

The background image shows a vast esports arena filled with a large crowd. The seating is divided into sections, with the left side illuminated in red and the right side in blue. At the front of the arena, there is a stage with several large vertical and horizontal screens. The screens display various images, including game footage and portraits of players. The overall atmosphere is vibrant and high-energy.

E-SPORTS

MARKET OVERVIEW

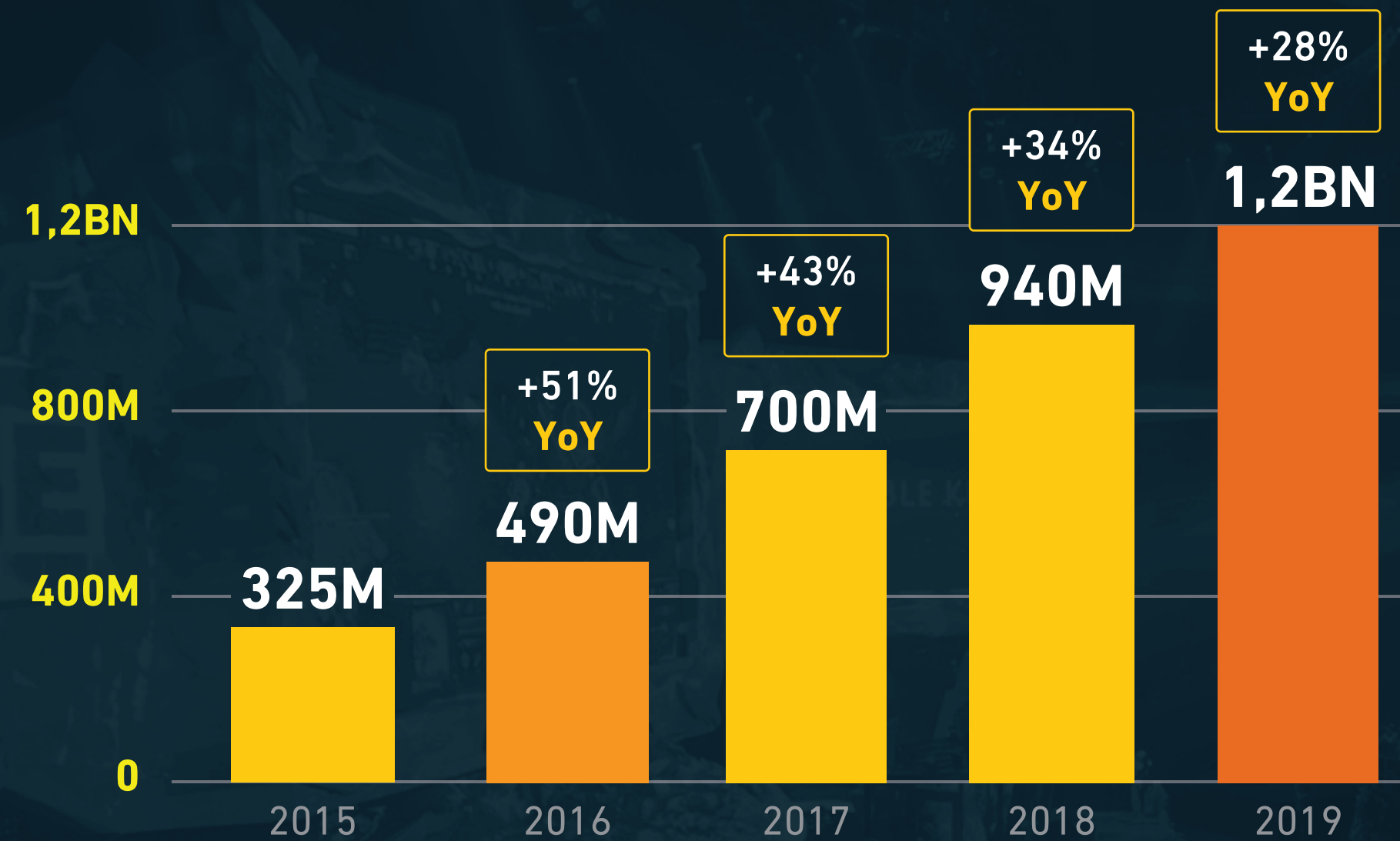


GENERAL OVERVIEW

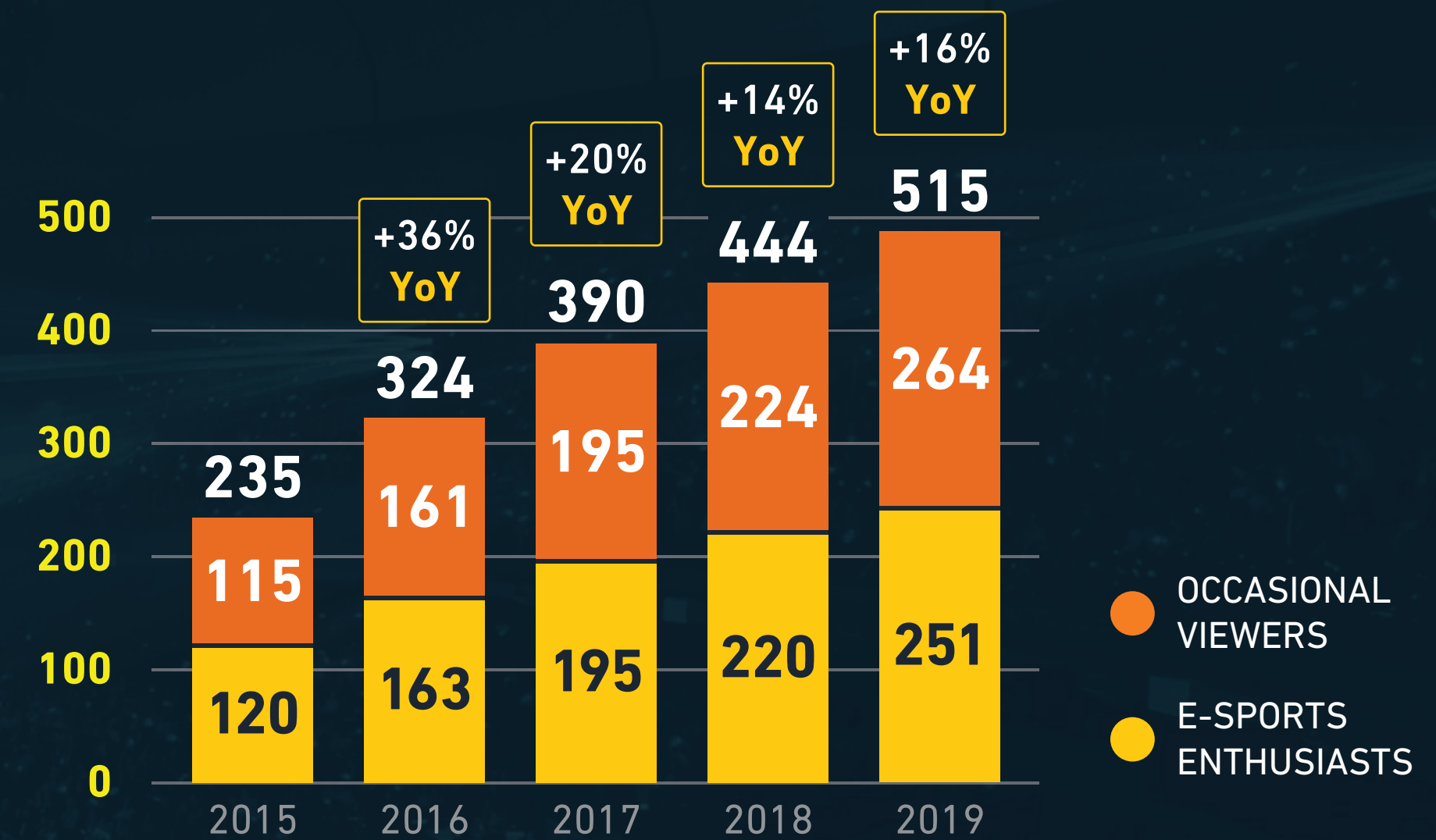
E-SPORTS MARKET

STRONG CONSUMER MARKET WITH UNTAPPED POTENTIAL

E-SPORTS REVENUE, \$



E-SPORTS AUDIENCE, M



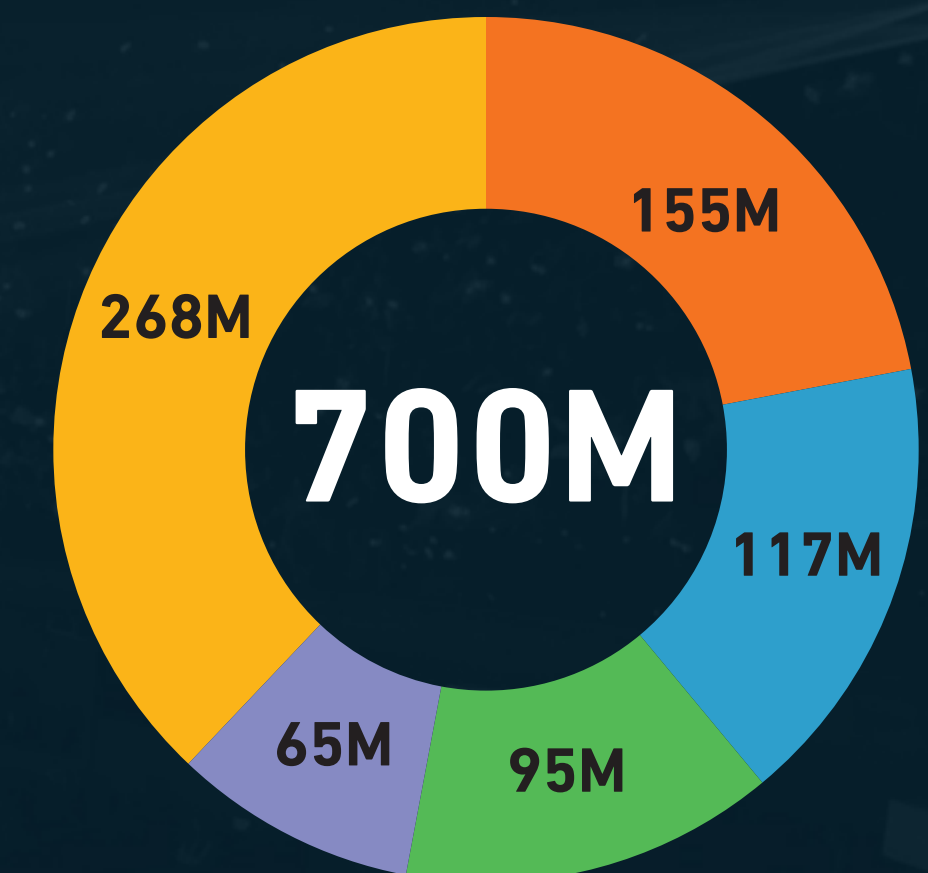
ARPU GROWTH



SPLIT BY REGION AND CATEGORY



REVENUE PER CATEGORY, \$, 2017



- SPONSORSHIP
- ADVERTISING
- GAME PUBLISHER FEES
- MEDIA RIGHTS
- MERCHANDISE & TICKETS

E-SPORTS ECO-SYSTEM

GAME DEVELOPERS & PUBLISHERS



COMPANIES WHICH DEVELOP, PUBLISH
AND SUPPORT E-SPORTS GAMES

TEAMS AND PLAYERS



GROUP OF PROFESSIONAL GAMERS UNITED UNDER ONE BRAND. EACH
BRAND CAN HAVE SEVERAL TEAMS IN MULTIPLE GAME TITLES

CHANNELS



BROADCASTING PLATFORMS THAT ALLOW
FANS TO WATCH LIVE E-SPORTS ACTIONS

EVENTS & LEAGUES



ORGANIZATIONS WHICH CREATE AND
HOLD ONLINE/OFFLINE TOURNAMENTS

WHY E-SPORTS?



GAME DEVELOPERS

GAME DEVELOPERS ARE MAKING
E-SPORTS #1 MARKETING TOOL



SPORTS CLUBS

SPORTS CLUBS AND OWNERS BUYOUT
E-SPORTS TEAMS BRANDS OR CREATE
E-SPORTS DIVISIONS

16\$

ARPU

ARPU IN E-SPORTS WILL GROW 8 TIMES
BIGGER IN UPCOMING 10 YEARS

2\$

10 YEARS

turner

MATV

ESPN

TV CHANNELS

MAJOR TV CHANNELS START TO
BROADCASTING E-SPORTS LEAGUES
AND TOURNAMENTS

E-SPORTS AUDIENCE



390M

TOTAL AUDIENCE

195M

OCCASIONAL VIEWERS

195M

ENTHUSIASTS



16-36 YRS

85% OF ENTHUSIASTS

85%

MALES

AUDIENCE PROFILE (US)



iPhone

42%

owns an iPhone

vs 38% of online population



20%

streams via Twitch

vs 3% of gamers



Spotify

35%

has subscription

vs 13% of online population



22%

watches

vs 13% of online population



NVIDIA

30%

has very positive brand attitude

vs 19% of gamers



58%

has very positive brand attitude

vs 42% of gamers



Google Play

46%

uses Google Play

vs 44% of online population

SAMSUNG

35%

owns a Samsung phone

vs 31% of online population



52%

has subscription

vs 29% of online population

E-SPORTS TALENTS AS OPINION LEADERS

**WHEN IT COMES TO BUYING
PRODUCTS OR SERVICES E-SPORTS
PLAYERS ARE ROLE MODELS FOR
MILLIONS OF ADMIRERS**



72%
fans

WANT TO EXPLORE TEAMS
PARTNERS PRODUCTS AND
SERVICES

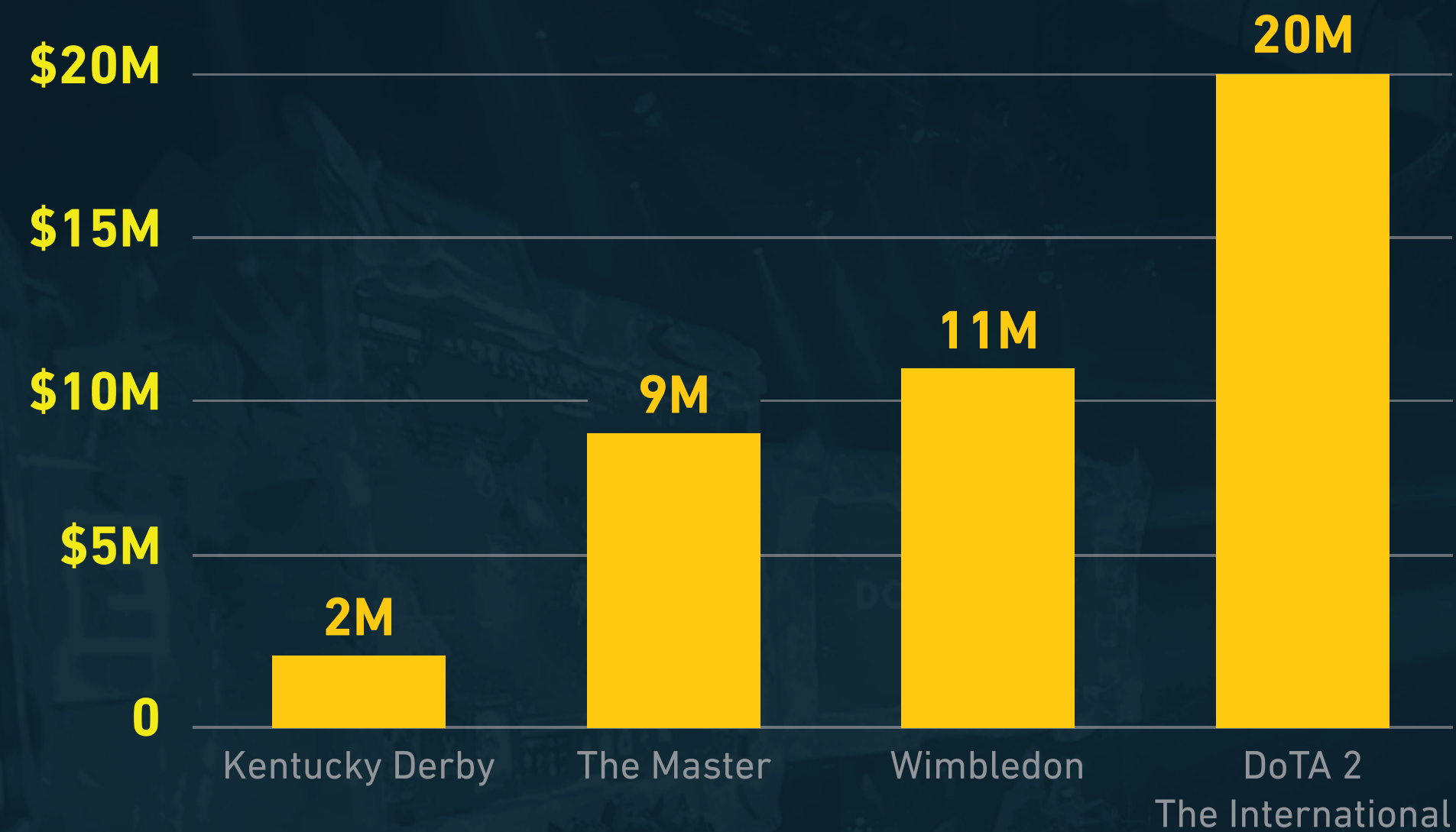


65%
fans

**MAKE PURCHASING
DECISIONS** BASED DIRECTLY
ON SPONSORSHIP BRAND
EXPOSURE

SPORTS VS E-SPORTS

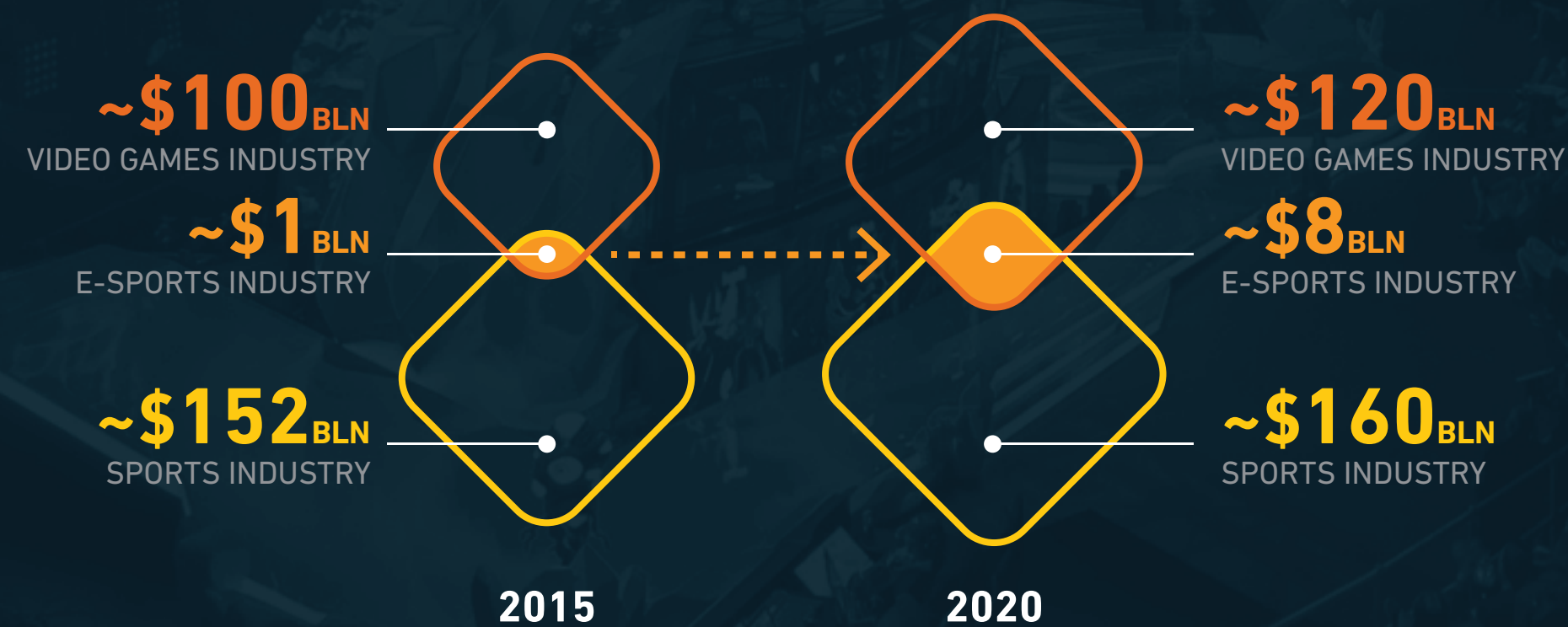
NOTEABLE PRIZE MONEY IN 2015



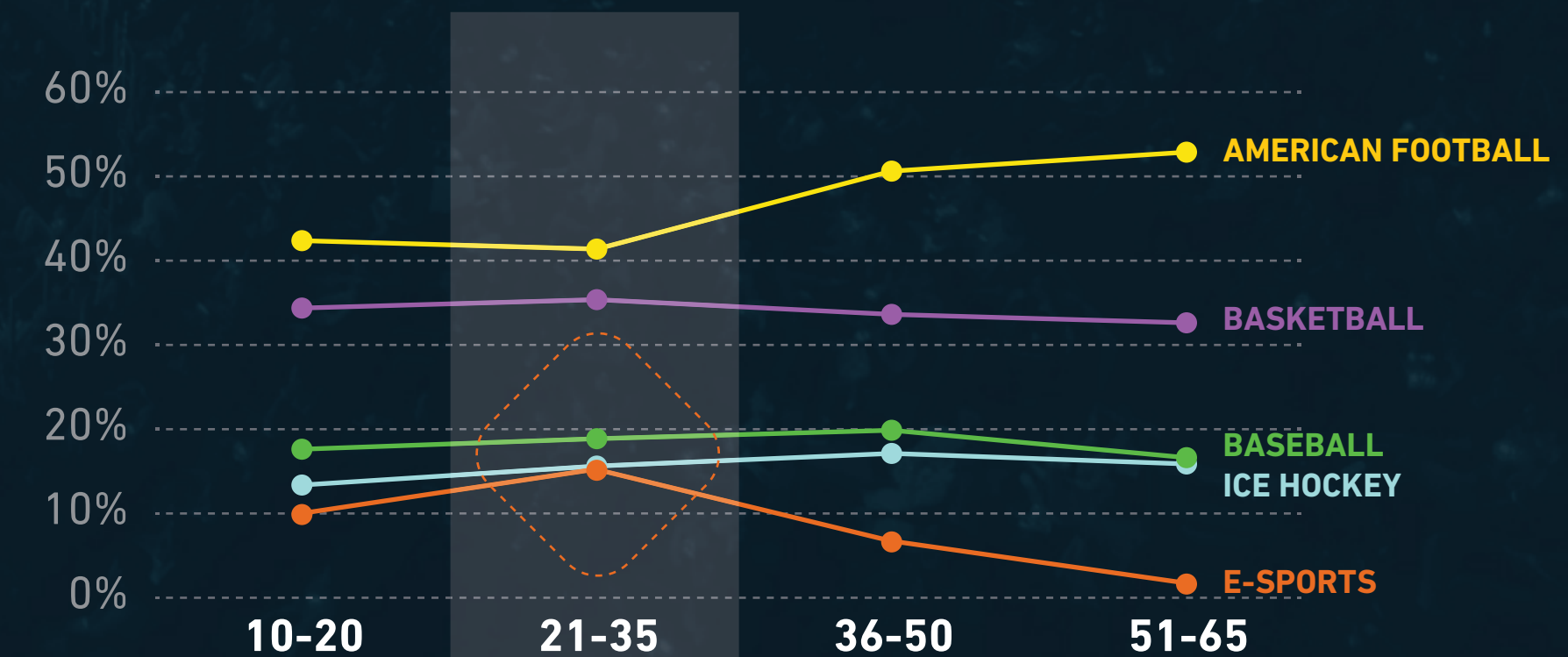
MILLION VIEWERS IN 2015



MARKET GROWTH



POPULARITY OF (E) SPORTS BY AGES**



* DATA SOURCES - NEWZOO RESEARCHES; ESFORCE ESTIMATION; OPEN SOURCES DATA (TOURNAMENTS, LEAGUES)

** US

BRANDS

WORLD TOP BRANDS ARE ALREADY IN E-SPORTS

MORE AND MORE NON-ENDEMIC BRANDS ARE COMING INTO E-SPORTS EVERY YEAR

ENDEMIC





NON-ENDEMIC CASES



NON-ENDEMIC



TOP E-SPORTS GAMES

GAME	MONTHLY PLAYERS	TOTAL PLAYERS	TOTAL HOURS WATCHED	SHARE E-SPORTS
	100M	N/A	100M	28%
	9,5M	28M	50M	46%
	11M	102M	37M	37%
	N/A	70M	36M	12%
	N/A	N/A	5M	43%
	N/A	30M	22M	7%
	N/A	20M	5M	25%

The background is a dark, monochromatic illustration of an esports arena. It shows a large, curved stadium filled with spectators. In the foreground, there's a stage area with a large screen displaying the text 'DOUBLE KILL'. The overall aesthetic is futuristic and high-tech, with a focus on the scale and atmosphere of professional esports events.

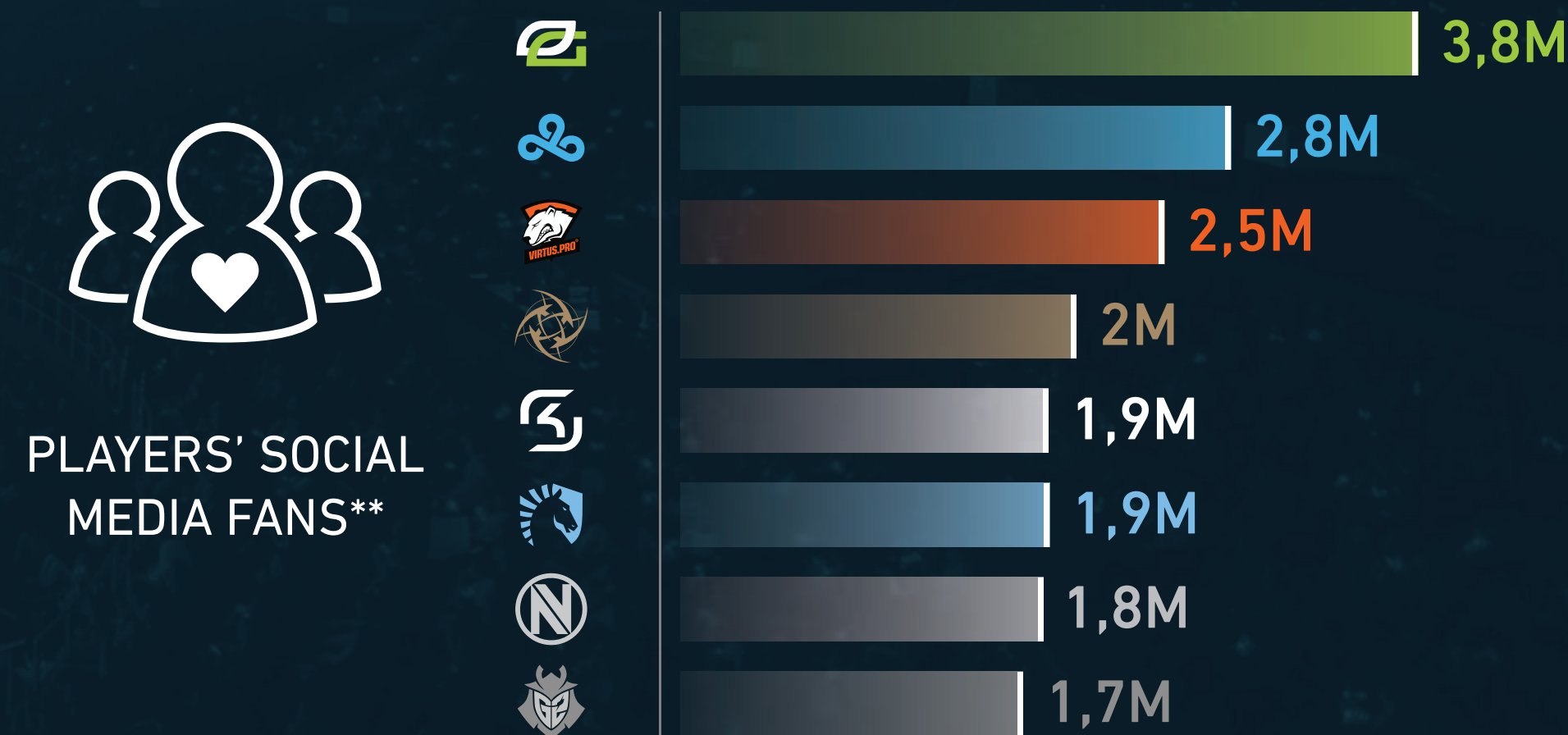
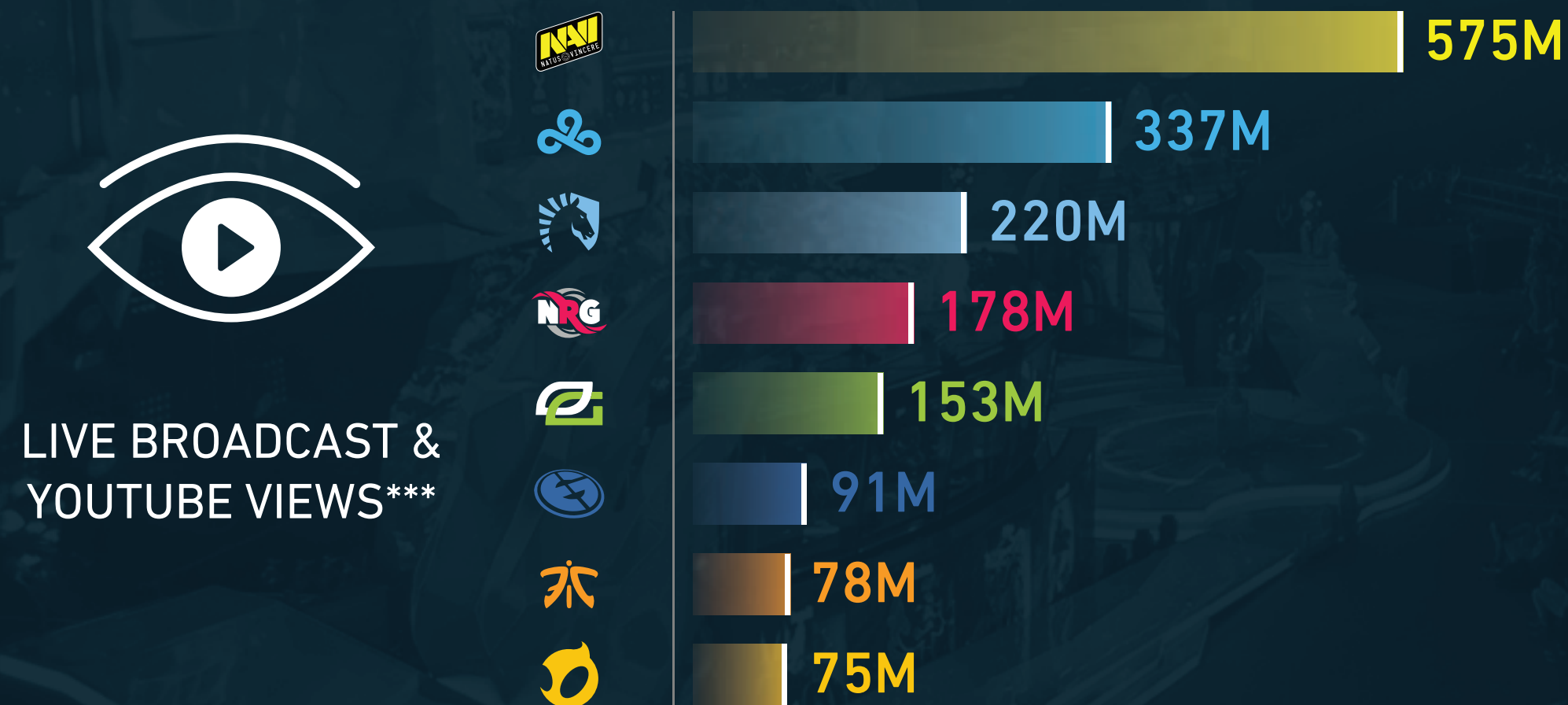
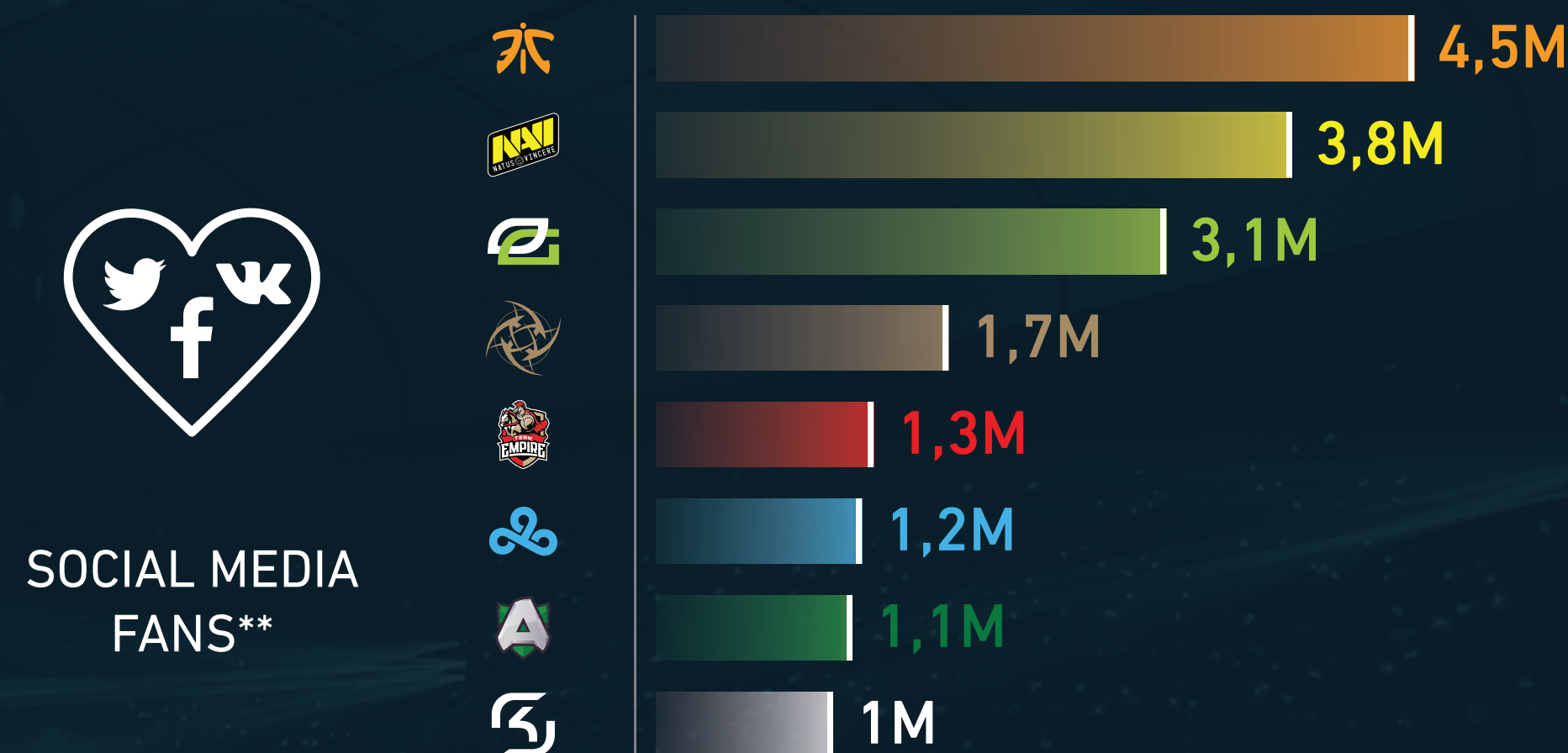
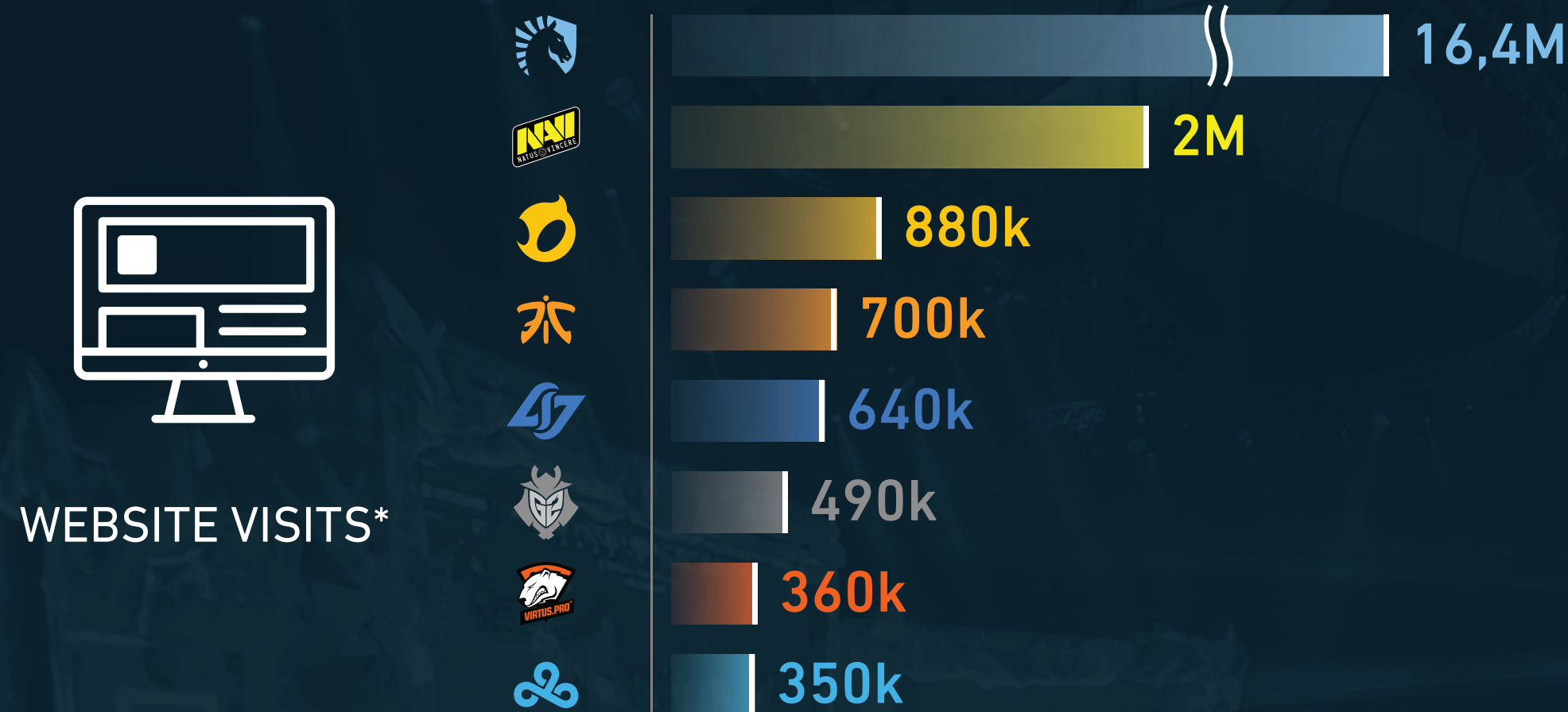
E-SPORTS TEAMS OVERVIEW

OVERVIEW

100+ PROFESSIONAL TEAMS ON E-SPORTS MARKET



TOP E-SPORTS TEAMS



PRIZE MONEY WON **



\$15,5M



\$7,3M



\$6,3M



\$5,2M



\$5,1M

*AVERAGE BASED ON LAST 3 MONTHS **TOTAL ***ALL CHANNELS, ALL TIME TOTAL

TOP E-SPORTS PLAYERS

E-SPORTS PLAYERS ARE TRENDSETTERS FOR MILLIONS OF FANS

TOP PLAYERS FANBASE



Bjergsen (Team SoloMid)

pashaBiceps (Virtus Pro)

scumper (OpTic Gaming)

brTT (RED Canids)

Faker (SK Telecom T1)

xPeke (Origen)

Dendi (Natus Vincere)

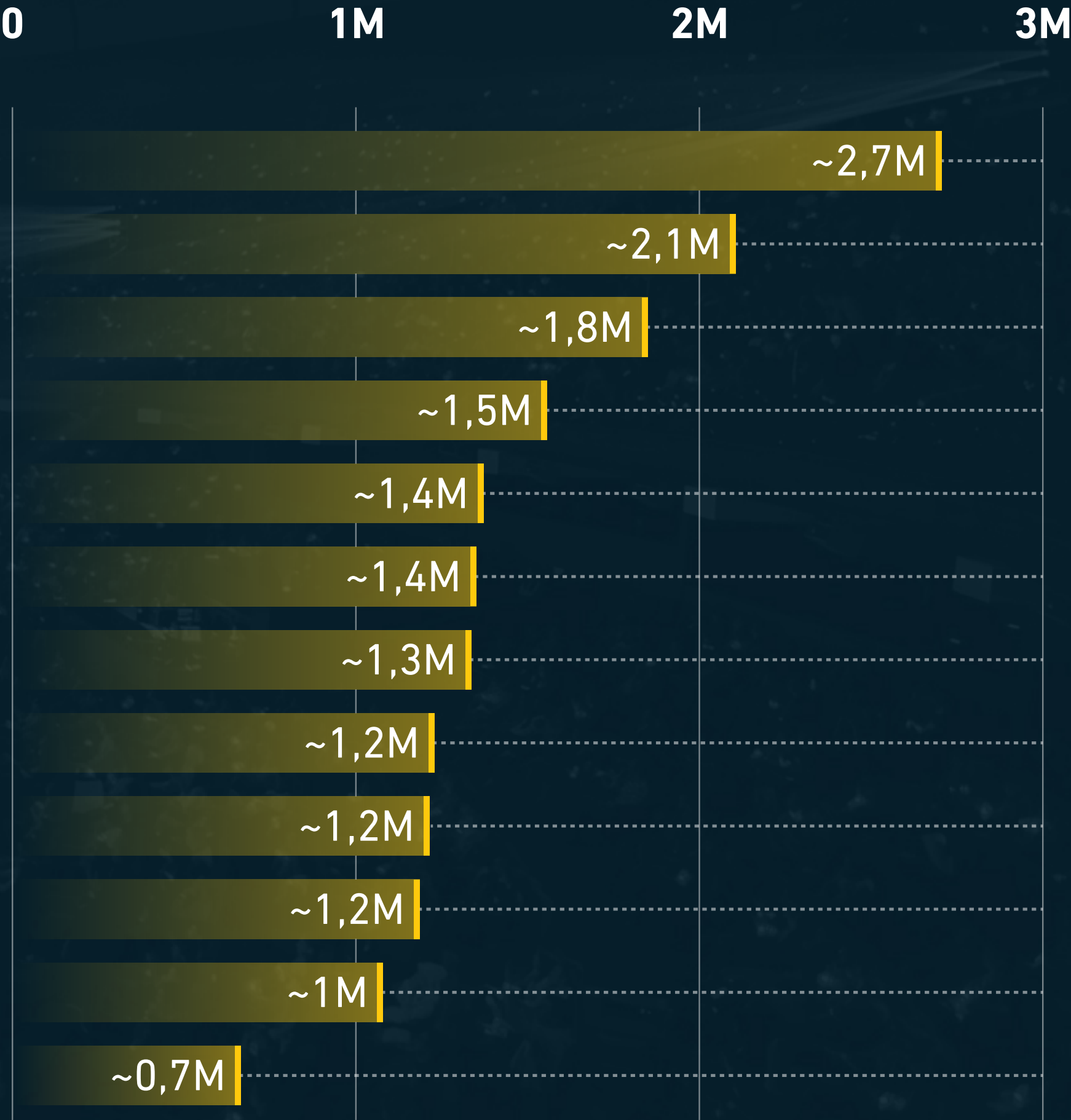
kami (paiN Gaming)

GeT_RiGhT (Ninjas in Pyjamas)

Rekkles (Fnatic)

FalleN (SK Gaming)

s1mple (Natus Vincere)

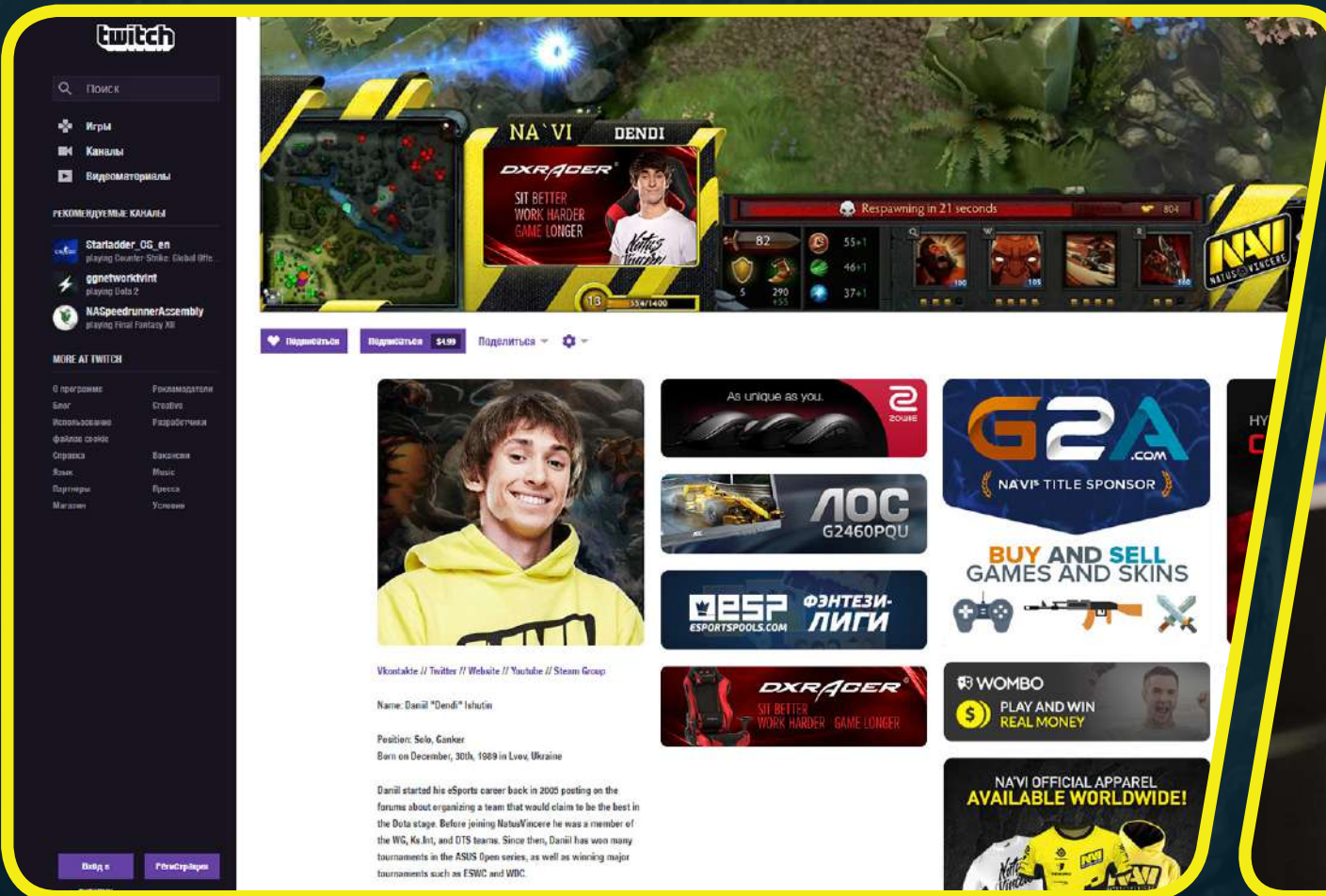
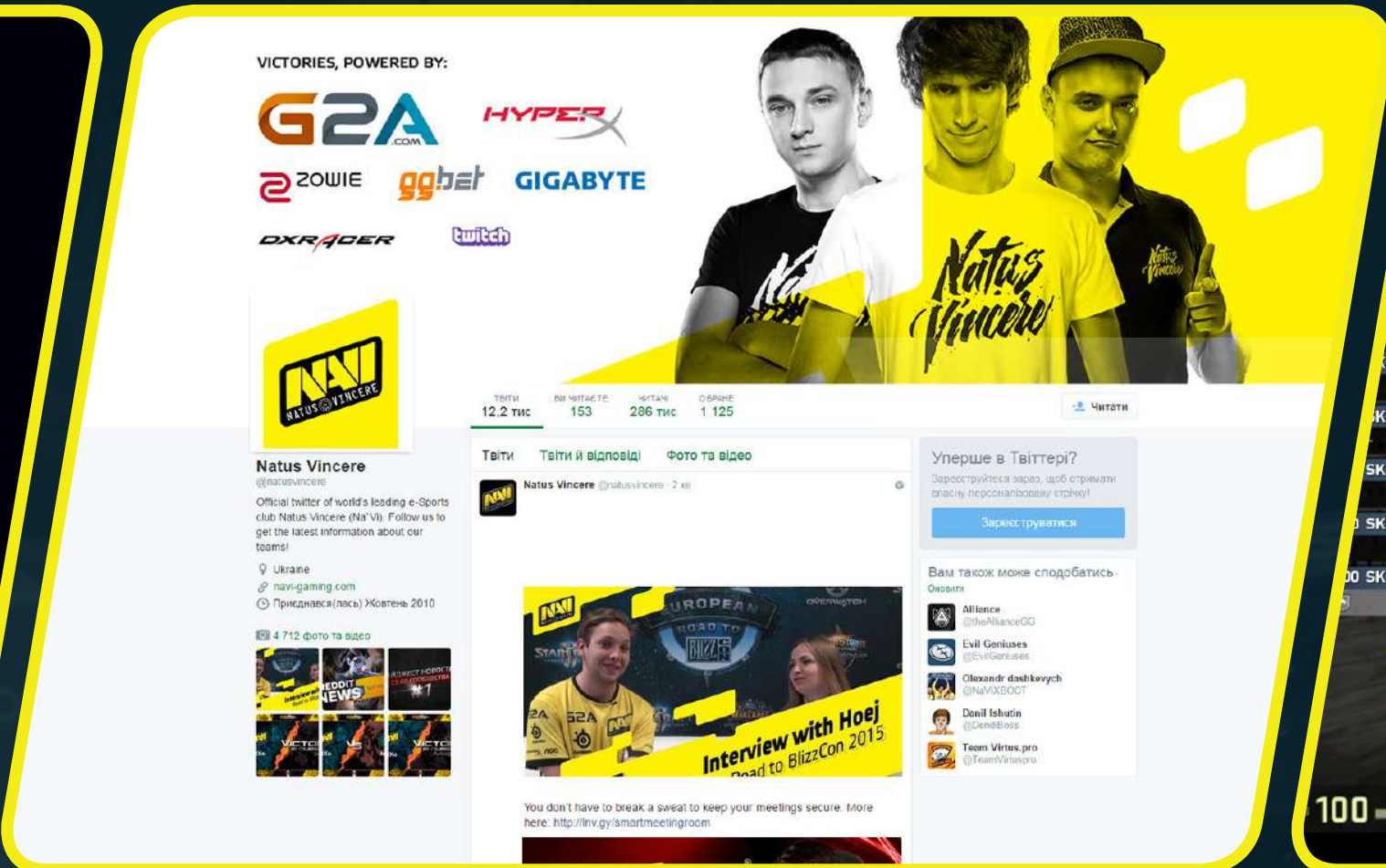


TEAMS SPONSORSHIP PROMOTION KIT



SPONSORSHIP PACKAGE PRICE RANGE \$150K - \$1M

TEAMS SPONSORSHIP PROMOTION KIT

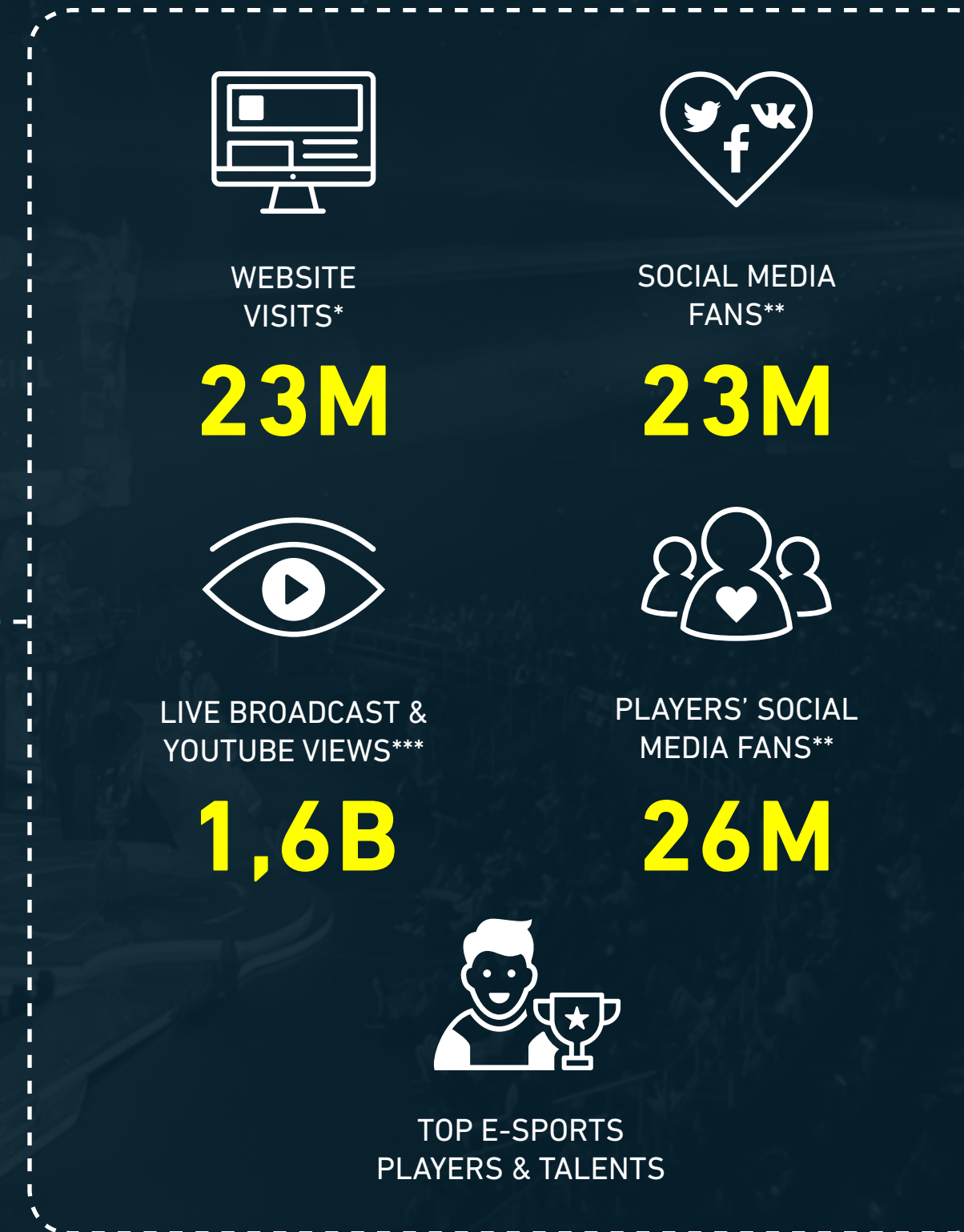


TEAMS EVALUATION

21 TOP TEAMS



REACH



VALUE



*AVERAGE BASED ON LAST 3 MONTHS

**TOTAL

*** ALL CHANNELS, ALL TIME TOTAL



E-SPORTS TOURNAMENTS OVERVIEW

OVERVIEW

**MAJOR TOURNAMENTS COVER
95% OF E-SPORTS AUDIENCE**

NORTH AMERICA



WESTERN EUROPE



EASTERN EUROPE



ASIA



3-5M

UNIQUE VIEWS



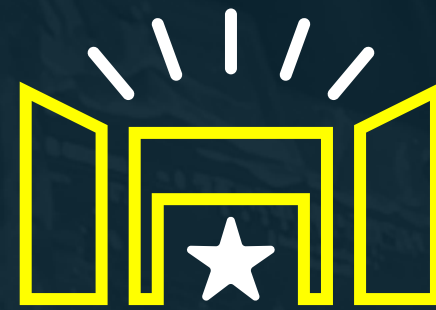
15-30M

VIEWS

PER TOP EVENT

EVENTS SPONSORSHIP PROMOTION KIT

SPONSORSHIP PROMOTION



OFFLINE

PROMO STANDS (BOOTH'S)

STAGE BRANDING

BRANDING (PRESS-WALLS, TICKETS,
MERCHANDISE)

PRODUCT PLACEMENT

SPECIAL PROMO SPONSOR SHOWS

VIDEOS ON VENUE

PROMO VIDEOS PRODUCTION



LIVE BROADCAST

PROMOTION DURING STREAMS (BANNERS,
PRE-ROLLS, CHAT-ADS)

STUDIO BRANDING

CASTERS PROMOTION

IN-GAME BRANDING & ADS



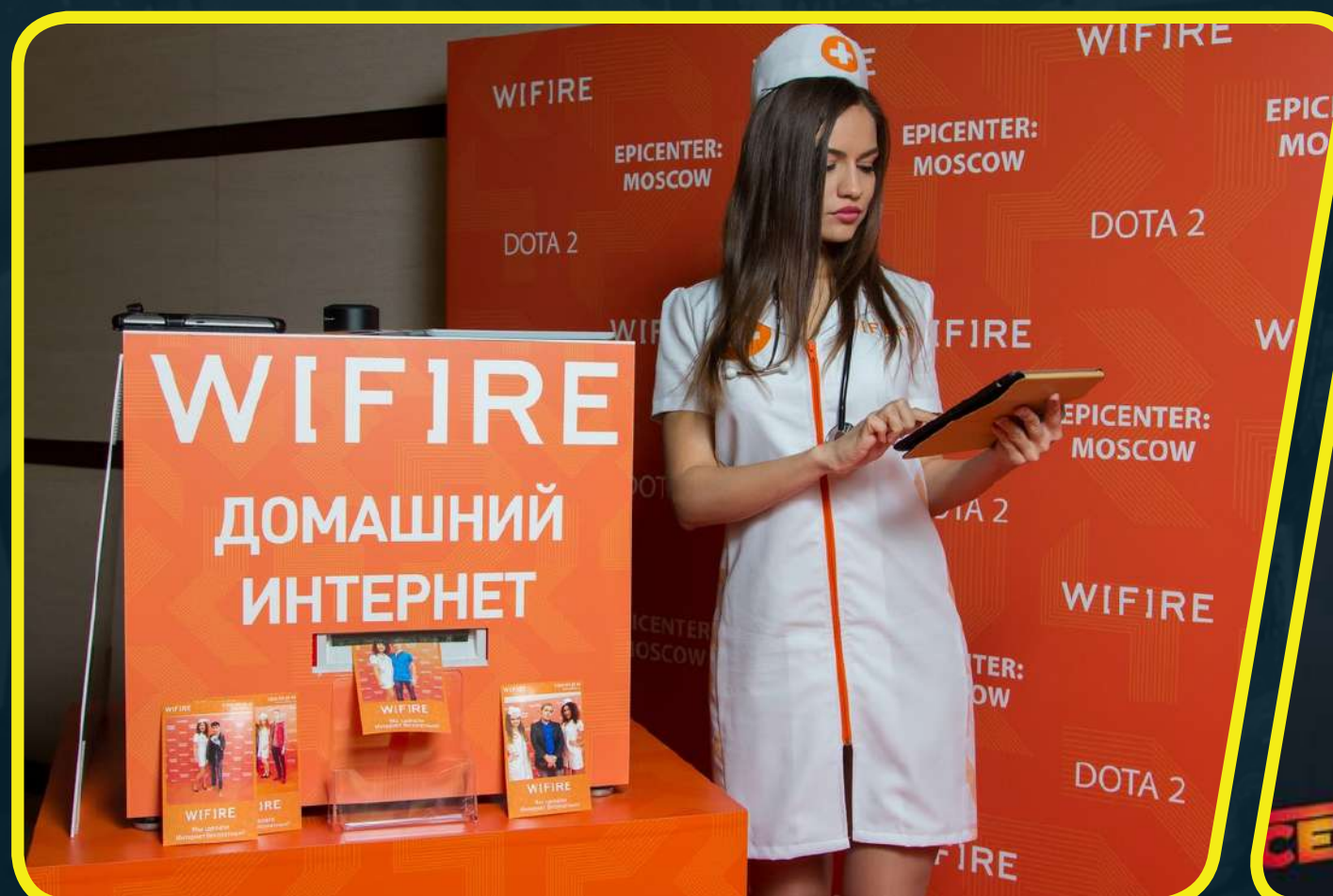
DIGITAL

DIGITAL MEDIA BRANDING & BANNERS
(WEB-SITE, SOCIAL MEDIA, YOUTUBE)

PROMO POSTS IN SOCIAL MEDIA

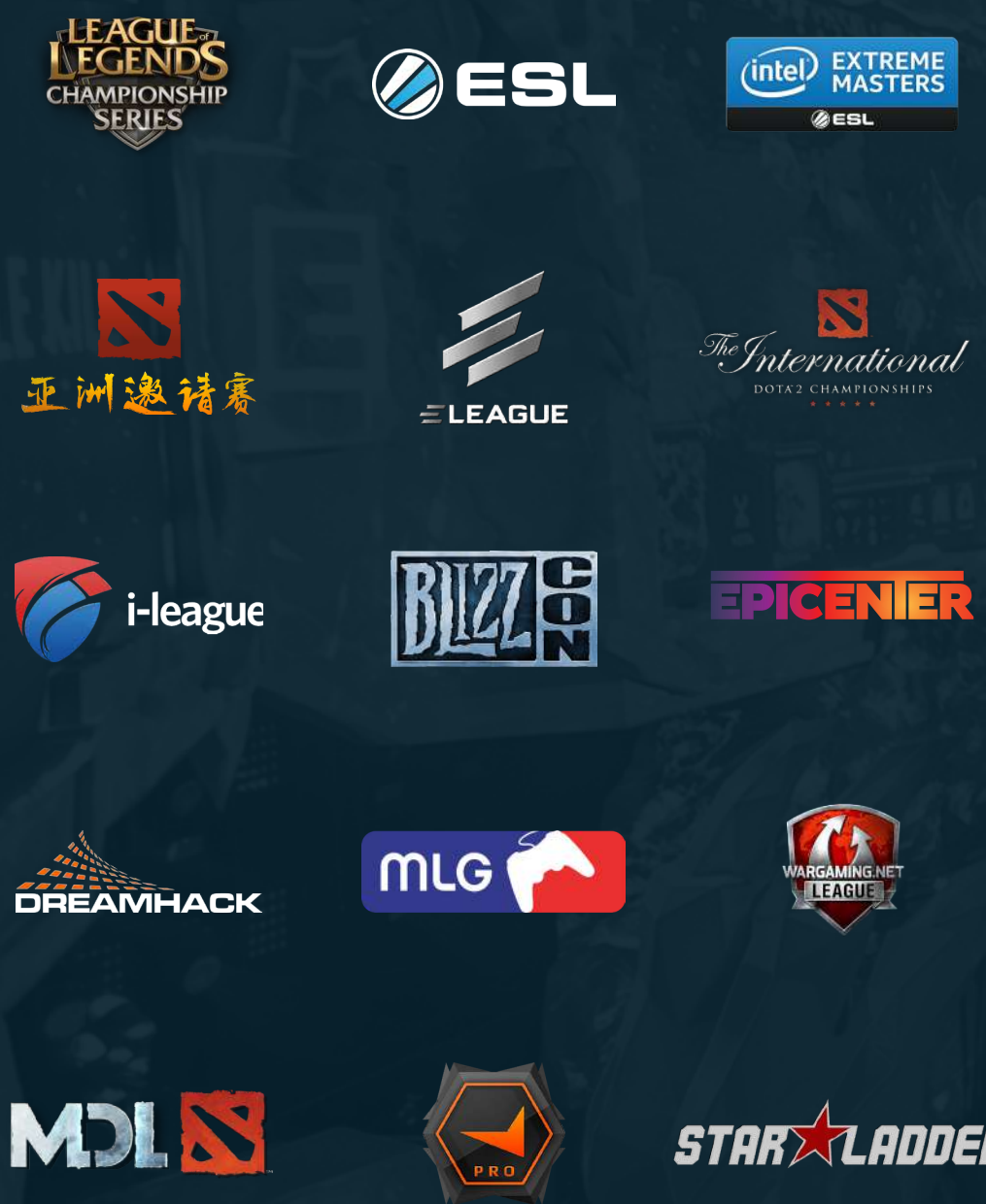
SPONSORSHIP PACKAGE PRICE RANGE \$100K - \$5M / PER EVENT

EVENTS SPONSORSHIP PROMOTION KIT



LEAGUES AND TOURNAMENTS EVALUATION

MAIN EVENTS



REACH



~370M

95% OF E-SPORTS
FANS & ENTHUSIASTS

VALUE



~\$200M+

SPONSORSHIP
INVENTORY
AND MEDIA RIGHTS

The background is a dark, monochromatic illustration of an esports arena. It shows a large, curved stadium filled with spectators. In the center, there is a stage with a large screen and various equipment. The overall tone is professional and high-tech.

OTHER PROMOTIONAL POSSIBILITIES IN E-SPORTS

OTHER PROMOTION POSSIBILITIES IN E-SPORTS



BROADCASTING
STUDIOS



PROFESSIONAL PLAYERS,
E-SPORTS TALENTS AND
CELEBRITIES



PRO AMATEUR
EVENTS



AND MILLIONS OF OTHERS



BRAND INTEGRATIONS EXAMPLES & EVALUATION

HYPERX



KEY PLAYER ON E-SPORTS SPONSORSHIP MARKET WITH WORLDWIDE FOCUS

SPONSORED E-SPORTS TEAMS



+ OTHER LOCAL
MARKETS TEAMS

SPONSORED E-SPORTS TOURNAMENTS



+ OTHER LOCAL
MARKETS EVENTS

SPENDING EVALUATION



~\$3,5-4M



MODERATE INVESTMENT IN E-SPORTS WITH FOCUS ON EVENTS AND LOCAL TEAMS

SPONSORED E-SPORTS TEAMS



SPONSORED E-SPORTS TOURNAMENTS



SPENDING EVALUATION



~\$600-900k

ASUS



FOCUSES ON OWN IP TOURNAMENTS, HIGH-QUALITY TOURNAMENTS AND E-SPORTS TEAMS

**SPONSORED
E-SPORTS TEAMS**



eSports



**SPONSORED E-SPORTS
TOURNAMENTS**



EPICENTER

OWN ASUS TOURNAMENT



**SPENDING
EVALUATION**



~\$800k-1M

SPONSORSHIP

+ OWN TOURNAMENT
ORGANIZATION
EXPANSES



THANK YOU FOR ATTENTION!

THE LAST QUESTION IS...

WHEN

WILL YOU BE IN E-SPORTS?

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