# ONE ESPORTS

# WHAT'S NEXT IN ESPORTS STREAMING?

ONE ESPORTS INSIGHTS SERIES
APRIL 2021

# CONTEXT

In the first installment of the **ONE Esports Insights Series**, we revealed why brands should target the growing esports community in Southeast Asia. Specifically, we showcased how deeply engaged this fan segment is and how that engagement has spawned lucrative commercial opportunities.

We've received many requests to dive deeper into esports event viewership. Many of you were impressed by our Dota 2 SEA League, which garnered over 90 minutes watch time per unique Twitch viewer. These requests were the impetus for this second installment of the ONE Esports Insights Series.

The streaming landscape is more dynamic than ever, with new platforms and new content rapidly emerging. In this report, we will share our insights on the relationship between streaming platforms and esports fan engagement.

We conducted a large-scale quantitative study focused on esports streaming in six SEA countries, the Philippines, Indonesia, Thailand, Singapore, Vietnam, and Malaysia, with three key objectives:

**1**

Crystalize the dynamics between global and local streaming platforms

**2**

Decode consumer preferences towards platforms and content

**3**

Identify growth areas for our distribution partners

While we must keep platform names anonymous throughout this report, the platforms included in the study all have high penetration in the region.

We appreciate the global and local platforms that have chosen to collaborate with us in our goal to create unforgettable esports experiences for fans around the world and have included examples to hopefully inspire more content innovation and partnerships in this space.

We hope you find this report 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 other interesting topics that are top-of-mind for your team.
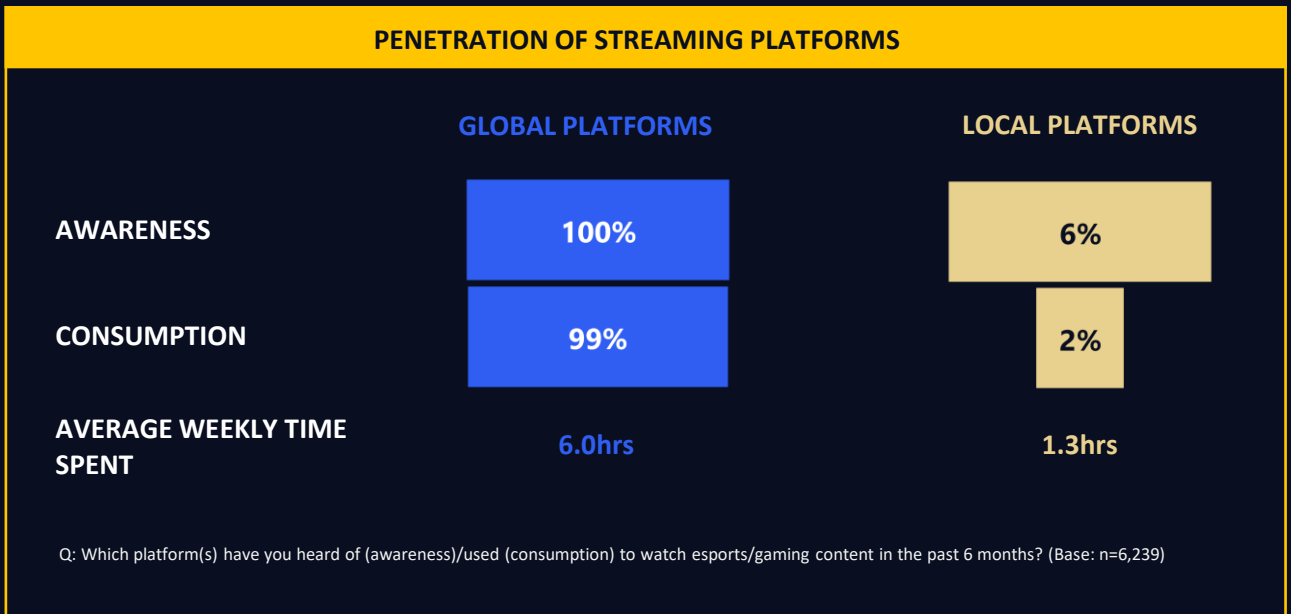
**#WeAreONE**

# GLOBAL PLATFORMS ENJOY NEAR UNIVERSAL PENETRATION FOR ESPORTS CONSUMPTION

A simple way to segment the streaming landscape is as follows:
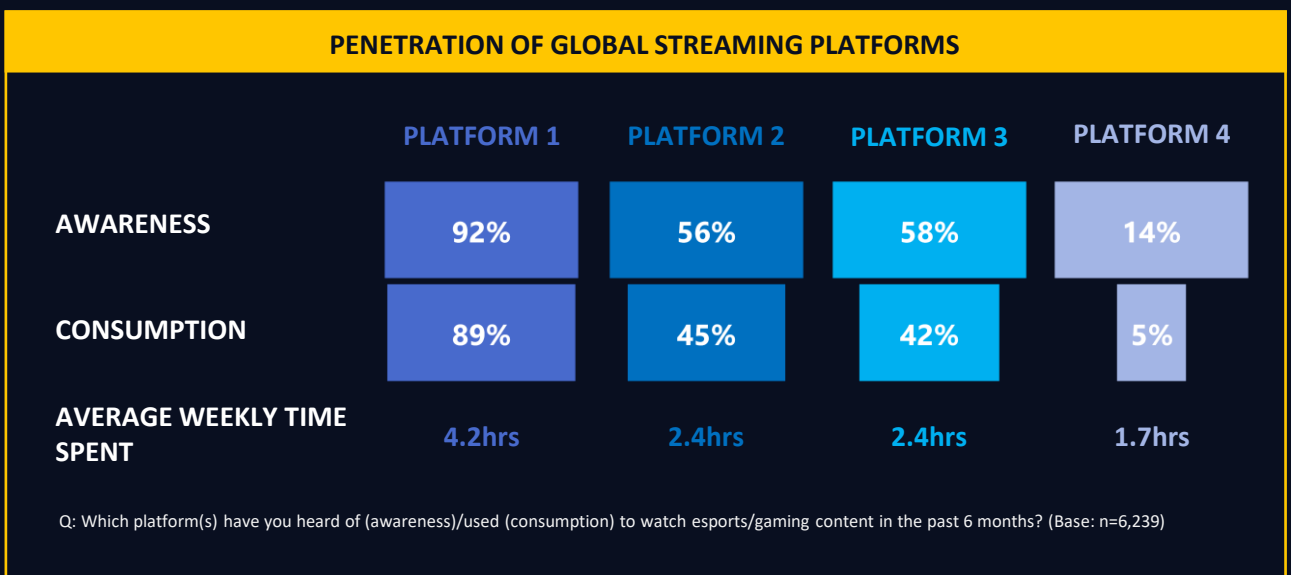- **Global platforms** have scaled across the world.
- **Local platforms** focus on one country or region.

Global platforms currently dominate the esports scene in SEA, with near universal awareness and usage. Moreover, viewers are more engaged on global platforms, spending almost 1 hour each day, compared to 1 hour per week on local platforms.

We see opportunity in this space, because using 2-3 platforms to consume esports and gaming content is the norm for this audience. Having said that, defining a unique value proposition that resonates with the esports community is the real key to growth, and would unlock both global and local players.

## PENETRATION OF STREAMING PLATFORMS

| | GLOBAL PLATFORMS | LOCAL PLATFORMS |
|---|---|---|
| **AWARENESS** | 100% | 6% |
| **CONSUMPTION** | 99% | 2% |
| **AVERAGE WEEKLY TIME SPENT** | 6.0hrs | 1.3hrs |

Q: Which platform(s) have you heard of (awareness)/used (consumption) to watch esports/gaming content in the past 6 months? (Base: n=6,239)

Looking closer at global platforms, not all of them are equal. Among the four market leaders, there is a clear winner in terms of penetration and time spent. The other three serve a smaller but dedicated audience of their own. To grow market share, it is important to understand the driving forces behind platform adoption.

## PENETRATION OF GLOBAL STREAMING PLATFORMS

| | PLATFORM 1 | PLATFORM 2 | PLATFORM 3 | PLATFORM 4 |
|---|---|---|---|---|
| **AWARENESS** | 92% | 56% | 58% | 14% |
| **CONSUMPTION** | 89% | 45% | 42% | 5% |
| **AVERAGE WEEKLY TIME SPENT** | 4.2hrs | 2.4hrs | 2.4hrs | 1.7hrs |

Q: Which platform(s) have you heard of (awareness)/used (consumption) to watch esports/gaming content in the past 6 months? (Base: n=6,239)

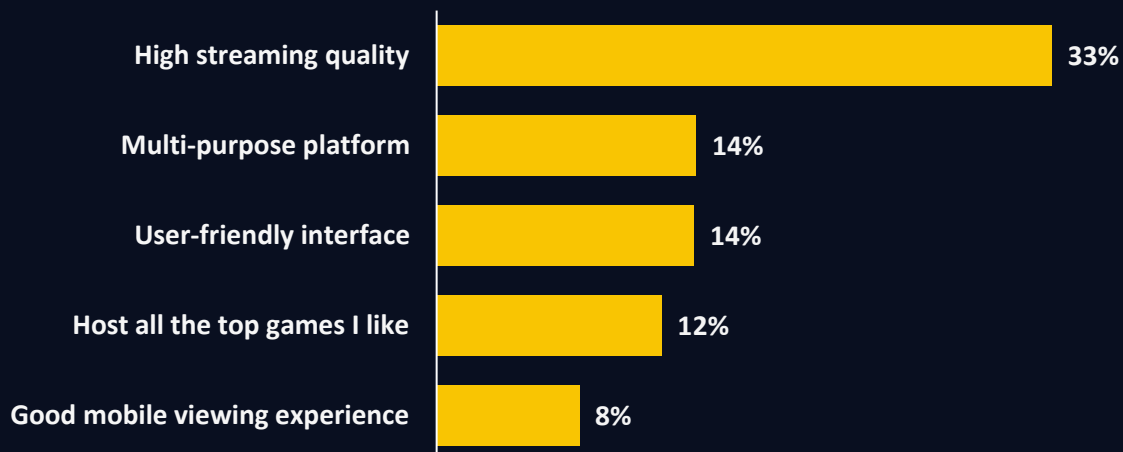# PLATFORM BUILD AND CONTENT OFFERING ARE KEY DRIVERS BEHIND PLATFORM ADOPTION

When it comes to choosing an esports streaming platform, consumers consider two things:
1. **Platform build** - the features and technology of the platform.
2. **Content offering** - the type of esports content and the gaming titles on the platform.

## PLATFORM BUILD

For both global and local platforms, **high streaming quality** is mandatory for success. Being a multi-purpose platform and having a user-friendly interface are also critical drivers.

### TOP 5 REASONS FOR CHOOSING STREAMING PLATFORMS

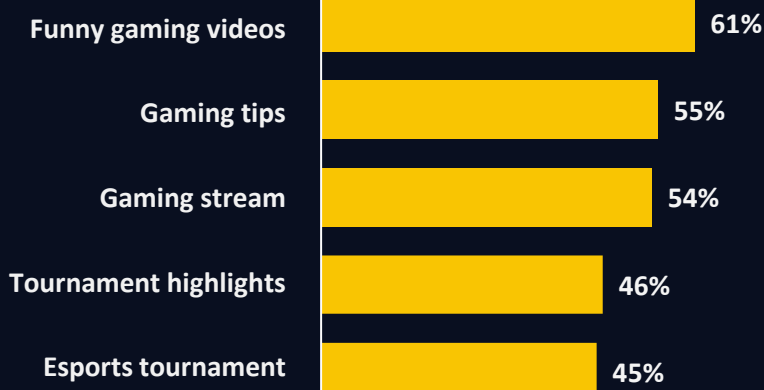| Reason | Percentage |
|---|---|
| High streaming quality | 33% |
| Multi-purpose platform | 14% |
| User-friendly interface | 14% |
| Host all the top games I like | 12% |
| Good mobile viewing experience | 8% |

Q: Which factors are important for you to choose a platform to watch esports/gaming content? (Base: n=6,239)

## CONTENT OFFERING

Fans crave a variety of esports content. Streaming platforms are not just destinations for content consumption, but also sources for discovering new content. Ultimately, fans seek both **education** and **entertainment** - they want to learn new strategies and moves to improve, but they also want somewhere to relax and de-stress.

### TOP 5 ESPORTS/GAMING CONTENT TYPES BY CONSUMPTION

| Content Type | Percentage |
|---|---|
| Funny gaming videos | 61% |
| Gaming tips | 55% |
| Gaming stream | 54% |
| Tournament highlights | 46% |
| Esports tournament | 45% |

Q: Which type(s) of esports/gaming content have you watched in the past 6 months? (Base: n=5,325)

# THERE IS BIG POTENTIAL FOR LOCAL PLATFORMS TO WIN THE ESPORTS COMMUNITY

While global platforms win over fans through high performance, local platforms do it through **local relevance**. These platforms are in local languages, and often offer content hosted by local streamers, influencers, and celebrities. It is worth noting that local appeal is the key reason for adoption, while other aspects like social features and mobile viewing experience are all secondary reasons.

## TOP 3 REASONS FOR CHOOSING STREAMING PLATFORMS

| GLOBAL PLATFORMS | | LOCAL PLATFORMS | |
|---|---|---|---|
| High streaming quality | 63% | High streaming quality | 35% |
| User-friendly interface | 60% | It's in local language | 34% |
| Multi-purpose platform | 59% | It's a local platform | 26% |

Q: Which factors are important for you to choose a platform to watch esports/gaming content? (Base: n=6,239)

## VIDIO'S PERFORMANCE DURING THE ONE ESPORTS DOTA 2 SEA LEAGUE SHOWS HOW LOCAL PLATFORMS CAN WIN

Vidio is one of the largest local streaming platforms in Indonesia, offering the most complete inventory of livestreaming, films, and TV programs.

For the Dota 2 SEA League, ONE Esports collaborated with Vidio to bring Indonesian fans a high-quality Bahasa Indonesia livestream of the tournament. As a result, we saw unprecedented engagement, with 61% of Dota 2 SEA League viewers watching the tournament in Bahasa Indonesia on Vidio, instead of more established global platforms.

## DOTA 2 SEA LEAGUE BAHASA INDONESIA STREAMS

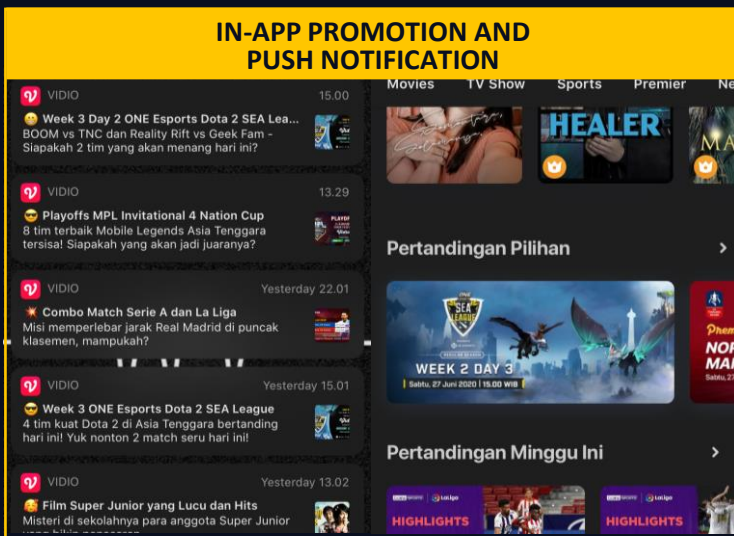■ **Vidio**
■ **GLOBAL PLATFORMS**

39%

**2.4M VIEWS**

61%
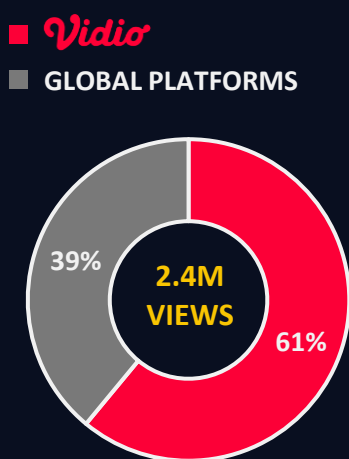
*"Vidio is the #1 local OTT in Indonesia with 60M MAU and is building its muscle to be the preferred destination for quality esports content. Our collaboration with ONE Esports gave us confidence to triple our esports plays and minutes watched in 2021."*

**HERMAWAN SUTANTO**
Deputy CEO, Vidio

Source: Dota 2 SEA League, FY20 4 Jun-19 Jul live views, platforms' back-end data

# ACTIVATING WITH LOCAL AND GLOBAL STREAMING PARTNERS

## KEY ACTIVATIONS FROM VIDIO THAT DROVE VIEWERSHIP


**IN-APP PROMOTION AND PUSH NOTIFICATION**


**SOCIAL MEDIA POST**


**VIDIO ESPORTS TVC ON VIDIO YOUTUBE, SCTV & INDOSIAR YOUTUBE**

Vidio's streaming success is a clear example of viewers' desire to watch localized content on local platforms, which they feel more connected to than global ones.

## COMBINING THE POWER OF MARTIAL ARTS AND ESPORTS TO DRIVE ENGAGEMENT FOR A GOOD CAUSE

ONE Esports and ONE Championship also work closely with Facebook Gaming to connect the martial arts and esports communities and create new and engaging content.

Not only can fans watch their idols from Team Lakay, like ONE Heavyweight World Champion, Brandon Vera, play their favorite games, but they can also interact with them over their shared love of gaming.

# ACTIVATING WITH LOCAL AND GLOBAL STREAMING PARTNERS

A core focus of the activation was to use the power of Brandon Vera and Team Lakay to give back and contribute to the local community. Two select community activations included:

## YOUNG FOCUS



## SAVE THE CHILDREN



**Young Focus** gives underprivileged children from Smokey Mountain, Philippines the chance to develop themselves through education.

Fans were encouraged to share the stream to bring awareness to Young Focus's efforts.

**Save the Children**, the world's leading independent children's organization, has been working in the Philippines for over three decades and is dedicated to helping children.

As part of #GamingTuesday, an initiative for gamers to give back on the global day of giving, Truth x Lakay Gaming partnered with SecretLab to raise funds for Save The Children Philippines.

## METHODOLOGY

We surveyed over 6,000 social media users engaged with esports content in Southeast Asia. The sample is representative of the esports/gaming community on social media in the six surveyed markets, aged 13 to 49 years old.

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