2020

European Esports: Digital Goods & Payment Consumer Behaviour

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

<table>
<thead>
<tr>
<th>REASONS FOR PURCHASE – ESPORTS GOODS</th>
<th>ESPORTS AUDIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>The design/quality</td>
<td>44%</td>
</tr>
<tr>
<td>It's cool</td>
<td>40%</td>
</tr>
<tr>
<td>Support esports league</td>
<td>36%</td>
</tr>
<tr>
<td>Support favourite esports team</td>
<td>35%</td>
</tr>
<tr>
<td>Friends all have the merchandise</td>
<td>30%</td>
</tr>
<tr>
<td>Show off fandom</td>
<td>30%</td>
</tr>
<tr>
<td>Premium Content Passes</td>
<td>28%</td>
</tr>
<tr>
<td>Esports Physical Merchandise</td>
<td>24%</td>
</tr>
<tr>
<td>Esports Digital Merchandise</td>
<td>22%</td>
</tr>
<tr>
<td>Premium Content Passes</td>
<td>21%</td>
</tr>
</tbody>
</table>

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 process.

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%).

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%).

**EVER CANCELLED PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS**

Over half of Esports Spenders have cancelled a payment process.

47% 53%

**IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Esports Enthusiasts</th>
<th>Occasional Viewers</th>
</tr>
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<tbody>
<tr>
<td>Feels more secure</td>
<td>46%</td>
<td>49%</td>
</tr>
<tr>
<td>Easy-to-use</td>
<td>38%</td>
<td>41%</td>
</tr>
<tr>
<td>Convenience</td>
<td>26%</td>
<td>27%</td>
</tr>
<tr>
<td>Speed of transaction</td>
<td>25%</td>
<td>29%</td>
</tr>
<tr>
<td>My information is saved</td>
<td>16%</td>
<td>11%</td>
</tr>
</tbody>
</table>

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

- Privacy concerns - personal data: 27%
- Limited / insufficient options: 22%
- Lack of trust in site: 22%
- Unhappy with recurring payments: 20%
- Lack of product information: 19%
- Unwanted registration: 19%
- Unhappy with final pricing: 16%
- Hidden or unexpected charges: 16%
- Privacy concerns - payment: 16%
- Slow or unresponsive website: 15%
- Poor product reviews: 15%
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 Physical Merchandise
- Esports Digital Merchandise
- Premium Content Passes

<table>
<thead>
<tr>
<th>Reason</th>
<th>Esports Physical Merchandise</th>
<th>Esports Digital Merchandise</th>
<th>Premium Content Passes</th>
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<td>13%</td>
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<tr>
<td>It’s cool</td>
<td>32%</td>
<td>25%</td>
<td>15%</td>
</tr>
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**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

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

62% of Esports Spenders have cancelled a payment process

62% of Esports Digital Spendars have cancelled a payment process

Reasons for cancelling payment process |

Esports Digital Spendars 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 Spendars as reasons for cancelling a payment process.

Important features of payment provider |

Esports Enthusiasts & Occasional Viewers

Feels more secure

- Esports Enthusiasts: 45%
- Occasional Viewers: 40%

Convenience

- Esports Enthusiasts: 43%
- Occasional Viewers: 44%

Speed of transaction

- Esports Enthusiasts: 28%
- Occasional Viewers: 26%

Easy-to-use

- Esports Enthusiasts: 25%
- Occasional Viewers: 28%

Familiarity with method

- Esports Enthusiasts: 23%
- Occasional Viewers: 22%
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 Physical Merchandise**
- **Esports Digital Merchandise**
- **Premium Content Passes**

**Esports Goods**

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

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

- 44% of Esports Spenders have cancelled a payment process
- 56% of Esports Spenders have not cancelled a payment process

**IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS**

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<tr>
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<tr>
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<td>35%</td>
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</tr>
<tr>
<td>Convenience</td>
<td>28%</td>
<td>33%</td>
</tr>
<tr>
<td>Familiarity with method</td>
<td>18%</td>
<td>18%</td>
</tr>
</tbody>
</table>

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

- Hidden or unexpected charges: 31%
- Unhappy with final pricing: 28%
- Slow or unresponsive website: 20%
- Limited / insufficient options: 20%
- Lack of product information: 16%
- Privacy concerns - personal data: 16%
- Lack of trust in site: 14%
- Unhappy with recurring payments: 13%
- Poor product reviews: 12%
- Unwanted registration: 11%
- Privacy concerns - payment: 9%

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.

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

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**

Almost 1 in 2 Esports Spenders have cancelled a payment process

**IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS**

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<tr>
<th>Feature</th>
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<tr>
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<td>45%</td>
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<td>35%</td>
</tr>
<tr>
<td>Speed of transaction</td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td>Convenience</td>
<td>31%</td>
<td>23%</td>
</tr>
<tr>
<td>Familiarity with method</td>
<td>12%</td>
<td>16%</td>
</tr>
</tbody>
</table>

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

- Lack of product information: 26%
- Slow / unresponsive website: 23%
- Hidden / unexpected charges: 23%
- Lack of trust in site: 21%
- Poor product reviews: 21%
- Privacy concerns - payment: 20%
- Privacy concerns - personal data: 16%
- Unwanted registration: 16%
- Unhappy - final pricing: 15%
- Limited / insufficient options: 14%
- Unhappy - recurring payments: 13%

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**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Physical</th>
<th>Digital</th>
<th>Content Passes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality and/or design</td>
<td>49%</td>
<td>43%</td>
<td></td>
</tr>
<tr>
<td>It’s cool</td>
<td>39%</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>Support esports league</td>
<td>28%</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>Support favourite esports team</td>
<td>24%</td>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>Friends all have the content or merchandise</td>
<td>18% 17%</td>
<td>15%</td>
<td>14% 16%</td>
</tr>
<tr>
<td>Show off fandom</td>
<td>14%</td>
<td>16%</td>
<td>7%</td>
</tr>
</tbody>
</table>

**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

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 Spendrs 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 Spendrs

41% of Esports Spendrs have cancelled a payment process

Important Features of Payment Provider | Esports Enthusiasts & Occasional Viewers

<table>
<thead>
<tr>
<th>Feature</th>
<th>Esports Enthusiasts</th>
<th>Occasional Viewers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feels more secure</td>
<td>41%</td>
<td>49%</td>
</tr>
<tr>
<td>Easy-to-use</td>
<td>40%</td>
<td>38%</td>
</tr>
<tr>
<td>Convenience</td>
<td>34%</td>
<td>32%</td>
</tr>
<tr>
<td>Speed of transaction</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>Familiarity with method</td>
<td>15%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Reasons for Canceling Payment Process | Esports Digital Spendrs

Lack of trust in site: 31%
Poor product reviews: 24%
Hidden or unexpected charges: 24%
Privacy concerns - personal data: 19%
Privacy concerns - payment: 17%
Limited / insufficient options: 17%
Unhappy with recurring payments: 17%
Unhappy with final pricing: 16%
Unwanted registration: 14%
Slow or unresponsive website: 12%

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%).
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**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Physical</th>
<th>Digital</th>
<th>Premium</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality and/or design</td>
<td>37%</td>
<td>38%</td>
<td>27%</td>
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<td>23%</td>
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<td>Support esports league</td>
<td>25%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Friends all have the content or merchandise</td>
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<td>11%</td>
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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

Almost 1 in 2 Esports Spenders have cancelled a payment process

IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS

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

- Slow or unresponsive website: 25%
- Poor product reviews: 23%
- Lack of trust in site: 20%
- Hidden or unexpected charges: 19%
- Privacy concerns - personal data: 17%
- Privacy concerns - payment: 16%
- Limited / insufficient options: 16%
- Unwanted registration: 16%
- Unhappy with final pricing: 13%
- Lack of product information: 13%
- Unhappy with recurring payments: 6%

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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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%).

Important Features of Payment Provider | Esports Enthusiasts & Occasional Viewers

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Reasons for Cancelling Payment Process | Esports Digital Spenders Who Have Cancelled a Payment Process

- Unhappy with final pricing: 22%
- Poor product reviews: 21%
- Slow or unresponsive website: 20%
- Hidden or unexpected charges: 19%
- Lack of product information: 19%
- Limited / insufficient options: 19%
- Unwanted registration: 17%
- Unhappy with recurring payments: 16%
- Privacy concerns - payment: 15%
- Privacy concerns - personal data: 13%
- Lack of trust in site: 12%

Almost 1 in 2 Esports Spenders 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**

- **It’s cool**: 39% for digital, 35% for physical
- **Quality and/or design**: 34% for digital, 19% for physical
- **Support esports league**: 27% for digital, 26% for physical
- **Support favourite esports team**: 27% for digital, 21% for physical
- **Show off fandom**: 26% for digital, 18% for physical
- **Friends all have the content or merchandise**: 20% for digital, 9% for physical

**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

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

3 in 5 Esports Spenders have cancelled a payment process

60% 40%

IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS

<table>
<thead>
<tr>
<th>Feature</th>
<th>Esports Enthusiasts</th>
<th>Occasional Viewers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easy-to-use</td>
<td>52%</td>
<td>59%</td>
</tr>
<tr>
<td>Feels more secure</td>
<td>48%</td>
<td>57%</td>
</tr>
<tr>
<td>Speed of transaction</td>
<td>37%</td>
<td>31%</td>
</tr>
<tr>
<td>Familiarity with method</td>
<td>20%</td>
<td>13%</td>
</tr>
<tr>
<td>Convenience</td>
<td>10%</td>
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REASONS FOR CANCELING PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS WHO HAVE CANCELLED A PAYMENT PROCESS

- Unhappy with final pricing: 28%
- Lack of trust in site: 23%
- Poor product reviews: 20%
- Slow or unresponsive website: 19%
- Hidden or unexpected charges: 19%
- Lack of product information: 18%
- Unwanted registration: 17%
- Privacy concerns - payment: 17%
- Unhappy with recurring payments: 9%
- Privacy concerns - personal data: 8%
- Limited / insufficient options: 7%

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.
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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Digital</th>
<th>Physical</th>
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<tbody>
<tr>
<td>Quality and/or design</td>
<td>40%</td>
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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

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%).

<table>
<thead>
<tr>
<th>Important Features of Payment Provider</th>
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<tr>
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**EVER CANCELLED PAYMENT PROCESS | ESPORTS DIGITAL SPENDERS**

Almost 3 in 4 Esports Spenders have cancelled a payment process

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

- Slow or unresponsive website: 29%
- Hidden or unexpected charges: 24%
- Lack of trust in site: 19%
- Unhappy with final pricing: 19%
- Limited / insufficient options: 18%
- Unhappy with recurring payments: 18%
- Lack of product information: 15%
- Privacy concerns - payment: 13%
- Unwanted registration: 13%
- Poor product reviews: 13%
- Privacy concerns - personal data: 11%

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.

REASONS FOR PURCHASE – ESPORTS GOODS | ESPORTS AUDIENCE

- **Support favourite esports team**: 40%
- **Support esports league**: 32%
- **The design/quality**: 27%
- **It’s cool**: 22%
- **Show off fandom**: 21%
- **Friends all have the merchandise**: 9%
- **Premium Content Passes**: 4%

**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

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**

Almost 1 in 2 Esports Spenders have cancelled a payment process.

**IMPORTANT FEATURES OF PAYMENT PROVIDER | ESPORTS ENTHUSIASTS & OCCASIONAL VIEWERS**

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

- Hidden or unexpected charges: 29%
- Unhappy with final pricing: 29%
- Slow or unresponsive website: 27%
- Limited / insufficient options: 22%
- Unwanted registration: 21%
- Privacy concerns - payment: 18%
- Unhappy with recurring payments: 18%
- Privacy concerns - personal data: 16%
- Lack of trust in site: 14%
- Poor product reviews: 12%
- Lack of product information: 11%

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!