APPOTA ESPORTS

.network

VIETNAM ESPORTS

GUIDEBOOK 2019



VEG
VIETNAM ESPORTS GUIDEBOOK

INTRODUCTION

WELCOME TO APPOTA'S FIRST DETAILED REPORT ON THE VIETNAM ESPORTS LANDSCAPE.

The Vietnam eSports Guidebook (VEG) is a series of reports released annually by Appota eSports, showcasing in-depth analysis of Vietnamese eSports ecosystem in Vietnam. The report is suitable for game publishers, marketers, eSports enthusiasts and knowledge seekers alike, to gain a thorough look into Vietnam's newest digital entertainment industry.

The report features an extensive survey study of Vietnamese eSports audiences. The Vietnam eSports Guidebook is also the very first eSports directory, offering the most completed list of players in the Vietnam eSports ecosystem.

As a vibrant country which ranked only behind Singapore in terms of market dynamics in the Southeast Asia region, Vietnam will certainly present great opportunities for the development of eSports in digital entertainment. These opportunities and predictions of the future of eSports in Vietnam are also presented with analyses from Appota's experts in this guidebook.

By leveraging Appota's combined 7 years of experience in game publishing, eSports event organization, and gaming communities management. As well as third party data and analyses. We hope this guidebook will be a valuable asset for all brands, especially game publishers who want to enter the Vietnam eSports market or tap into the minds of the young affluent Vietnamese eSports fans.

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VEG
VIETNAM ESPORTS GUIDEBOOK

Appota Headquarters, Hanoi

01

THE VIETNAM ESPORTS MARKET

THE EMERGENCE OF A NEW DIGITAL ENTERTAINMENT INDUSTRY IN VIETNAM

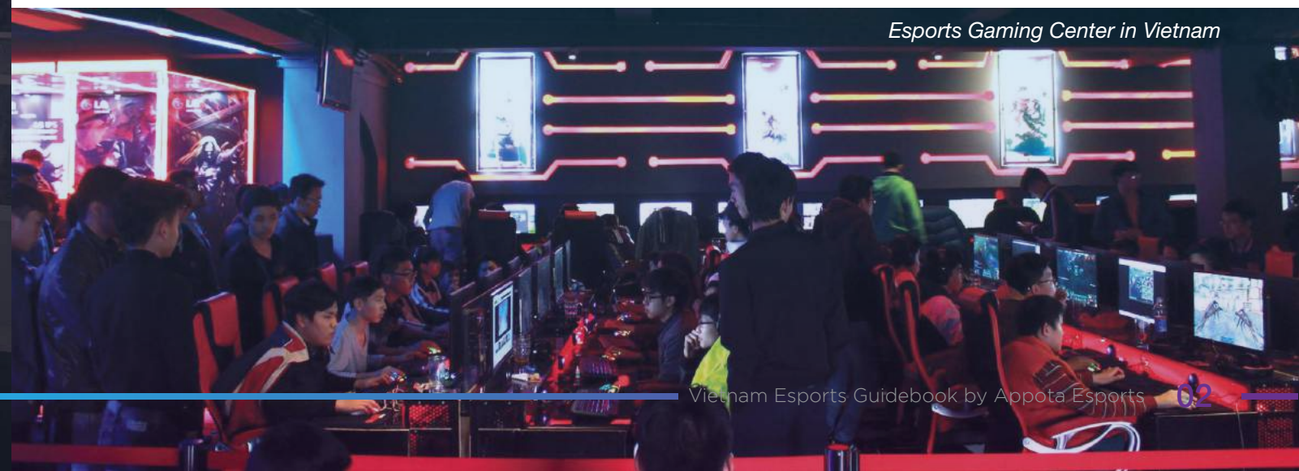
After the Doi Moi economic reforms in 1986, Vietnam had been growing impressively, becoming one of the hottest markets in the Southeast Asia region. The amazing performance of Vietnam's economy was made possible by an open market policy, along with a vibrant and youthful workforce. These young and economically active workforce participants account for over 60% of the total population, which will be the driving force for the future of the Vietnam market.



Vietnam mobile internet connectivity index (GSMA, 2018)

The mass adoption of the Internet in Vietnam began around 1997. Since then, Vietnam has had one of the world's fastest internet penetration rates, reaching over 64 millions users (67% of the population). And in addition to landlines, the Vietnamese enjoy the best cost to speed ratio of mobile internet (3G&4G) in the Southeast Asia region. These have enabled the Vietnamese to enjoy a wide range of digital entertainment on the move, and have effectively placed Vietnam high in the GSMA mobile connectivity index, even surpassing Indonesia.

Thanks to great internet connectivity, the Vietnamese are exposed to the endless world of digital entertainment, among which include gaming and eSports. In the early 2000s, the Internet started to become more and more affordable for the masses, which was also accompanied by the appearance of internet cafés. For the very first time, Vietnamese gamers got to compete in tournaments of iconic games like Age of Empires and StarCraft, World of Warcraft, and later online games like MU, Gunbound, Audition, etc.



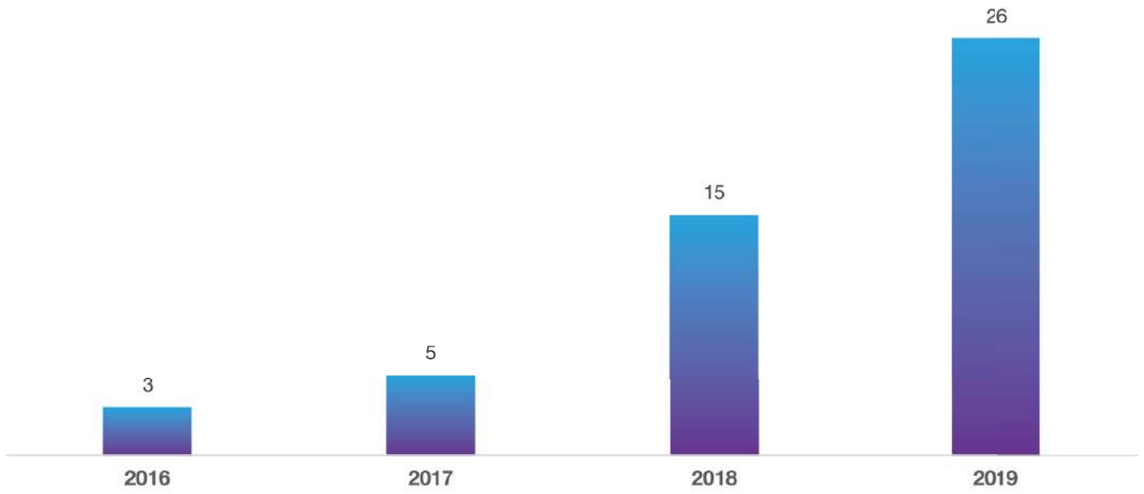
Esports Gaming Center in Vietnam

With that start, the Vietnamese youth soon adopted the new form of gaming and created gamer communities centered around their favorite games in schools or even local internet cafés. And after 2010, along with the spread of Facebook in Vietnam, the gaming communities grew faster, becoming more connected and informed. Thus, much of the growth of numbers and quality was thanks in large part due to internet and the social media platform.

In 2018, Appota estimated that there are more than 15 millions eSports games players. The number will continue to rise, reaching 26 millions players this year. This is the amazing base of viewers and players for a thriving eSports ecosystem.

26M

Vietnam expected eSports players as of 2019



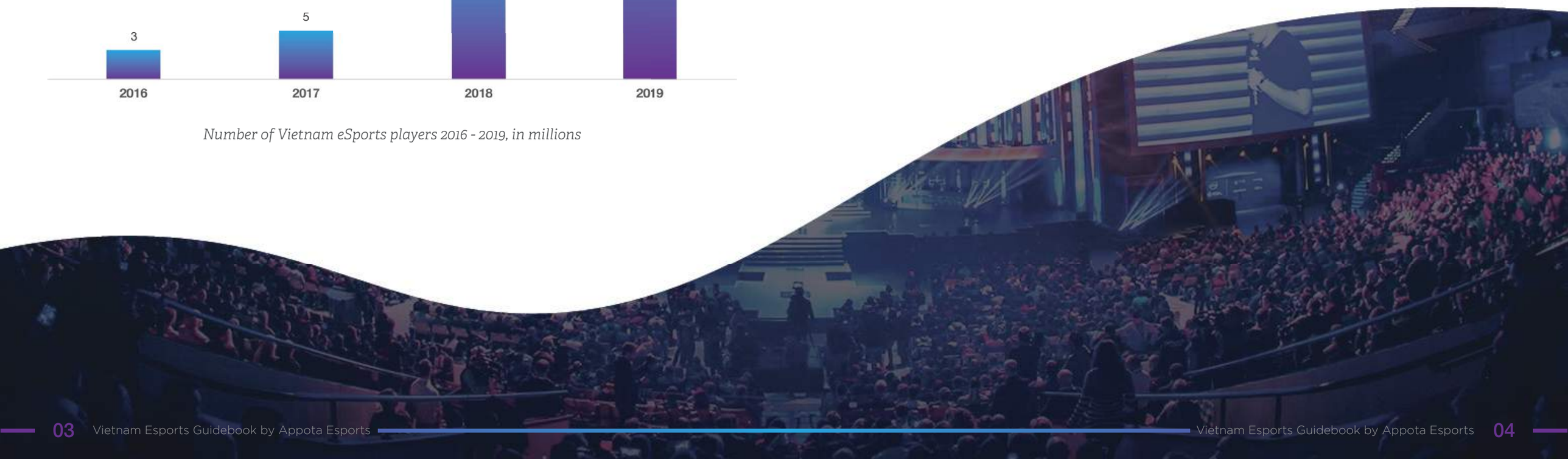
Number of Vietnam eSports players 2016 - 2019, in millions

"...it is estimated that Vietnam will have over 16 million eSports enthusiast viewers in 2019"

Also, it is estimated that Vietnam will have over 10 millions of eSports viewer who watch at least one a week, and will be on track to reach 16 million in this year. These eSports enthusiast viewer and players are parts of the gaming communities of over 32.8 million gamers are one of the major driving forces for the success of several gaming-focused startups in Vietnam like Garena, VTC, Appota, and SohaGame. They have also helped to generate Vietnam's first startup unicorn - Vinagame (VNG).

The gaming industry in Vietnam therefore has amazing potential for growth, especially when it comes to eSports.

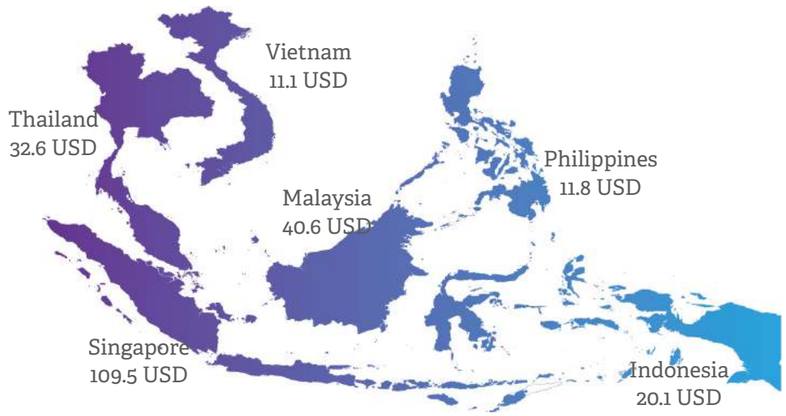
That is to say, Vietnam's gaming industry had climbed from 35th to 28th position in the world's largest gaming market ranking by Newzoo, with estimated revenues of over 365 million USD.



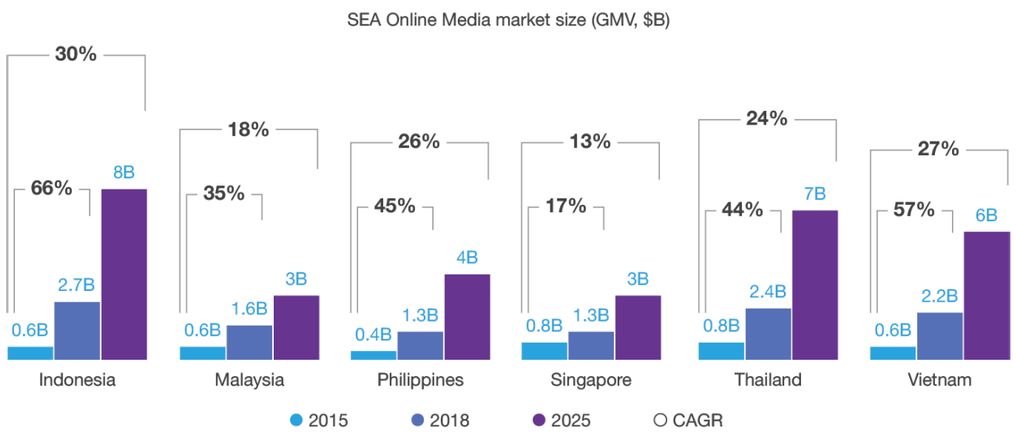
Although Vietnam has the 2nd highest number of gamers (32.8 million), just behind Indonesia (43.7 million), Vietnam's average revenue per player in 2017 is dwarfed in comparison to those of Singapore and Malaysia – which are the region's eSports hub. However, future of Southeast Asia's online gaming market is projected to reach 10 billion USD in 2025, and Vietnam will surely represent a large portion of this market, thriving as a new regional eSports hub.

The astounding growth of Vietnam's gaming and eSports market is the result of increase in digital entertainment consumption, and spending power of gamers. A report by Google and TEMASEK in 2018 called Vietnam "a dragon being unleashed" in the internet economy of the SEA region, with gaming and advertising growing more than 50% year-on-year. And thanks to an increase in consumer trust and the active gaming community, this trend is visible across the whole SEA region.

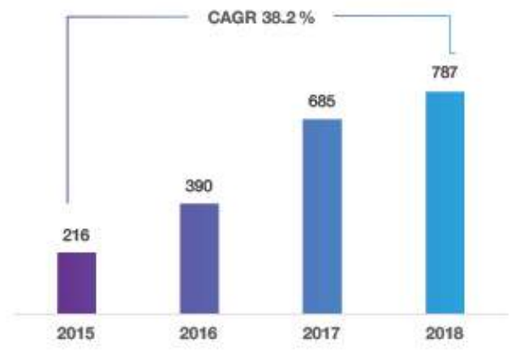
Southeast Asia's Average Revenue Per Player in 2017



Newzoo (2018)



*Vietnam eSports Prizes Value in thousands USD**

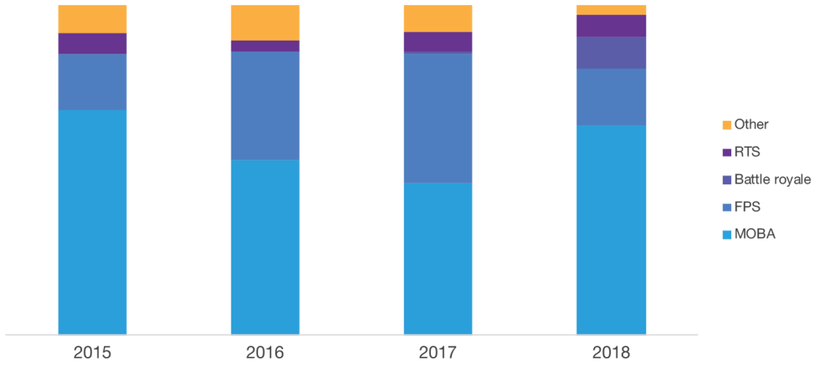


The amount of eSports tournament prize pool values in Vietnam increased drastically from 2015 – 2018, hitting over 787,000 USD in 2018. This is a clear indicator of how much money brands and game publishers are willing to invest into Vietnam's eSports economy. The biggest portion of the prize pools currently belongs to Multiplayer Online Battle Arena (MOBA) and First Person Shooter (FPS) games, namely League of Legends, Arena of Valor, and CrossFire. These games had long been Vietnam's eSports backbone ever since they were introduced in the market.

The strong growth in prize pools is largely due to the increased size of game audiences that attract brands to invest in sponsorships. The 787,000 USD in 2018 is just the prize pool money alone; the total sponsorship for eSports tournaments also covers all costs for organizing, which could well cost brands millions of USD. And tournament organizers still earn revenues through ticket selling, advertising and media rights fees. Thus, the Vietnam eSports market is at rapid growth stage, benefiting all party involves.



**Total prize value of amateur and professional tournaments and leagues in Vietnam throughout 2015-2018 for the following games: League of Legends, Arena of Valor, Dota 2, CS:GO, AoE, StarCraft I & II, Vainglory, CrossFire Legend, CF Đột Kích, PES, FIFA, FIFA Online 3, Blade & Soul, Liên Quân, Tộp Kích, 3Q, Huyộn thoội MOBA, PUBG, Rules of Survival*

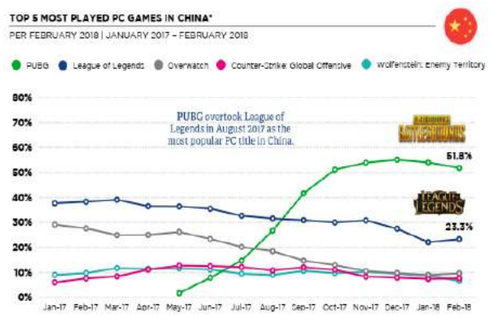


*Prize pool percentages by game genres**

For League of Legends, one of the top eSports games in the world, Vietnam had officially been recognized as a region on its own and thus guaranteed a spot in the opening stage of all League of Legends international tournaments. That showcases how strong the game's community and MOBA genre is in Vietnam. Other professional leagues in Vietnam like the CrossFire Elite League, the Crossfire Legends Pro League, or the Vietnam Pro Gaming League also have massive prize pools for teams and individual players.

Currently, MOBA and FPS host the largest prize pools. However, battle royale – a survival and shooter focused genre – has started to gain traction, attracting thousands of players both on mobile devices and computers. Not only players, but streaming viewership for these games also increased. The trend aligns with the global gaming community; according to Newzoo, viewership for Fortnight and Playerunknown's Battleground (PUBG) accounted for 20.6% of total hours viewed on Twitch & Youtube Gaming.

In China, PUBG overthrew League of Legends to become the most popular title. This trend is also noticeable in Vietnam as all of the top Vietnamese streamers do PUBG livestreams, and at festivals there are people who dress up as PUBG characters with the iconic helmet and frying pan. Furthermore, Divine eSports, a professional Vietnamese team, won the PUBG Southeast Asia Championship 2018 in Thailand in October. As the game viewership increases, brands and advertisers will surely come along and pour more money into tournaments.

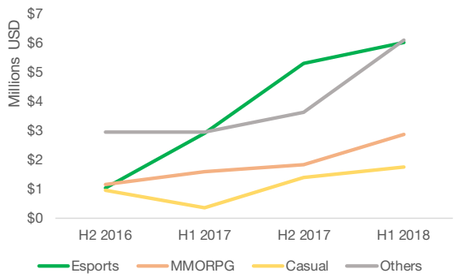


**Total prize value of amateur and professional tournaments and leagues in Vietnam throughout 2015-2018 for the following games: League of Legends, Arena of Valor, Dota 2, CS:GO, AoE, StarCraft I & II, Vainglory, CrossFire Legend, CF Đột Kích, PES, FIFA, FIFA Online 3, Blade & Soul, Liên Quân, Tộp Kích, 3Q, Huyộn thoội MOBA, PUBG, Rules of Survival*



Vietnamese PUBG players getting together for a "fun run"

Total revenue of top 50 grossing games in the AppStore & PlayStore by genre



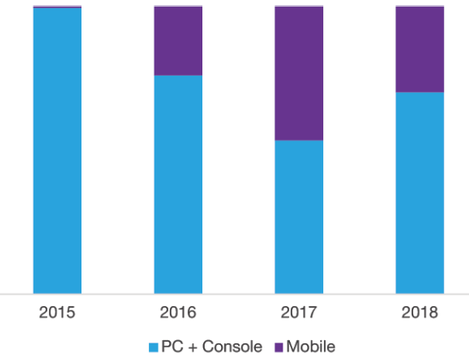
A high proportion of Vietnam's population is young mobile-centric. There are 51 million 3G/4G subscribers in Vietnam, and around 32.8 million gamers. That means about 1 in 2 people who have mobile internet plays games. Thus, mobile gaming is a big deal in the Vietnamese market. For a long time, mobile gaming in Vietnam was associated with casual players using free games, or youth playing highly monetized MMORPG games with poor graphics, and was taken lightly by gaming communities. However, as technology advanced, the gaming experience on mobile devices has also improved, and a new mobile eSports trend among the Vietnamese has developed.



**Total prize value of amateur and professional tournaments and leagues in Vietnam throughout 2015-2018 for the following games: League of Legends, Arena of Valor, Dota 2, CS:GO, AoE, StarCraft I & II, Vainglory, CrossFire Legend, CF Đột Kích, PES, FIFA, FIFA Online 3, Blade & Soul, Liên Quân, Tap Kich 3Q, Huyen thoai MOBA, PUBG, Rules of Survival*

The number of downloads for mobile eSports games in the first half of 2018 was almost triple that of the second half of 2016, going from 12.8 million to 37.5 million, and even surpassed casual games. In addition, total revenue skyrocketed from 1 million USD to over 6 million USD. On the other hand, MMORPG and casual games showed stagnation in growth. This is a clear sign that more serious gamers are now playing on mobile platforms, which opens up great opportunities for publishers, eSports organizers and brands.

Prize pool percentages by gaming devices



Leading the mobile eSports in Vietnam are Liên Quân (Arena of Valors), PlayerUnknown's BattleGround Mobile, Crossfire Legends, Vainglory, and Rules of Survival. Although they just started to appear in Vietnam 3 years ago, these games have attracted millions of players and they account for up to 30% of Vietnam's total eSports prize pools.

eSports was also featured at the 2018 Asian Games, and Vietnam won bronze medals in Pro Evolution Soccer 2018, StarCraft II, as well as for mobile games, Clash Royale and Arena of Valor. Furthermore, the Philippines announced that eSports tournaments will be a part of the 2019 SEA Games, with 6 game titles: Dota 2, StarCraft 2, Mobile Legends, Arena of Valor, Tekken 7. Reports also suggest the Paris 2024 Olympics may include eSports as an official competition.

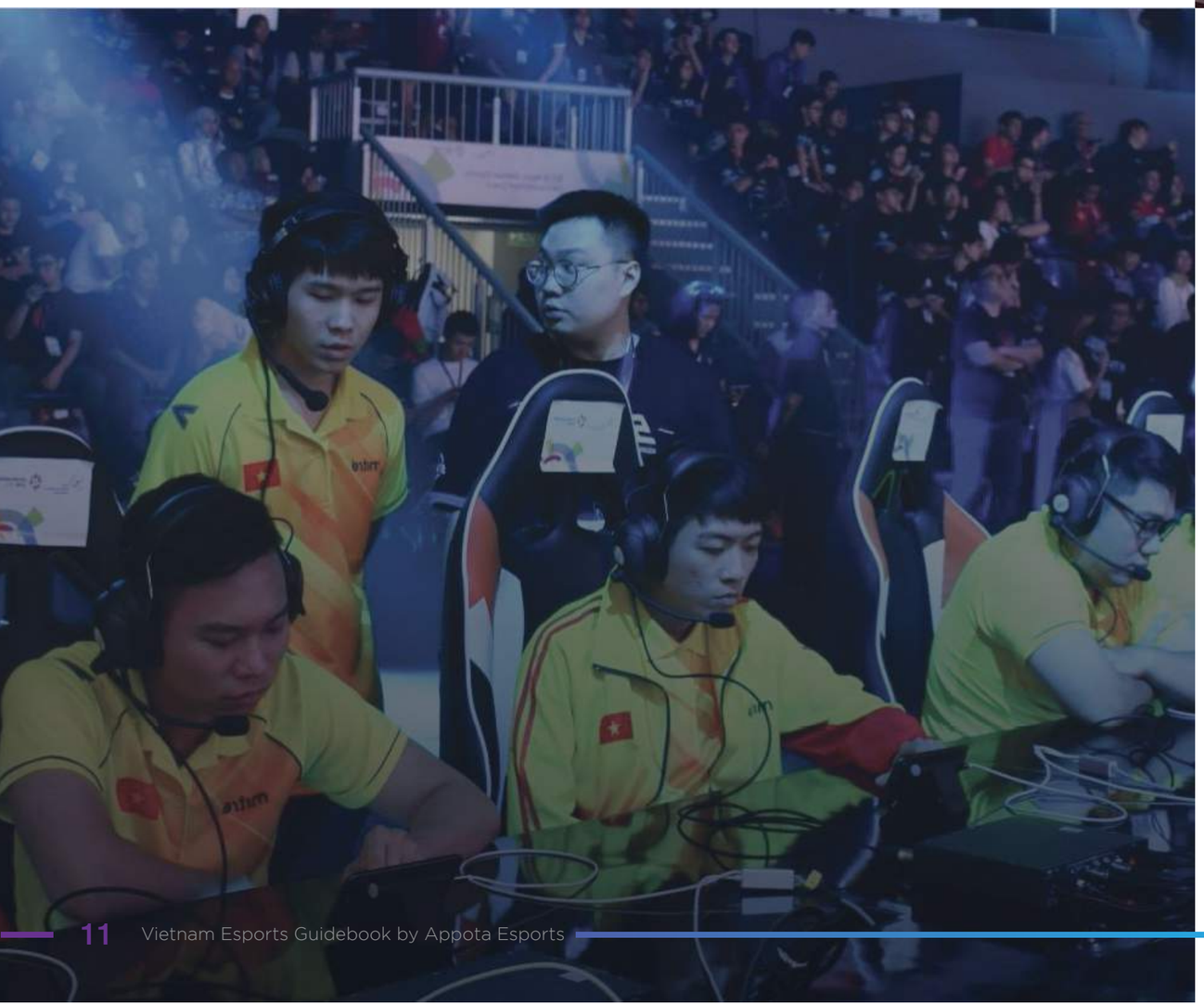
18th ASIAN GAMES Jakarta Palembang 2018

PHILIPPINES 2019 TENTATIVE SEA GAMES LOGO

The Vietnam's qualifying round of Arena of Valor had total time watched up to 300,000 hours, with livestream peaked at over 79,000 con-current viewers.



Vietnam Age of Valor team won Bronze at Asia Game 2018



As eSports gets featured as professional sports competitions in international arenas, overall viewership for eSports leagues and livestreams increase as well. Vietnam Television – the national television broadcaster of Vietnam – also introduced a dedicated online channel for eSports on VTVPlay. VTVcab – Vietnam Cable Television – also joined as eSports organizers, promising to host international standard eSports leagues and tournaments.

VTV PLAY



According to the Facebook Gaming Creators Program, Vietnamese people have the highest livestream watch hours on the platform. The country is also among the top in terms of videos hours watched on YouTube Gaming. That shows enormous potential for eSports related content to entertain and satisfy the young Vietnamese audience.

Besides renowned streaming platforms like YouTube and Twitch, many new players have also joined the streaming space upon seeing opportunity in Vietnam's eSports economy. Notably, the Facebook Gaming Pilot Program, which partnered with Appota's OTA Network, attracted over 100 Vietnamese streamers with millions of followers. Other streaming platforms that operate both on mobile and web also feature eSports sections with thousands of viewers. We will learn more about these in later parts.



"There are 51 million 3G/4G subscribers in Vietnam, and around 32 million mobile gamers. That means about 1 in 2 people who have mobile internet plays games."

Vietnam's eSports market is at a growth stage as more and more brands invest into the sport, trying to get as much brand exposure as possible in front of the young eSports players and viewers. The number of viewership is also increasing at a rapid pace, making Vietnam a potential to become a large eSports base for fans in the near future. Vietnamese professional eSports players and teams are also reaching an international level, thereby drawing attention from the youth including people who are not even into gaming, and national television. Future attention from mainstream media will further boost eSports viewership in Vietnam.

"According to the Facebook Gaming Creators Program, Vietnamese people have the highest livestream watch hours on the platform."

As viewership rises, and more streamers appear, the more streaming platforms join this new digital entertainment industry, grabbing every piece of this delicious cake. eSports in Vietnam also brings opportunities for events organizers, eSports avenues, and streaming tool providers to join in on this multibillion dollar worldwide entertainment industry, powered by fans as well as both global and local brands.



Team Flash at Arena of Fame, Winter 2018

VIETNAM'S INTERNATIONAL ESPORTS PRESENCE IN 2018

ASIAN GAME 2018

Game: Arena of Valor
Result: 3rd place

Game: Arena of Valor
Result: 3rd place

Game: Pro Evolution Soccer 2018
Result: 3rd place

Game: Clash Royale
Result: 3rd place

ARENA OF VALOR INTERNATIONAL CHAMPIONSHIP 2018

Game: Arena of Valor
Result: 3rd place

PUBG SEA CHAMPIONSHIP 2018

Team: Refund Gaming
Result: 2nd place
Prize: $20,000 USD

JIB PUBG SOUTHEAST ASIA CHAMPIONSHIP 2018

Team: Divine eSports
Result: 1st place
Prize: $25,000 USD

Team: Rate Me Five Stars
Result: 3st place
Prize: $9,000 USD

WESG 2018 - SEA QUALIFIER

Game: StarCraft II
Player: MeomaikA

Result: 2nd place
Prize: $2,250 USD

Team Flash at Dau Truong Danh Vong – the largest Arena of Valor league in Vietnam

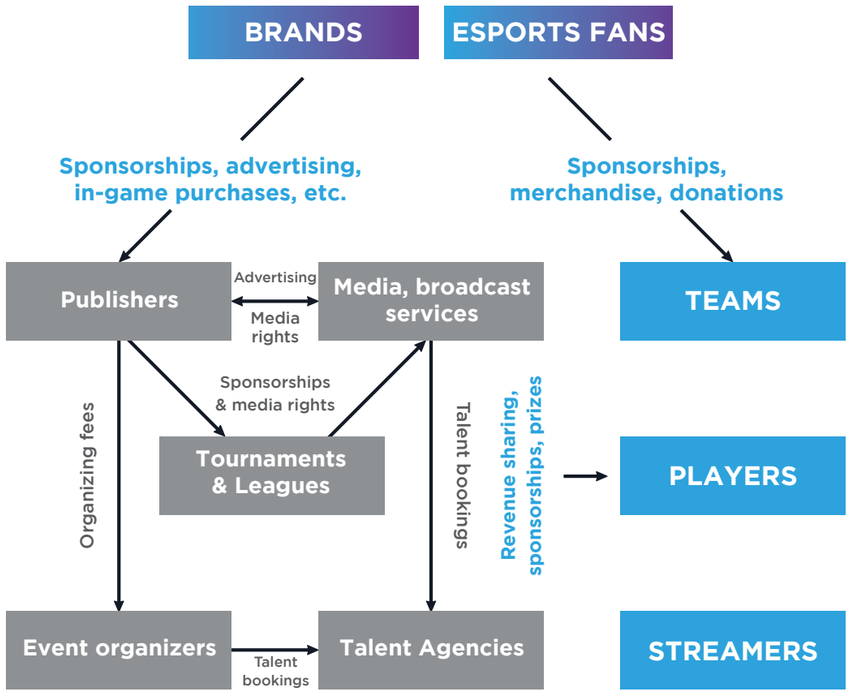
02

THE VIETNAM ESPORTS ECOSYSTEM

VIETNAM ESPORTS VALUE CHAIN
VIETNAM ESPORTS LANDSCAPE

THE VIETNAM ESPORTS VALUE CHAIN

WHERE THE MONEY FLOWS



Money that flows into the eSports economy essentially comes from fans and brands via various forms such as: in-game purchases, merchandise, ticket sales, fan donations, sponsorships, advertising, etc. These streams of money pour into organizing events and tournaments, advertising, talent bookings, as well as to the pockets of eSports teams, players and streamers. However, in a growing market like Vietnam, publishers and organizers are also pouring their own money to organize tournaments and support local eSports communities.

Tournaments and leagues are the center of the eSports value chain and are sponsored by brands, media outlets and publishers. The prize pools are the clearest indicators of the scale of event sponsorships. Talent agencies are the newest category in the Vietnam eSports economy, and they serve as middlemen to connect brands, event organizers and media outlets to the pool of streamers. These streamers are there to increase coverage for tournaments and visibilities of brands; top casters like ViruSs are able to reach over a million followers alone.

THE VIETNAM ESPORTS LANDSCAPE





KEY PLAYERS: PUBLISHERS

Publishers are among the central parts of the eSports landscape. In Vietnam, publishers not only work to maintain games up and running, but also pour investments into building the eSports ecosystem and encourage the development of communities and professional eSports. Currently, Vietnam have 15 active game publisher. However, there are only 4 top publishers that engage in eSports. These publishers are: Garena, VNG, VTC Game and Gamota.

Garena is one of the pioneers in developing eSports in Vietnam. Having entered the market since 2009, the Singapore-based company has introduced well-known electronics sports titles to Vietnam such as: League of Legends (2012), FIFA Online 3 (2013), Arena of Valor (2016), and Blade & Soul (2017). The company is among the most active publishers in organizing eSports events and communities, and has made games like League of Legends and FIFA Online 3 stand as the pillars of Vietnam's eSports industry. Its leagues like the Vietnam Championship Series attract high volumes of viewers and are the base for Vietnamese professional eSports teams to reach international arenas.

MAJOR ESPORTS TITLE

VNG is the first Vietnamese startup unicorn and also the earliest online game publisher in the market. The company saw success among Vietnamese gamers with famous online game titles such as "Vo Lam Truyen Ky" in 2005, which got over 20 million players, as well as other casual online games that became a big part of the childhood of Vietnamese millennials. The publisher also quickly picked up on eSports and introduced to Vietnam major mobile eSports titles like CrossFire Legends Mobile, Mobile Legends and trending battle royale -Rules of Survival and PlayerUnknown's Battleground. These have been promising moves and will likely to boost Vietnam's mobile eSports scene in the near future.

MAJOR ESPORTS TITLE

VTC Game is one of the four pillars of Vietnam's online game industry, which also joined the market early in 2006. The publisher brought several arcade, shooting and MMORPG styles to the Vietnam game market, the most notable being the Audition Online series and Phi Doi. In term of eSports, the company also invested heavily into FPS games like the famous CrossFire, organizing big leagues with prize pools of up to 500 million VND for its CrossFire Elite League, and 2 billion VND for several titles in the Vietnam Pro League 2017. However, in 2018, the publisher showed far less investment in eSports tournaments than in previous years, and did not organize as many events.

MAJOR ESPORTS TITLE



Gamota is a younger publisher that joined the market in 2012, and over the course of 7 years, the company has become well known for its MMORPG games on mobile devices and great community engagement with over 10 million players. Gamota is a part of Appota's digital entertainment ecosystem with over 50 million users. In term of eSports, Gamota brought to Vietnam the famous mobile MOBA eSports title Vainglory in 2017. Gamota is also organizing eSports tournaments, notably the Fighting League for PlayerUnknown's Battlegrounds, and the Vietnam eSports Premier League, co-partnering with Vietnam Television (VTV). In addition, Gamota owns the very first gaming multi-channel network comprised of over 100 top Vietnamese game streamers.

MAJOR ESPORTS TITLE







KEY PLAYERS: GAMES

Games are the critical components of an eSports landscape. In Vietnam many top eSports titles are published by local publishers, namely League of Legends, CrossFire, the FIFA Online series, Vainglory, etc. And there are also many more that are not published by local players such as the Age of Empires series, StarCraft series, Counter-Strike: Global Offensive, PUBG, etc.

Real-time strategy, sports games and fighting games were among the very first eSports titles that were widely played by Vietnamese players, as they were available since the early 2000s. Games like Age of Empires, Dota 2, StarCraft, Tekken, Pro Evolution Soccer are classic titles in Vietnamese gamers' minds that are still occasionally organized in tournaments. However, since the publishers of these games are not based in Vietnam, the local communities receive little to no support, and thus events are mainly self-organized, so their prize pools and audience engagements are rather limited.

On the other hand, games that receive a good amount of attention from the public are ones that are published by locally based companies like League of Legends, CrossFire, Arena of Valor, the FIFA Online series, etc. There are also exceptions like PlayerUnknown's Battlegrounds: the PC version of the game is not owned by any local publisher, however, its international fame attracts many players and live stream viewers. Thus, the game has high potential for eSports event organizers to open local tournaments and leagues; for example, the Fighting League for the mobile version of the game had over 3 million views and 335 thousand live stream hours watched.



KEY PLAYERS: PROFESSIONAL ESPORTS TEAMS

Professional teams and players are the core of the eSports ecosystem. Without these competing athletes, there is no eSports. The teams and their players draw massive numbers of fans to the tournament venues as well as online stream viewers.



A team is a company in itself, typically with a director, manager, coach and team members. In Vietnam, organizing teams is still in early stages where there is still a lack of professional organization in areas including accounting, finance, resource management, as well as funding and proper gaming houses. The only team that currently has a permanent gaming house is EVOS eSports where players can live and train together.

However, with the current pace of market development, Vietnam eSports teams will likely see an increase in funding in the near future. This will allow them to become more professionally organized and better develop their mental and physical skills for gaming, which will in turn help them appear better in public and appeal to more sponsors. Furthermore, the lack of professional gaming infrastructure also presents an opportunity for companies to provide professional gaming house rentals – a kind of co-working space for gaming – which have started appearing in European countries.



Team Liquid's professional gaming house

LIST OF NOTABLE VIETNAMESE ESPORTS TEAMS

GAM eSports
League of Legends · PUBG · FIFA
fb.com/GAMeSportsVN
Followers: 226,096

EVOS eSports
League of Legends
fb.com/TeamEVOSLOL/
Followers: 119,736

Team Box Gaming
Liên Quân Mobile · PUBG
fb.com/boxgaming.vn
Followers: 107,056

Phong Vũ Buffalo
League of Legends
fb.com/PhongVuBuffaloLoL
Followers: 84,467

Friends Forever Gaming
League of Legends · PUBG
fb.com/FriendsforeverGaming
Followers: 77,694

Team Flash
Liên Quân Mobile
fb.com/FLASHAOVVN/
Followers: 65,175

Adonis eSports
Liên Quân Mobile
fb.com/lqmadoniseSports/
Followers: 40,563

Vikings Gaming
League of Legends · PUBG
fb.com/Vikings.Gaming
Followers: 39,249

VEC Fantasy Main
Mobile Legends
fb.com/vecfantasy
Followers: 37,336

Team GameTV
Age of Empires
fb.com/TeamGameTV
Followers: 27,801

Cerberus eSports

fb.com/AdoniseSportsLOL

Followers: 22,300

Sky Gaming

fb.com/skygaminglol

Followers: 18,852

Cherry eSports

fb.com/CanThoCherry

Followers: 5,952

Boss.CFVN

fb.com/bosscfvn.fanpage

Followers: 5,670

Divine eSports

fb.com/divineteamvn

Followers: 18,517

Rate Me Five Stars

fb.com/RM5SeSports

Followers: 16,701

Swing Phantom

fb.com/orionswing

Followers: 4,415

496 Gaming

fb.com/496Gaming

Followers: 3,739

Team Dragon

fb.com/DRAGONCFLVN

Followers: 13,281

Venus Gaming

fb.com/venusgamingcenter

Followers: 12,577

Smokin Falcons

fb.com/smokinfalcons

Followers: 2,722

Rebellion Gaming

fb.com/rebellionesport

Followers: 2,567

FTV eSports

fb.com/FTV.FapTelevision

Followers: 10,593

StarsBoba

fb.com/StarsbobaNet

Followers: 10,505

Next Gen

fb.com/nextgenlmht

Followers: 2,567

EVA Team

fb.com/evateamcrossfire

Followers: 2,327

Refund Gaming

fb.com/refundgaming

Followers: 9,954

MEGA AORUS

fb.com/NextGenDota2

Followers: 8,890

Sabertooth

fb.com/teamsabertoothgg

Followers: 2,316

GameHome eSports

fb.com/GameHome.gg

Followers: 1,940

AHIHI Team

fb.com/AHTEAMCFLVN

Followers: 7,550

Team Overclockers

fb.com/teamoverclockers

Followers: 7,549

Meet Your Master Team

fb.com/MYMPES

Followers: 1,562

H2 Gaming

fb.com/h2.team

Followers: 1,452



NEWS AND MEDIA

In recent years, eSports has become a trending content type and an effective marketing channel, attracting a huge number of audiences across Vietnam.

Accompanying the development of eSports has been the media, which have helped bring the latest and hottest news about tournaments to viewers and have helped tournaments reach an even a wider range of audiences.

The media also serve the purpose of branding for eSports event organizers, through various activities like offline events, road shows, etc.

At the current state, there are two models of cooperation between the media and eSports activities:

The first is paid PR articles on news following traditional booking procedures, which are used to spread information of tournaments to the general public.

The second is media sponsorships for tournaments, which provide the media full access to the latest information, and is the most effective channel of communication for tournaments.

MAJOR ESPORTS-FOCUSED NEWS

GameK

gamek.vn

The largest game-focused news channel in Vietnam with over 16 millions monthly visitor.
The news channel are suitable to promote all kinds of tournaments.

Average Monthly Visits: 16,200,000+*
Facebook Followers: 1,500,000+
Mobile App: Yes

Game8

game8.vn

A game-focused media channel with over 1.5 million monthly visitors, which suitable to promote tournament of games like AOV, LOL, PUBG, ect..

Average Monthly Visits: 1,500,000+*
Facebook Followers: 298,000+
Mobile App: No

Game Hub

gamehub.vn

A news channel focused mainly on mobile game with over 1 million monthly visitors, which suitable to promote tournament of games like PUBG mobile, Vainglory, ect…

Average Monthly Visits: 998,000+*
Facebook Followers: 699,000+
Mobile App: Yes

Game TV

gametv.vn

The best news channel for Age of Empire and Arena of Valor gamers

Average Monthly Visits: 798,000+*
Facebook Followers: 586,000+
YouTube Subscribers: 391,000+
Mobile App: Yes

Lienminh 360

lienminh360.vn

Focused on League of Legends, the news channel is suitable for promoting LOL tournament only.

Average Monthly Visits: 3,700,000+*
Facebook Followers: 831,000+
YouTube Subscribers: 48,000+
Mobile App: No

LagVN

lag.vn

A game-focused media channel, which is suitable to promote tournament of League of Leagends

Average Monthly Visits: 881,000+*
Facebook Followers: 246,000+
YouTube Subscribers: 30
Mobile App: No

XemGame

xemgame.com

A game-focused media channel, which is suitable to promote tournament of League of Leagends, AOV

Average Monthly Visits: 737,000+*
Facebook Followers: 168,000+
YouTube Subscribers: 13,700+
Mobile App: No

Thanh nien Game

lienminh360.vn

A game-focused media channel, which is suitable to promote tournament of League of Leagends, AOV, CS:GO

Average Monthly Visits: 363,000+*
Facebook Followers: 132,000+
YouTube Subscribers: 16,000+
Mobile App: Yes

2Game

2game.com

A game-focused media channel, which is suitable to promote tournament of League of Leagends, AOV

Average Monthly Visits: 606,000+*
Facebook Followers: 8,000+
YouTube Subscribers: 7,000+
Mobile App: No

Vikings.GG

vikings.gg

A eSports-focused media channel, which is suitable to promote tournament of Dota 2, PUBG, CS:GO

Average Monthly Visits: 606,000+*
Facebook Followers: 8,000+
YouTube Subscribers: 7,000+
Mobile App: No

**Estimated Data from Similarweb*

BROADCAST

Game TV

gametv.vn

The best news channel for Age of Empire and Arena of Valor gamers

Average Monthly Visits: 798,000+*
Facebook Followers: 586,000+
YouTube Subscribers: 391,000+
Mobile App: Yes

Vietnam eSports TV

garena.live

Specialized in broadcast production for League of Legends, Arena of Valor tournaments

Average Monthly Visits: 650,000+*
Facebook Followers: 1,109,000+
YouTube Subscribers: 2,565,000+
Mobile App: Yes

VTV Play eSports

vtvplay.vn

Specialized in broadcast production for all eSports tournaments

Facebook Followers: 41,000+
YouTube Subscribers: 3,000+
Mobile App: Yes

Divine TV

divinetv.vn

Specialized in broadcast production for PUBG tournaments

Facebook Followers: 10,000+
YouTube Subscribers: n.a
Mobile App: No

Gank eSports

youtube.com/ganktv

Specialized in broadcast production for Vainglory, PUBG mobile, Starcraft tournaments

Facebook Followers: 20,000+
YouTube Subscribers: 18,000+
Mobile App: No

23 Creative TV

23creative.vn

Specialized in broadcast production for DOTA 2, PUBG tournaments

Facebook Followers: 30,000+
YouTube Subscribers: 200,000+
Mobile App: No

500Bros

youtube.com/500bros

Specialized in broadcast production for CS:GO, PUBG tournaments

Facebook Followers: 31,000+
YouTube Subscribers: 100,000+
Mobile App: No

GUIDES/STATS

Lienminh 360

lienminh360.vn

Average Monthly Visits: 3,700,000+*
Facebook Followers: 831,000+
YouTube Subscribers: 48,000+
Mobile App: No

EXP.GG

exp.gg/vn

Average Monthly Visits: 1,700,000+*
Facebook Followers: 13,000+
YouTube Subscribers: 5,000+
Mobile App: No

LagVN

lag.vn

Average Monthly Visits: 881,000+*
Facebook Followers: 246,000+
YouTube Subscribers: 30
Mobile App: No

Liên minh săm soi

lmss.vn

Average Monthly Visits: 768,000+*
Facebook Followers: 75,000+
Mobile App: Yes



EVENT ORGANIZERS

There are two type of eSports event organizers in Vietnam. The first type is originated from major game publishers. Their works mainly focus on organizing events and tournaments for their own game publishers. These organizers include: Vietnam eSports, VTC Games, VNG, and Gamota. The second type are the independent organizers. They are mainly formed by gamers from the gaming community who partner with several units to organize various tournaments and events of all eSports titles. These organizers include: 23 Creative VN, 500 Bros, Box Studio, GameTV, Divine TV, VEC and Gank Studio.

Publishers event organizer

Independent event organizer

VIETNAM ESPORTS

Founded: 2012
Based in: Hanoi
W: vietnameSports.vn
F: fb.com/vneSportstv
Y: Vietnam eSports TV

Vietnam eSports is among the leading and biggest eSports event organizers in Vietnam. The company was founded in 2012 to organize events and communities for Garena in Vietnam. Vietnam eSports mainly organizes leagues and tournaments for its titles, which are League of Legends, Arena of Valor, FIFA Online 4 and Blade & Soul. The company also owns an extensive broadcast network – Vietnam eSports TV, giving it media access to over 2.5 million YouTube subscribers.

Notable Top Leagues

Arena of Fame

Game: Arena of Valor

Prize: up to $78,000 USD/tournament

Vietnam Championship Series

Game: League of Legends

Prize: up to $60,000 USD/tournament

National Championship

Game: FIFA Online 4

Prize: up to $5,000 USD/tournament

VNG is the first online game publisher in Vietnam, famous for their excellent MMOARPG games and their expertise in eSports event organizing. The company is currently owning several eSpors game titles like Rules of Survivals, PUBG Mobile and Mobile Legends. We expect to see strong investment in organizing mobile eSports event by VNG in the upcoming years.

Founded: 2004
Based in: Hanoi
W: vng.com.vn

Notable Top Leagues

360 Mobi Mobile Legends Championships

Game: Mobile Legends

Prize: up to $22,000 USD/tournament

Survival Championship

Game: Rule of Survival

Prize: up to $6,000 USD/tournament

Crossfire Legends Star League

Game: Crossfire Legends

Prize: up to $14,000 USD/tournament

Based in: Hanoi
W: vtcgame.vn

VTC is the pioneer in eSports in Vietnam with shooter games like Cross Fire, World of Tank. VTV Games owned a community channel, broadcasting news and worldwide eSports tournaments, however the channel had shut down its operation.

Notable Top Leagues

Vietnam Championship Series

Game: League of Legends

Prize: up to $60,000 USD/tournament

Founded: 2012
Based in: Hanoi
W: gamota.com

Joined the eSports industry in 2017 with Vainglory – a world renowned mobile eSports game titles. Gamota will introduce two new eSports game to Vietnam market in 2019, namely Arena of Glory and Survival Heroes. The move is creating a strong hype in Gamota's 10 million player community. Thus, Gamota is promising to organize high standard eSports event in upcoming years.

Notable Top Leagues

Vietnam Vainglory Championship

Game: Vainglory

23 Creative Vietnam is a pioneering startup in the eSports industry in Vietnam. Founded in 2016, the company was formed with top Vietnamese Dota 2 casters. Hence, it was well known by the gaming community for organizing various Dota 2 tournaments in Vietnam. The company provides full organizing, broadcasting and media services for eSports leagues and tournaments. 23 Creative Vietnam does not own any leagues like Vietnam eSports. But the event organizer has partnered with well known organizers like Mineski to bring qualifying rounds of international tournaments to Vietnam, and also host Dota 2's Pubstomp events.

Founded: 2016
Based in: Hanoi
W: 23creative.vn
F: fb.com/23creative.vn
Y: 23 Creative VN

Notable Tournaments in 2018

Vietnam Pro Gaming League

Game: DOTA 2

Prize pool: $9,000 USD

PUBG SouthEast Asia Championship – Vietnam Qualifying Round

Game: PlayerUnknown's Battleground

Prize pool: $2,800 USD

Founded: 2010
Based in: Hanoi
W: gametv.vn
F: fb.com/VietnamGameTV/
Y: VietnamGameTV

GameTV is the leading organizers for Age of Empire (AOE) eSports event in Vietnam. The company had organized and broadcast various AOE tournament both locally and internationally. GameTV also tried to organize tournament for other eSports title but haven't gain much success beyond Age of Empire.

Notable Tournaments in 2018

Be Yeu Cup

Game: Age of Empire

Prize pool: $4,000 USD

Based in: Hanoi
W: giaidau.gank.vn
F: fb.com/gankesport
Y: GankTV

Gank Studio is a division of Appota eSports. The production studio started with the release of Vainglory – a top mobile eSports title – in Vietnam. Gank Esport possesses a media channel GankTV, as well as an extensive network of media, eSports venue partners, and access to Appota's ecosystem of over 50 millions user. Gank Production offers full eSports event organizing and broadcasting services. Notable partnerships include those with national television eSports channel VTVPlay, and OTA Network, a multi-channel gaming network and talent agency.

Notable Tournaments in 2018

Fighting League Vietnam

Game: PlayerUnknown's Battleground Mobile

Prize Pool: $20,000 USD

500 Bros is a non-profit studio. The team aims to leverage the Vietnam eSports scene by bringing electronic sports closer to Vietnamese audiences. 500 Bros focuses on Counter-Strike: Global Offensive, broadcasting international tournaments of the game to Vietnamese fans. The studio provides organizing and broadcasting services for eSports events. The studio has partnered with Vikings eSports Arena and 23 Creative Team to organize and broadcast various tournaments.

Founded: 2016
F: fb.com/500anhem
Y: 500BROS

Notable Tournaments in 2018



NimoTV PUBG ALL-STAR

Game: PlayerUnknown's Battleground

Prize Pool: $5,000

Box Studio is a young eSports organizer with lots of potential. The company started as a talent agency form game streamers. Box Studio own multiple eSports teams, competing in Arena of Valor, PUBG Mobile, Mobile Legends. The studio had showed it potential by successfully organize Vietnam Master Championship with 23 Creative VN and VTV Play.

Founded: 2018
Based in: Hanoi
F: fb.com/box.studio269

Notable Tournaments in 2018

Vietnam Master Championship

Game: PlayerUnknown's Battleground

Prize Pool: $30,000 USD

DivineTV is a studio specialize in organize and broadcast tournaments of PUBG. The studio owns a ranked PUBG league system "Vietnam Divine League". This is the only ranked league system of PUBG in Vietnam.

Founded: 2018
Based in: Hanoi
W: divinetv.vn
F: fb.com/divinetv
Y: DivineTV

Notable Tournaments in 2018

Vietnam Divine League

Game: PlayerUnknown's Battleground

Prize Pool: $6,000 USD/month



ESPORTS LEAGUES

There were around a hundred tournaments for Vietnam's amateur and professional players, and thousands of smaller scale micro tournaments for eSports players all over the country in 2018.

VIETNAM CHAMPIONSHIP SERIES

Game: League of Legends

The Vietnam Championship Series (VCS) is a professional League Of Legends tournament series held annually and divided into two parts (Spring and Summer). The tournament features Vietnam's top eSports teams, competing for a prize pool of up to 60,000 USD per season. As of 2018, the VCS was granted to be independent from the Garena Premier League (GPL). Thus, Vietnamese teams can advance directly from VCS to international events held by Riot Games without having to participate in GPL. The VCS is among the largest eSports events in Vietnam; the 2018 edition had aired over 300 hours of play and amassed a total of over 12 million hours watched.

ARENA OF FAME

Game: Arena of Valor

Arena of Fame is a professional league for Arena of Valor in Vietnam. The league started its first season in 2017. The tournament is also divided in two parts (Spring and Winter), and is currently the biggest league for mobile gamers in terms of prize pool. The 2018 seasons featured 8 top Vietnamese teams competing for a prize pool of 130,000 USD, and the Spring 2019 edition was announced with a prize pool of 86,000 USD. In 2019, Arena of Valor announced it has more than 12 million players, making it the most popular mobile game in Vietnam. The Arena of Fame Winter 2018 racked up 5 million hours of view time with just 111 hours of play that aired.

VIETNAM DIVINE LEAGUE

Game: PlayerUnknown's Battleground

Introduced in the second half of 2018, the Vietnam Divine League is the first complete league system for PlayerUnknown's Battleground players in Vietnam. The league features a 3-level ranking system (Rookie - Go Pro - Master), allowing teams from all levels to compete, train and climb the ladder to be a professional PUBG team. With the goal to serve and help build the Vietnam PUBG community, the league is well perceived by players all over the country and has had more than 370 teams that have participated in the league. Divine TV, the league's exclusive streaming channel, has more than 67,000 subscribers and over 8.4 million views.

CROSSFIRE ELITE LEAGUE

Game: Crossfire (PC version)

The Crossfire Elite League is the highest league level for Crossfire in Vietnam, featuring 8 Vietnam pro teams like Boss.CFVN, EVA team, etc. The league is divided into two seasons per year, and there is also a semi-pro league that takes place between the two pro seasons which allows amateurs and new teams to participate and earn their chance to compete in the Elite League. The prize pool is up to 22,000 USD per season. The league's YouTube channel has more than 263,000 subscribers and 35 million views.

CROSSFIRE LEGENDS STAR LEAGUE

Game: Crossfire Legends (Mobile version)

The Crossfire Legends Star League (CFL Star League) is the professional level tournament with participants from the top 8 Vietnamese Crossfire Legends teams. The league is split into two seasons per year, with the lower tier tournament occurring in between. The CFL Star League is among largest mobile eSports leagues in Vietnam; the second season of 2018 boasted a prize pool of 14,000 USD.

360 MOBI MOBILE LEGENDS CHAMPIONSHIPS

Game: Mobile Legends

The 360 Mobi Mobile Legends Championships just started to organize from 2018. The league is open for all team levels, from online to offline competition rounds for the prize pool of 22,000 USD.



ESPORTS VENUES

Since the early 2000s, internet café businesses started booming in Vietnam. The Internet Café, or what they usually call in Vietnamese: “quan net”, was the base of the gaming community at the time. However, these internet cafés weren’t meant for serious gaming, rather, they were mainly a place for people to access computers and internet. Thus, there was a period when many internet cafés went out of business in big cities due to low-end hardware, lack of complementary services, and the fact that personal computer ownership rose in Vietnam.

Until recent years, these types of businesses reclaimed their positions by shifting to become eSports gaming centers. Massive investments were made to upgrade hardware, management software and new services. eSports gaming center chains also started to appear, offering professional and consistent services. Intel i5 and i7 are now the standard for all centers, along with hardware that can handle the latest mainstream game titles. Gamers can also enjoy table service with restaurant grade menus. Many eSports centers feature competition zones for organizing eSports tournaments, as well as zones for mobile gaming and private team training.

The fact that these eSports gaming centers are growing in size and number is one of the apparent signs of a growing gaming market that focuses on eSports. The city of Hanoi alone boasts 6 different eSports gaming center chains: GameHome, Imba, Vikings, Cyzone, KOW Black, and Den Long Do.

Apart from dedicated gaming stadiums, large eSports events in Vietnam like Vietnam Pro League 2017, Garena Throne of Glory 2017, and ASUS ROG Championship, were hosted in larger venues such as the National Convention Center and other sporting stadiums.



Viking eSports Arena, Hanoi

NOTABLE ESPORTS VENUES

Cyzone eSports Stadium

Cyzone is a chain of eSports centers, equipped with high-end computer systems and table service. The Cyzone eSports Stadium is the largest of the centers, featuring 530 high-end computers, a competition stage, and a team training zone.

Vikings eSports Arena

Vikings is one of the largest eSports gaming center chains in Hanoi, and is famous for organizing big tournaments. The Vikings eSports Arena is a 1500m2 complex with 300 computers, training zones, stages, console games, and even mobile gaming zones.

GG Stadium

GG stadium is an eSports arena built by Riot Games. Currently it is the only such arena in Vietnam and is the biggest among Riot Games studios. The stadium was built to host leagues for Garena games, such as the Vietnam Championship Series.

Virus eSports Stadium

This is one of the largest eSports stadiums in the central region of Vietnam. The center is equipped with 233 high-end computers, along with a competition zone.

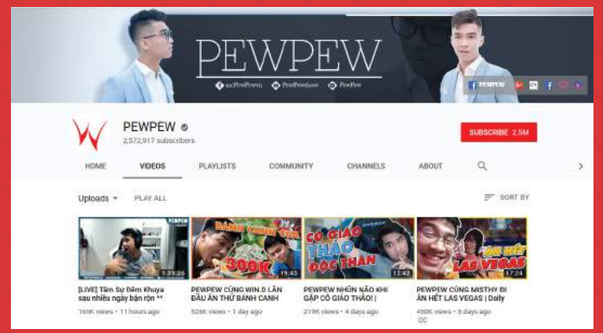
Venus Gaming Center

Venus Gaming Center is located in Hue, a city in the central region of Vietnam. The center’s design emphasizes the use of green space and open areas. With only 80 computers, the center still boasts a competition area and coffee house.

GG Gaming Center

The 900m2 gaming center located in Can Tho – a city in the southern region. GG Gaming Center has over 100 gaming computers, along with dedicated consoles, mobile game and VR gaming zones, and competition zones.

STREAMING PLATFORMS



Streaming platforms are an essential part of the eSports ecosystem; they bring tournament matches to everyone, anywhere, with the power of the internet. While Twitch tends to be the most popular game streaming platform globally, it is actually quite different in Vietnam. YouTube is currently the platform of choice for many eSports broadcast channels, eSports teams, players and streamers. For example, Vietnam eSports TV has 2.5 million subscribers and 1 billion views. Pewpew, one of Vietnam's most famous streamers, also has over 2.5 million subscribers and 250 million views.

facebook gaming



One of the big names that entered the market in 2018 was Facebook, with its Gaming Creator Program partnering with OTA Network in Vietnam. The platform, which already is the most popular social media network in Vietnam, attracted more than 100 gaming streamers with millions of viewers. One of Vietnam's most famous streamers, ViruSs, also left YouTube for Facebook Gaming. Apart from streaming, Facebook has yet to tap into other parts of Vietnam's eSports scene.

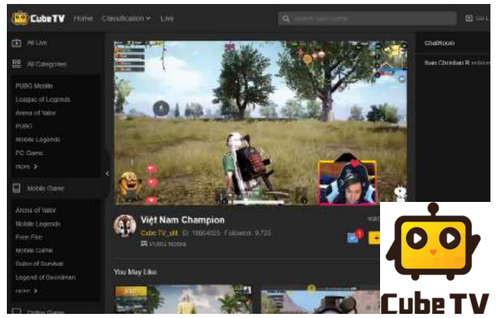
The current market for streaming content in Vietnam can be described as an arms race. Each platform is building up its own games, recruiting mass numbers of game streamers, sponsoring eSports tournaments, teams and players. The result is that YouTube has lost quite a lot of Vietnamese content creators.

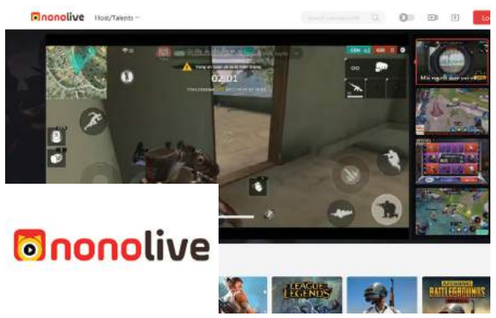
CubeTV, NimoTV and Tamago are getting involved much deeper into eSports than Facebook and Youtube. These streaming platforms are actively recruiting game streamers, sponsoring both eSports tournaments and top professional Vietnamese eSports teams. For instance, GAM eSports and FF QTV Gaming are sponsored by CubeTV, while NimoTV sponsors Phong Vu Buffalo and EVOS eSports.

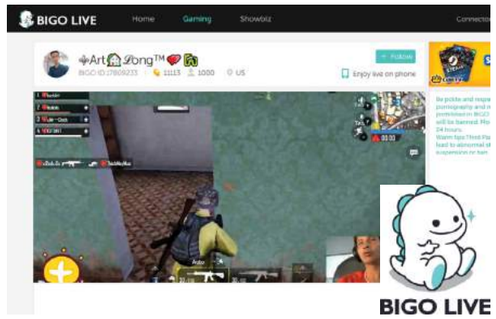
The battle over the gaming audience has proven lethal at times, with the first casualty being Tamago. The livestream platform announced its closure in December 2018, after just 6 months of operation. Tamago was the sponsor of Cherry eSports, Rate Me Five Stars and MYM eSports. Tamago even organized Tamago 100 Legends tournaments, with a $90,000 USD prize pool.

Other streaming platforms such as Nonolive, Live.me, and BigoTV also feature gaming sections, but there haven't been any top game streamers who have joined these platforms. Garena Live is also running in Vietnam as a native streaming platform for Garena's game titles. All of these streaming platforms have web-based and mobile apps.









STREAMING TOOLS AND DONATION PORTALS

Xsplit and Streamlabs are the most popular streaming tools for Vietnamese streamers and broadcast studios. These tools are easily accessible for any streamer and studio, and boast a wide range of tools to customize broadcast screens and audience experiences. Streamlabs is a freeware, and thus, is currently more popular.

Donation portals were created so fans could show support to their beloved streamers, eSports teams and players. These portals provide local payment services that are not accessible by foreign tools like Streamlabs. Both UngHoToi and VRDonate can receive donations via Master/Visa card and local banks. Tipit is another donation portal, but is owned by Creatory and it only serves the agency's streamers.

Player Duo and Ung Ho Live are other types of donation portals. These platforms allow fans to hire and book playing time with streamers for a fee. The Streamer then receives payment for playing live with that fan. This type of service is relatively new to the Vietnamese, but has started to gain attention and become very beneficial for beginners and intermediate streamers.

GAMING TALENT ACADEMY & AGENCY

The industry itself is in its early stages, and currently there are a small number of agencies with a large base of talents. Our prediction is that in the future, more agencies will join the battle for gaming streamers, but only a handful of pioneering agencies will hold all top tier streamers, similar to what happened in the fashion model industry in Vietnam in the last decade.

The game streaming community has just recently, within the last 2 years, been picked up by mainstream media, making headlines on national television and becoming idolized by the youth. The growth of the streaming community is largely thanks in part to pioneering streamers like Pewpew, Misthy, ViruSs, etc.

By working with agencies, brands will get access to professional influencer marketing services with legal protection, experts with local know-how, and brand exposure to millions of gaming streamer fans and followers.

Vietnamese streamers, who are mostly in their twenties, could also benefit by getting legal and career advice, protection from scammers, access to larger media networks with millions of audiences, better visibility to brands, and opportunities to work and learn from senior and more successful streamers.



Nam Blue, Caster Jay and ViruSs at the Vietnam Creator Summit by OTA Network and Facebook Gaming

CREATORY

CREATORY.VN FB.COM/CREATORYVN

CREATORY is a talent academy for streamers in gaming, lifestyle, beauty and music. The academy mission is to incubates and guide talented individuals to become next-generation content creators.Two famous Vietnamese streamers – Misthy and Pewpew – currently work with CREATORY. CREATORY now has 22 streamers, of which 10 are gaming content creators, with around 10 million fans/followers.



Misthy



Pewpew

3
BILLION+ Views on LiveStream

200
MILLION+ Monthly Views

2
BILLION+ Views on Youtube

10
MILLION+ Fans/ Subscribers

50K+
CONCURRENT Viewers on live streaming

GAMETV.VN FB.COM/VIETNAMGAMETV

Founded in 2010, GameTV has a long record of incubating eSports teams and players. Their eSports team Team GameTV is also a pioneer in gaming livestream in Vietnam. The company also owns several top tier eSports teams which compete in various eSports titles like Age of Empires, CS:GO, PUBG, Arena of Valor, etc. GameTV also works as an eSports event organizer and broadcast network.



Team GameTV at Arena of Glory Winter 2017

BOX.STUDIO FB.COM/BOX.STUDIO269

Founded in 2017, Box Studio is specialized in training streamers, helping them become influencers and connect with brands. The company now has more than 60 streamers and 3 professional eSports teams. The Box Gaming team mainly competes in Arena of Valor and PUBG, and are among top tier teams in Vietnam.



Team Box Gaming (Arena of Valor)

20 Sections

20SECTION.COM **FB.COM/20SECTIONS**

20 Sections introduced the DIVISION X project as a streamer academy. The project focuses on incubating a new generation of online content creators and helping connect them to brands. 20 Sections currently has 10 streamers.

VECTV KHÁT VỌNG CHIẾN THẮNG

VECTV.NET

VECTV is a veteran in Vietnam's eSports market. Founded in 2011, the company is well known for its efforts in organizing professional Age of Empires tournaments. VECTV also has top tier AOE and Mobile Legend teams, as well as several well-known streamers.

TAKADEMY

FB.COM/TAKADEMY

TAKADEMY is a newcomer in the industry, the academy positions itself as an eSports streamer academy, which brings professional career opportunities to young eSports fans in Vietnam. TAKADEMY also works with brands and streaming platforms like Facebook Gaming, thus, promising to bring great opportunities for eSports streamers.

ota

facebook gaming

OTA.NETWORK **FB.COM/OTANETWORKVN**

OTA Network is a gaming talent agency and gaming multi-channel network based in Vietnam. The agency boasts 109 top gaming content creators, which makes it the biggest gaming talent agency in Vietnam. Notable among these streamers are ViruSs, Nam Blue, Caster Jay, Tuan Tien Ti, Trau TV, and professional eSports players like Chim Se Di Nang and Be Chanh.

OTA Network is the only partner of the Facebook Gaming Creator Program in Vietnam, and follows Facebook's standards for content and professional streamers.





03
AUDIENCE SNAPSHOT

ESPORTS IS THE GATE WAY TO GENERATION Z MALE

It is estimated that there are around 15 million eSports players in Vietnam as of 2018. And around 10 million are eSports fans that watch eSports content on a regular basis.

The common belief is that eSports viewers are young males, the majority being under 19 years old, uneducated, and unemployed.

To understand the true audience of eSports in Vietnam, we conducted a survey study with 1500 people, using a random sampling of all people who were watching OTA Network's gaming streamers in December of 2018.

Interestingly, there was at least 1 person from every single province and city of Vietnam in the sample, however, Hanoi and Ho Chi Minh City comprised of the biggest portions, 42% and 25% respectively. Still, this evidence supports the notion that eSports viewers come from every part of Vietnam.

The second finding was that eSports is being driven by Gen Z (those born between 1995 and 2013), as the survey showed that 83% are in the age range of 13 to 24. But, unlike the common social belief, the majority of eSports players isn't under 18; rather, the survey recorded that 60% overall are 19 to 24 years old, and among them, 58% has monthly income.

This age group is made up of those who have just started their careers, are enthusiastic, and are active both socially and economically. They also have strong influences over their friends and family in areas such as lifestyle and choice of commodity, especially technology gadgets.

For a brand that wishes to tap into the new consumer generation of Vietnam, eSports events and livestream would certainly be among the choices for communication channels.

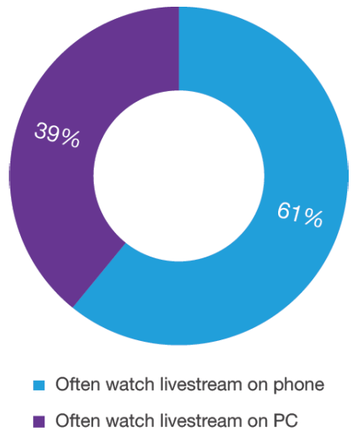
85%
Vietnam's eSports audience is Gen Z

94%
The eSports audience is predominantly male

58%
Has monthly income

MOBILE IS THE WAY TO REACH THE VIETNAMESE ESPORTS AUDIENCE

61% of Vietnamese eSports viewers watch gaming livestreams via their smartphones more often than on their personal computers. For the 13 to 18 age group, the preference is even more profound, as 71% of them watch on phone more often than PC. This finding is in line with the level of mobile phone usage in Vietnam, which has a smartphone penetration rate of 72% in major cities.



THE ESPORTS AUDIENCE WATCH WHAT THEY DON'T PLAY

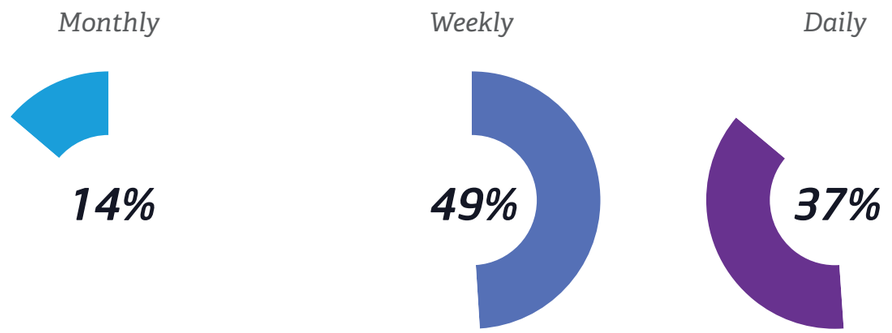
More than half of eSports audiences watch livestreams of games that they do not play themselves. This finding corresponds with other worldwide reports of how people watch eSports from well known research firms like Newzoo and Nielsen. This also suggests that the audience is not watching just because they want to learn about the game, but also because they love to watch gaming and their favorite streamers in general.

52%

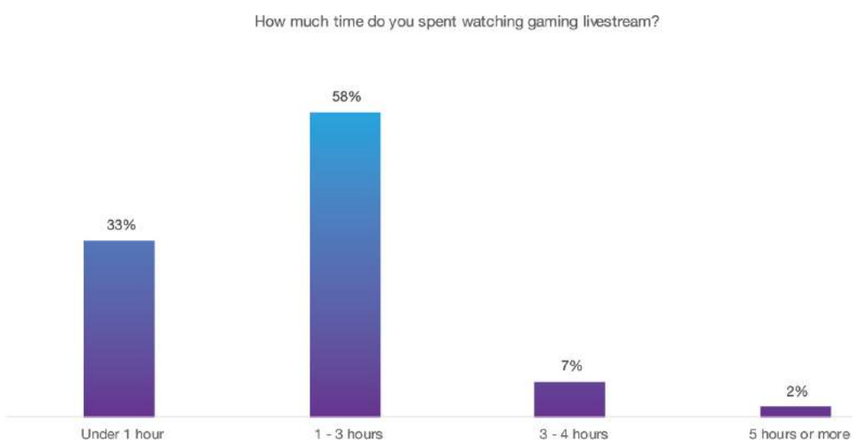
eSports audience watch livestreams of games that they don't play themselves

WATCHING ESPORTS LIVESTREAMS HAS BECOME AN INDISPENSABLE ENTERTAINMENT ACTIVITY

Watching gaming livestreams has become a daily routine for 37% of eSports audiences, while half watch at least once a week. This shows that for the majority of livestream audiences, this activity has become an inseparable part of their entertainment lives.

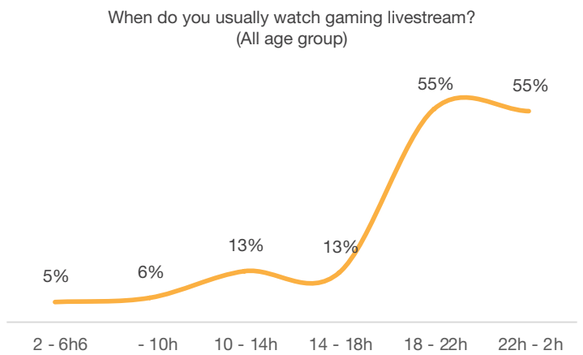


For those who watch daily, 6 out of 10 spent at least 1 hour every day in front of the screen, watching their favorite streamers, players and teams play and compete.

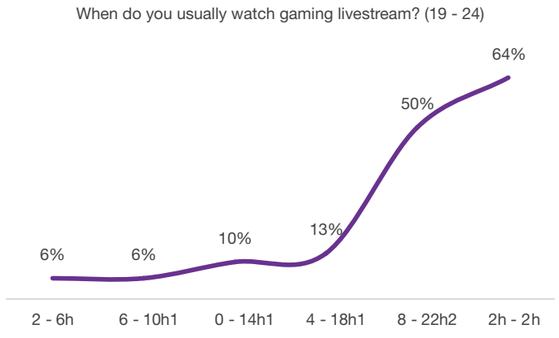


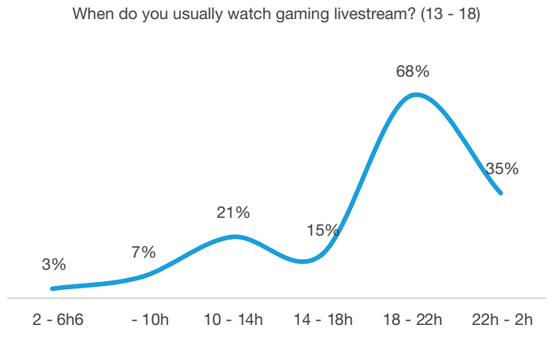
NIGHT-TIME IS THE PLACE TO BE

The majority of all age groups watch gaming livestream at night from 18:00 to 2:00 the next morning. This would be the prime time to target Vietnamese eSports audiences.



However, there are major differences between the eSports audience in the age groups of 13 to 18 and 19 to 24. The older group is significantly active during midnight hours, while the younger group, who may be under stronger parental influences, cannot stay up too late like the older group. But the younger group watches gaming livestream more than all other groups around noontime during the hours of 10 to 14 o'clock. Advertisers should carefully pick the times for the most effective exposures to target the different eSports audience age groups.





GAMING TECHNIQUE ISN'T EVERYTHING IN LIVESTREAM, VIEWERS ARE LOOKING FOR MORE

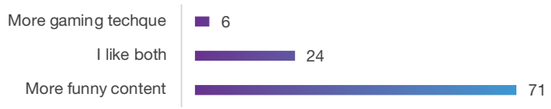
While gaming is certainly what hooks them in watching eSports livestreams, but the Vietnamese gaming livestream audience demand more than that. They also enjoy contents related to streamers' daily lives and stories, and look to have more fun while watching livestreams.

Streamers and brands alike should recognize the need to provide entertaining contents for the Vietnamese eSports audience. Bringing a good balance of gaming along with other fun content will certainly help streamers reach a higher number of audiences.

What type of eSports streamer content do you like to see more?



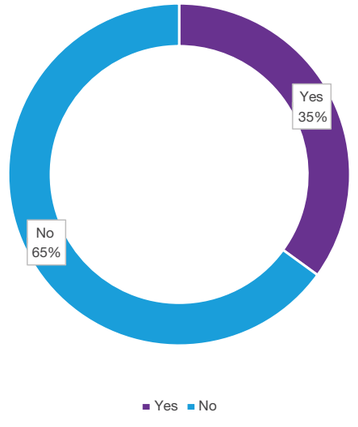
What type of gaming livestream do you like to see more?



THE VIETNAMESE AUDIENCE IS READY TO SUPPORT THEIR FAVORITE STREAMER ECONOMICALLY

More than 35% of the gaming livestream audience said they had donated to streamers in the last 30 days. Donating audiences can be translated as paying users, which is one of the revenue streams of streamers. This is also an indicator of how ready the Vietnamese eSports audience is to spend money for their favorite streamers, game contents, merchandise, and eSports events.

Have you donated to streamers in the last 30 days



04

THE FUTURE OF ESPORTS IN VIETNAM

WHAT'S NEXT FOR VIETNAM'S ESPORTS INDUSTRY
THE 6 OBSTACLES HOLDING BACK THE DEVELOPMENT OF VIETNAM ESPORTS

WHAT'S NEXT FOR VIETNAM'S ESPORTS INDUSTRY

01 Increase of viewership and national television coverage.

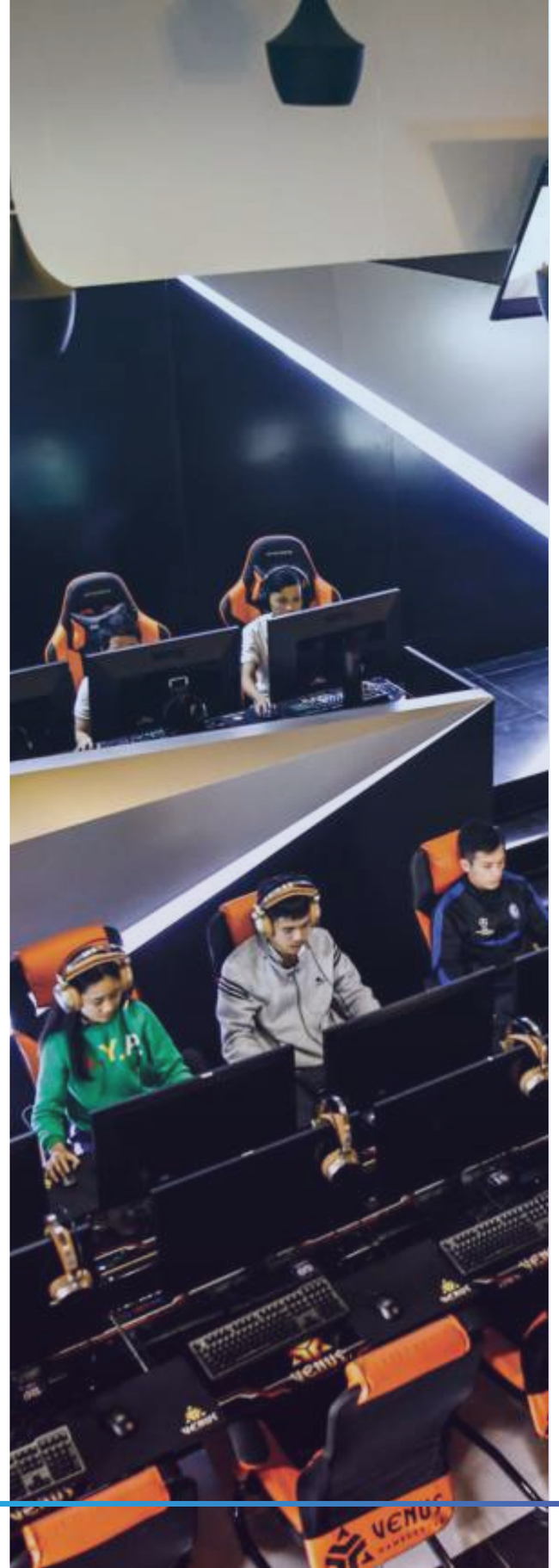
The number of eSports enthusiast viewer will rise to 16 millions in 2019, and the number of eSports game player will jump to 26 millions. When there is more demand for eSports content, more and more content creators, media channels and eSports event organizers joining the market. Furthermore, as Vietnamese professional players appear with the national flag at international sporting arena, there will be more coverage on traditional TV channels, raising even more awareness of eSports as a official sport.





02 Rise of gaming livestream as a professional career.

The demand for entertaining gaming content will continue to rise, along with the appearance of professional eSports streaming channel like Facebook Gaming, CubeTV, NimoTV in Vietnam will reinforce the growing of the gaming content creators community. They will get more chance to connec with brands and advertisers, as well as a learning environment provided by professional eSports production agencies.



03 Mobile eSports will take the lead.

Vietnam is a mobile-first country, there is far more people owning a smartphone than a PC. The number of people prefer watching livestream on mobile phone is also higher than on PC. Furthermore, there are a lot of major eSports title now available on mobile for Vietnamese gamer, such as Arena of Valor, PUBG Mobile, Mobile Legends, Crossfire, Vainglory, etc. New mobile eSports game like Arena of Glory, Survival Heroes is also coming to Vietnam in 2019. All these game are belong to the top 4 game publishers in Vietnam Thus, there is no doubt that in 2019, mobile eSports will take the lead in the near future.

04 Vietnam will be a destination for major world's eSports league.

It was announced that Vietnam will become the host country for League of Legends Mid Season Invitational and the Arena of Valor World Cup in 2019. There was also appearance of ESL – one of the world most renowned eSports organizer – in Vietnam with it self organized Apex Legends tournament. From 2019 onward, along with other South East Asia eSports hub like Philippine, Singapore, Indonesia, Thailand and Malaysia, Vietnam will rise as a new host for international eSports events.

THE 6 OBSTACLES HOLDING BACK THE DEVELOPMENT OF VIETNAM ESPORTS

Although eSports had started very early in Vietnam since the 2000s, it wasn't able to go "big" due to several reasons, of which some are still haunting the market even to this day.

01 The eSports ecosystem is still incomplete and relatively weak

The number of players in the ecosystem is low, especially in terms of professional event organizers, eSports leagues and talent agencies. The lack of long-running community leagues for gamers is the main reason for performance and skill gaps between Vietnamese and international players in games like Dota 2, StarCraft, Hearthstone, FIFA, etc. Furthermore, the Vietnam eSports ecosystem currently lacks competition platforms like Skillz or Faceit. Betting platforms and game marketplaces are also not available for Vietnamese players. However, this also presents opportunities for companies that are willing to fill the gaps and strengthen the ecosystem.

02 Esports in Vietnam lacks funding

This problem also relates to the previous one. Without sufficient funding, publishers and event organizers cannot deliver eSports leagues and community cups to gamers, and have no ability to scale up the competition. Garena and Vietnam eSports are examples of how sufficient funding can be achieved: they have been able to organize complete league systems, covering from Community's Cups to professional leagues, drawing the attention of millions of viewers. In a different way of providing support, Syed Saddiq, Malaysia's Minister of Youth and Sports, pledged to invest 2 million USD in developing Malaysia's electronic sports. Vietnamese investors should also take a look at the potential of eSports and consider investing more in the future of electronic sports in Vietnam, while eSports companies ramp up the games. This is the prime time to invest as interest in gaming from the Vietnamese audience is growing fast.

03 Unprofessional eSports organization

Although Vietnamese teams have competed in international stages, most eSports organizations do not have standards for the sport. These organizations and teams do not own gaming houses for training, nor have complete teams of coaches, analysts, and supporting staffs. Many teams that play at the pro-level leagues in Vietnam are formed by just players themselves, even without managers or signing up with agencies. These factors make it less appealing for sponsors, harder to maintain team performance, difficult to organize and utilize team incomes, and as a result, teams disband much more easily. Currently, only a handful of eSports organizations are sufficiently funded and trained professionally, like EVOS eSports and GAM eSports. Vietnamese teams must recognize the need to organize professionally like a company, instead of just forming a team of gamers.

04 The development of Vietnam games and tournaments is rather scattered

Each publisher has their own way of growing their game and eSports communities, so there isn't much coordination between publishers and eSports organizers. This lack of strong cooperation creates a limitation in Vietnam's eSports scene. It limits the size of eSports leagues in Vietnam, as there isn't a single competition that can include all major eSports games in Vietnam. The eSports communities are also scattered around their main games. Thus, a strong cooperation between key players in the ecosystem will open up new possibilities. By coordinating between publishers, organizers, and the government, a large eSports tournament featuring all major eSports titles could be organized, which could be comparable to the size of the Vietnam National Olympics, and attract many engaging viewers.

05 eSports haven't been officially recognized as sports

Vietnam introduced the Vietnam Recreational eSports Association (VIRESA) in 2009, and is a member of the International eSports Federation. The governing body is in charge of representing Vietnam eSports in the international arena. However, the organization's activities are still limited and the funding, regulations, and support from the government are still weak. Looking at other countries such as South Korea, the Korean e-Sports Association (KeSPA) was introduced in 2000, which manages 25 eSports games, and eSports now brings in millions of USD to the country and is a cultural phenomenon itself. In Malaysia, the Ministry of Youth and Sports also recognized and decided to invest in eSports. And the Philippines, which has also recognized eSports players as sporting athletes, will introduce eSports in the upcoming SEA Games. As seen in several countries, the support from government is vital to the success of eSports. A sufficient investment will help the Vietnam eSports scene take off and create a new source of income for the country.

06 Social stigma that eSports is associated with being a "gaming addict"

The negative perception that the Vietnamese society has toward gaming has existed ever since it first appeared in Vietnam. And this negative view carries over to eSports as well. The majority of ordinary Vietnamese still do not recognize professional gaming as an actual career. Although the sentiment mainly exists in the minds of senior citizens, this is particularly unfavorable in the sense that parents will deter their children from taking part in eSports tournaments, and thus may prevent the development of newer generations of professional sporting players. However, national television programs are now starting to show more positivity towards eSports as careers by providing more coverage on professional eSports competitions. This is a step that may help to detach the negative views such as "gaming addicts" that are associated with professional eSports players.



CLOSING LINE

Thank you for tuning into the Vietnam eSports Guidebook 2019 by Appota eSports. We hope that the document has well introduced the current Vietnam eSports landscape.

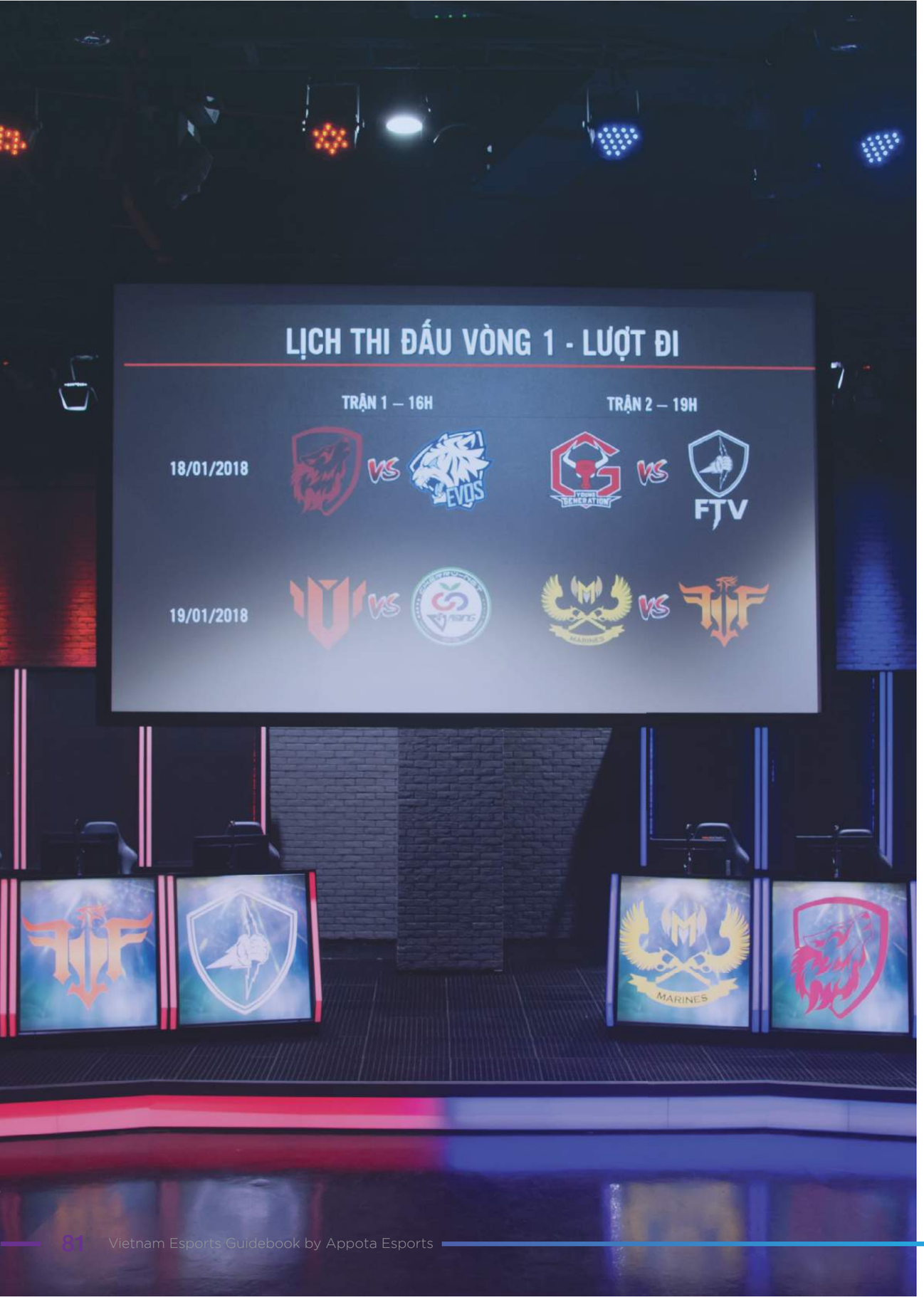
Esports isn't a new business in Vietnam, but it has been hindered from its true potential for years. At Appota, we believe eSports will thrive as a new entertainment industry in Vietnam, benefiting all parties involved, and that 2019 to 2022 will be the period of rapid development for the industry. There will be more international eSports events in Vietnam, more professional teams, more players to compete and bring fame to the nation, and most importantly, strong growth and increase in eSports viewership.

However, to truly uncover the potential of eSports, there is the need for heavier investment and cooperation between the government and those involved in the eSports ecosystem to recognize eSports as an official sport, and professional eSports players as athletes.

All parties in the eSports ecosystem need to cooperate and bring the best eSports events, games, and high quality entertaining contents to the audience, and help enhance the eSports community in Vietnam.

Appota hopes that in 2019 there will be more advancements made through the cooperation of all entities in the industry and investments from the government, so that all obstacles can be overcome for the thriving of the eSports community in Vietnam.





DISCLAIMER

The Vietnam eSports Guidebook 2019 is produced by Appota Esports and OTA Network, utilizing both internally produced data as well as data from external sources, and is meant to provide a wide knowledge base of the Vietnam eSports market. Press and media units can use the information presented in the report as long as credit is given to Appota and the respective sources cited in the guidebook.

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For any inquiry, please contact: marketing@appota.com

ABOUT APPOTA ESPORTS

Appota Esports is the first eSports ecosystem in Vietnam with the principle of neutrality and open cooperation with all partners with the same vision to develop e-sports in Vietnam and Asia.

The electronic sports ecosystem of Appota Esports includes a professional production team (GankTV) in parallel with the network of top 100 streamers in Vietnam (OTA Network), Esports news website (EGN) and the gaming audience community of more than 10 million people.

In the coming years, Appota Esports aims to tap into the market of eSports, and to build the relationship between organizational units and brands, and push Vietnam eSports to a new level.

WHAT WE DO

- STADIUM EVENT
- PRODUCTION
- PR - MARKETING
- TOUR ORGANIZER (CUP - LEAGUE)
- ESPORTS CONTENT MANAGEMENT
- COPYRIGHTS AND PARTNERSHIP
- BRANDS SPONSORSHIP
- BROADCASTING/ SHOUTCASTER
- STREAMER ACADEMY
- PLAYER TRANSFERS

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