




TAPPING INTO THE ESPORTS COMMUNITY IN SOUTHEAST ASIA

**ONE ESPORTS INSIGHTS SERIES
OCTOBER 2020**

LEVEL UP YOUR KNOWLEDGE OF THE GAMING AND ESPORTS COMMUNITY IN SOUTHEAST ASIA



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When I started at ONE Esports, I immediately noticed that the data available on the behaviors and preferences of esports fans and players in Southeast Asia was not as developed as it is in North America, Europe, or China.

This report will showcase why the esports community in Southeast Asia is one of the most attractive customer segments to connect and engage with. Furthermore, this report will show how ONE Esports has nurtured and grown its fandom into the most engaged and passionate esports community in the region - a community that has also welcomed the authentic entrance and participation of our brand partners.

The key insights of this report are as follows:

- 1** ONE Esports fans are the most passionate fans among the already engaged esports audience.
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- 2** The ONE Esports community has strong purchase intent across several key product categories.
Page 4
- 3** TUMI entered esports credibly with compelling content and authentic brand activations with ONE Esports.
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The journey to collect and analyze the data of gamers and esports fans in Southeast Asia has not been easy. Generating these insights would not have been possible without the stellar work of ONE's Analytics & Insights team. A big shoutout to Jane Guo, Valentina Mosca, Adeline Goh, and Jason Khoo, who have worked tirelessly to put this report together.

We hope you find this report and its insights helpful in your journey to understand and engage this growing, attractive community. Please contact us if you have any questions or would like us to explore interesting topics that are top-of-mind for your team.

#WeAreOne

INSIGHT #1

ONE ESPORTS FANS ARE THE MOST PASSIONATE FANS AMONG THE ALREADY ENGAGED ESPORTS AUDIENCE

The proliferation of video content over the past few years has exposed millions of people to gaming content.

This vast group of consumers includes the general gaming audience, defined as those who prefer casual games (such as Candy Crush), as well as the esports audience, defined as those who watch or play competitive gaming titles (such as Dota 2).

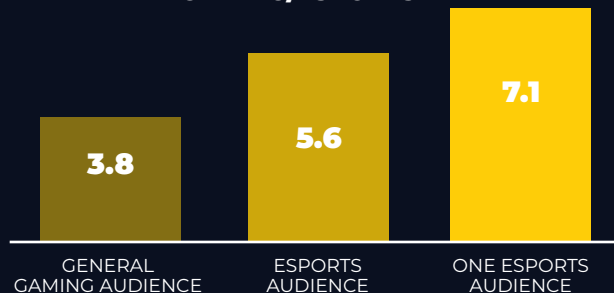
For example, reports have indicated that more women are consuming esports and gaming content. Consequently, brands will need to shift their strategy to be more inclusive.⁴

Fans are generous with their time and money when it comes to enjoying their favorite esports content. ONE Esports fans are the most passionate fans among the esports community.

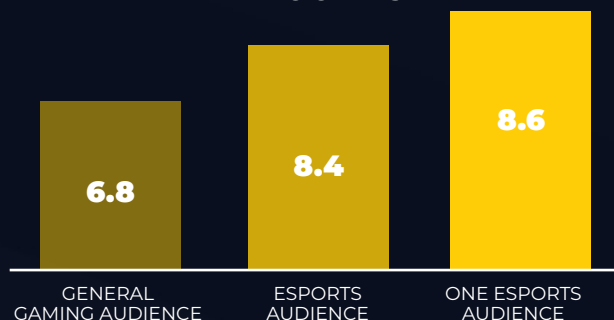
ONE Esports delivers the best esports content and events in SEA. As a result, our audience is the most passionate and engaged esports fan base out there. They spend more time watching, playing, and spending on esports content.

A good example of our fans' deep passion comes from the recent ONE Esports Dota 2 SEA League, where the average watch time per unique viewer on Twitch was over 90 minutes throughout the tournament.

WEEKLY HRS SPENT WATCHING GAMING/ESPORTS¹



WEEKLY HRS SPENT PLAYING GAMES²



MONTHLY US\$ SPENT ON GAMING/ESPORTS³



^{1,2,3} General gaming audience is defined as social media users (13-49yo) who consumed gaming content (but not esports) on streaming platforms in the past 6 months, and esports audience are those who consumed esports content. ONE Esports audience is defined as social media users (13-49yo) who consumed esports/gaming content on streaming platforms in the past 6 months and are very familiar with ONE Esports. Source: FY20 OTT Viewers Research. Note: Respondents tend to over claim spending in surveys. Need to interpret spend data with caution.
⁴<https://newzoo.com/insights/articles/consumer-engagement-with-games-is-changing-gamer-segmentation-personas-gender-age-demographics/>






INSIGHT #2

THE ONE ESPORTS COMMUNITY HAS STRONG PURCHASE INTENT ACROSS SEVERAL KEY PRODUCT CATEGORIES

ONE Esports fans not only spend more on gaming, but also on mainstream lifestyle categories. Our fans consistently over-index on their purchase intent across major product and service categories, including big ticket items, relative to fans who are unfamiliar with ONE Esports.



PURCHASE INTENT FOR ONE ESPORTS FANS VS ESPORTS FANS WHO ARE UNFAMILIAR WITH ONE ESPORTS

CATEGORY	INDEX
 AUTO/BIKES	172
 COMPUTER	133
 ELECTRONICS	129
 TELCO	123
 AUDIO	119
 FINANCIAL PRODUCTS	117
 SMARTPHONE	116

DEEP DIVE INTO TWO MAIN CATEGORIES: AUTO/BIKES & SMARTPHONES



47%

Of ONE Esports fans intend to purchase a new auto/bike in the next 12 months



1.7X

More likely to purchase an auto/bike in the next 12 months than esports fans who are unfamiliar with ONE Esports

67%

"I WILL CONTINUE TO USE MY CURRENT AUTO/BIKE OR WILL REPLACE IT WITH ANOTHER MODEL IN THE SAME BRAND IN THE NEXT 12 MONTHS"

33%

"I AM CONSIDERING REPLACING MY AUTO/BIKE WITH A MODEL FROM A DIFFERENT BRAND"

Of all the categories we surveyed, the auto/bike category had the biggest difference in propensity to purchase between ONE Esports fans and esports fans who were unfamiliar with ONE esports. This finding resonates with the rising income per capita in SEA, and the willingness of many consumers in the region to spend on big ticket items.¹

Over 47% of fans intend to purchase an auto/bike in the next 12 months vs just 27% of esports fans who are unfamiliar with ONE Esports fans. These consumers are up for grabs for brands that have the right proposition.



¹https://www.aseanstats.org/wp-content/uploads/2019/11/ASEAN_Key_Figures_2019.pdf

ONE Esports audience is defined as social media users (13-49yo) who consumed esports/gaming content on streaming platforms in the past 6 months and are very familiar with ONE Esports. Esports fans who are unfamiliar with ONE Esports are defined as social media users (13-49yo) who consumed esports/gaming content on streaming platforms in the past 6 months and have never heard of ONE Esports

INSIGHT #2 (CONT.)

THE ONE ESPORTS COMMUNITY HAS STRONG PURCHASE INTENT ACROSS SEVERAL KEY PRODUCT CATEGORIES



64%

Of ONE Esports fans intend to purchase a new smartphone in the next 12 months



1.2X

More likely to purchase a smartphone in the next 12 months than esports fans who are unfamiliar with ONE Esports

59%

41%

"I WILL CONTINUE TO USE MY CURRENT SMARTPHONE OR WILL REPLACE IT WITH ANOTHER MODEL IN THE SAME BRAND IN THE NEXT 12 MONTHS"

"I AM CONSIDERING REPLACING MY SMARTPHONE(S) WITH A MODEL FROM A DIFFERENT BRAND"



99% of ONE Esports fans currently own a smartphone, which is representative of growing smartphone usage and the rising trend of mobile gaming across SEA. However, our fans are also constantly looking for the best new products, with 64% of them looking to upgrade in the next 12 months.

We also know that our audience is much more likely to purchase phones that are specifically designed for gaming, with up to 3x higher ownership of gaming phones vs esports fans who are unfamiliar with ONE Esports fans.

ONE Esports audience is defined as social media users (13-49yo) who consumed esports/gaming content on streaming platforms in the past 6 months and are very familiar with ONE Esports. Esports fans who are unfamiliar with ONE Esports are defined as social media users (13-49yo) who consumed esports/gaming content on streaming platforms in the past 6 months and have never heard of ONE Esports

INSIGHT #3

TUMI ENTERED ESPORTS CREDIBLY WITH COMPELLING CONTENT AND AUTHENTIC BRAND ACTIVATIONS WITH ONE ESPORTS

TUMI PARTNERED WITH ONE ESPORTS TO REACH THE ESPORTS AUDIENCE ACROSS SEA

Objectives

TUMI wanted to build awareness and association with the esports community. They focused on authentically telling the story of the “journey” and how it relates to both its customers and esports fans across Asia.

ONE Esports helped TUMI build credibility with the esports audience through live event activations and in-stream exposure. At the same time, we leveraged our digital assets and storytelling expertise to drive always-on engagement.



“The collaboration with ONE Esports and Team Secret has been a truly unique and innovative partnership that helped open up new possibilities for TUMI within the esports ecosystem.”

We look forward to deepening our relationship with this new generation of athletes and fans to perfect their journeys – while having a bit of fun along the way.”

Adam Hershman
Vice President, APAC & Middle East, TUMI

“Working with TUMI and ONE Esports has been a great experience for our team. TUMI is a company that is focused on adding value to the esports ecosystem and we are excited to be a part of that.”

This is the perfect time for brands to engage in esports - the future of sports and entertainment.”

John Yao
CEO, Team Secret

INSIGHT #3 (CONT.)

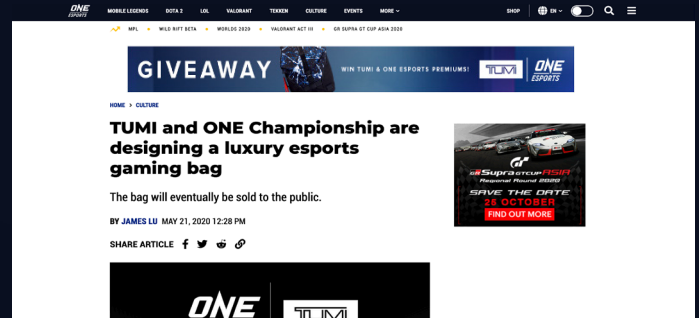
TUMI ENTERED ESPORTS CREDIBLY WITH COMPELLING CONTENT AND AUTHENTIC BRAND ACTIVATIONS WITH ONE ESPORTS

Activations

The 360-degree integrated marketing strategy that ONE Esports co-designed with TUMI enabled it to be omnipresent from mega-scale live events to opinion pieces on onesports.gg to exposure on ONE Esports' social channels. Most importantly, the activations were focused on being authentic and providing genuinely insightful and valuable information to the esports community.



LIVE EVENT



ONEESPORTS.GG WEBSITE



BRANDED HIGHLIGHT CONTENT



TEAM ENDORSEMENT

1) LIVE EVENT ACTIVATION: MASSIVE REACH ACHIEVED THROUGH THE ONE ESPORTS DOTA 2 SINGAPORE WORLD PRO INVITATIONAL



464K

PEAK CONCURRENT VIEWERS¹



26M

TOTAL HOURS WATCHED¹



89%

AGED BETWEEN 18-25 YEARS OLD



52%

VIEWS ON MOBILE



facebook.

YouTube

twitter

火猫直播 HUOMAO.COM

虎牙直播 HUYA.COM

¹Total Reach and Total Video Views are aggregated across all of ONE's social media platforms for the period 17 Dec 2019 to 22 Dec 2019. Source: Twitch, Facebook, YouTube, Twitter, Huya, Huomao, ONE Esports Event Survey

INSIGHT #3 (CONT.)

TUMI ENTERED ESPORTS CREDIBLY WITH COMPELLING CONTENT AND AUTHENTIC BRAND ACTIVATIONS WITH ONE ESPORTS

2) DIGITAL AND SOCIAL ACTIVATION

ONE Esports engaged Team Secret to film a custom video at TUMI's Marina Bay Sands store. The branded custom video allowed TUMI to engage in creative storytelling and position itself as the authority in "elevating life on the move for the next generation of athletes".



#1

Most viewed video on the ONE Esports Facebook page



11M

Total reach



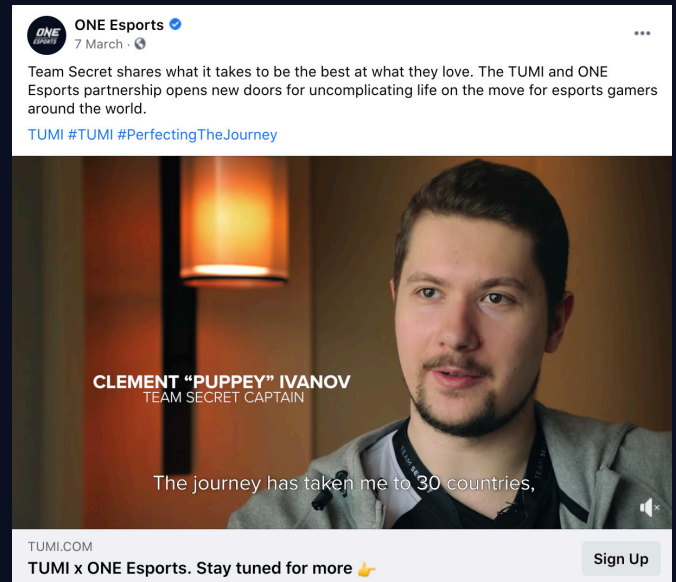
3.3M

Total video views



9X

Higher engagement vs the previous strongest performing TUMI video



TUMI X TEAM SECRET CUSTOM BRANDED VIDEO ON FACEBOOK

3) DIGITAL ACTIVITIES TO GENERATE TRAFFIC AND LEADS

Along with driving awareness and engagement, growing a strong esports community database was a key objective for TUMI to scale their email marketing efforts and create a conversation with coveted esports fans.



TEAM REALITY RIFT VIDEO CAMPAIGN



TUMI'S PRODUCT PROMOTION



TUMI'S DAILY GIVEAWAY POST



Impressions



Clicks



APAC Sign-ups

Conclusion

The journey for TUMI to establish itself as the preferred international travel and lifestyle brand for esports fans has begun, and the results have been extremely promising. The ONE Esports platform provides brands with a unique opportunity to engage with a passionate esports audience to generate tangible results that align with their objectives.

HARNESS THE POPULARITY AND ENGAGEMENT OF ESPORTS TO GENERATE RESULTS FOR YOUR BUSINESS TODAY

METHODOLOGY AND APPROACH

For this esports report, we surveyed over 25,000 social media users engaged with esports content across Southeast Asia. To ensure the quantitative methodology was both robust and representative, we weighted the sample by considering the size of:



Social media population



Sub-target groups

(E.g. ONE Esports fans vs esports fans who are unfamiliar with ONE Esports fans)

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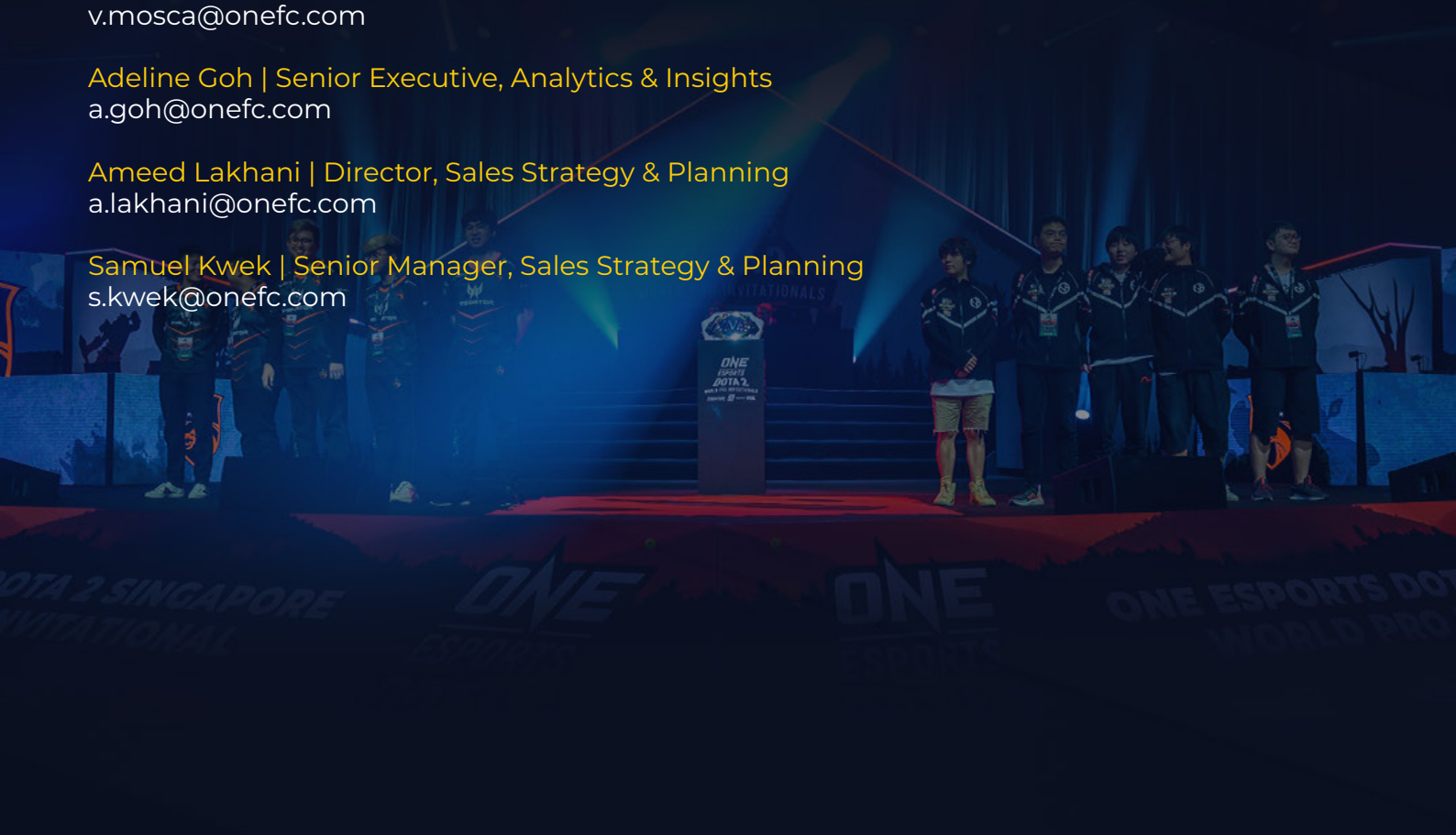
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The background of the entire page is a dark, high-angle photograph of a large esports arena. The arena is filled with a massive crowd of spectators. At the far end, a large stage is illuminated with bright lights. A massive screen on the stage displays a colorful, chaotic game map, likely from League of Legends. Various sponsor logos are visible on the stage and around the arena. The overall atmosphere is one of a major, high-stakes esports tournament.

ONE ***ESPORTS***

*THE HOME OF **ESPORTS** HEROES*

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