



FREE REPORT

# THE ROLE OF MOBILE IN ESPORTS

---

THE STATE AND FUTURE OF MOBILE  
ESPORTS IN ASIA AND THE WEST

**newzoo**

FEBURARY 2018



# TABLE OF CONTENTS

1. Market Overview	5
2. PC Esports vs. Mobile Esports	11
3. Mobile Esports in the West	16
4. Mobile Esports in Asia	22
5. Future Outlook	29

# INTRODUCTION

## AN OVERVIEW OF THE CURRENT MOBILE ESPORTS SCENE

The past two years has witnessed crucial developments in the global esports market, growing by 102% in revenues from 2015 to 2017. While mobile has quickly grown as the biggest gaming screen worldwide, its esports scene is largely lagging behind that of PC and console.

In Asia however, mobile esports is experiencing a boom, accelerated by the mobile-first culture of the region. The phenomenon is especially outstanding in China, leading with top franchises such as Tencent's Honor of Kings and Giant Network's Battle of Balls. In Asia, mobile esports is expected to follow a similar structure to that of PC, with the top games being played and scalable stadium events taking place with large viewership.

In the West, PC is still the dominant form of gaming entertainment and is expected to remain so for the coming years. Here, mobile esports is expected to be more successful in other layers of esports, such as the amateur scene.

For the mobile esports scene, 2018 will be a year to uncover its own identity within the larger esports ecosystem.



### FEATURED CASE STUDIES



**25M+** DAU in China

**Battle of Balls**  
in China



**30M+** DAU in the West

**Clash Royale**  
in the West

“In Asia, mobile esports is expected to follow a similar structure to that of PC, with the top games being played and scalable stadium events taking place with large viewership. In the West, mobile esports is expected to be more successful in other layers of esports, such as the amateur scene.”



**PETER WARMAN**  
NEWZOO CEO

# FACTS ON MOBILE ESPORTS

NUMBER OF EVENTS, FEATURING TWO DISTINCTIVE FRANCHISES



THE WESTERN  
MARKET RECORDED

**33**

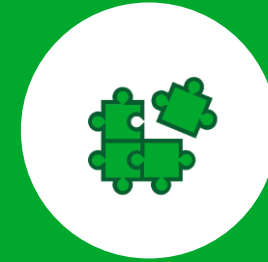
LARGE MOBILE  
EVENTS IN 2017



OF ASIAN VIEWERS OF  
VAINGLORY ESPORTS,

**63%**

DO NOT PLAY THE  
GAME BUT SIMPLY  
ENJOY THE ESPORTS  
CONTENT



BATTLE OF BALLS  
IS THE WORLD'S

**#1**

CASUAL MOBILE  
ESPORTS TITLE



1

# MARKET OVERVIEW

---

THE GLOBAL GAMES AND  
ESPORTS MARKETS



“The arrival of the smartphone more than 10 years ago has not only created a \$50 billion dollar global business in game revenues but, equally important, has pioneered new business models and marketing mechanics that are impacting nearly every market and industry.

The success of competitive mobile games in general and esports activities is taking mobile gaming to the next level: all-round entertainment, more engaging than any other form.”

- Jelle Kooistra, Head of Market Analysts, Newzoo



# 2015-2020 GLOBAL GAMES MARKET

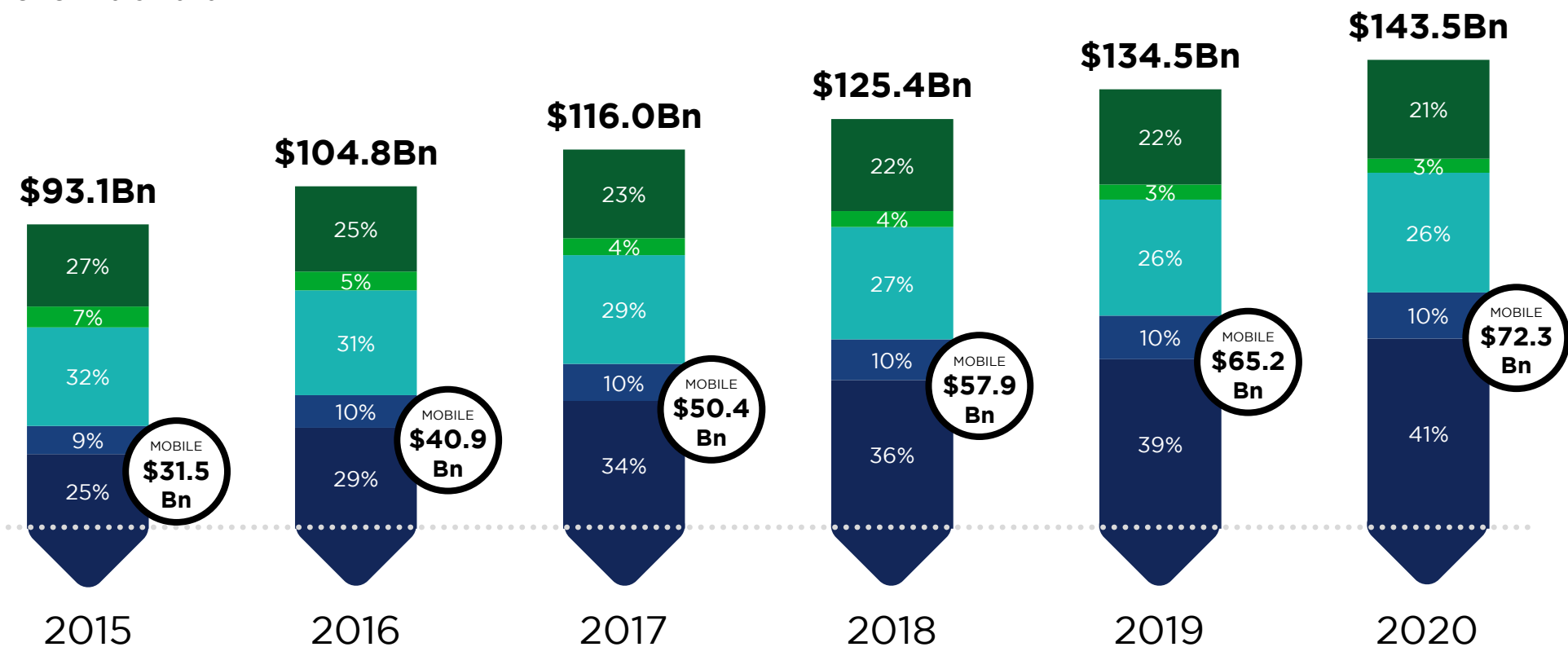
FORECAST PER SEGMENT TOWARD 2020

TOTAL MARKET

**+9.0%**

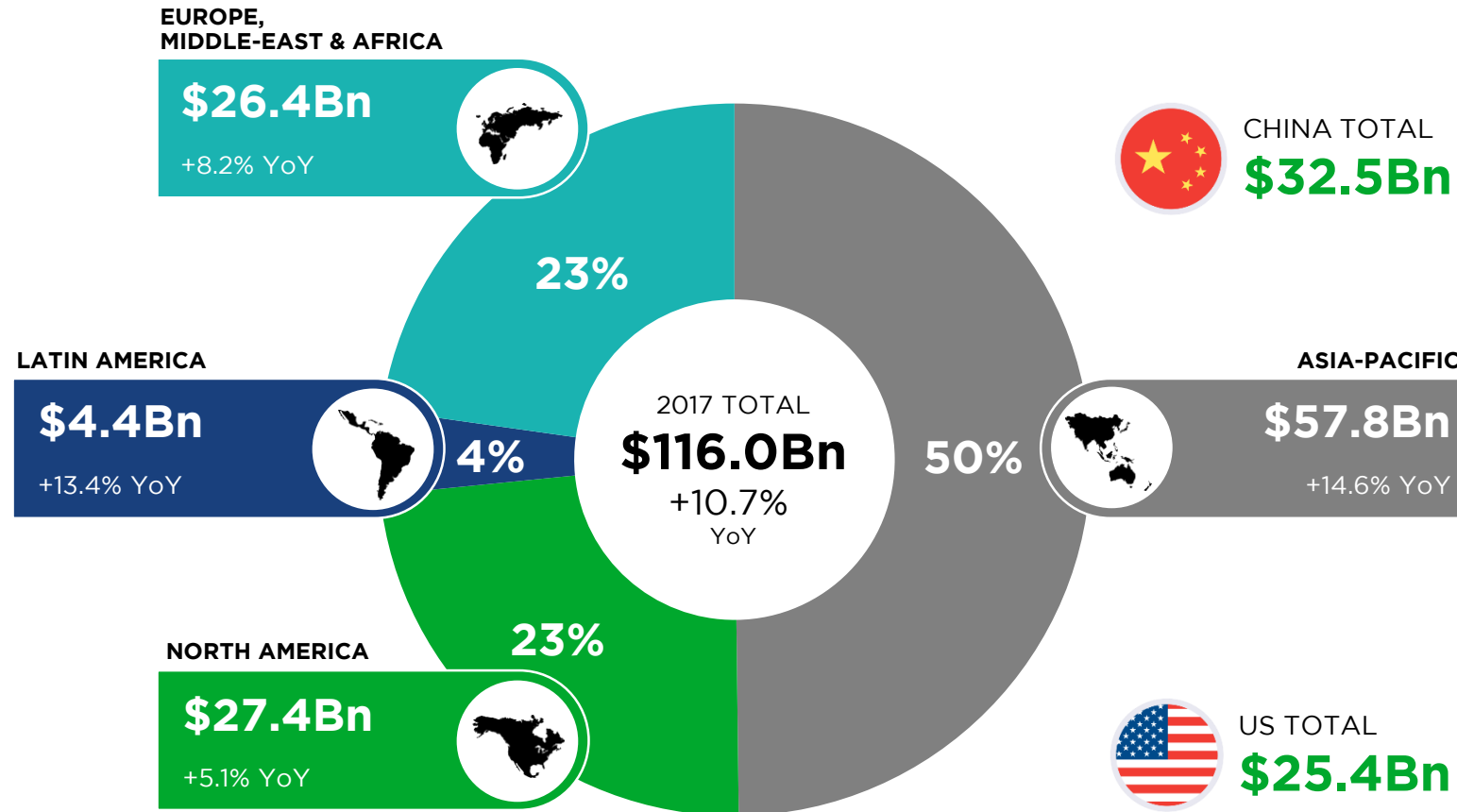
CAGR 2015-2020

● Boxed/Downloaded PC ● Browser PC ● Console ● Tablet ● Smartphone



# 2017 GLOBAL GAMES MARKET

PER REGION WITH YEAR-ON-YEAR GROWTH RATES



In 2017, the U.S. and China combined accounted for

**50%**

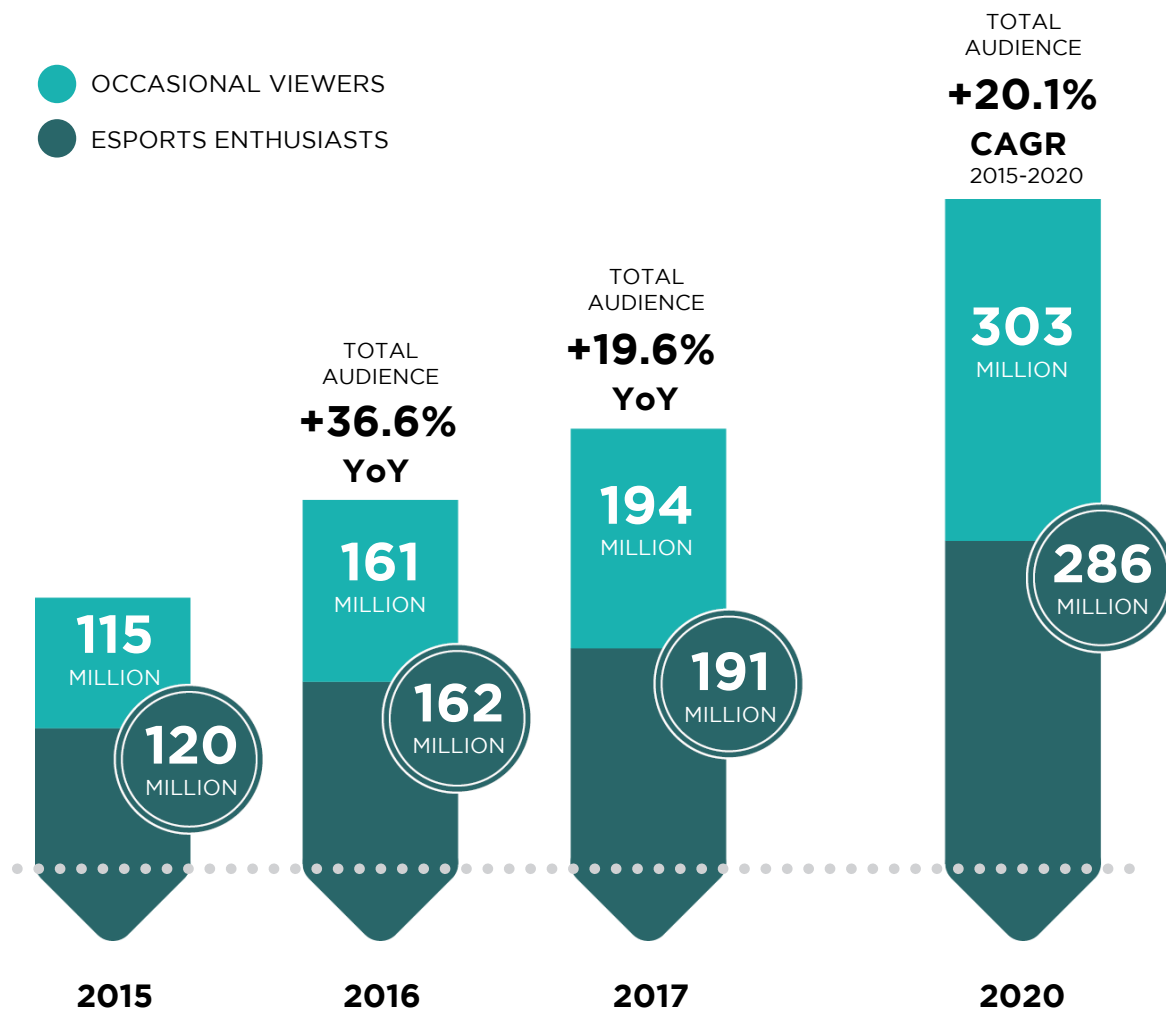
of all consumer spend on games

# ESPORTS AUDIENCE GROWTH

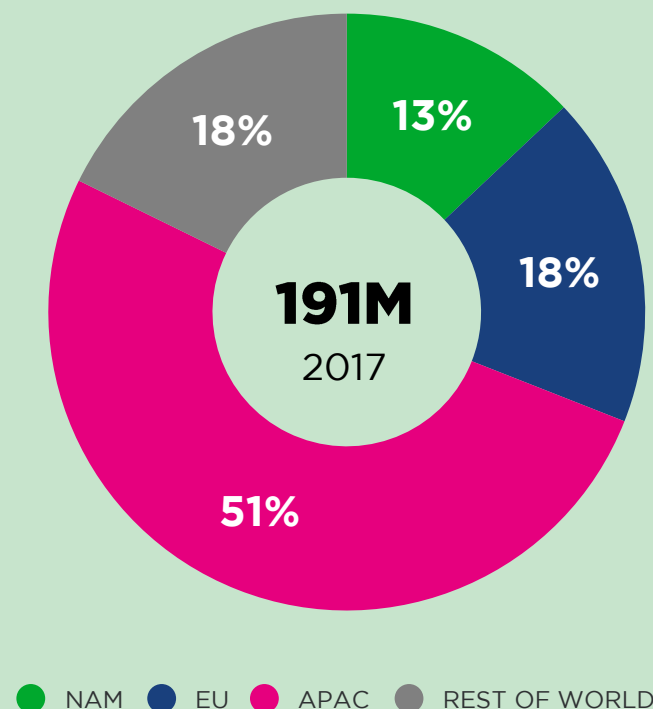
GLOBAL | FOR 2015, 2016, 2017, 2020

● OCCASIONAL VIEWERS

● ESPORTS ENTHUSIASTS



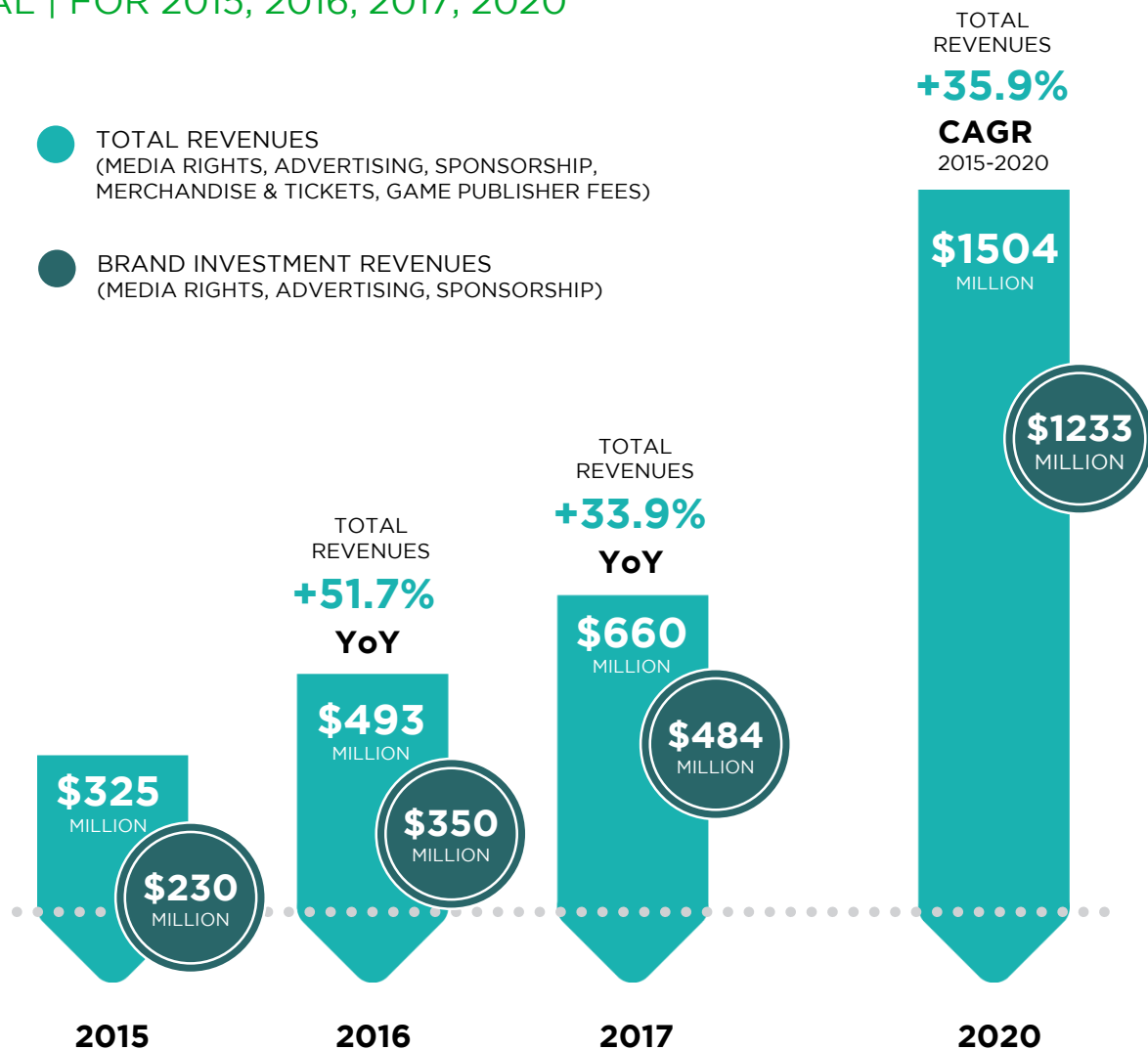
Asia-Pacific  
accounted for  
**51%**  
of Esports  
Enthusiasts in 2017



# ESPORTS REVENUE GROWTH

GLOBAL | FOR 2015, 2016, 2017, 2020

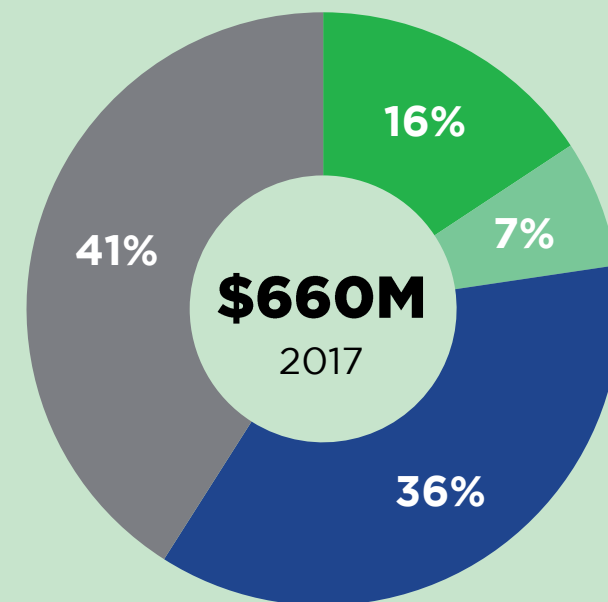
- TOTAL REVENUES  
(MEDIA RIGHTS, ADVERTISING, SPONSORSHIP,  
MERCHANDISE & TICKETS, GAME PUBLISHER FEES)
- BRAND INVESTMENT REVENUES  
(MEDIA RIGHTS, ADVERTISING, SPONSORSHIP)



China & North America  
generated

**\$344M**

in 2017, or 52% of global  
esports revenues



● CHINA ● S.KOREA ● NAM ● REST OF WORLD



# 2

## PC ESPORTS VS. MOBILE ESPORTS

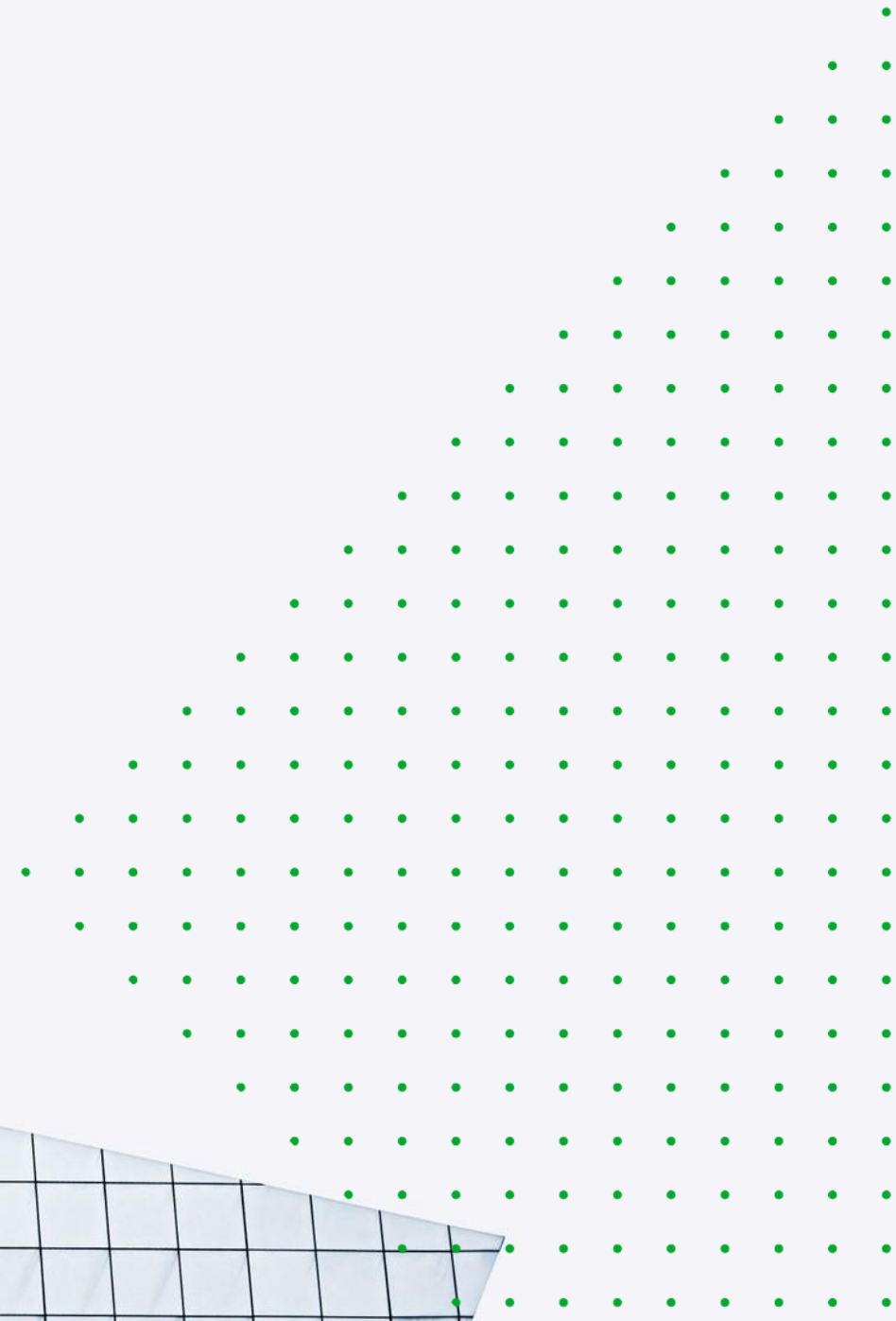
A DETAILED COMPARISON  
ON DIFFERENT LAYERS



“Back in 2013, we were the first to report on esports as a trend that would reshape the media landscape on a truly global scale. It’s amazing to see where we are now, not only in terms of audience and live stadium events, but also the convergence of telecom, media, sports, and entertainment.

At the same time, the success of esports can never be evaluated without understanding the deeper consumer-driven trends that have pushed esports to where it is now.”

- Peter Warman, CEO & Co-Founder, Newzoo



# TOP 50 ESPORTS EVENTS IN 2017

PC IS STILL THE MOST POPULAR FORM OF GAMING ENTERTAINMENT

## TOP 50 ESPORTS EVENTS

BY VIEWERSHIP HOURS | PER REGION | 2017



EVENT	ORGANIZER	VIEWER-SHIP*	ATTEND-EES**	TICKET REVENUE**	PRIZE POOL	RANK
GLOBAL						
Rift Rivals	Riot Games	7.1M	9K	\$44K	-	19
ASIA PACIFIC						
LoL World Championship	Riot Games	49.5M	173K	\$5.5M	\$4.9M	1
Dota 2 Asia Championship	Perfect World	8.0M	24K	\$559K	\$575K	16
LMS Summer Split	Garena	6.7M	11K	\$99K	\$100K	21
LoL Champions Korea Spring	OnGameNet	6.4M	11K	\$55K	\$300K	22
LoL Champions Korea Summer	OnGameNet	6.2M	15K	\$75K	\$300K	23
LMS Spring	Garena	6.0M	12K	\$108K	\$100K	24
StarLadder i-League Invitational 2	StarLadder, ImbaTV	3.8M	-	-	\$100K	37
2016 Battle of Balls Global Final	Giant Network	3.6M^	13K	\$500K	\$153K	39
ESL One Genting	ESL	3.4M	6K	\$209K	\$250K	44
Mars Dota 2 League	Mars Media	2.9M	20K	-	\$250K	48
World Electronic Sports Games	WESG	2.7M	6K	\$140K	\$3.7M	50
NORTH AMERICA						
ELEAGUE Major	Turner	42.7M	5K	\$561K	\$1.0M	2
The International	Valve	36.9M	85K	\$5.1M	\$24.7M	3
NA LCS Spring	Riot Games	27.2M	38K	\$1.6M	\$200K	4
NA LCS Summer	Riot Games	18.2M	44K	\$1.5M	\$200K	7
DreamHack Masters - Las Vegas	DreamHack	11.1M	2K	\$45K	\$450K	13
RLCS Season 4	Psyonix	7.0M	5K	\$150K	\$316K	20
IEM Oakland	ESL	5.4M	12K	\$300K	\$500K	25
All-Stars	Riot Games	5.0M	2K	\$50K	-	26
EVO	Shoryuken	4.8M	10K	\$100K	\$260K	27
RLCS Season 3	Psyonix	4.7M	2K	\$111K	\$256K	29
DreamHack Austin	Dreamhack	4.0M	10K	\$229K	\$245K	32
CS Summit	Beyond the Summit	3.9M	-	-	\$150K	34
Dota Summit 7	Beyond the Summit	3.9M	-	-	\$100K	35

^ Accumulated live viewership hours on streaming platforms in China.

EVENT	ORGANIZER	VIEWER-SHIP*	ATTEND-EES**	TICKET REVENUE**	PRIZE POOL	RANK
NORTH AMERICA (CON'T)						
Overwatch World Cup	Blizzard	3.8M	7K	\$280K	\$360K	36
Dota Summit 8	Beyond the Summit	3.7M	-	-	\$300K	38
Hearthstone Championship Winter	Blizzard	3.4M	-	-	\$250K	42
ESL One New York	ESL	3.4M	14K	\$840K	\$250K	45
ELEAGUE Premier	Turner	2.9M	1K	\$20K	\$1.0M	49
EUROPE, MIDDLE EAST & AFRICA						
Kiev Major	PGL	23.3M	15K	\$117K	\$3.0M	5
IEM Season XI - Katowice	ESL	14.5M	173K	\$550K	\$760K	8
EU LCS Spring	Riot Games	13.8M	42K	\$829K	\$200K	9
StarLadder i-League StarSeries S3	SLTV, ImbaTV	12.0M	7K	\$22K	\$300K	10
EU LCS Summer	Riot Games	11.2M	50K	\$1.3M	\$200K	11
ESL One Cologne	ESL	11.2M	15K	\$856K	\$250K	12
PGL Major Krakow	PGL	10.0M	35K	\$489K	\$1.0M	14
DreamHack Masters Malmo	DreamHack	8.6M	13K	\$1.3M	\$250K	15
DreamHack Winter	DreamHack	7.4M	43K	\$1.6M	\$1.4M	17
EPICENTER CS:GO	Epic Esport Event	7.4M	14K	\$71K	\$500K	18
ESL One Hamburg	ESL	4.8M	20K	\$900K	\$1.0M	28
Dota Pit League Season 5	Dota Pit	4.4M	20K	\$66K	\$140K	31
DreamHack Summer	DreamHack	3.9M	38K	\$2.7M	\$385K	33
DreamHack Valencia	DreamHack	3.4M	40K	\$528K	\$483K	41
StarLadder i-League invitational 3	StarLadder, ImbaTV	3.4M	2K	\$5K	\$300K	43
Epicenter Dota 2	Epic Esport Event	3.3M	20K	\$328K	\$500K	46
AMD SAPPHIRE Dota PIT League	One Game	3.2M	-	-	\$300K	47
LATIN AMERICA						
Mid Season Invitational	Riot Games	22.6M	35K	\$1.0M	\$400K	6
CBLoL Summer Season	Riot Games	4.5M	15K	\$302K	\$60K	30
CBLoL Winter Season	Riot Games	3.5M	15K	\$302K	\$64K	40

\* Viewership: total live viewership hours of the tournament or league on Twitch during the course of the event globally.

\*\* Attendees and ticket revenue: estimations based on public information such as stadium capacity and average ticket price.

# ESPORTS IS THE PINNACLE OF COMPETITIVE GAMING

UNDERLYING SUCCESS OF COMPETITIVE GAMING HAS PUSHED IT TO A PROFESSIONAL LEVEL



## CASE: PLAYERUNKNOWN'S BATTLEGROUNDS (PUBG)

PUBG rose quickly to become the most viewed game on Twitch and the first game to have more viewers than gamers.

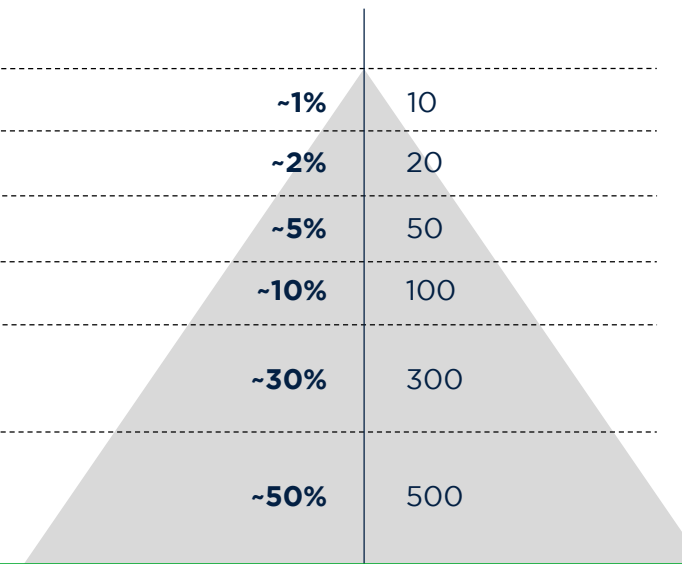
- Up to 30% of game enthusiasts (depending on country) plays the game in an online competitive mode.
- Professional teams quickly added PUBG teams but...
- The game is far from being a solid esports title in multiple ways...



## ESPORTS AS PINNACLE OF COMPETITIVE GAMING TREND



## SHARE OF TOP 1,000 GAMES PER LAYER (INDICATIVE)



# MOBILE ESPORTS MIGHT TAKE A DIFFERENT PATH

MOBILE COMPETITIVE TITLES SURGE BUT ITS ESPORTS ECOSYSTEM COULD PROVE TO BE DIFFERENT



## CASE: BATTLE OF BALLS

- Giant's Battle of Balls is already an esports success in China, and other Asian regions are soon to follow.
- The Battle of Balls Professional League (BPL) is the world's first casual mobile esports league.
- Giant E-Sports is part of the company's mobile esports ecosystem. It organizes events for franchises such as Battle of Balls, Vainglory, and Streetball in China.

## ANALYSIS OF MOBILE ESPORTS OPPORTUNITY

- There is a market for pro esports events in Asia, but less so in the West. In Asia, esports around mobile games is more similar to PC, especially in Southeast Asia.
- Single player will not be enough for esports entertainment.
- Consumers and small organizations set up **events** at physical locations, for instance, fun community competitions.
- These events can be anywhere and anytime for mobile games, as there is no additional equipment required.
- Facilitating & stimulating the **creation of leagues and competition** between friends is key to both mobile and PC competitive games.
- Traditional esports is **viewed** most on mobile where there is no option to play. For mobile games, fans can immediately switch between playing and viewing.
- Performance on Twitch is a clear indication of esports potential. Mobile esports scores low viewership.
- Moments to **share** determine content creation.
- What these moments are determine if it is esports.
- Do the moments have to do with skills? Or fun or visual? Esports require skill-based moments.
- Mobile games can be equally **competitive** to PC and console games.
- F2P business model dominates both mobile and PC games. Mass audience required for competitive matching is represented on mobile.





3

## MOBILE ESPORTS IN THE WEST

---

FACTS FEATURING CASE  
STUDIES

# MOBILE ESPORTS IN THE WEST

## MOBILE ESPORTS SCENE LAGS BEHIND THAT OF PC & CONSOLE

**PC** is still the dominant form of gaming entertainment in the West and is expected to remain so for the coming years. While mobile has quickly grown as the biggest gaming screen worldwide, its esports scene still lags behind that of PC as well as console.

**COMPETITIVE** games are the core of mobile esports in the West. Top mobile esports franchises in the West include Clash Royale, Vainglory, and Summoners War, which fall into the genres of multiplayer strategy, mobile MOBA, and MMO, respectively.

**MULTI-GAME** events are catching the eye of big organizers and investors in the West. In the East, a typical multi-game event involves top mobile games of a single publisher. In the West, however, events with games from different publishers are common. Amazon organized Mobile Masters tournaments in 2017 in which various games were played, including Vainglory, Hearthstone, World of Tanks Blitz, etc.

### TWITCH VIEWERSHIP HOURS

PC VS. MOBILE | NAM & EU | 2017



**405M**

Total Twitch viewership hours of all PC esports events in NAM and EU combined, 2017

**2M**

Total Twitch viewership hours of all mobile esports events in NAM and EU combined, 2017

### TOP WATCHED MOBILE FRANCHISES ON TWITCH

NAM & EU | 2017



**1,021K**

Total Twitch viewership hours of Clash Royale events in NAM and EU combined, 2017



**606K**

Total Twitch viewership hours of Vainglory events in NAM and EU combined, 2017












# TOP GROSSING GAMES IN THE WEST

## COMPETITIVE AND ESPORTS SCENES

### TOP 10 iOS GAMES

BY REVENUES | US | DECEMBER 2017















#	GAME TITLE	PUBLISHER
1	 Candy Crush Saga	King
2	 ROBLOX	Roblox
 3	 <b>Clash Royale</b>	Supercell
4	 Candy Crush Soda Soga	King
5	 Clash of Clans	Supercell
6	 DoubleDown Casino	DoubleDown Interactive
7	 MADDEN NFL Mobile	Electronic Arts
8	 Heart of Vegas	Product Madness
9	 Gardenscapes	Playrix Games
10	 MARVEL Contest of Champions	Kabam

### TOP 10 iOS GAMES

BY REVENUES | EUROPE | DECEMBER 2017



#	GAME TITLE	PUBLISHER
1	 Candy Crush Saga	King
 2	 <b>Clash Royale</b>	Supercell
3	 Clash of Clans	Supercell
4	 Gardenscapes	Playrix Games
5	 Homescapes	Playrix Games
6	 Candy Crush Soda Soga	King
 7	 Summoners War	Com2uS
8	 Hay Day	Supercell
9	 Pokémon GO	Niantic
10	 MARVEL Contest of Champions	Kabam

Competitive titles



Esports scene

# FEATURED MOBILE ESPORTS FRANCHISES

## CLASH ROYALE & SUMMONERS WAR



**CLASH ROYALE**  
LAUNCH DATE: JANUARY 2016  
PUBLISHER: SUPERCELL  
HQ: HELSINKI, FINLAND



Clash Royale is one of the most played mobile games in the West. Supercell has started developing the game's esports scene with several initiatives including its Crown Championship, Clash Royale's top-level esports event. The game has now grown to be the #1 mobile esports title in the West by viewership hours on Twitch; in 2017, all Clash Royale tournaments and leagues generated totally **1.3 million viewership hours**.

# #3

grossing mobile  
game in the U.S.  
on iOS in  
December 2017



**SUMMONERS WAR**  
LAUNCH DATE: JUNE 2014  
PUBLISHER: COM2US  
HQ: SEOUL, SOUTH KOREA



Summoners War is a turn-based strategy/MMO game developed by the South Korean company Com2uS. In 2017, the United States and Europe contributed 30% and 19% of the game's total revenues on iOS, respectively. Summoners War is a rising star in mobile esports. The 2017 Summoners War World Arena Championship Finals, which was a single-day event, had **249,000 viewership hours** on Twitch.

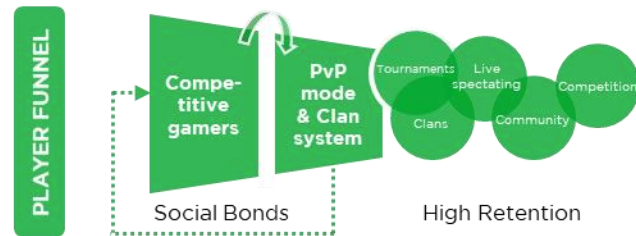
# #20

grossing mobile  
game in the U.S.  
on iOS in  
December 2017

# CASE STUDY: CLASH ROYALE

## ITS OPEN PLAY MODE ATTRACTED MILLIONS OF PLAYERS TO PARTICIPATE FROM ALL OVER THE WORLD

Clash Royale's PvP mode, together with its tournament feature, creates a highly competitive scene for the game. Social bonds are established by the clan system and connections to external social platforms. In 2016, Supercell introduced a live spectating feature that allows players to invite friends to watch a battle. These features have pushed up Clash Royale's retention rate and gradually moved the game into an esports scene. As of December 2017, the game had over 50 million DAU globally.



Clash Royale's global esports competition The Crown Championship has an open-play mode that allows any players at Level 8 or higher to participate by organizing online, open-battle, custom tournaments that are directly available in the Clash Royale app. The 2017 Crown Championship attracted 27.4 million global participants. Shortlisted players from Bracket Play and Elimination phases can take part in the spring/fall finals and the world finals.



The Crown Championship is a global event. The Spring Split 2017 was launched in North America, Europe, Latin America, China, South Korea, and Japan. The Fall Split 2017 was further expanded to Southeast Asia and the rest of the world. The World Finals was held in London on December 3<sup>rd</sup>, 2017 and attracted players and audiences from all over the world.



In Q4 2017, all Clash Royale live streaming videos accumulated 15.8 million viewership hours on YouTube Gaming and 6.3 million on Twitch. It was the #1 mobile game on Twitch and YouTube Gaming combined by viewership hours. Noticeably, Clash Royale was the only title in the top 20 viewed games that had much more viewership hours on YouTube Gaming than on Twitch.

# THE CROWN CHAMPIONSHIP WORLD FINALS

SUPERCELL'S LARGEST STADIUM EVENT



**5,000**

Live audience at the Clash  
Royale Crown Championship  
World Finals in London

**122K**

Total Twitch viewership hours  
of the Clash Royale Crown  
Championship World Finals



4

# MOBILE ESPORTS IN ASIA

---

FACTS FEATURING CASE  
STUDIES

# MOBILE ESPORTS IN ASIA

## CHINA IS THE WORLD'S LARGEST MOBILE ESPORTS MARKET

**MOBILE** esports is more popular in the East than in the West, especially in China, accelerated by the mobile-first culture of the region. In Asia, mobile esports is expected to follow a similar structure to that of PC, with the top mobile games being played and large stadium events taking place with large viewership.

**CASUAL** mobile games hold a strong position in the esports scene in Asia, which is different from the West where competitive genres dominate the market. Giant Network's Battle of Balls Professional League was the world's first casual mobile esports league and its 2017 Global Final will be the first mobile esports event held in Mercedes-Benz Arena Shanghai, the former exhibition hall of World Expo 2010.

**SOCIAL** functions are largely adopted in mobile games in Asia, creating strong bonds between gamers. In China, for example, all of Tencent's mobile games can be connected to either QQ or WeChat where gamers can easily access the leaderboards and any updates of the games they are playing via the embedded game centers. Gamers can also play with/against their friends by using the social system.

### TOP MOBILE ESPORT LEAGUES/TOURNAMENTS IN ASIA



**VAINGLORY WORLD CHAMPIONSHIP**  
Super Evil Megacorp



**KING PRO LEAGUE**  
Tencent



**BATTLE OF BALLS PROFESSIONAL LEAGUE**  
Giant Network



**CHINA MOBILE E-SPORTS GAMES**  
Datang Network

### TOP FRANCHISES IN ASIA



**HONOR OF KINGS**  
Tencent



**CROSSFIRE MOBILE**  
Tencent



**BATTLE OF BALLS**  
Giant Network



**MONSTER STRIKE**  
Mixi

# TOP PERFORMING ANDROID GAMES IN CHINA













## COMPETITIVE AND ESPORTS SCENES



### TOP 10 ANDROID GAMES

BY REVENUES | CHINA | OCTOBER 2017















#	GAME TITLE	PUBLISHER
 1	 <b>Honor of Kings</b>	Tencent
2	 Onmyoji	NetEase
3	 Dream Journey	4399
4	 Cally's Cave 3	Jordan Pearson
5	 Fantasy Westward Journey	NetEase
6	 Happy Lord	Tencent
7	 Miracle Nikki	Tencent
8	 Werewolf	Jiang Cheng
 9	 Clash of Clans	Supercell
10	 Mini World	Minipay


### TOP 10 ANDROID GAMES

BY MAU | CHINA | OCTOBER 2017



#	GAME TITLE	PUBLISHER
 1	 <b>Honor of Kings</b>	Tencent
2	 Anipop	Happy Elements
3	 PopStar! 2016	Migu
4	 Mini World	MiniPlay
5	 Snake	WePie
6	 Zombie Tsunami	Zplay
7	 Happy Lord	Tencent
8	 Bingo Crush	MicroFun
 9	 Battle of Balls	Giant Network
10	 PopStar! Chinese	Zplay

Competitive titles

 Esports scene

# FEATURED MOBILE ESPORTS FRANCHISES

## BATTLE OF BALLS & HONOR OF KINGS



**BATTLE OF BALLS**  
LAUNCH DATE: MAY 2015  
PUBLISHER: GIANT NETWORK  
HQ: SHANGHAI, CHINA



Battle of Balls, a casual mobile game developed by Giant Network, has accumulated more than 400 million users globally. The Battle of Balls Professional League (BPL) was introduced in 2016 and was the world's first casual mobile esports event. The 2016 Global Final attracted an audience of 13,000 in Shanghai and **3.6 million viewers** on various Chinese live streaming platforms.

# #9

Android game in  
China by MAU in  
October 2017



**HONOR OF KINGS**  
LAUNCH DATE: NOVEMBER 2015  
PUBLISHER: TENCENT  
HQ: SHENZHEN, CHINA



Honor of Kings is by far Tencent's most successful mobile MOBA game. Launched in November 2015, Honor of Kings now has more than 200 million users in China. The largest Honor of Kings league in China is King Pro League (KPL), which was first introduced in September 2016. The 2017 KPL Fall Final attracted a live audience of more than 5,000 in Shenzhen, with a total prize pool of **\$430,000**.

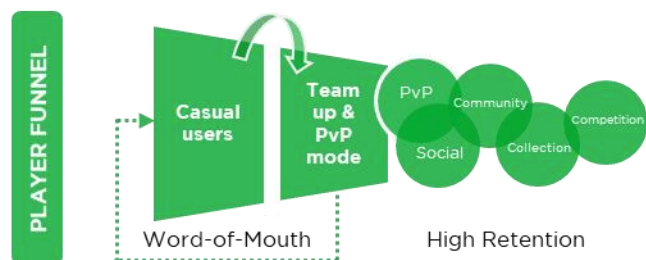
# #1

Android game in  
China by MAU in  
October 2017

# CASE STUDY: BATTLE OF BALLS IN CHINA

## IT'S NOT ONLY A GAME BUT A WELL-ESTABLISHED BRAND

Battle of Balls features casual gameplay as well as intense antagonism. Players can play against each other as individuals or team up with other players. There is strong interactivity in the game logics, which matches the casualness of current gaming trend. The game integrates great sociability for heavy game players at the same time. Battle of Balls had 25 million DAU in China as of January 2017.



Battle of Balls adopts a point system that is similar to the ATP rankings in tennis. Teams earn points by winning various tournaments. Top teams are qualified to higher level tournaments and leagues.



Battle of Balls has established itself as a brand, or IP, in China, partnering with companies across various industries. Battle of Balls sportswear and accessories were introduced by New Era and G-Shock in China. A field marketing campaign was carried out with the leading beverage group Uni-President in China, and in return, Uni-President became a sponsor of Battle of Balls leagues.

Battle of Balls has revolutionized the casual mobile esports scene by organizing large stadium events that have attracted live audiences in the thousands. Licensed live streaming platforms in China actively broadcast Battle of Balls esports content, which has accumulated millions of viewership hours in total.

# THE BATTLE OF BALLS GLOBAL FINAL

GIANT'S LARGEST STADIUM EVENT



**13,000**

Live audience at the 2016 Battle of Balls Global Final (BGF) in Shanghai

**3.6M**

Total viewership hours of the 2016BGF on live streaming platforms in China

# CASE STUDY: GIANT E-SPORTS

## A MOBILE ESPORTS BRAND OF GIANT NETWORK

Driven by the accelerated growth of mobile esports in China, Giant Network set up Giant E-Sports as a separate mobile esports division to further establish the ecosystem around some of the company's core mobile titles, including Battle of Balls, Vainglory, and Streetball.

On top of the success of Battle of Balls as an esports franchise in China, Giant E-Sports also partners with Alisports, a leading third-party esports event organizer in China under the Alibaba Group, to further optimize the event systems and esports content.

At the same time, Giant E-Sports is mapping out its global expansion. Battle of Balls is already a popular mobile title in Asian countries and regions such as South Korea, Taiwan, and Hong Kong. Organizing local tournaments in these regions is on Giant E-Sports' roadmap.

### GIANT E-SPORTS



### PARTNER



Giant has been the local publisher of Super Evil Megacorp's mobile MOBA Vainglory in China since November 2015. In 2017, China contributed 20% of the game's revenues on iOS, becoming the second largest grossing market of Vainglory after the U.S.

Together with Super Evil Megacorp, Giant E-Sports has brought Vainglory esports to China by organizing Vainglory8 China Spring, Summer, and Fall Split and Vainglory China League (VCL) in 2017.



Streetball is a 3v3 mobile basketball game published by Giant in November 2016. Only one year after its official launch in China, it has become a selected franchise in the China Mobile E-Sports Games, a nationwide mobile esports event organized by General Administration of Sport of China.

On top of that, Giant E-Sports has organized several tournaments for Streetball, including Streetball Online Tournament, Streetball Asia Tournament, and Streetball Global Finals.



5

# FUTURE OUTLOOK

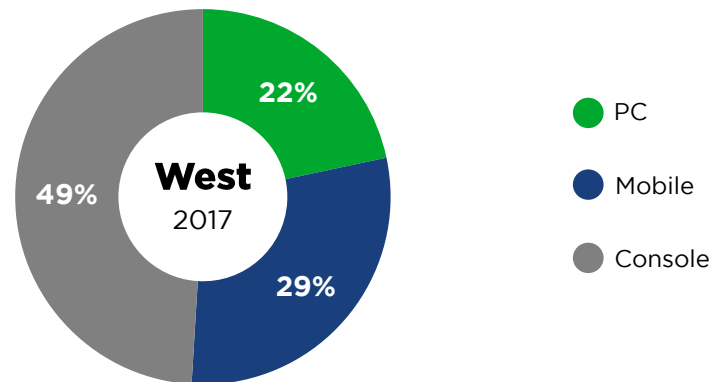
SCENARIOS IN THE WEST  
AND THE EAST

# THE FUTURE OF MOBILE ESPORTS

## HOW IT WILL EVOLVE IN THE WEST AND THE EAST

### GAMES MARKET REVENUES IN THE WEST

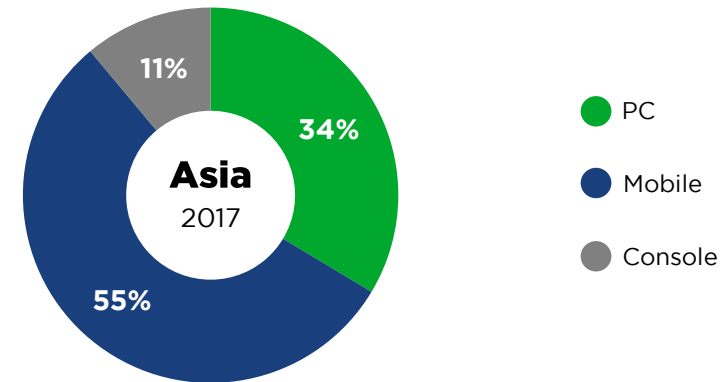
PER SEGMENT | NAM & EU | 2017



In the West, competitive games are expected to continue their dominant status in the esports scene. However, due to a currently low viewership and a relatively underdeveloped esports ecosystem in the West, mobile esports is more likely to be successful in the amateur scene in the near future, which explains why Supercell's open-play mode in the Crown Championship was such a hit.

### GAMES MARKET REVENUES IN ASIA

PER SEGMENT | 2017



Driven by the mobile-first culture in Asia, mobile esports is expected to continue its growth in the region. With top Chinese franchises expanding to other Asian countries and Tencent's partner Sea Group holding a leading position in the Southeast Asian games market, we also expect the coming few years to see a boom in the mobile esports market in countries such as Japan, Thailand, Indonesia, and Vietnam

# A FURTHER LOOK INTO MOBILE-FIRST ASIA

CHINA IS LEADING THE MARKET AND INDIA IS TO FOLLOW



China will continue its leading position in the global mobile esports market. With the support from the government, the market is expected to flourish with an increasing number of scalable stadium events with large viewership and prize money. More non-competitive titles will establish their positions in the mobile esports scene thanks to the casualness of the latest gaming trend. Mobile esports in China is expected to follow a similar structure to PC that top franchises will gradually grow to well-established brands and build their unique ecosystems. Meanwhile, the success in mobile esports will further drive the development of mobile game streaming platforms in China.

## ACTIVE MOBILE DEVICES

INDIA & U.S. | NOVEMBER 2017



# 339M

Actively used mobile devices  
in India, November 2017



# 304M

Actively used mobile devices  
in the U.S., November 2017

Mobile esports in India is expected to develop rapidly in the coming few years, driven by the exponential growth in the mobile market and mobile games section in the country. India has grown to the world's second-largest mobile market by number of active devices, and from 2017 to 2020, the global mobile games market is expected see the fastest growth coming from India. The Indian mobile games market is forecast to grow by 240% from 2017 to 2020 and to become the world's fourth-largest mobile games market by 2020. The development of the mobile esports scene in India is expected to be similar to that in China, with competitive and casual titles both being actively involved.



## GLOBAL LEADER IN GAMES, ESPORTS, AND MOBILE INTELLIGENCE

### OUR MISSION

The current pace of change in consumer behavior, media, and technology requires a new type of intelligence firm that is agile, innovative, truly global, and ahead of the curve. We are that firm. As the number one provider of games, esports, and mobile intelligence in the world, we support our global clients daily in growing their businesses.

### OUR EXPERTISE



**MARKET  
FORECASTS**



**TRACKING  
DATA**



**CONSUMER  
INSIGHTS**

### MORE THAN 150 GLOBAL SUBSCRIBERS



### OUR SOLUTIONS



**STANDARD  
SUBSCRIPTIONS**



**MARKET  
PACKAGES**



**CUSTOM  
SERVICES**



**PARTNER  
MODEL**