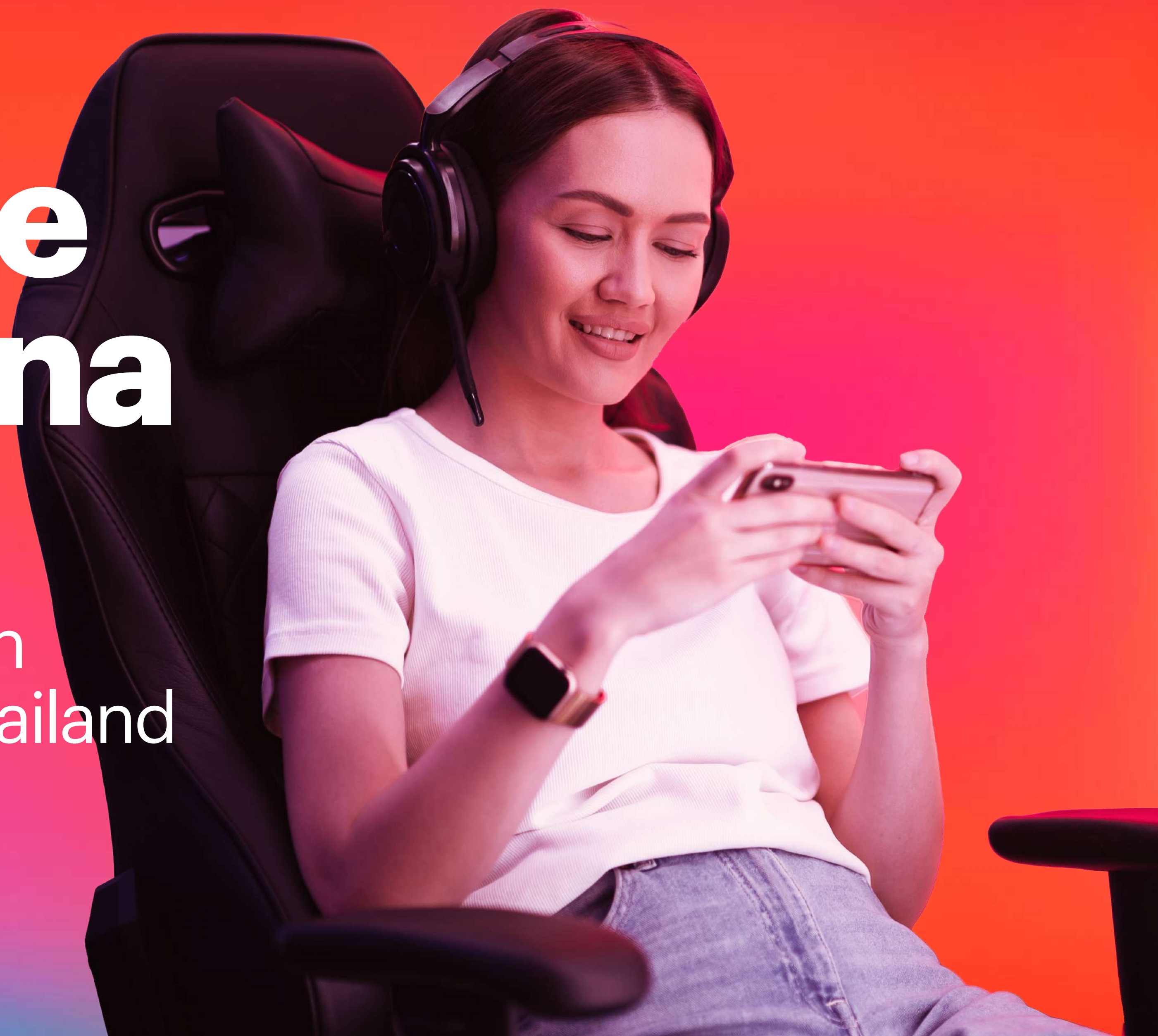


Mapping the esports arena in APAC

An analysis on esports fans in Singapore, Indonesia and Thailand



Introduction

The world of esports has rapidly evolved from a niche pastime to a global phenomenon, captivating millions of viewers and generating billions of dollars in revenue. In APAC, Singapore, Indonesia, and Thailand have emerged as regional hubs for esports, boasting a vibrant and passionate community of players, organizers, and enthusiasts. This report delves into the burgeoning esports landscape in these three countries, highlighting notable events, showcasing prominent teams, and attitudes of these esports and games followers.

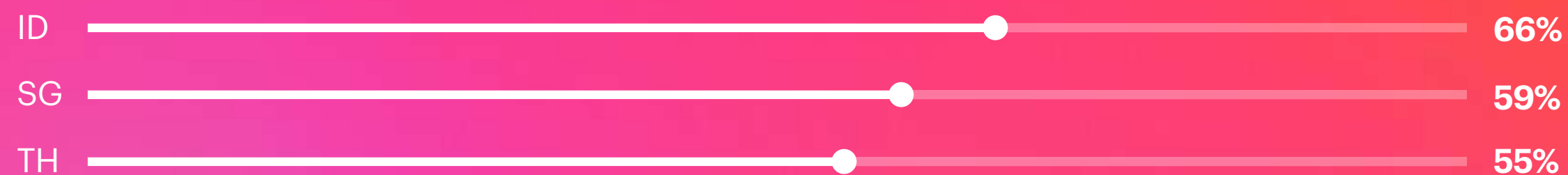
% of games and franchises followers



Demographics and behaviour of e-sport games followers

The esports audience across the three countries predominantly consists of individuals aged 18-34, with variations in gender representation and employment status.

Age (18-34)



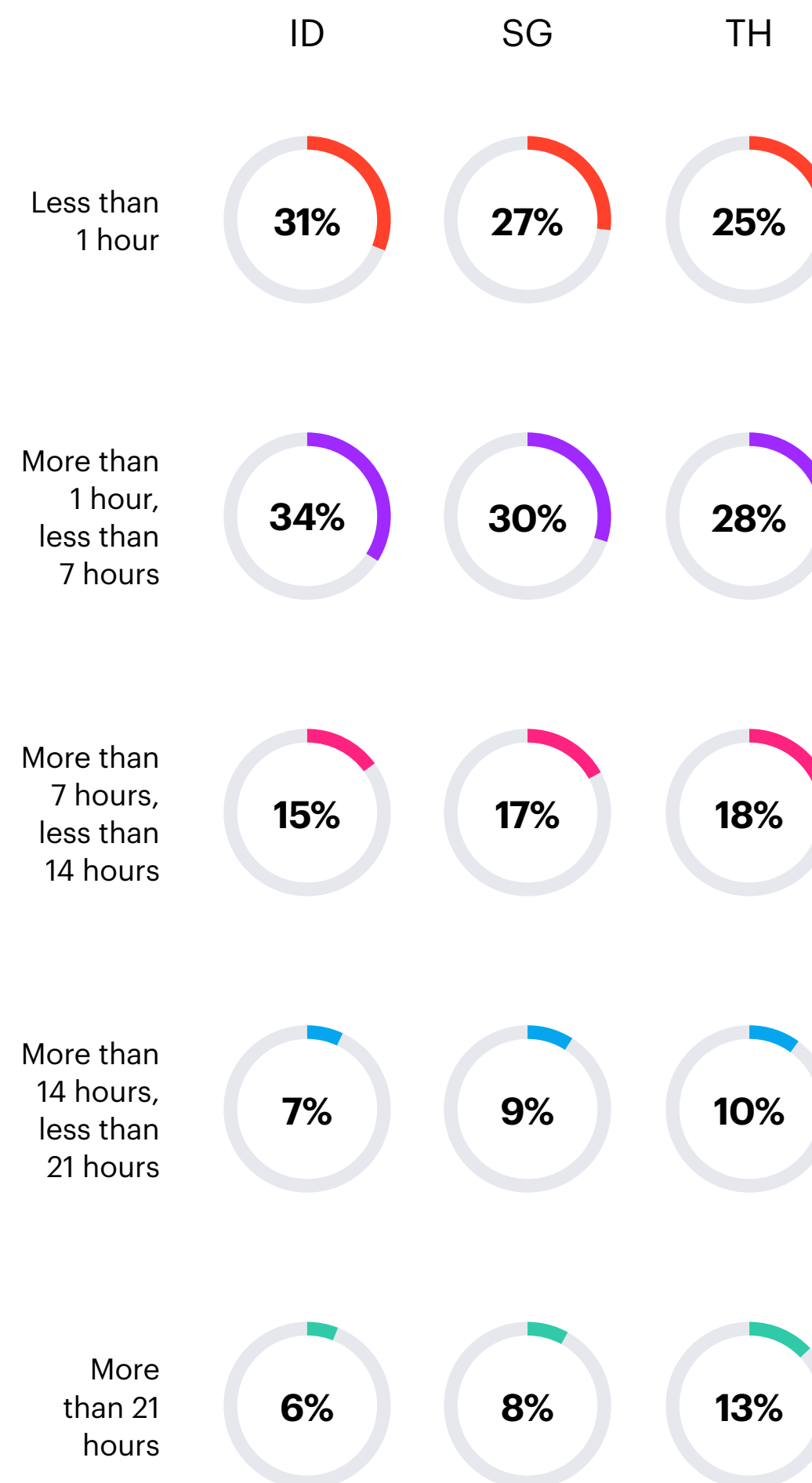
Gender (Male)



Employment status (Working Full Time)



Number of hours spent gaming on mobile phone/handheld console weekly



In ID, where the highest percentage of game followers is reported at **54%**, there seems to be a proportional decrease in the number of hours spent gaming as the percentage of followers decreases. It suggests that a larger following correlates with a slightly lower average time spent gaming, potentially indicating a more diverse range of interests among the gaming community.

Conversely, in SG, despite having the lowest percentage of game followers among the three regions at **24%**, there is a notable increase in the number of hours spent gaming. This relationship suggests that while the community may not be as heavily invested in specific game franchises, the overall engagement in gaming activities, measured by time spent, is comparatively higher.

TH falls in between, both in terms of the percentage of game followers (**45%**) and the distribution of hours spent gaming. This middle ground might suggest a more balanced gaming culture with a sizable following and a moderate amount of time spent gaming.

Top games and franchises followed

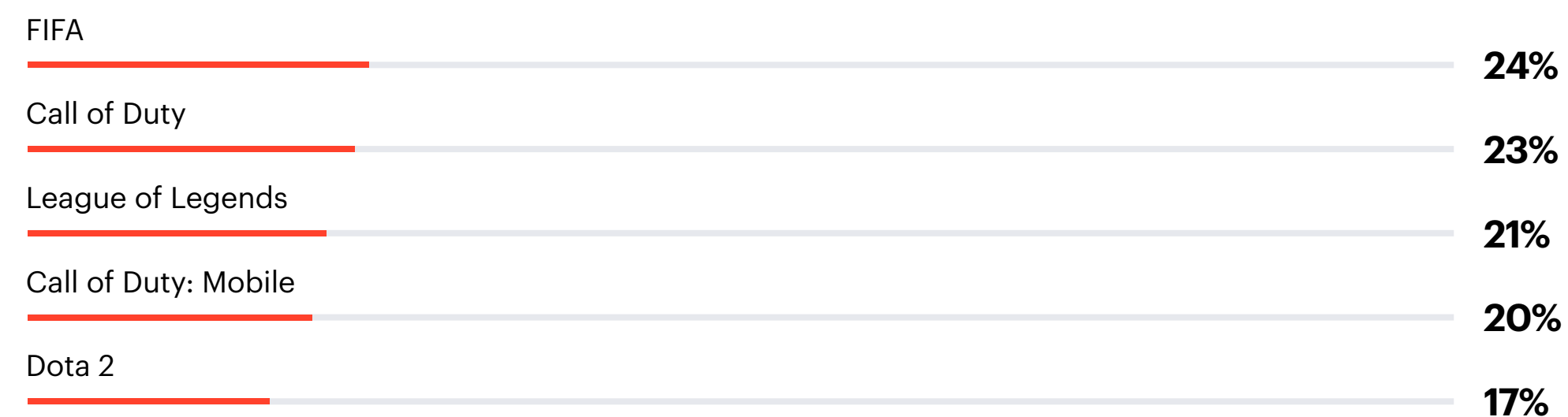
Indonesia's gaming preferences lean towards Mobile Legends: Bang Bang, PUBG MOBILE, FIFA, Call of Duty, and Call of Duty: Mobile, with Mobile Legends: Bang Bang dominating the market with an impressive **41%**. In Singapore, FIFA, Call of Duty, League of Legends, Call of Duty: Mobile, and Dota 2 are the most popular games and franchises, with FIFA holding the top position with **24%**. Thailand's gamers favor FIFA, Arena of Valor/Honor of Kings, PUBG MOBILE, Apex Legends, and Call of Duty, with FIFA leading the pack with **31%**. These insights reveal the diverse gaming preferences across Singapore, Indonesia, and Thailand, highlighting the popularity of both mobile and PC gaming titles and the strong presence of established franchises like FIFA and Call of Duty.



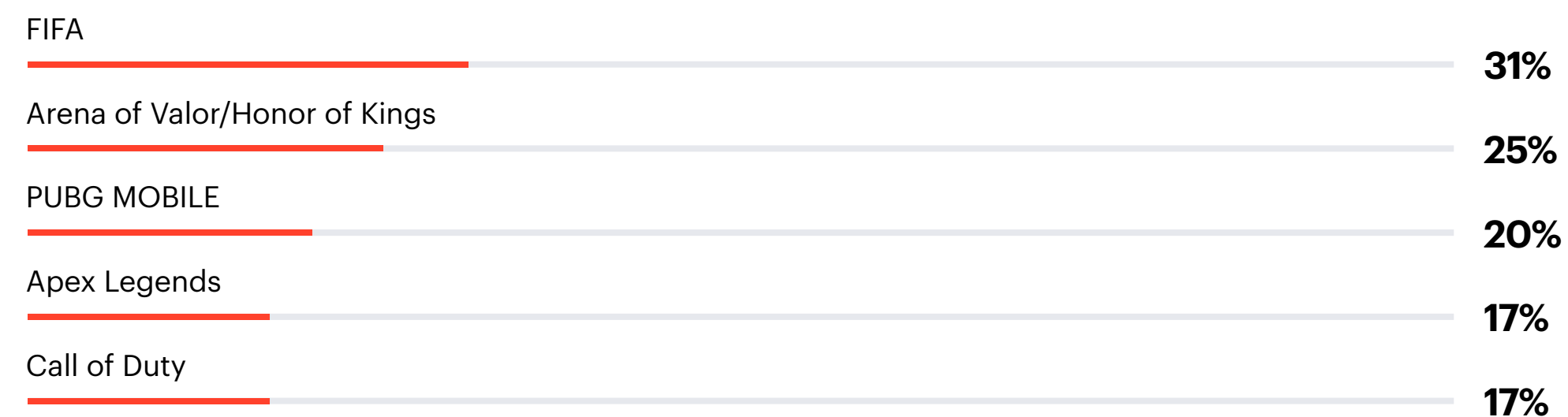
ID



SG



TH



Global leagues and events

A significant majority of game followers in Indonesia, Singapore, and Thailand are aware of global leagues and events, indicating a strong interest in the competitive aspect of gaming and a willingness to engage with international esports tournaments. In Indonesia, **96%** of game followers are aware of global leagues and events, while the figure stands at 91% in Singapore and **92%** in Thailand.

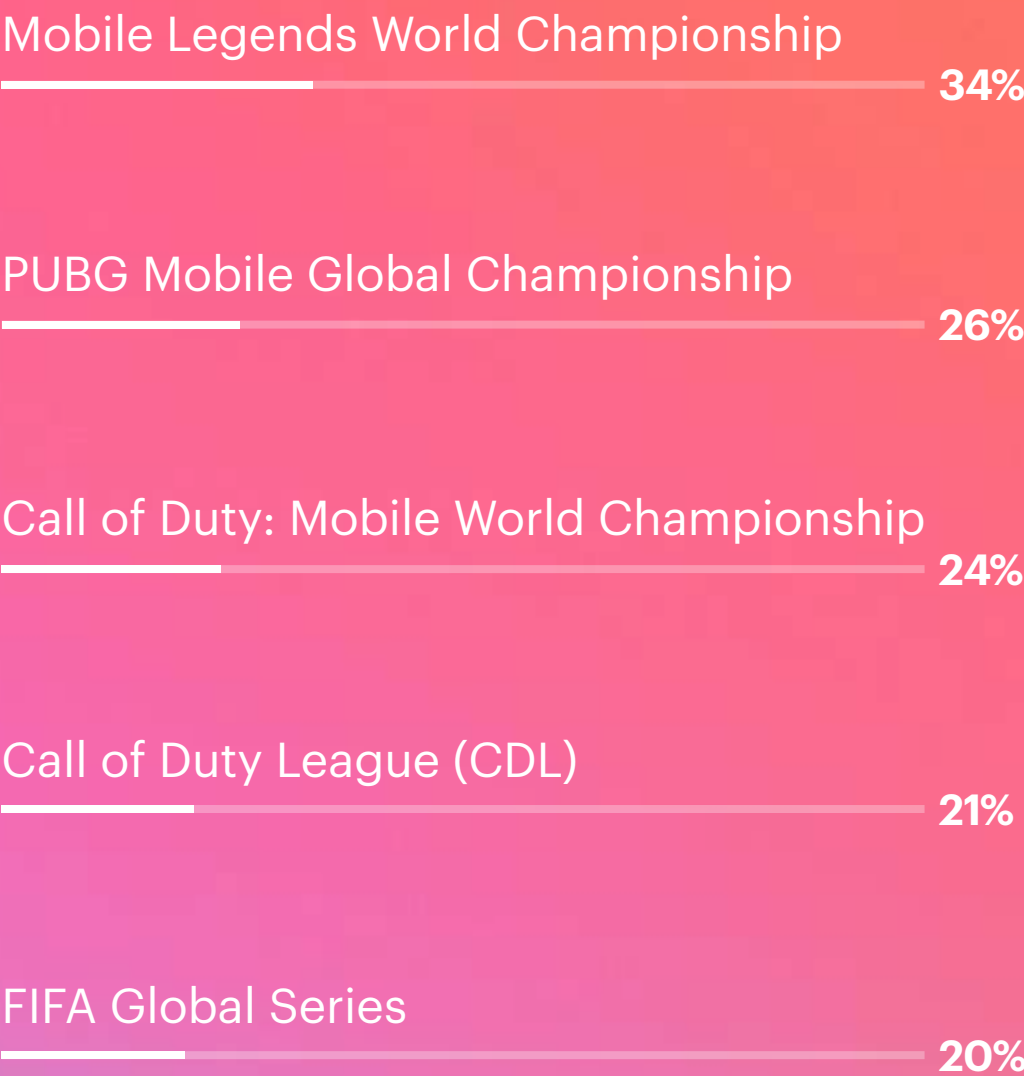
Mobile Legends: Bang Bang holds a commanding position in the Indonesian esports scene. With **25%** of game followers following its global championship, Mobile Legends: Bang Bang is the most popular esports in the country. This suggests a deep preference for mobile gaming and the popularity of the MOBA genre in Indonesia.

Call of Duty, a popular first-person shooter franchise, enjoys a strong presence across all three countries. Call of Duty League (CDL) and Call of Duty: Mobile World Championship consistently rank among the most followed global leagues and events, highlighting the enduring appeal of the franchise and its ability to attract a diverse audience. While some games, like Call of Duty, enjoy popularity across all three countries, each region also demonstrates unique preferences.

Awareness of global leagues and events

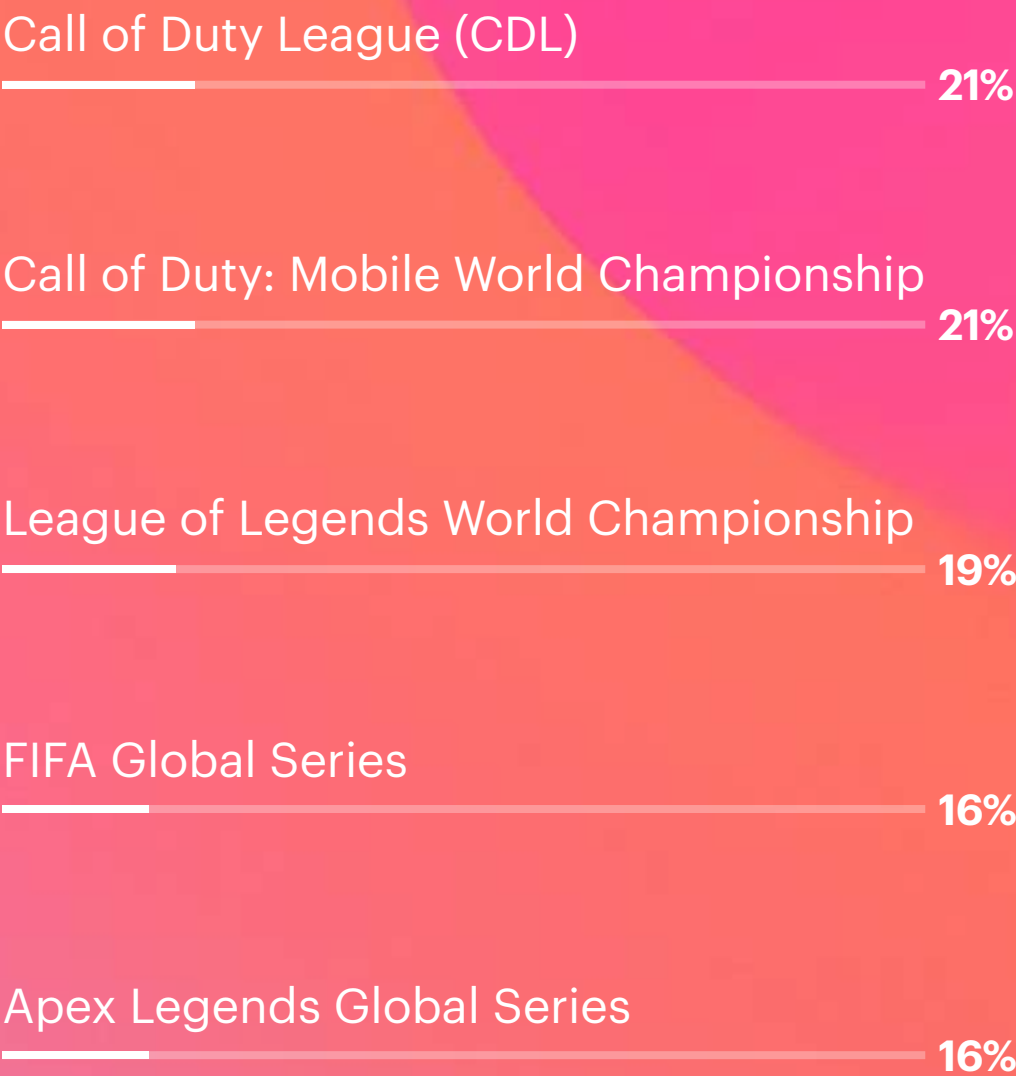
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96% of Indonesian followers of games are aware of global leagues and events.



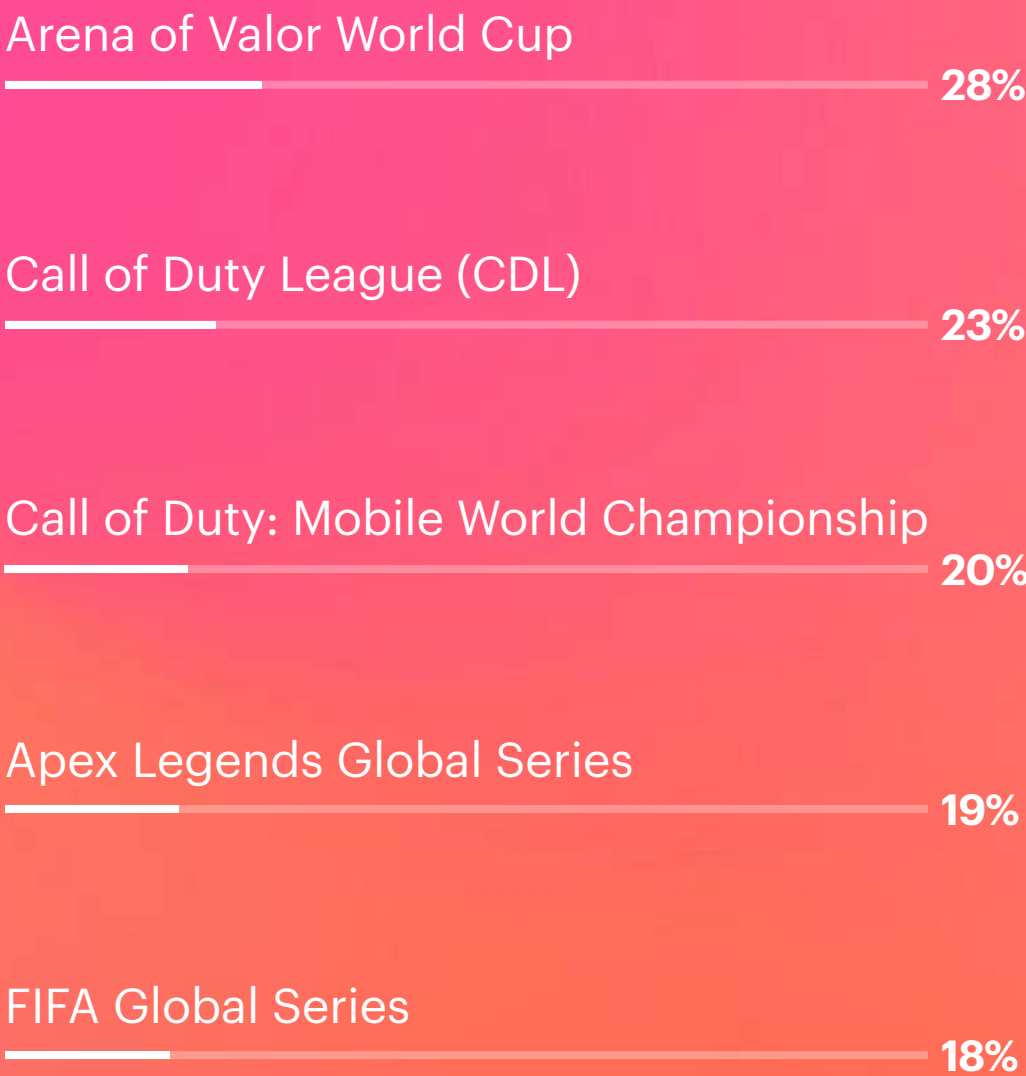
SG

91% of Singaporean followers of games are aware of global leagues and events.



TH

92% of Thai followers of games are aware of global leagues and events.



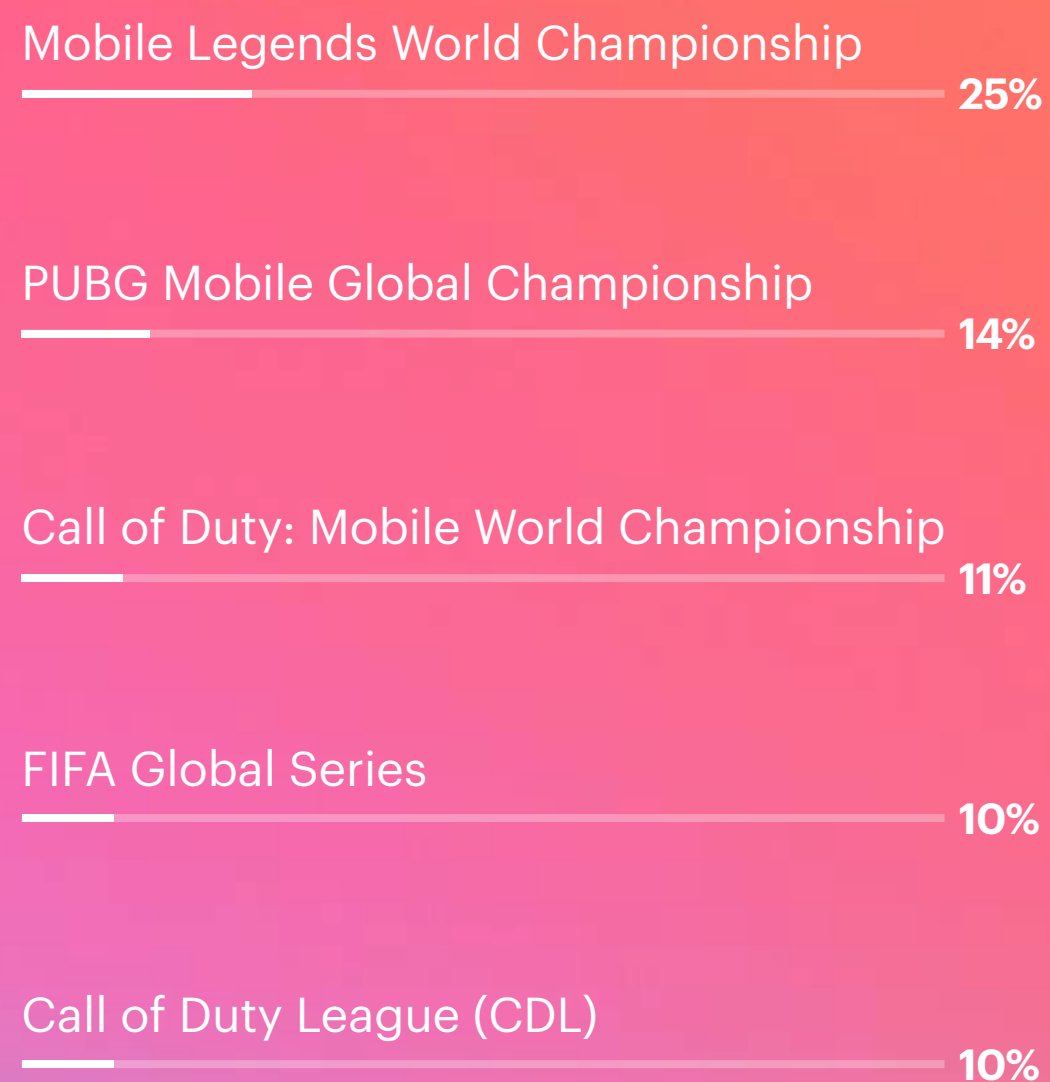
Global leagues and events

Fans in Indonesia, Singapore, and Thailand follow a variety of global leagues and events, with different leagues and events being popular in each country. This suggests that there is a strong interest in esports in APAC, and that fans in the region are interested in watching esports at both the regional and global levels.

Global leagues and events followed

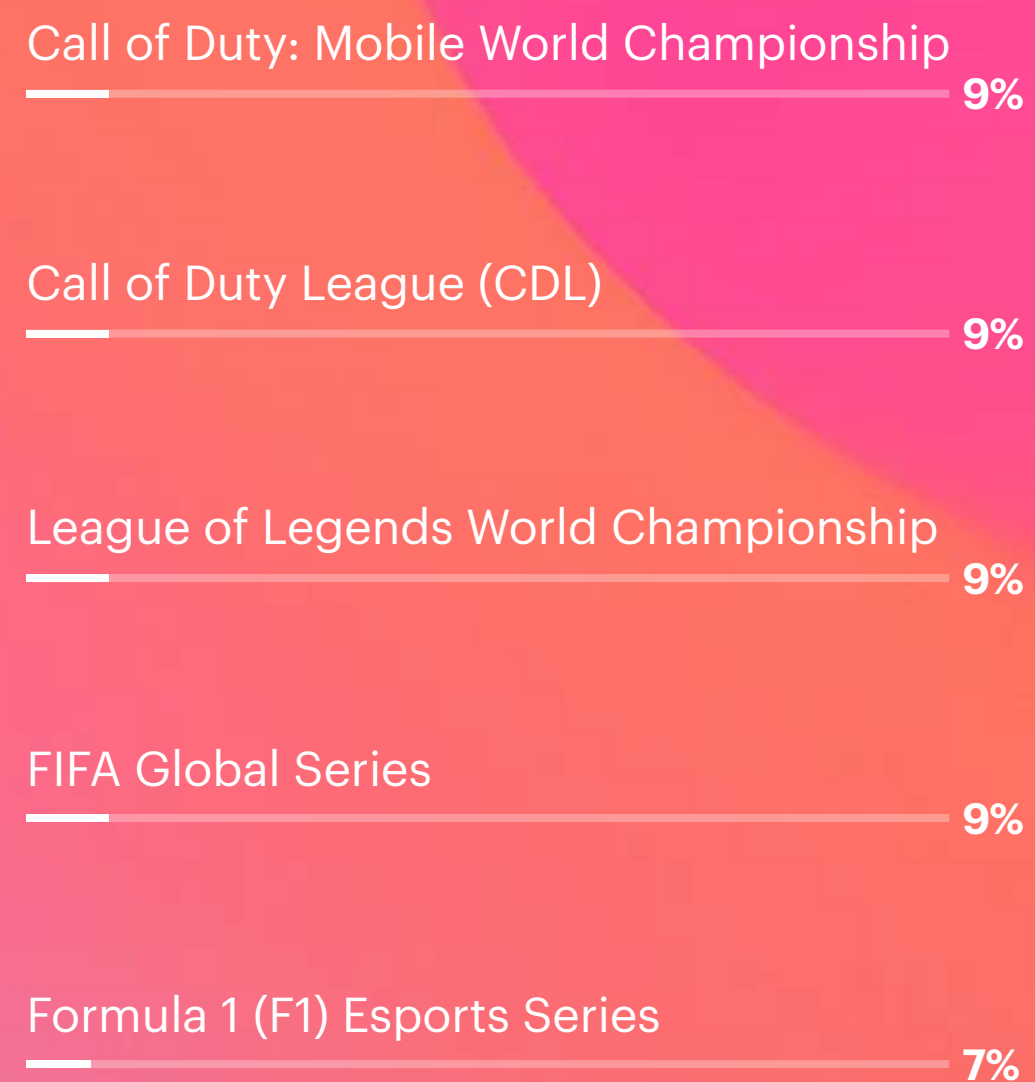
ID

85% of Indonesian followers of games are also followers of global leagues and events.



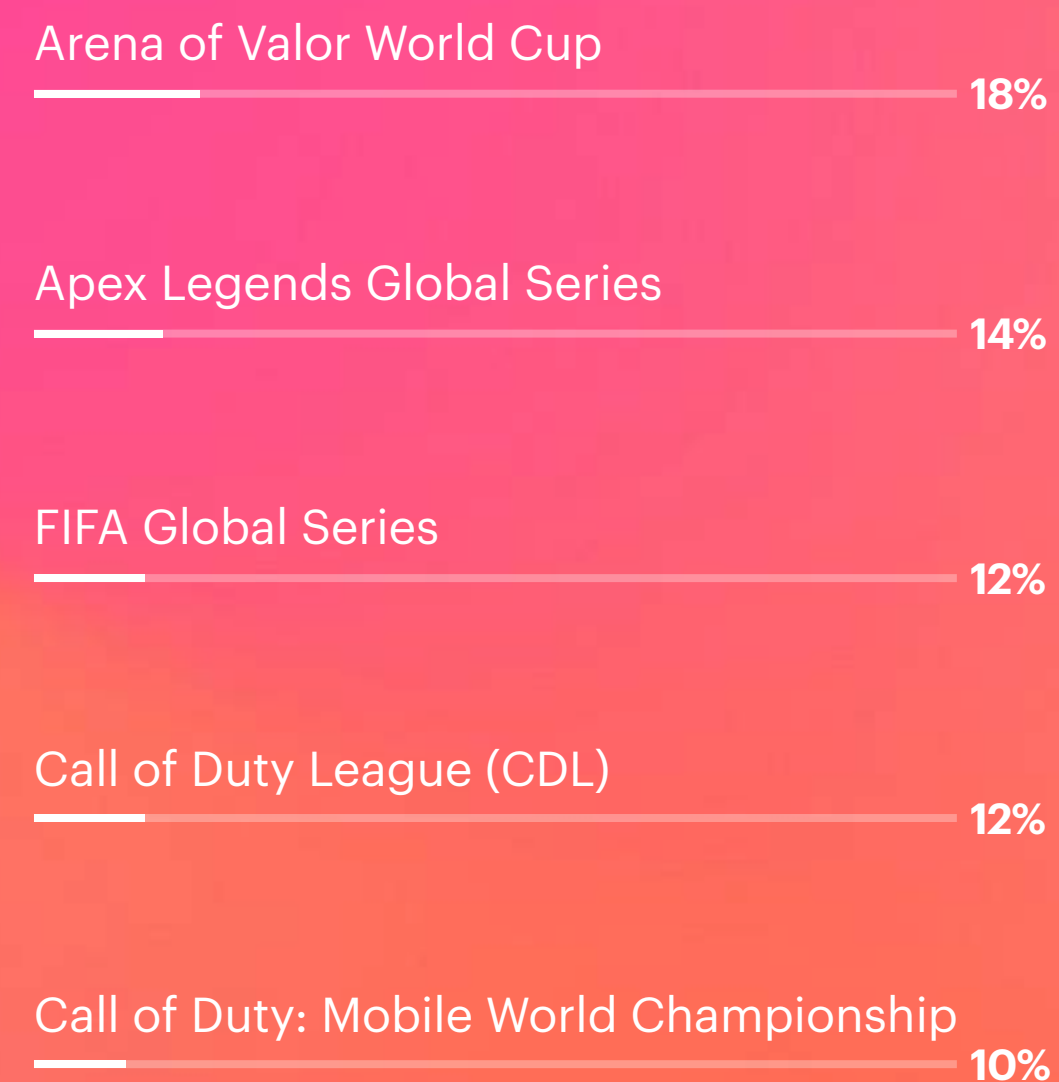
SG

74% of Singaporean followers of games are also followers of global leagues and events.



TH

82% of Thai followers of games are also followers of global leagues and events.



Global teams supported

ID



83%
of Indonesian followers
of games are supporters
of global teams.

Evil Geniuses 13%

Cloud9 10%

Excel Esports 10%

Complexity Gaming 9%

Counter Logic Gaming 9%

SG



67%
of Singaporean followers
of games are supporters
of global teams.

Cloud9 13%

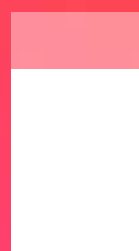
Complexity Gaming 10%

Evil Geniuses 10%

T1 9%

Counter Logic Gaming 9%

TH



78%
of Thai followers of
games are supporters
of global teams.

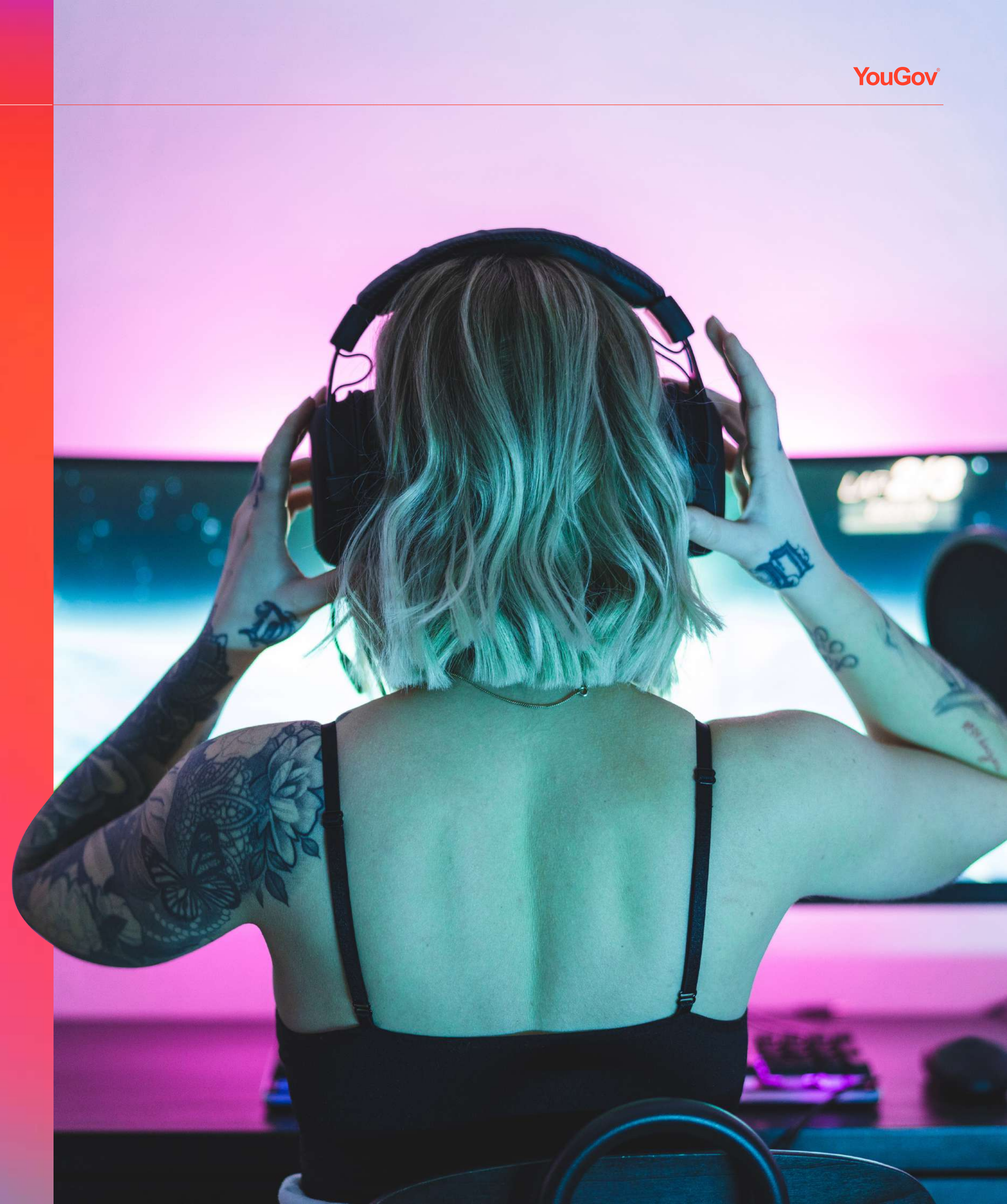
Complexity Gaming 17%

Cloud9 16%

Counter Logic Gaming 16%

100 Thieves 14%

Dignitas 12%



Regional leagues and events

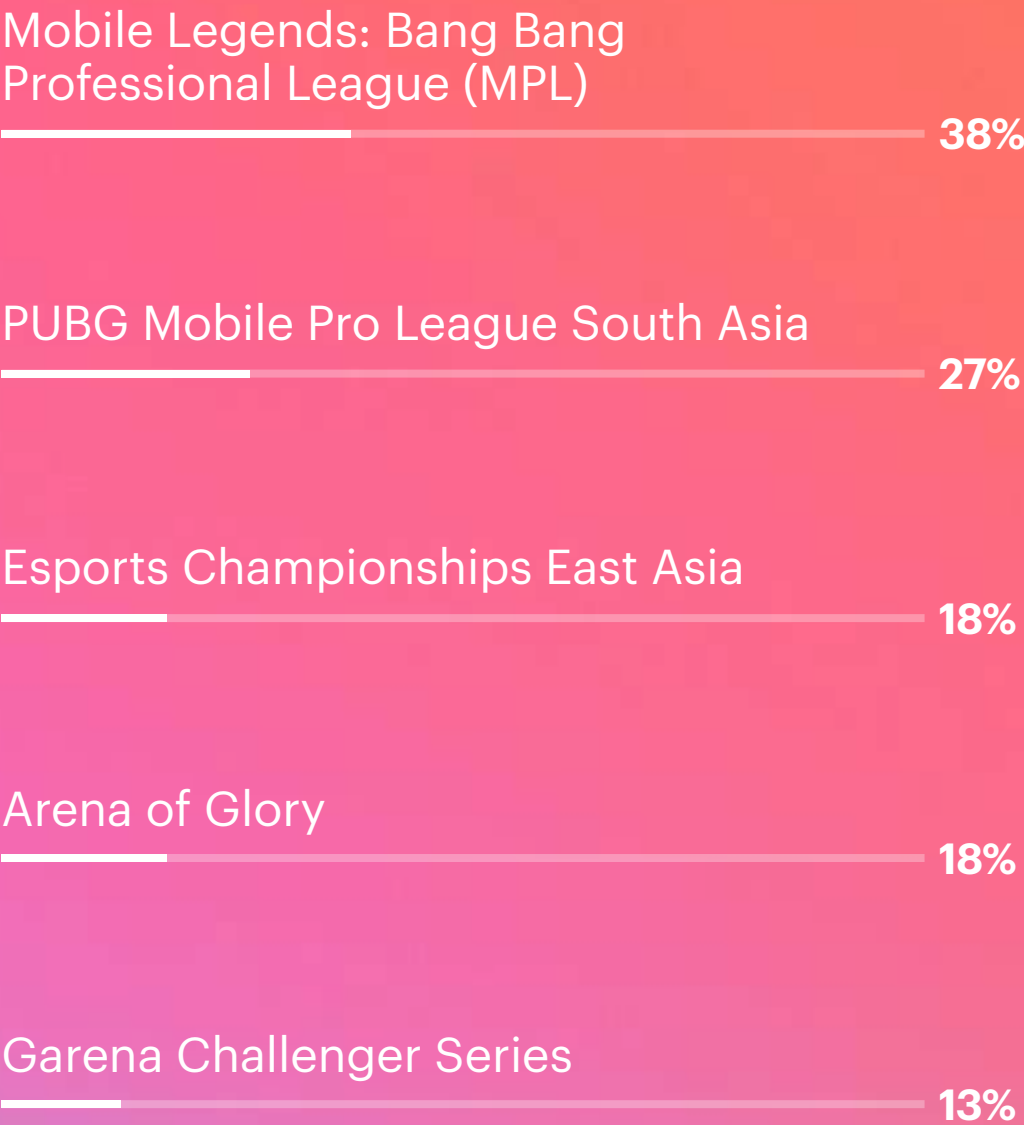
Mobile Legends: Bang Bang Professional League (MPL) is the most popular regional league in Indonesia with **38%** awareness and **30%** followership, likely due to the popularity of the game itself. Esports Championships East Asia is the most popular regional league in Singapore and Thailand with **18%** awareness and **9-15%** followership. Arena of Valor Japan League (AJL) is the most popular regional league in Thailand with **29%** awareness and **18%** followership.



Awareness of regional leagues and events

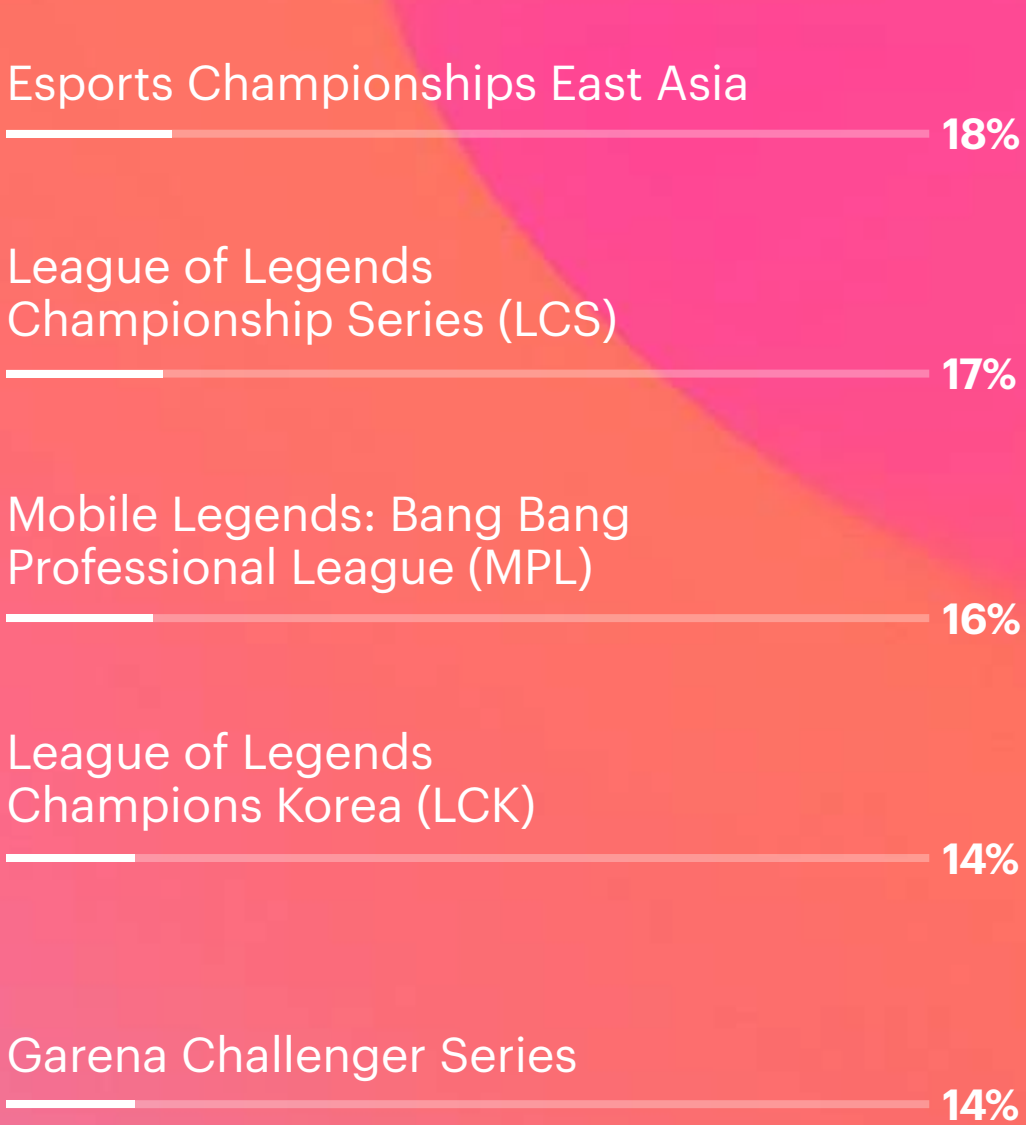
ID

94% of Indonesian followers of games are aware of regional leagues and events.



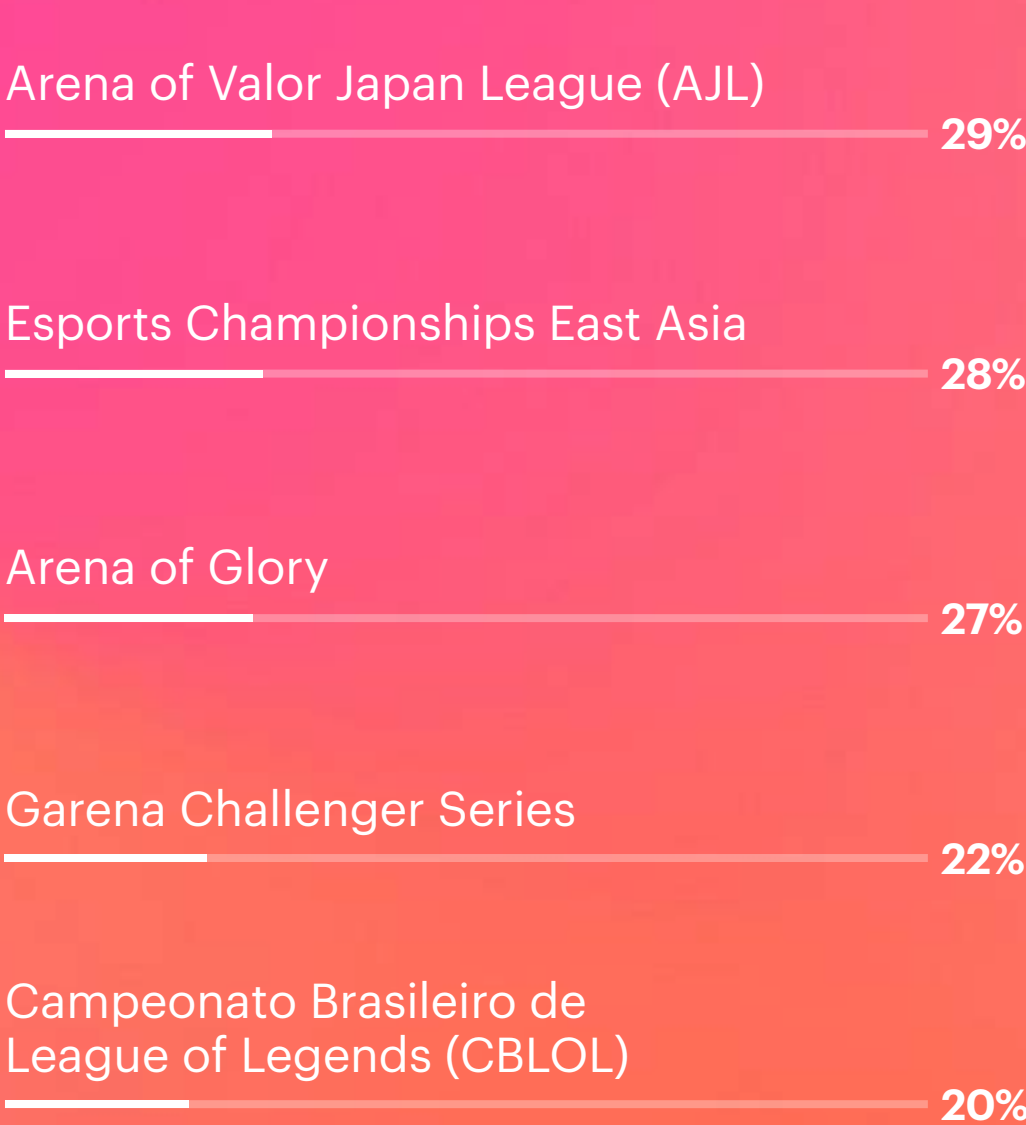
SG

82% of Singaporean followers of games are aware of regional leagues and events.



TH

92% of Thai followers of games are aware of regional leagues and events.



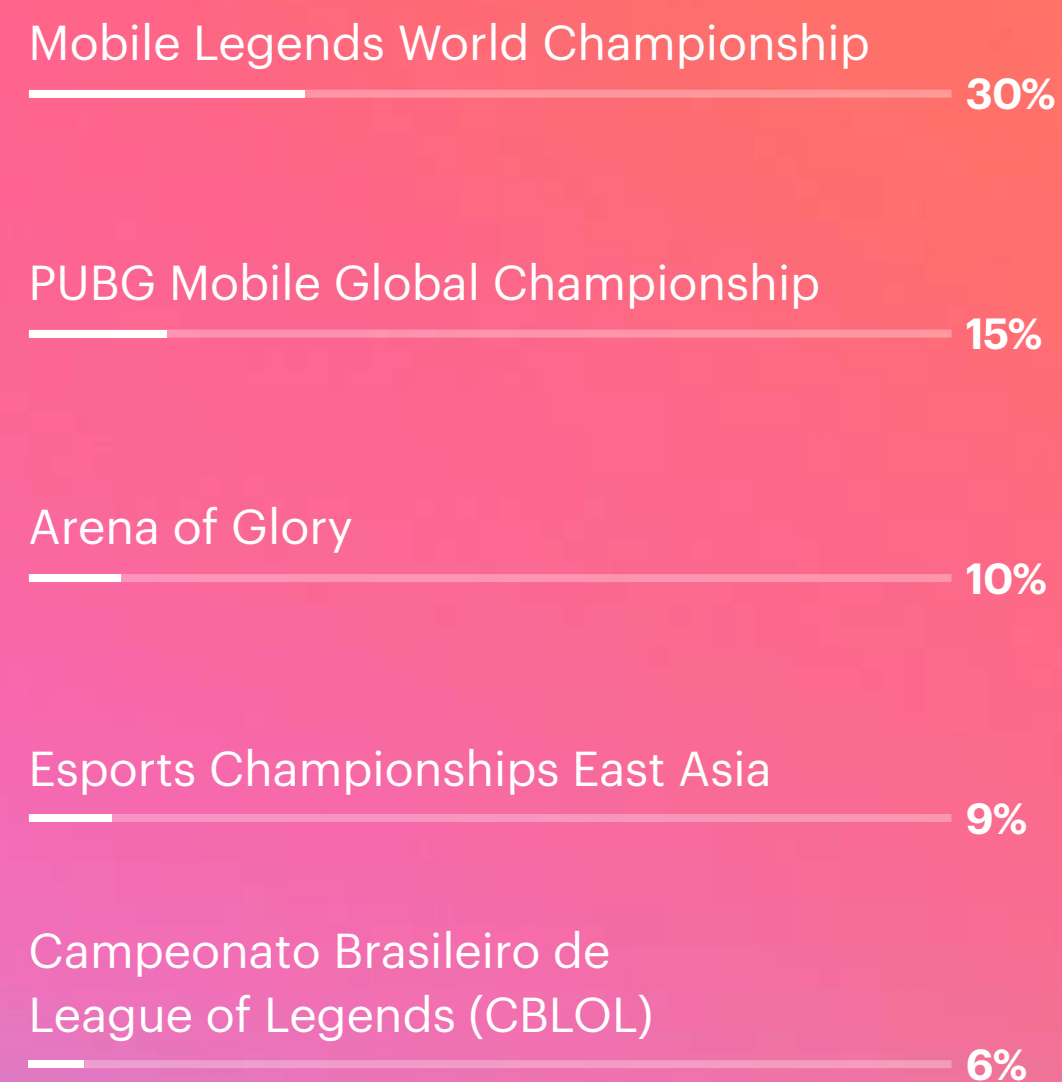
Regional leagues and events



Regional leagues and events followed

ID

80% of Indonesian followers of games are also followers of regional leagues and events.



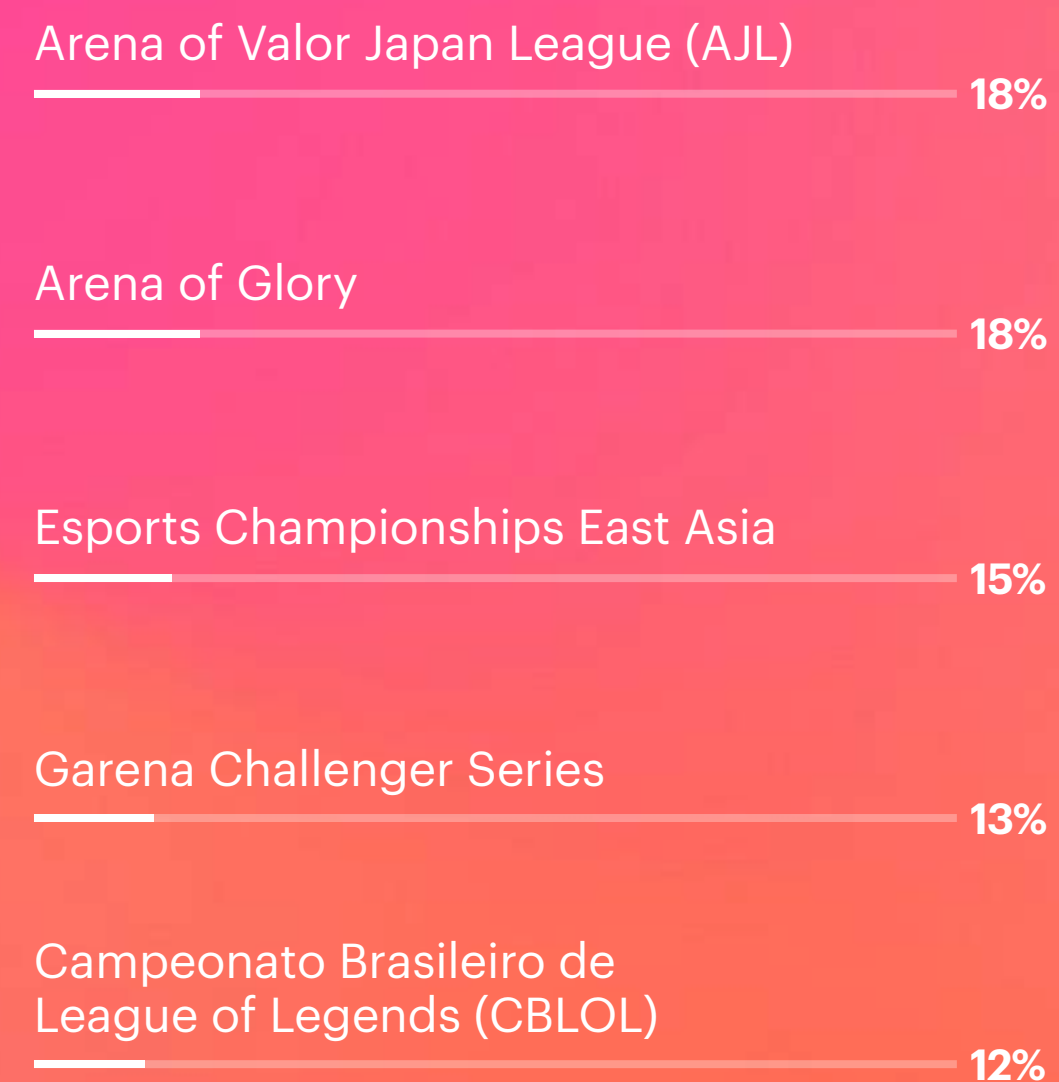
SG

62% of Singaporean followers of games are also followers of regional leagues and events.



TH

79% of Thai followers of games are also followers of regional leagues and events.



Regional teams supported

In addition to following global esports teams, esports fans in APAC also support regional teams. Esports teams and organizations can capitalize on this interest by creating localized content, partnering with local influencers, and hosting esports events in the respective countries.



Key insights and Conclusion

1. Rapid evolution and regional hubs: Esports has transitioned from a niche pastime to a global phenomenon, with Singapore, Indonesia, and Thailand emerging as regional hubs, showcasing vibrant communities of players and enthusiasts.

2. Varied gaming preferences: The gaming preferences across Indonesia, Singapore, and Thailand are diverse. Mobile Legends: Bang Bang dominates in Indonesia, FIFA in Singapore, and a mix including Arena of Valor/ Honor of Kings in Thailand. This diversity indicates a rich gaming culture with interests spanning both mobile and PC platforms.

3. Global awareness and engagement: A high percentage of game followers in all three countries are aware of and engaged with global esports leagues and events. This highlights a strong interest in the competitive aspect of gaming and a willingness to watch or participate in international esports tournaments.

4. Unique regional preferences: While certain games like Call of Duty enjoy popularity across all three countries, each region also exhibits unique preferences in terms of the games and franchises followed, indicating a nuanced gaming culture in each locale.

5. Team support across borders: There is substantial support for both global and regional esports teams.

Fans in APAC not only follow international teams like Evil Geniuses and Cloud9 but also show significant support for regional teams like EVOS Esports and Detonation Gaming.

6. Followers of regional leagues and events are also likely to follow international esports events. For example, 30% of Indonesian followers of regional leagues and events follow the Mobile Legends World Championship (**25%**).

The esports landscape in Singapore, Indonesia, and Thailand is marked by a dynamic and diverse ecosystem. The growth of esports in these countries is not only evident in the sheer number of game followers but also in the varied preferences, strong global engagement, and extensive support for both global and regional teams.

There is a significant opportunity for esports teams and organizations to expand their reach into APAC by catering to the specific needs and interests of gaming followers in the region. This could include creating localized content, partnering with local influencers, and hosting esports events in the region. The region has a large and passionate gaming community, and there is a strong interest in both global and regional esports events. The future of esports in APAC is bright, and the region is poised to play an even larger role in the global esports landscape in the years to come.

Methodology

Data as of 24 November 2023.

YouGov Profiles is based on continuously collected data and rolling surveys, rather than from a single limited questionnaire. Profiles data for Singapore is nationally representative, Profiles data for Indonesia

and Thailand is nationally representative of the online population and weighted by age, gender, education, region, and race. Learn more about Profiles.

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