



ESPORTS BAR

ESPORTS IN SOUTH-EAST ASIA

WORLD'S HOTTEST GROWTH REGION



SAMART BENJAMIN ASSARASAKORN
CEO BIG
THAILAND ESPORTS FEDERATION



PETER WARMAN
CEO & CO-FOUNDER
NEWZOO

PETER@NEWZOO.COM
LINKEDIN/IN/WARMAN
TWITTER: @PJWARMAN / @NEWZOOHQ



OWEN LEED
COMMERCIAL & COMM. DIRECTOR
BADMINTON WORLD FEDERATION

newzoo

FEBRUARY 2018

SOUTH-EAST ASIA

THE HOTTEST GROWTH REGION



MALAYSIA



INDONESIA



PHILIPPINES



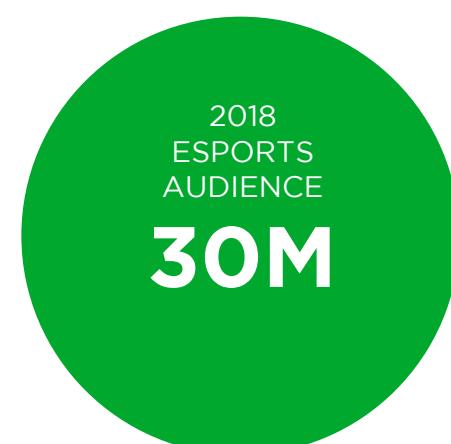
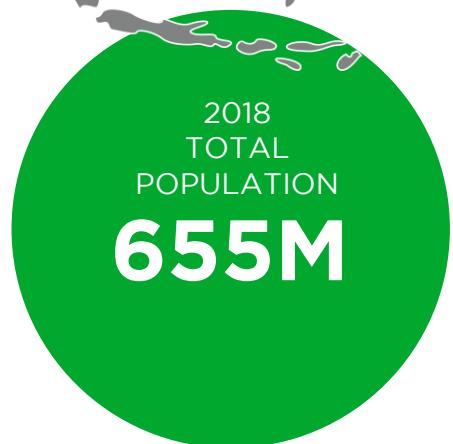
SINGAPORE



THAILAND



Vietnam



2020
669M
+2%

2020
336M
+18%

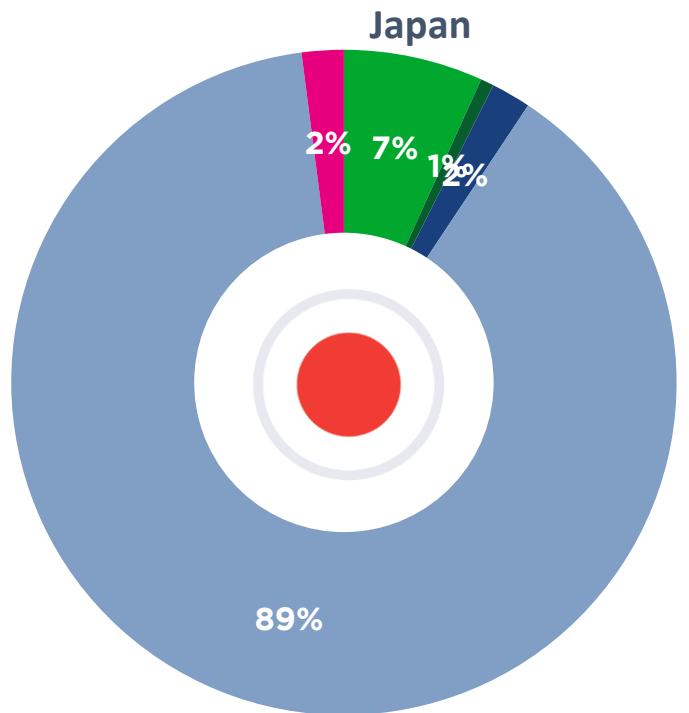
2020
\$6.2Bn
+51%

2020
52M
+73%

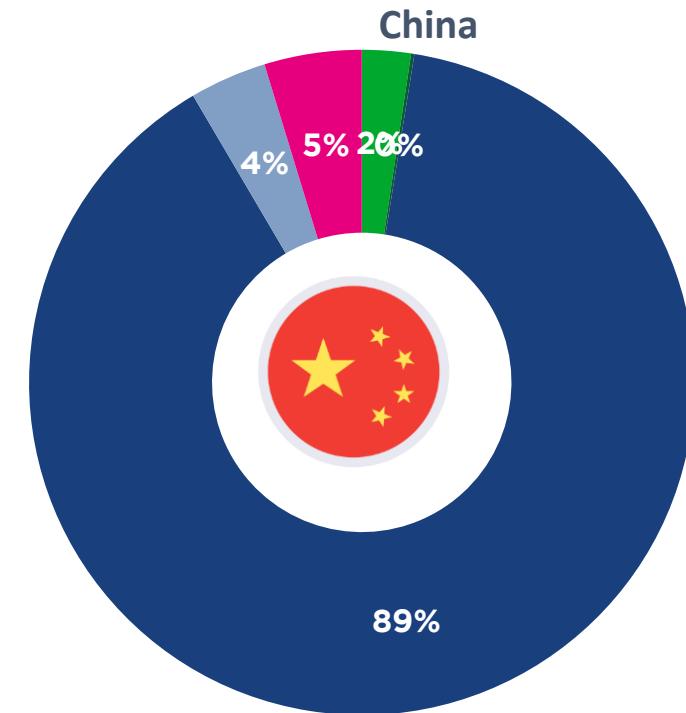
GOING INTO ASIA

CHANCES FOR OUTSIDERS

LOCAL GAME REVENUES BY COUNTRY/REGION OF PUBLIC COMPANIES



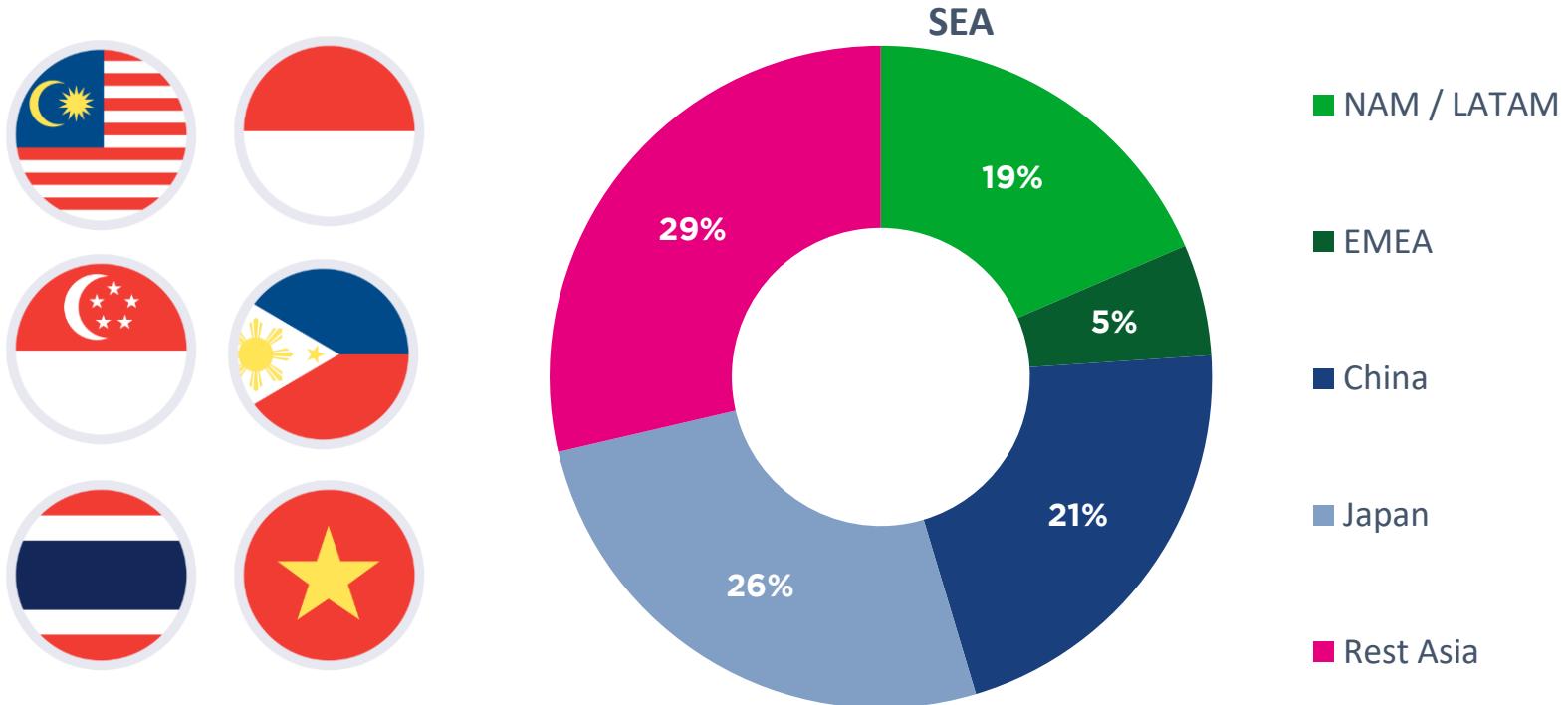
- NAM / LATAM
- EMEA
- China
- Japan
- Rest Asia



GOING INTO ASIA

CHANCES FOR OUTSIDERS

LOCAL GAME REVENUES BY COUNTRY/REGION OF PUBLIC COMPANIES





RAZER™
PHONE

A GAMES INDUSTRY HUB

SEA LEADERS GOING IPO



Gaming firm Razer seeks to raise over \$600M in Hong Kong IPO

Posted Jul 1, 2017 by Jon Russell (@jonrussell), Ingrid Lunden (@ingridlunden)



Gaming firm Razer has filed to go public through an IPO in Hong Kong as it looks to raise more than \$600 million to go after growth opportunities.

The U.S.-based company, which traces its origins back to Singapore, filed [initial paperwork](#) on Friday. Certain details — such as how much Razer is looking to raise, its valuation and the timing of the IPO — are not disclosed in the [345-page filing](#), but a source close to the company confirms it's likely to be upwards of \$600 million (earlier in the year, it looks like [Bloomberg](#) reported \$400 million). Razer's last round of venture capital investment valued the firm at \$2 billion.

The filing sheds some light on the company's financials and details of previous M&A that it hadn't disclosed.

Razer makes money selling gaming peripherals and laptops, but it hasn't been profitable lately. It posted a \$59.6 million loss in 2016 on revenue of \$392.1 million. It was profitable in 2014 — to the tune of \$20.3 million — but dropped into the red with a \$20 million loss a

<http://www.hkexnews.hk/APP/SEHK/2017/2017062803/Documents/SEHK201706290041.pdf>



SUPPORTED BY

Crunchbase

Razer

FOUNDED
2005

OVERVIEW
Razer™ is a world leader in connected devices and software for gamers. Razer is transforming the way people play games, engage with other gamers and identify with the gaming lifestyle. Having won the majority of E-Sports titles in the last six years, the company's leadership in product innovation continues to create new categories for the gaming community that is estimated to have ...

LOCATION

Irvine, CA

CATEGORIES

iOS, Consumer Electronics

FOUNDERS

Min-Liang Tan, Robert Kral

WEBSITE

<http://www.razerzone.com>

[Full profile for Razer](#)

THX

[Foxconn Technol](#)

OUYA

[Intel](#)

NEWSLETTER

[The Daily Crunch](#)

Get the top tech stories to your inbox

[TC Weekly Round](#)

(REDACTED)

(REDACTED)



connecting the dots

Southeast Asian e-commerce startup Sea Group to list on NYSE in potential \$1b IPO



Traders work on the floor of the New York Stock Exchange November 4, 2015. REUTERS/Tim McDermid

Shiwen Yap

September 23, 2017

Singapore-based Southeast Asian e-commerce enterprise **Sea Group** rebranded to the current trade name from Garena earlier this year — announced its plans to pursue an initial public offering (IPO) on the **Stock Exchange (NYSE)**.

<https://www.sec.gov/Archives/edgar/data/1703399/000119312517291352/d363501df1.htm>

SUPPORTED BY



American Depository Shares

sea

Sea Limited

Representing Class A Ordinary Shares

Class A Ordinary Shares

Goldman Sachs (Asia) L.L.C.

Morgan Stanley

Credit Suisse

See [Table 1](#) for a description of compensation payable to the underwriters, see [Underwriting](#)

Neither the Securities and Exchange Commission nor any other regulatory body has approved or disapproved of these securities or passed upon the accuracy or adequacy of this prospectus. Any representation to the contrary is a criminal offense.

Initial public offering price per share: \$10.00

Offering period: September 26, 2017 - October 12, 2017

Number of shares offered: 10,000,000

Offering price per share: \$10.00

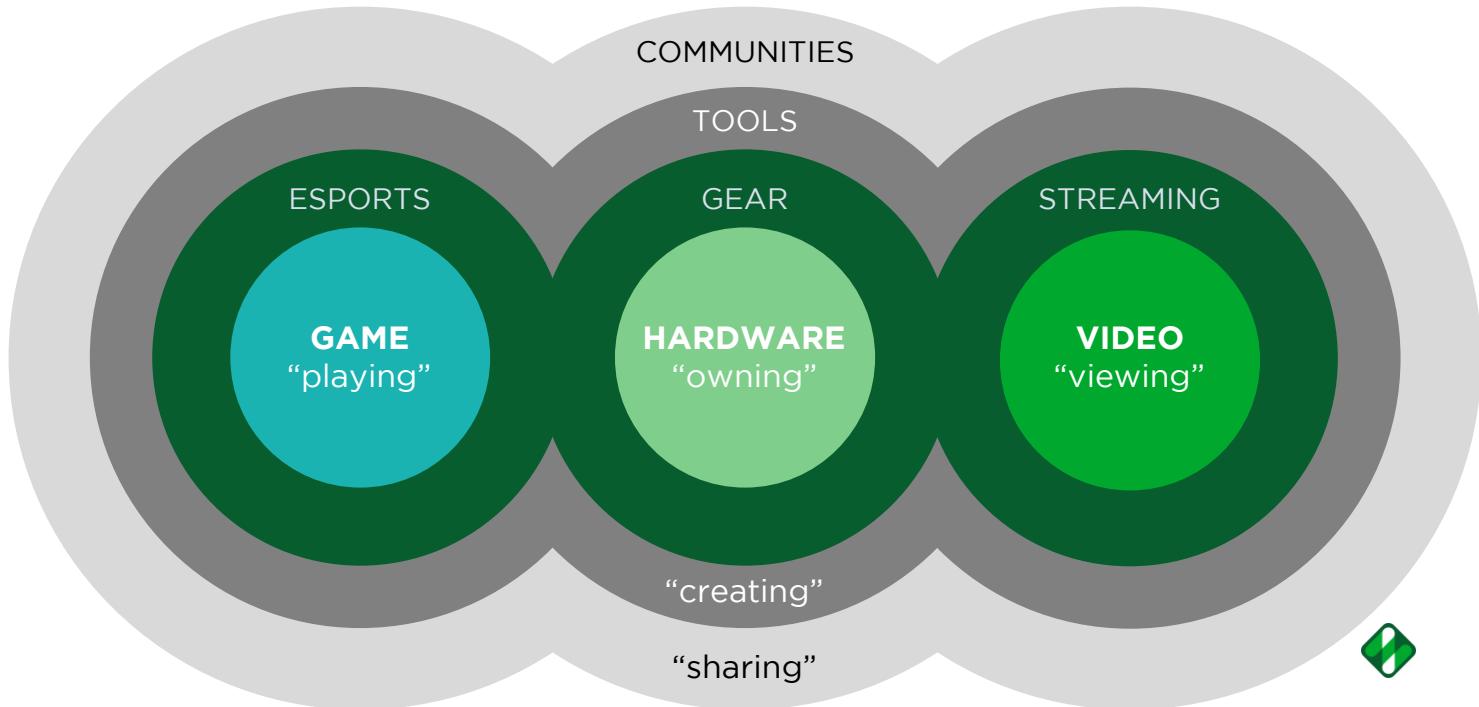
Offering price per share: \$10.00</p

1

› THE SUCCESS
OF ESPORTS LAYS DEEP

THE GAMING EXPERIENCE

EVOLVED



© Copyright Newzoo 2017 | Global Esports Market Report

THE MOST EMPOWERING

FORM OF ENTERTAINMENT



2

> YESTERDAY

A PERFECT EXAMPLE



Allan Phang



STEP 1. AWARENESS

GETTING YOUR COMPANY ON BOARD



STEP 2. GET STAFF GAMING

EVERY COMPANY IS FULL OF GAMERS



STEP 3. EMBRACE THE CULTURE

ITS EVENTS AND AND ITS BRANDS



STEP 4. HELP THE ECOSYSTEM

BY ADDING VALUE



ESPORTS

AirAsia Further Invests In Esports By Sponsoring Dota 2 Team Mineski



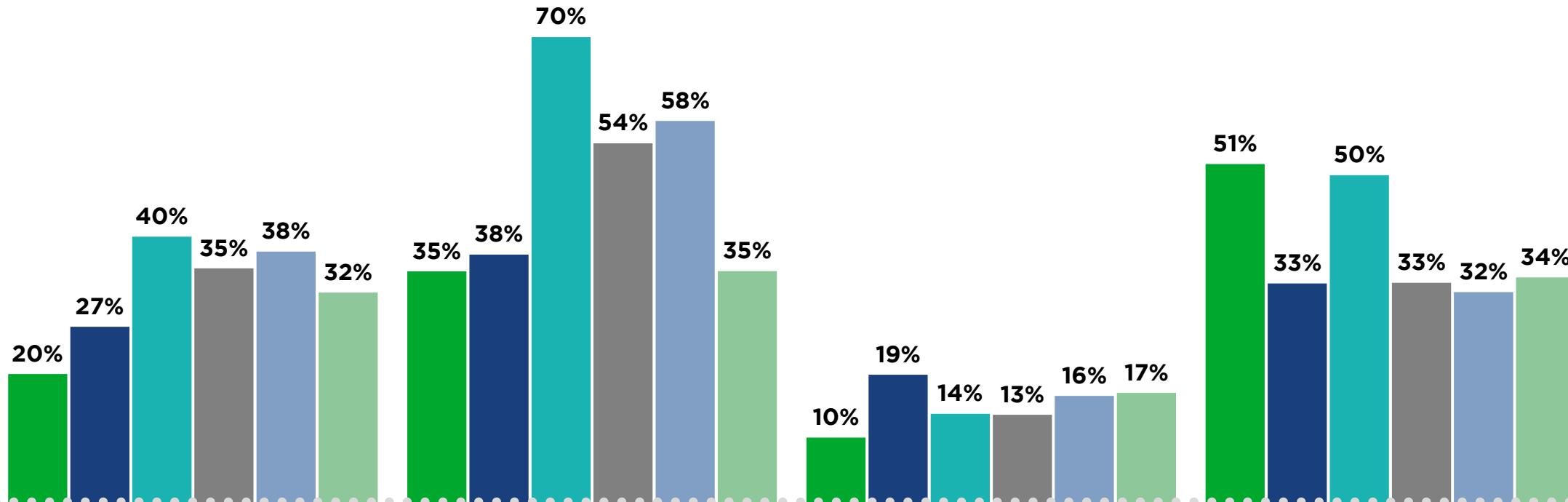
3

› THE STATE OF ESPORTS (IN SEA)

PLAYERS OF ESPORTS TITLES

PLAYED CS:GO, DOTA 2, HEARTHSTONE, AND LEAGUE OF LEGENDS IN THE PAST 3 MONTHS | SEA

● Vietnam ● Thailand ● Philippines ● Indonesia ● Malaysia ● Singapore



ESPORTS GROWTH

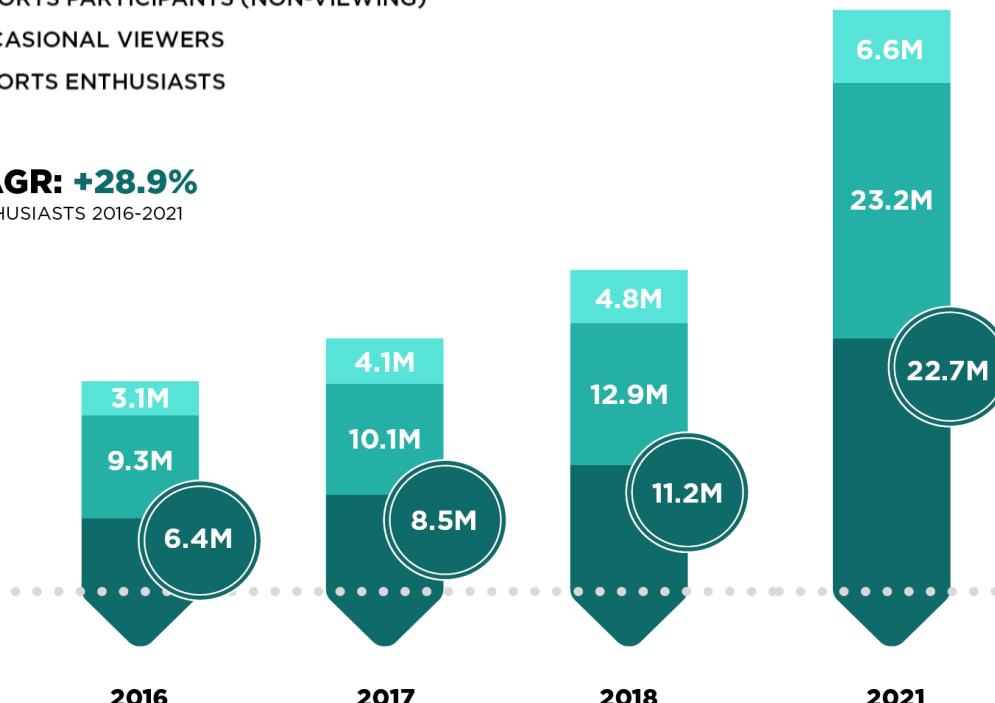
IN SOUTHEAST ASIA

ESPORTS AUDIENCE IN SEA

- ESPORTS PARTICIPANTS (NON-VIEWING)
- OCCASIONAL VIEWERS
- ESPORTS ENTHUSIASTS

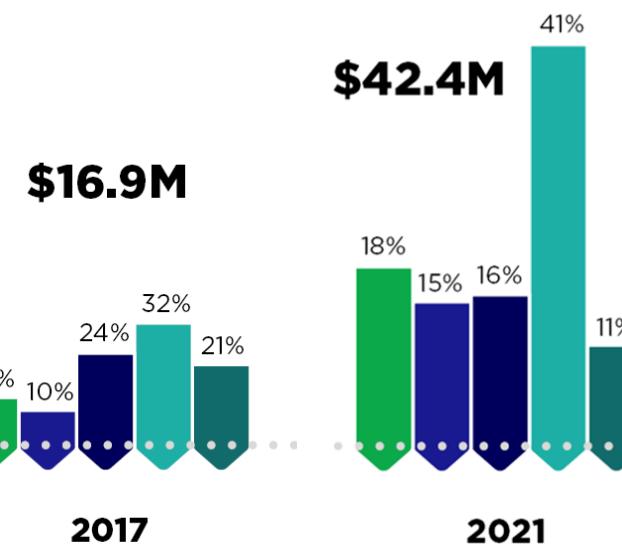
CAGR: +28.9%

ENTHUSIASTS 2016-2021



ESPORTS ECONOMY IN SEA

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



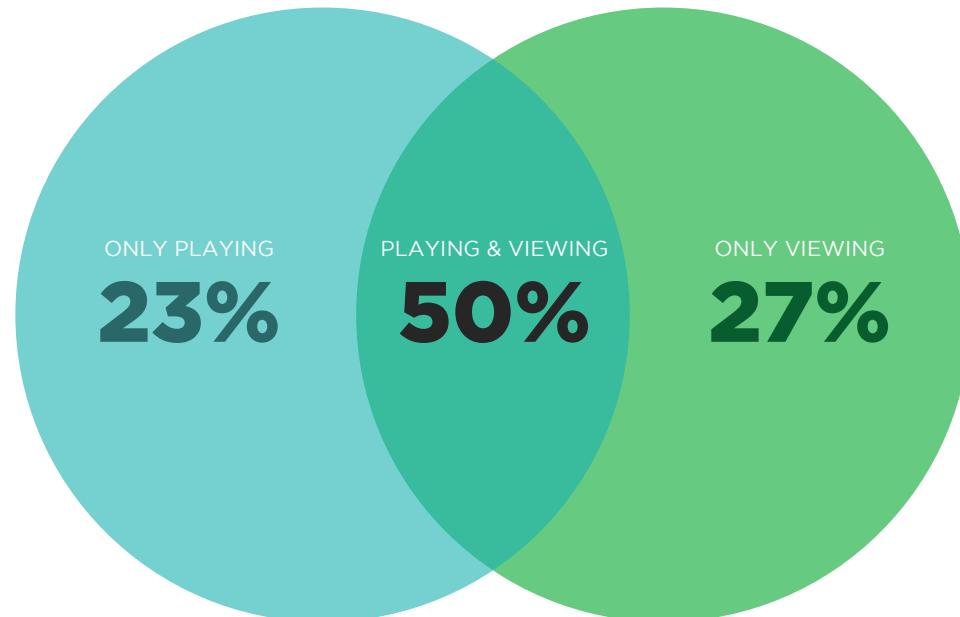
THE BIGGEST FANS

PLAY AND WATCH



PLAYERS
OF LOL

VIEWERS
OF LOL



THE BIGGEST FANS

PLAY AND WATCH

PLAYERS AND VIEWERS
OF DOTA 2



PLAYERS
OF DOTA 2

VIEWERS
OF DOTA 2

ONLY PLAYING

38%

PLAYING & VIEWING

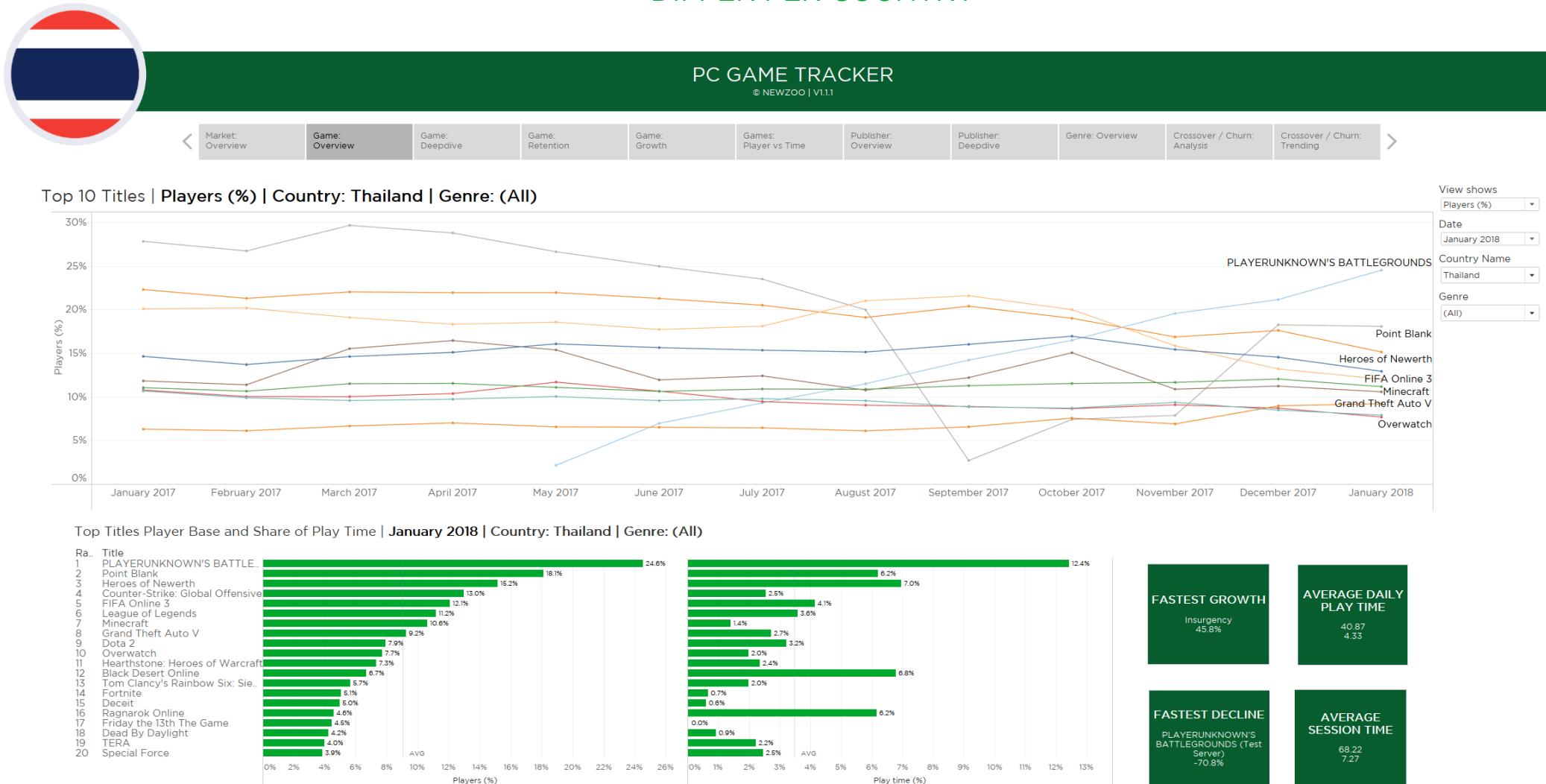
37%

ONLY VIEWING

24%

HOT GAMES

DIFFER PER COUNTRY



Statistics based on month-on-month comparison.
Line chart is based on 10 top played games over the available period.

POINT BLANK

Garena
GAMING FOR ALL

Zepetto

intel
experience
what's inside

acer PREDATOR







CHAMPIONS CUP

WINTER 2016

DEC. 17th SAT ~18th SUN

GMM LIVE HOUSE, 7TH FLOOR, CENTRAL WORLD, BANGKOK



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EGG NETWORK

CROSS SEA (BROADCAST) CHANNEL

The screenshot shows the homepage of the Egg Network website. At the top, there's a navigation bar with links for HOME, NEWS, STREAM, and PROGRAMME, along with social media icons for Facebook, Twitter, and YouTube. Below the navigation is a banner with the text "SOUTH EAST ASIA ESPORTS & GAMING COVERAGE" overlaid on a collage of game art from League of Legends, CS:GO, and other esports titles. On the left, a "TV Guide" section shows a schedule for February 14th to 20th, with "On Now" listing "CS Summit Day 2". It also lists an upcoming match "LCK Spring Week 4 - ROX vs KSV" at 09:45 PM. A note says "* Times are in GMT +8". On the right, there's a "VIRTUELLE BUNDESLIGA by EA SPORTS" section for the "SOUTH EAST ASIA WILDCARD QUALIFIER". Below these are sections for "News" (with cards for League of Legends, Destiny 2, and Arena of Valor), "Live Streams" (listing shroud, summit1g, Saviz, and DreamHack - Hearthstone), and "Upcoming Matches".

HOME NEWS STREAM PROGRAMME

SOUTH EAST ASIA ESPORTS & GAMING COVERAGE

TV Guide

Wed 14th Feb	Thu 15th Feb	Fri 16th Feb	Sat 17th Feb	Sun 18th Feb	Mon 19th Feb	Tue 20th Feb
On Now	CS Summit Day 2					
09:45 PM	LCK Spring Week 4 - ROX vs KSV 8h 47m					

* Times are in GMT +8

VIRTUELLE BUNDESLIGA by EA SPORTS

SOUTH EAST ASIA WILDCARD QUALIFIER

News

#Casual Corner #LoL #Destiny2 #AoV #Casual Corner #mobile mba

League of Legends - What's the Deal With 4 Reasons to Play Destiny 2 5 Things to Expect Before Playing Arena of Valor

shroud 36652 ●
summit1g 27404 ●
Saviz 10864 ●
DreamHack - Hearthstone 109 ●

RERUN: virz vs ALB987 - DreamHack Winter 2017

Upcoming Matches

VIETNAM ESPORTS TV

YOUTUBE GAMING CHANNEL

The image shows the YouTube channel page for 'Vietnam Esports TV'. At the top, there is a promotional banner for the 'VIETNAM CHAMPIONSHIP SERIES' featuring the logo for 'LIENMINH HUYENTHOA'. The banner includes the text 'KHỞI TRANH VÀO LÚC 16:00 18.01.2018' and 'TRỰC TIẾP TRÊN HTTPS://GARENA.LIVE/'. Below the banner, the channel's profile picture is a red square with the letters 'VETV' in white. The channel name 'Vietnam Esports TV' is displayed with a verified checkmark, and it has 2.028.127 subscribers. A red button labeled 'ABONNEREN 2 MLN.' is visible. The main content area shows a video thumbnail for a League of Legends draft segment, with the title '[Biết chọn gì đây?] Hình mẫu lý tưởng | Số 2', 57.968 views, and a timestamp of '2 weken geleden'. To the right, there is a 'FEATURED CHANNELS' section listing other Garena-related channels: 'Garena Blade & Soul Vi...', 'VETV7 ESPORTS', 'Garena Mobile Vietnam', and 'FIFA ONLINE 3 Việt Nam'. Each channel entry includes a small profile icon and a 'ABONNEREN' button.

VETV Vietnam Esports TV ✓
2.028.127 abonnees

HOME VIDEO'S AFSPEELLIJSTEN COMMUNITY KANALEN OVER

[Biết chọn gì đây?] Hình mẫu lý tưởng | Số 2
57.968 weergaven • 2 weken geleden
Khánh Hiệp và Minh Hảo sẽ chọn gì trong số này đây? Hãy cùng xem những lựa chọn mà họ cho là lý tưởng nhất nhé!!!
--
Vietnam Esports TV (www.vetv.vn) giữ bản quyền toàn bộ nội dung.
MEER WEERGEVEN

VETV VCS Xuân 2018 ALLES AFSPELEN

FEATURED CHANNELS

- Garena Blade & Soul Vi...
ABONNEREN
- VETV7 ESPORTS
ABONNEREN
- Garena Mobile Vietnam
ABONNEREN
- FIFA ONLINE 3 Việt Nam
ABONNEREN

4

› THE MOBILE-FIRST FUTURE AND THE IMPACT ON SEA ESPORTS

BACK IN 2015

PHILIPPINES IN THE LEAD



SUPERCELL



TOP GOOGLEPLAY GAMES IN MALAYSIA

GOOGLE PLAY | REVENUES & DOWNLOADS | JAN 2017



TOP 10 GOOGLE PLAY GAMES

BY REVENUES | MALAYSIA | JANUARY 2017

#	GAME TITLE	PUBLISHER
1	Mobile Legends: Bang Bang	Moonton
2	新射雕英雄传-金庸武侠MMO钜作	Efun Games Co.,Ltd.
3	叫我官老爷 - 原创当官手游	深圳创酷互动信息技术有限公司
4	Lords Mobile	IGG.COM
5	ROBLOX	ROBLOX Corporation
6	Slotomania - Vegas Slots Casino	Playtika
7	Zynga Poker – Texas Holdem	Zynga
8	神魔之塔	Mad Head Limited
9	Crisis Action: NO CA NO FPS	HERO Game
10	FINAL FANTASY AWAKENING : SE Authorize 3D ARPG	EFUN COMPANY LIMITED

TOP 10 GOOGLE PLAY GAMES

BY DOWNLOADS | MALAYSIA | JANUARY 2017

#	GAME TITLE	PUBLISHER
1	Mobile Legends: Bang Bang	Moonton
2	旅かえる	Hit-Point Co.,Ltd.
3	RULES OF SURVIVAL	NetEase Games
4	Knives Out	NetEase Games
5	Toon Blast	Peak Games
6	BarbarQ	Electronic Soul
7	Free Fire - Battlegrounds	GARENA INTERNATIONAL PRIVATE LIMITED
8	Candy Crush Saga	King
9	Subway Surfers	Kiloo
10	SuperStar BTS	Dalcomsoft, Inc.

TOP IOS GAMES IN MALAYSIA

iOS | REVENUES & DOWNLOADS | JAN 2017



TOP 10 iOS GAMES

BY REVENUES | MALAYSIA | JANUARY 2017

#	GAME TITLE	PUBLISHER
1	Mobile Legends: Bang Bang	moonton
2	新射雕英雄传-金庸武侠MMO钜作	Efun Games Co.,Ltd.
3	Zynga Poker - Texas Holdem	Zynga Inc.
4	叫我官老爺 - 原創宮廷當官手遊	Chuang Cool Entertainment
5	Crisis Action: Best FPS Mobile	dongyang han
6	FINAL FANTASY AWAKENING	Efun Games Co.,Ltd.
7	Lords Mobile	IGG.COM
8	Slotomania: Vegas Slots Casino	Playtika LTD
9	War Dragons	Pocket Gems, Inc.
10	诛仙手游-唯美时装季	Efun Games Co.,Ltd.



TOP 10 iOS GAMES

BY DOWNLOADS | MALAYSIA | JANUARY 2017

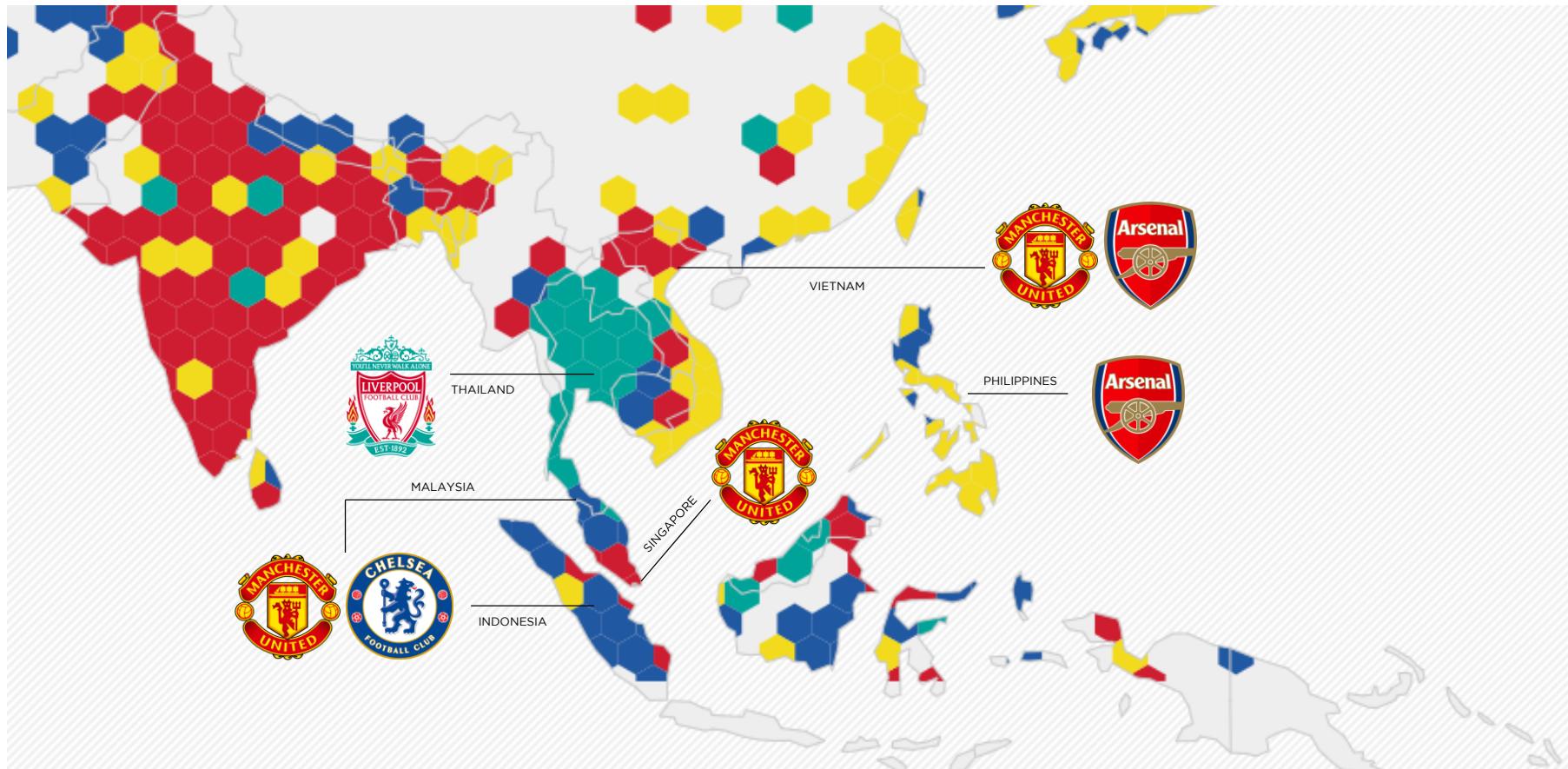
#	GAME TITLE	PUBLISHER
1	Rules of Survival	NetEase Games
2	Mobile Legends: Bang Bang	moonton
3	旅かえる	Hit-Point Co., Ltd.
4	Toon Blast	Peak Games
5	Reborn之怒一人氣日漫改編遊戲	Jinyong Yang
6	黑道教師—經典家教手遊	Qin Ye
7	SuperStar BTS	Dalcomsoft, Inc.
8	Garena Free Fire	GARENA INTERNATIONAL PRIVATE LIMITED
9	仙之傳說	Weixia Wu
10	Knives Out	NetEase Games

4

➤ ESPORTS AS A SPORT AND WHY SEA IS AT THE CENTRE

SPORTS (BRANDS) ARE HOT

LOCAL FANBASES HUGE



THE TEAMS

GLOBAL FANDOM



WESTERN SPORTS TEAMS
CATER TO THEIR SEA FANS,
EG CHELSEA

THE TEAMS

GLOBAL FANDOM

VIETNAMESE GIGABYTE
MARINES MADE IT TO
WORLDS AND DID VERY
WELL



WESTERN SPORTS TEAMS
CATER TO THEIR SEA FANS,
EG CHELSEA







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