Cloud9 and FaZe Clan

Regular leagues have been established to compete against each other and win prizes, e.g., ESL and Rocket League Championship Series

Sources: Newzoo

The gaming industry is mainly divided into game developers and community-centric services, which cater to the needs and wants of consumers

Deep Dive: Key players split by type

Key players in the gaming industry

Game Engines
UNREAL ENGINE, Unity, RPG MAKER, GameMaker, CRYENGINE

Developers & Publishers
EPIC GAMES, ACTIVISION BLIZZARD, EA, UBISOFT, Nintendo, SQUARE ENIX

Distribution Platforms
PlayStation Store, STEAM, Google Play, Nintendo eShop, EA, BATTLE.NET

Game Consoles
PlayStation, XBOX, NINTENDO SWITCH

Hardware & Tech
SONY, Microsoft, AMD, NVIDIA, REALITY LABS, intel

Broadcasting & Streaming
YouTube, twitch, YY直播, HUYA, DOUYU.COM

Communication & News
Discord, teamspeak, reddit, talkesport, TWIN GALAXIES, IGN

Events
gamescom, E3, GDC, EGX, ESPORTS CONEX, twitch con

Esports Leagues
MLG MAJOR LEAGUE GAMING, ESL, ESEA, ESWC, ELEAGUE, WCG, LCK

Esports Organizations
Garena, World Esports IESF, TUNDRA, TEAM LIQUID, FNATIC, G2 ESPORTS

Sources: Company information

Epic Games as one of the leading providers of engine technology

Company profiles: Epic Games

Epic Games key facts

In-store consumer spending: **US$820 m. (2022)**

Titles for sale: **1548 (2022)**

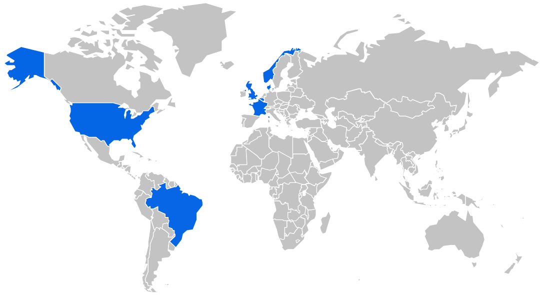
Gross Revenue: **US$5753.41 m. (2021)**

Founded: **1991**

Users: **>723 million (2022)**

Headquarters: **Cary, U.S.**

Countries with separate retail websites[1]



Product: Unreal Engine and Epic Games store

Epic Games is an American video game and software developer, publisher, and distributor. Outside of microtransactions from Fortnite and Epic Games Store the company makes money through licensing agreements for their game engine, Unreal Engine. As of now, Epic is a leading interacting environment company and provider of engine technology. Epic Games operates Fortnite, one of the world's most popular games with over 350 million accounts and organizes Esports events around the game.

Epic Games' digital strategy

Epic Games' most important source of revenue is its Unreal Engine and free-to-play games such as Fortnite, which allow in-game purchases. Their storefront Epic Games Store takes around 12% cut on games' sales, compared to Steam's 30%, therefore providing a competitive deal for partners and netting around 5% after direct costs. They also provide players with free game every week thanks to the big profits made from Fortnite, which aims at increase of shop's traffic.

Notes: (1) Brazil, Norway, Denmark, France, Belgium, United States, United Kingdom

Sources: Company information; sportskeeda

FaZe Clan is one o the biggest Esports teams around the world, competing in several different games

Company profiles: FaZe Clan

Epic Games key facts

Total prize money earned: **US$16.6 m. (2023)**

Tournaments played: **659 (2023)**

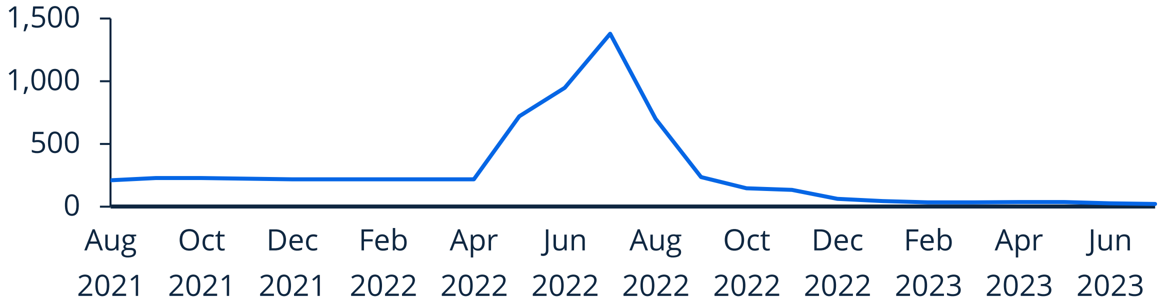
Revenue: **US$49.45 m (2022)**

Market cap: **20.54 m. (2023)**

Headquarters: **L.A., U.S.**

Founded: **2010**

Market cap FaZe Clan in million US$



FaZe Clan's portfolio

FaZe Clan stands as a prominent Esports and entertainment organization renowned for its expertise in competitive gaming, content creation, and brand collaborations. With a dynamic roster of skilled professional gamers across various titles, FaZe Clan has carved its name in the Esports scene, amassing a dedicated fanbase. The organization diversifies its portfolio through content creation, spanning YouTube, Twitch, and social media platforms, captivating millions with engaging videos, vlogs, and entertainment content. FaZe Clan's mastery lies in its ability to seamlessly blend Esports prowess with captivating content, making it a trailblazer in the modern intersection of gaming and entertainment.

FaZe Clan's strategy and downfall

In addition to its competitive gaming prowess, FaZe Clan has long sought to meld content creation, strategic collaboration, and Esports. Mismanagement challenges temporarily veered the organization off course in the past year. Conflicts over contracts and player relationships caused disruptions and unfavorable publicity. Consequently, team cohesion suffered, diverting attention from core pursuits. Despite these setbacks, FaZe Clan is actively engaged in rectifying these concerns, implementing measures to rebuild momentum and reputation. The organization is working steadfastly to regain its industry standing by improving internal communication, clarifying policies, and committing to ethical operational conduct.

Notes: (1) Brazil, Norway, Denmark, France, Belgium, United States, United Kingdom

Sources: Company information

League of Legends is still Riot Games' main trademark

Company profiles: Riot Games

Riot Games key facts

LoL[1] Revenue: **US$1.8 billion (2022)**

LoL[1] watch time on Twitch : **877.7 million**

Riot Games market cap: **US$3.52 billion (2022)**

League-based games players: **180 million (2022)**

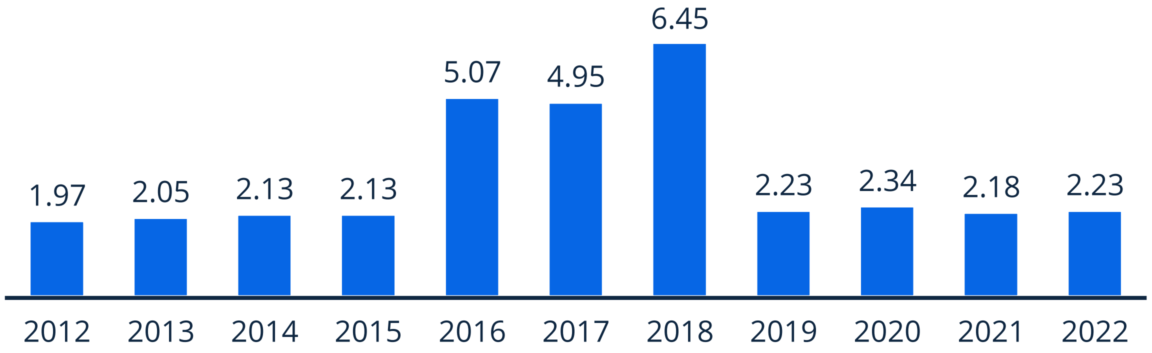
Founded: **2006**

Headquarters: **Los Angeles, U.S.**

Product: Online games and tournament events

Riot Games is an American video game developer, publisher and Esports tournament organizer famous for its game League of Legends and the new first-person shooter Valorant. In 2011 it was acquired by Chinese conglomerate Tencent. Riot Games operates 12 international League of Legends Esports leagues, the League of legends World Championship and the Valorant Champions Tour. Riot Games' Twitch channel has most total views across the platform, with 51.3 billion total views for its League of Legends.

LoL[1] World Championships prize pool from 2012 to 2022 in US$ million



Riot Games' digital strategy

Riot games generates most of their revenue through in-game purchases, corporate sponsorships, streaming rights, advertising and sponsorships from game tournaments broadcast on YouTube, event hosting and merchandise. Overall, the profits can be divided into two major categories: profits from owning big game titles such as League of Legends and Valorant, and profits from hosting the tournaments. They also took part in creation of Emmy-award-winning animated series Arcane, distributed by Netflix.

Notes: (1) League of Legends

Sources: Company information

Twitch is the most popular video game streaming platform

Company profiles: Twitch

Twitch key facts

Revenue: **US$2.8 billion (2022)**

Annual concurrent viewers: **2.58 million (2022)**

Annual hours watched: **22.4 million (2022)**

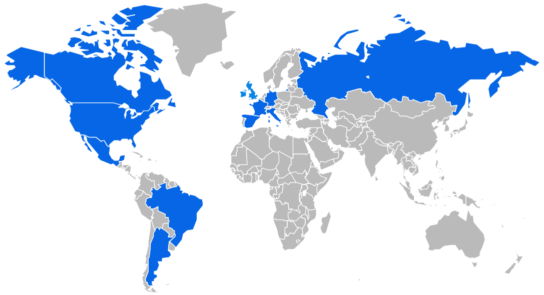
Parent company: **Amazon**

Founded: **2011**

Product: Video live streaming platform

Twitch is a video streaming service mostly known for its focus on video game live streaming and Esports competitions broadcasts. Twitch was originally a spin-off of Justin.tv, a single channel broadcasting Justin Kan's life, and mostly focused on video games. In 2014, after Twitch's apparent success, Justin.tv went through a rebranding, changing its name to Twitch Interactive. Later that year Twitch was acquired by Amazon. Nowadays Twitch provides its users with all sorts of content, starting with Music and ending with live streaming of special events and traveling, not limiting itself to video gaming.

Countries with more than 3% of total Twitch users[2]



Twitch's digital strategy

Users on Twitch are divided into two types: followers and subscribers. Followers can watch the streams for free and subscribers, people paying for Twitch Prime, can watch streams ad-free and with additional privileges, such as emblems and private chats with the streamer. The streamers can earn money from affiliate programs, people subscribing to their channel, virtual currencies, sales of games and related items, and advertising. Twitch itself makes most of its money with help of Twitch Prime and advertisement, the latter making up most of the revenue.

Notes: (1) CAGR: Compound Annual Growth Rate / average growth rate per year

Sources: Company information

Discord owns the niche of regulated online community space

Company profiles: Discord

Discord key facts

Revenue: **US$428 million (2022)**

Registered accounts: **>300 million (2022)**

Annual monthly active users: **140 million (2022)**

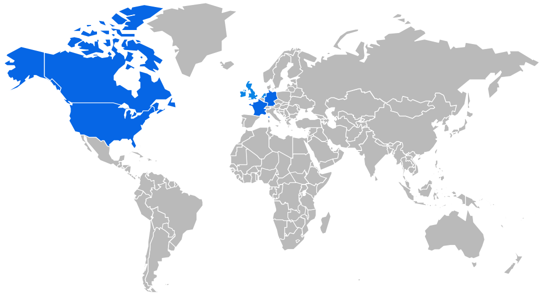
Headquarters: **San Francisco, U.S.**

Launched: **2015**

Product: Social media platform

Discord is a VoIP and instant messaging platform. It allows its users to send messages, make video and audio calls and browse media in private chats called "servers". One server can consist of various chatrooms and voice channels and can only be entered via invitation links. Initially created to serve as a platform for videogaming, Discord later developed into an all-inclusive platform for different purposes and communities, as well as a social media platform with no built-in algorithms for brands to build a direct connection with their target audience.

Countries that sent most traffic to Discord[2]



Discord's digital strategy

Most of Discord's revenue comes from Nitro, the premium subscription bundle. Discord doesn't use likes or algorithms, providing users with a platform to connect with others by using invitation system: to enter a discord channel you need to receive a link from the channel creator, therefore making it easier for people to connect with someone from their interest circle. Other than links, sometimes to enter a channel user might need applications, memberships or referrals. This creates a strictly regulated space for various communities and companies, therefore taking advantage of the created niche.

Notes: (1) CAGR: Compound Annual Growth Rate / average growth rate per year

Sources: Company information

CHAPTER 2

Markets

MARKETS

Esports Sponsorship & Advertising

The Sponsorship & Advertising market is witnessing tremendous growth in the upcoming years

Overview: Summary

Summary

In the realm of Esports, the dimensions of Merchandise and Ticketing weave together a captivating narrative that resonates across the global gaming landscape. Delving into these facets unveils intriguing insights into customer preferences, market trends, and the underlying macroeconomic forces that drive the development of Merchandise and Ticketing in Esports.

Esports enthusiasts are not only avid followers of virtual battles but also avid collectors of tangible experiences. The demand for Esports merchandise, ranging from apparel and accessories to limited-edition items, reflects fans' desire to connect with their favorite teams and players in the physical world. Additionally, attending live Esports events offers a unique sense of camaraderie and shared excitement, as fans converge to witness their idols in action, creating memorable experiences that mirror traditional sports events.

The trajectory of Merchandise and Ticketing in Esports is underscored by an ever-evolving landscape of fan engagement. Esports organizations and teams have recognized the potential of branded merchandise as a way to deepen fan loyalty and generate revenue. Limited drops, exclusive collaborations, and personalized collectibles cater to the preferences of passionate fans, creating a thriving market that transcends the digital realm. Simultaneously, Esports events have evolved into grand spectacles that attract thousands of attendees, with ticketing becoming a critical revenue stream for organizers.

The growth of Merchandise and Ticketing in Esports is rooted in the fusion of digital and physical worlds, driven by technological advancements and shifting consumer behaviors. E-commerce platforms have enabled streamlined distribution of merchandise, making it accessible to fans worldwide. The rise of influencer marketing and social media amplification has expanded the reach of Esports brands, fostering a global fan base that craves tangible connections. On the ticketing front, the allure of live events taps into the desire for shared experiences, catalyzing the growth of mega-tournaments and Esports conventions.

Sources: Market Insights 2023

Sponsorship & Advertising is an important component in the Esports ecosystem, as it generates attention and revenues

Overview: Market Definition

Market definition

Esports sponsorship and advertising encompass collaborative partnerships between brands and the Esports industry to promote products, services, or initiatives to a highly engaged audience of gamers and enthusiasts. Sponsorship involves companies aligning with Esports teams, players, or events to gain visibility through branding, endorsements, and in-game integrations. Advertising in the Esports space involves creating targeted campaigns across various digital platforms to reach the expansive and diverse gaming community. Both sponsorship and advertising leverage the widespread popularity of Esports to establish brand recognition and connect with a demographic that is deeply invested in the competitive gaming landscape.

Sources: Market Insights 2023

Sponsorship & Advertising accounted for 23.15% of the Esports market revenue in 2022

Overview: Key Takeaways and in scope / out of scope

Key Takeaways

Revenue in the Sponsorship & Advertising market is projected to reach US$0.89bn in 2023.

Revenue is expected to show an annual growth rate (CAGR 2023-2027) of 6.85%, resulting in a projected market volume of US$1.16bn by 2027.

With a projected market volume of US$262.30m in 2023, most revenue is generated in China.

The average revenue per user (ARPU) is expected to amount to US$0.12.

In scope

This market includes:

- Deals for sponsoring an Esport event
- Product Placement
- Sponsoring Esport Teams
- Payments by brands for the use of the Esport Team
- Advertising sold as part of a sponsorship package

Out of scope

This market excludes:

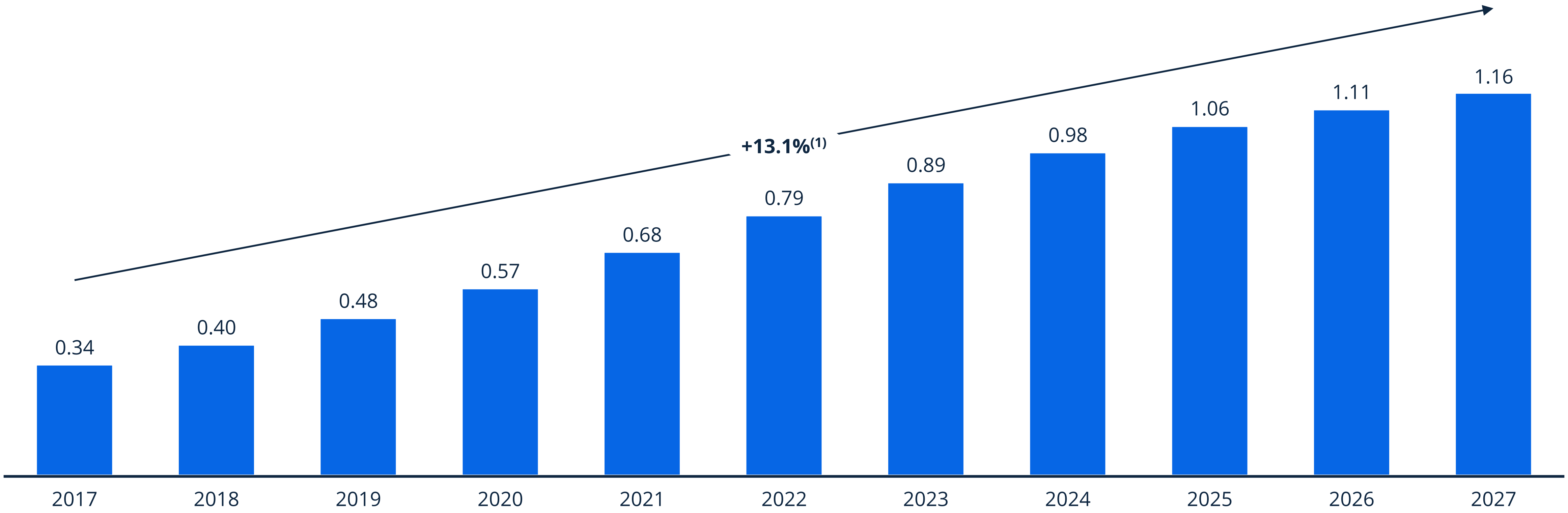
- Sponsorship outside of the Esports ecosystem
- Advertising outside of the Esports ecosystem

Sources: Market Insights 2023

Sponsorship & Advertising revenues are estimated to increase at a CAGR[1] of 13.1% from 2017 to 2027

Market Size: Global

revenue forecast in billion US$



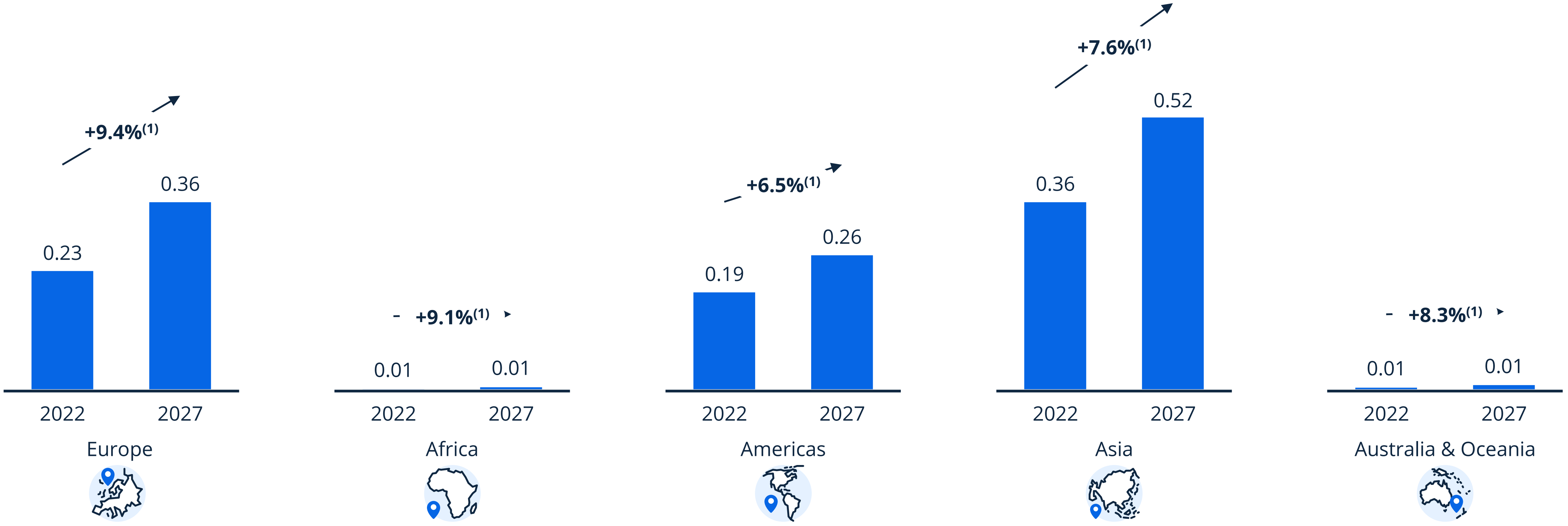
Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

With revenue of US$ 0.36 billion, Asia is the biggest market among selected regions in 2022

Market Size: Regional Comparison (1/2)

revenue forecast in billion US$

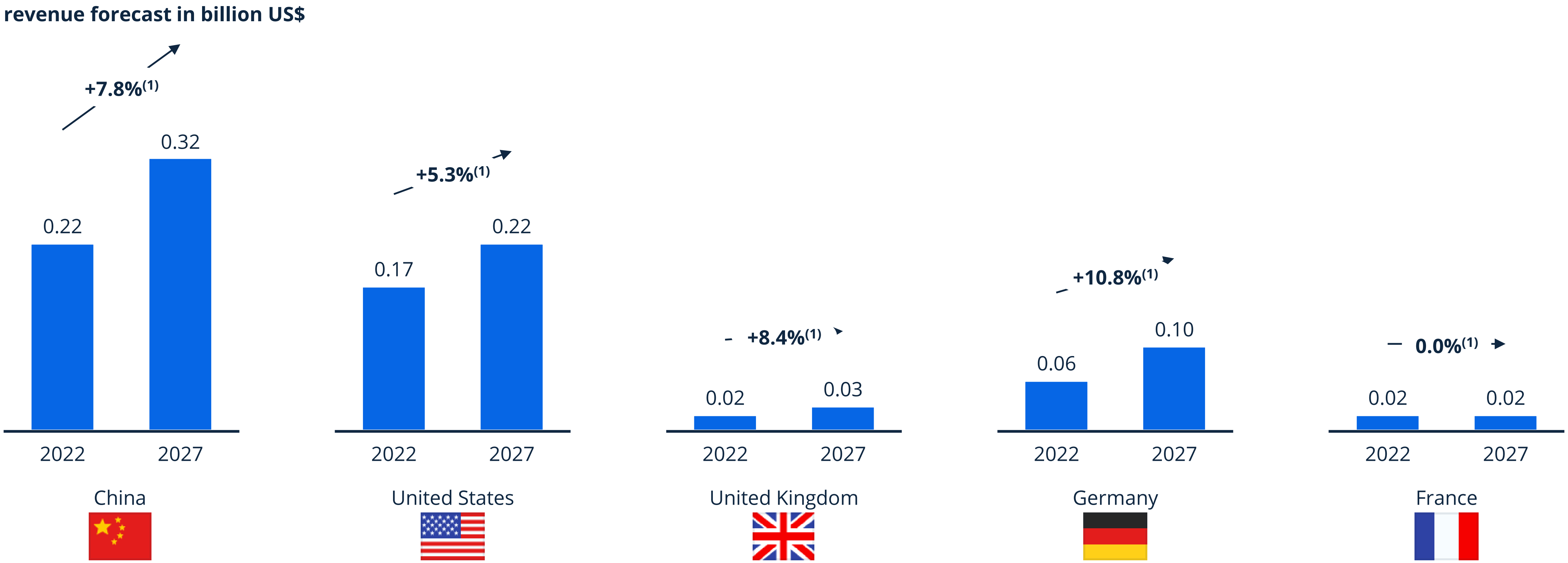


Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

With revenue of US$ 0.2 billion, China is the biggest market among selected countries in 2022

Market Size: Regional Comparison (2/2)



Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

MARKETS

Esports Merchandise & Ticketing

The Merchandise & Ticketing market is recovering after a downfall due to the COVID-19 pandemic but looking into a brighter future

Overview: Summary

Summary

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Esports enthusiasts are not only avid followers of virtual battles but also avid collectors of tangible experiences. The demand for Esports merchandise, ranging from apparel and accessories to limited-edition items, reflects fans' desire to connect with their favorite teams and players in the physical world. Additionally, attending live Esports events offers a unique sense of camaraderie and shared excitement, as fans converge to witness their idols in action, creating memorable experiences that mirror traditional sports events.

The trajectory of Merchandise and Ticketing in Esports is underscored by an ever-evolving landscape of fan engagement. Esports organizations and teams have recognized the potential of branded merchandise as a way to deepen fan loyalty and generate revenue. Limited drops, exclusive collaborations, and personalized collectibles cater to the preferences of passionate fans, creating a thriving market that transcends the digital realm. Simultaneously, Esports events have evolved into grand spectacles that attract thousands of attendees, with ticketing becoming a critical revenue stream for organizers.

The growth of Merchandise and Ticketing in Esports is rooted in the fusion of digital and physical worlds, driven by technological advancements and shifting consumer behaviors. E-commerce platforms have enabled streamlined distribution of merchandise, making it accessible to fans worldwide. The rise of influencer marketing and social media amplification has expanded the reach of Esports brands, fostering a global fan base that craves tangible connections. On the ticketing front, the allure of live events taps into the desire for shared experiences, catalyzing the growth of mega-tournaments and Esports conventions.

Sources: Market Insights 2023

Merchandise & Ticketing incorporates all products related to Esports tournaments and teams, as well as all the ticket sales

Overview: Market Definition

Market definition

Esports merchandise and ticketing encompass the sale of branded products and admission passes related to competitive video gaming events. This market segment involves the production and distribution of a wide array of items, such as apparel, accessories, collectibles, and digital goods, featuring logos, designs, and themes associated with popular Esports teams, players, and games. Additionally, ticketing pertains to the purchase of entry passes for live Esports competitions, tournaments, and fan conventions, allowing enthusiasts to witness the action in person and engage with fellow fans, players, and industry stakeholders.

Sources: Market Insights 2023

Merchandise & Ticketing accounted for 5.27% of the Esports market revenue in 2022

Overview: Key Takeaways and in scope / out of scope

Key Takeaways

Revenue in the Merchandise & Ticketing market is projected to reach US$210.60m in 2023.

Revenue is expected to show an annual growth rate (CAGR 2023-2027) of 10.61%, resulting in a projected market volume of US$315.20m by 2027.

With a projected market volume of US$78.67m in 2023, most revenue is generated in China.

In the Merchandise & Ticketing market, the number of users is expected to amount to 27.0m users by 2027.

User penetration will be 0.3% in 2023 and is expected to hit 0.3% by 2027.

The average revenue per user (ARPU) is expected to amount to US$8.43.

In scope

This market includes:

- Merchandise sales of live events
- Ticket sales of live events

Out of scope

This market excludes:

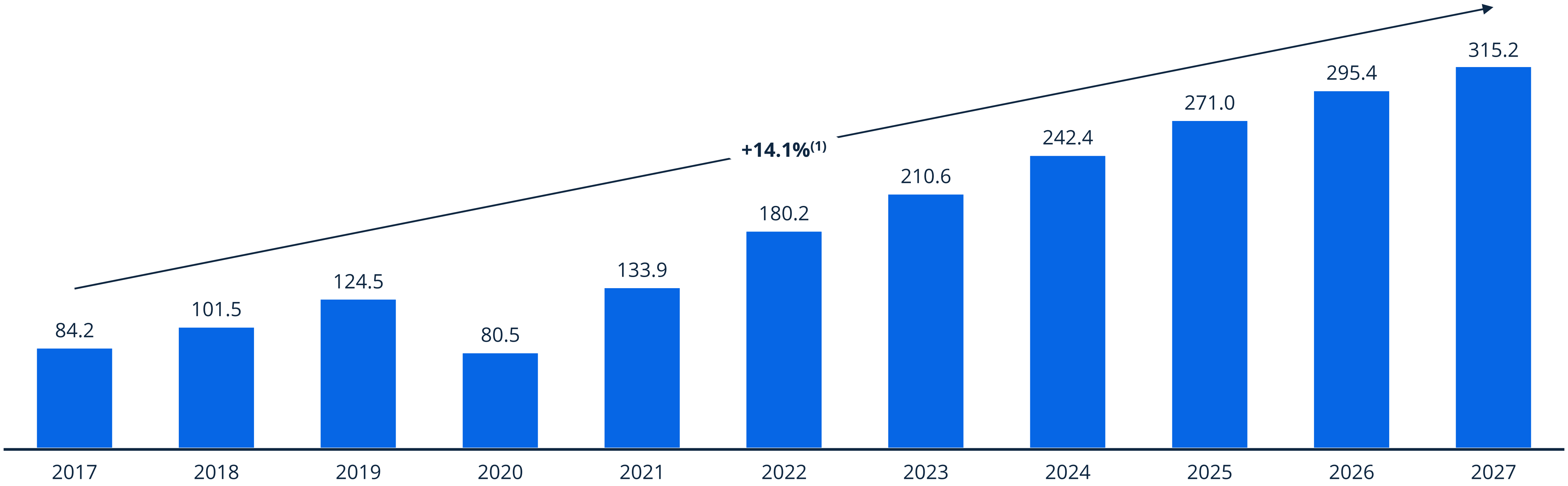
- Merchandise outside of the Esports ecosystem
- Event tickets outside of the Esports ecosystem

Sources: Market Insights 2023

Merchandise & Ticketing revenues are estimated to increase at a CAGR[(1)] of 14.1% from 2017 to 2027

Market Size: Global

revenue forecast in million US$

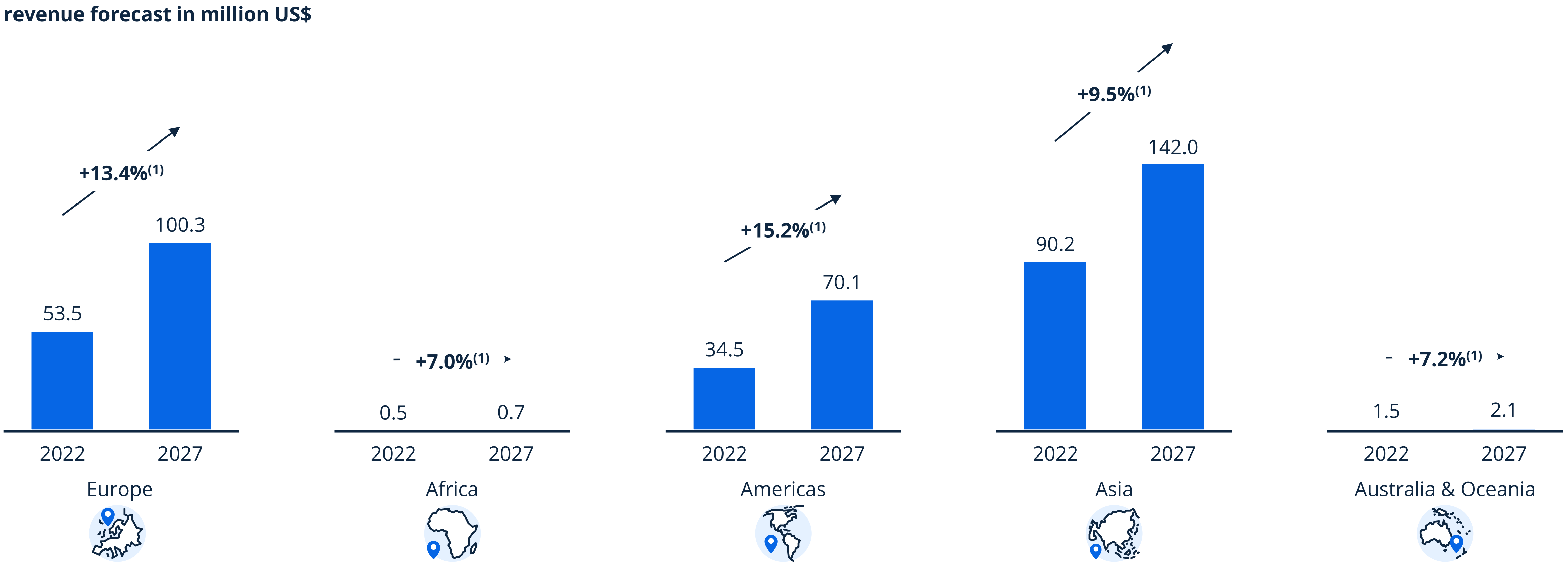


Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

With revenue of US$ 90.2 million, Asia is the biggest market among selected regions in 2022

Market Size: Regional Comparison (1/2)



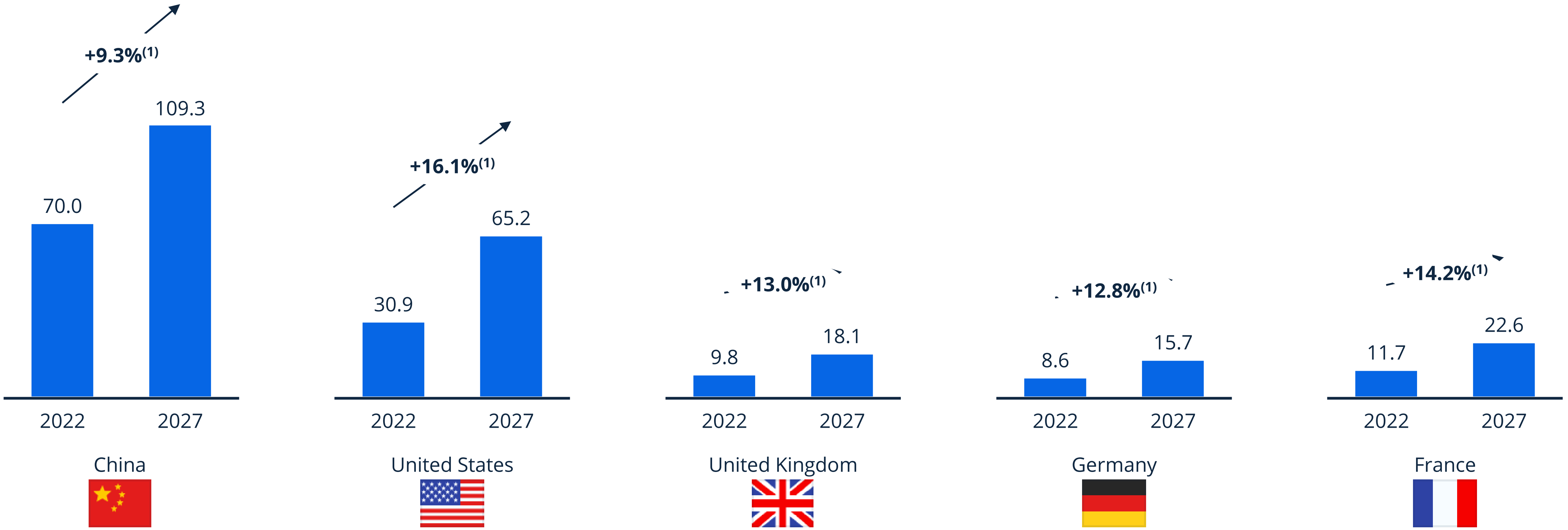
Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

With revenue of US$ 70.0 million, China is the biggest market among selected countries in 2022

Market Size: Regional Comparison (2/2)

revenue forecast in million US$



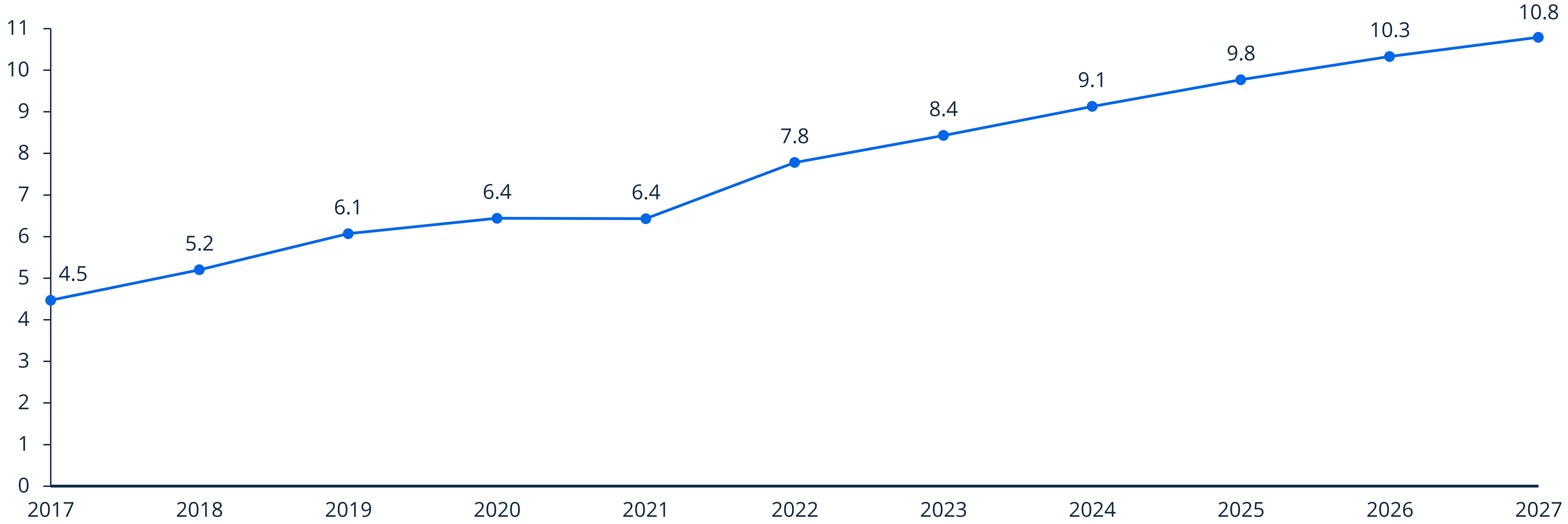
Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

Merchandise & Ticketing average revenue per user is estimated to increase from 2017 to 2027

Market Size: Global

arpu forecast in US$



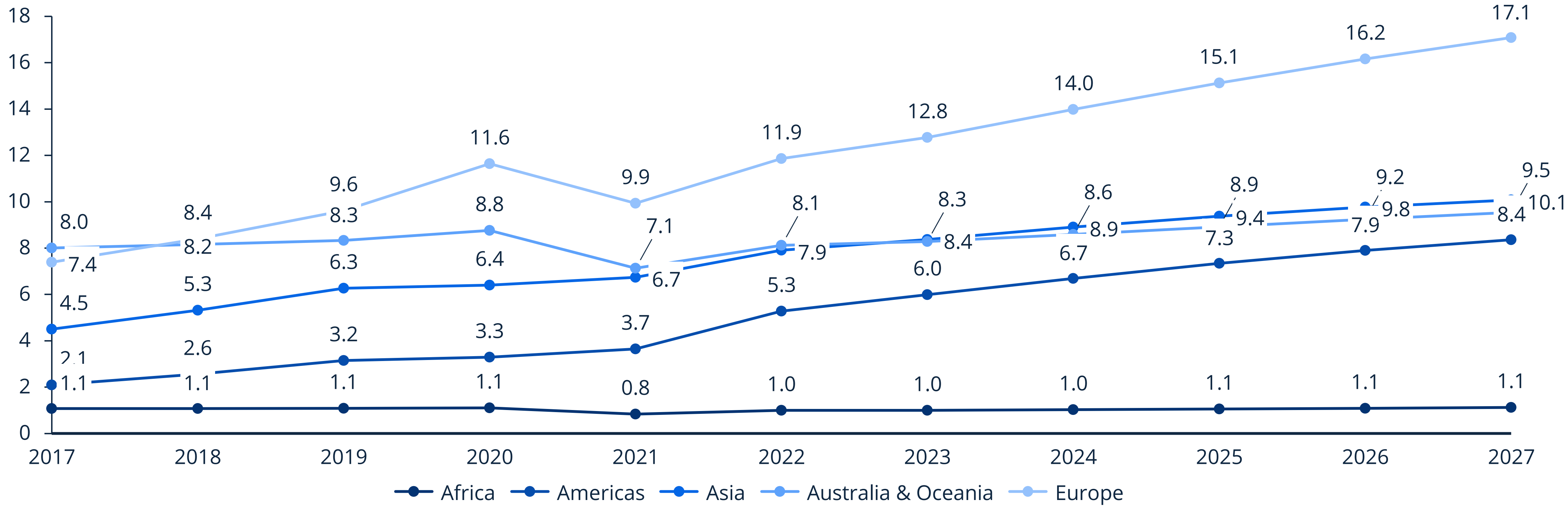
Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

Europe has the biggest value for Merchandise & Ticketing average revenue per user in 2027

Market Size: Regional Comparison (1/2)

arpu forecast in US$



Notes: (1) CAGR: Compound Annual Growth Rate

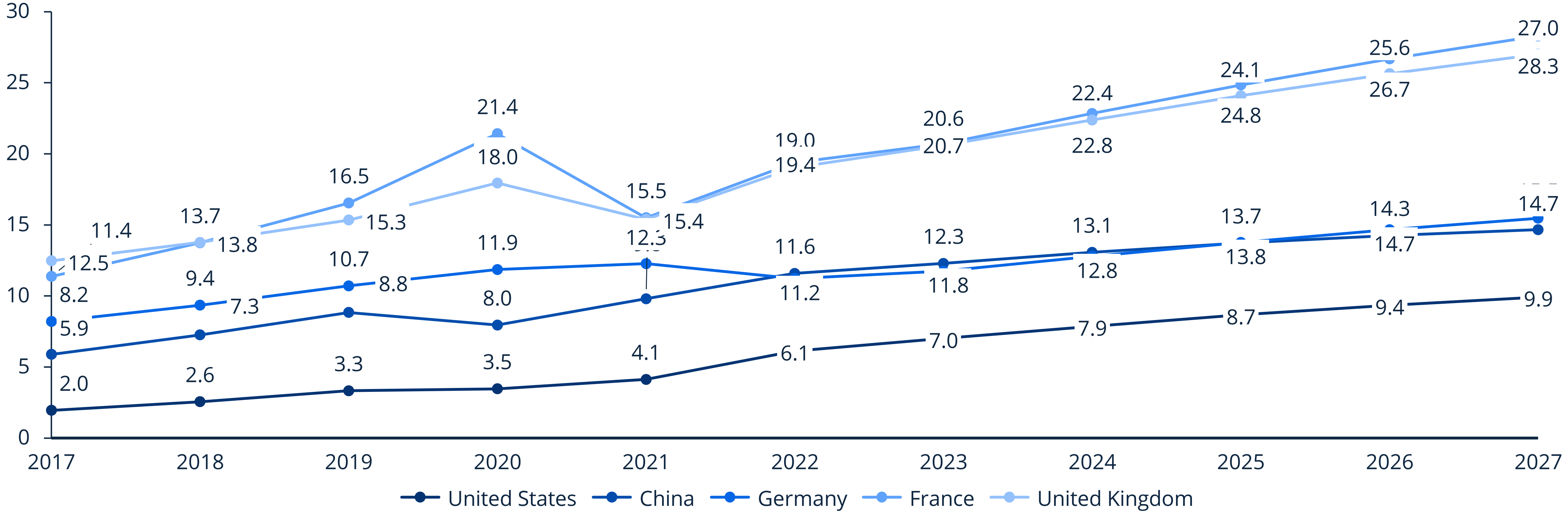
Sources: Market Insights 2023

Market Insights by statista

With average revenue per user of US$ 34.9, France spends on average the most in selected countries in 2022

Market Size: Regional Comparison (2/2)

arpu forecast in US$



Notes: (1) CAGR: Compound Annual Growth Rate

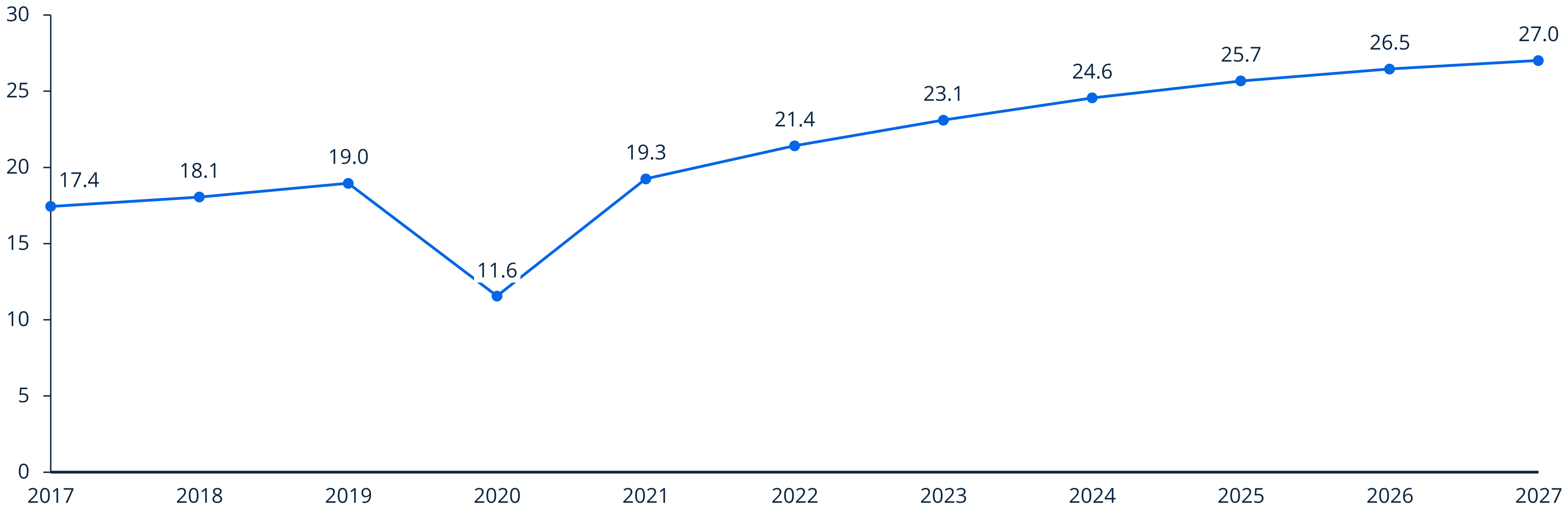
Sources: Market Insights 2023

Market Insights by statista

Merchandise & Ticketing users are estimated to increase from 2017 to 2027 after decrease due to COVID-19 pandemic

Market Size: Global

users forecast in million



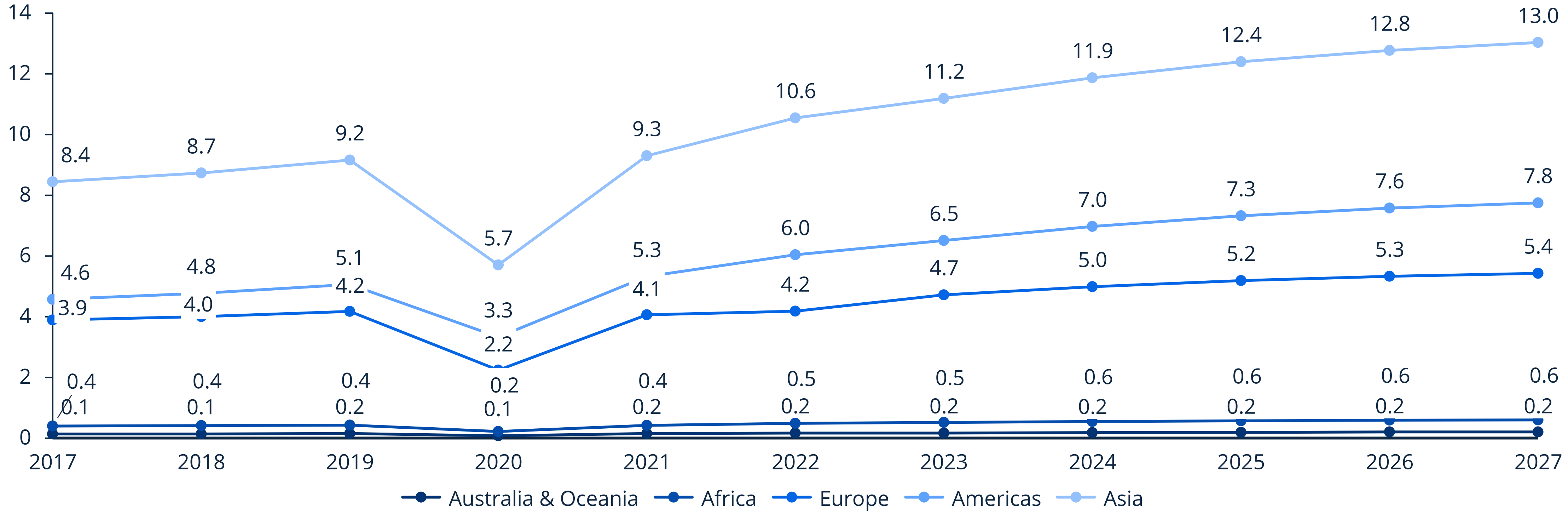
Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

Asia has the biggest number of Merchandise & Ticketing users in 2027

Market Size: Regional Comparison (1/2)

users forecast in million



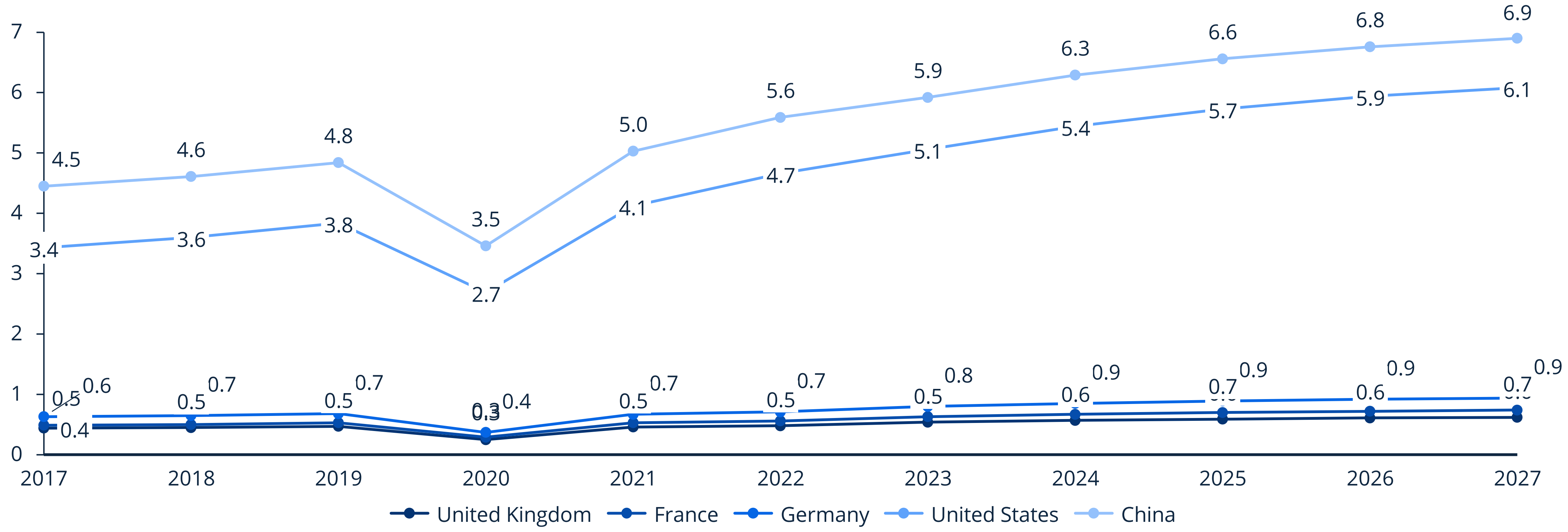
Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023

With 5.6 million users, China is the biggest market among selected countries in 2022

Market Size: Regional Comparison (2/2)

users forecast in million



Notes: (1) CAGR: Compound Annual Growth Rate

Sources: Market Insights 2023