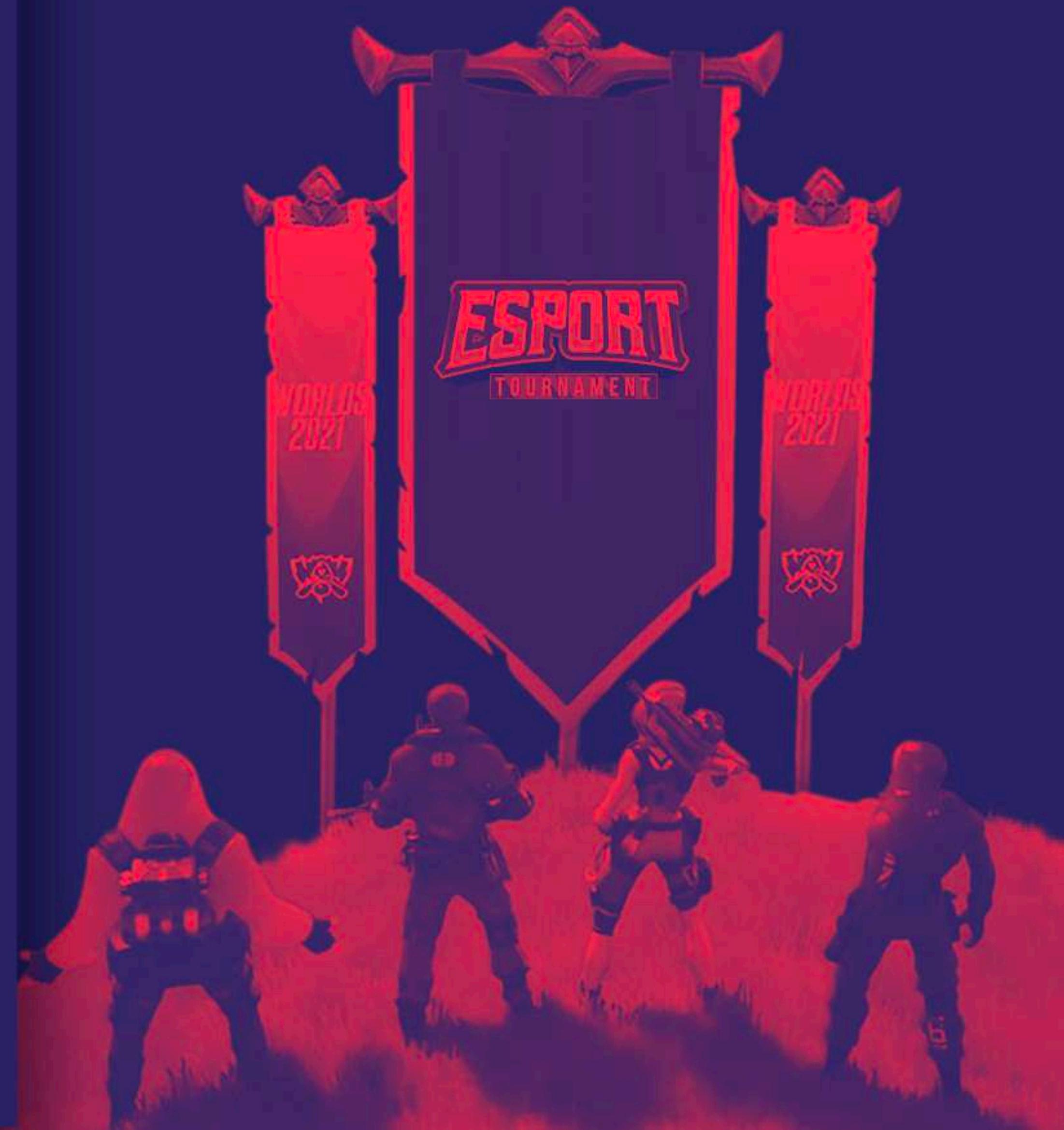


BRANDS AND ONLINE GAME
IN VIETNAM

GAMING AND ESPORTS IN VIETNAM: A NEW ARENA FOR BRANDS



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WHY ESPORTS NOW ?

**A CULTURE OF COMPETITION
A GLOBAL RISING STAR
VIETNAM'S NEW FAVOURITE PASTIME**



vero
Decision Lab



WHY ESPORTS NOW?

As communicators and marketers, we love to talk about the “next big thing” in the branding world. At Vero, we believe that brand relevance stems from empathy for the people who live and breathe their culture and interact with the cultural objects and each other in unique ways.

Decision Lab shares our vision of helping brands connect with the modern consumers in innovative ways. As such, we have partnered up to combine their research capabilities and our brand consulting teams to explore the esports landscape in Vietnam today. Decision Lab's online survey, which forms the backbone of this report, looks into Vietnamese consumers' gaming behaviors and provides valuable data on the gaming ecosystem in Vietnam, the characteristics and behaviors of Vietnamese gamers and esports fans, and the communication channels through which advertisers may reach them.

In the past few years, esports has grown to become a seriously influential platform through which people craft identities, establish online presences, and connect with the outside world. Like the larger story of gaming, it has transformed from a subcultural interest to a mainstream cultural force, which opens up a wide range of opportunities for brands to join the fray. In an era characterized by both hyper-individualism and hyper-connectivity, brands must be more empathetic and willing to adapt to rapid changes in cultural spheres that are increasingly diffuse. Those who can pull it off will gain a key competitive advantage, particularly among the younger generations who will only become more central in the years to come.



Photo: Screenshot from League of Legends, Riot Games



WHY
ESPORTS NOW?

Vero  Decision Lab

Photo: PUBG New State, Krafton



Esports has transformed from a subcultural interest to a mainstream cultural force, which opens up a wide range of opportunities for brands to join the fray. In an era characterized by both hyper-individualism and hyper-connectivity, brands must be more empathetic and willing to adapt to rapid changes in cultural spheres that are increasingly diffuse.



Esports is one of the largest cultural platforms of our time, but its subcultural origins mean that it is often seen as an “insider’s game” only accessible to savvy consumers. To unlock the potential of the esports ecosystem, we took a deep dive by conducting a survey that brought us closer to esports fans, granting us a familiarity with the market akin to the common understanding of fans of both traditional sports and pop culture, of which esports is a sort of hybrid.

In Vietnam, a third of the population now plays esports games, from mobile players sneaking a quick round on their lunch breaks to pro gamers training for international competitions. The growth of esports as a culture has also made it a strong platform for Key Opinion Leaders to establish and grow their online presence, and it has great potential for brands to creatively reach out to their target audiences. The esports ecosystem offers a large set of consumer demographic data for brands to develop effective marketing strategies.

For brands, esports are effectively a new communication channel, with all the opportunities and challenges that entails.

At Vero, we are advising our clients to move beyond stereotypes of gamers and connect authentically with those who enjoy this popular hobby. Decision Lab is also excited to help brands better understand their audiences and reach them through gaming platforms.

For those who handle it well, esports has become a highly effective digital marketing platform with an audience that responds with unusual enthusiasm to branded elements that effectively tie in with their favorite games. We hope that this report will help brands and marketers to learn and make more informed decisions about how they might get involved in Vietnam’s booming esports scene.



Photo: iStock



The growth of esports as a culture has also made it a strong platform for KOLs to establish themselves and grow their presence, and it offers great potential for brands to reach out to their target audiences in creative ways.





A CULTURE OF COMPETITION

Esports (aka e-sports or eSports) describes the world of competitive, organized video gaming. To be considered an esport, a video game should have...

- Leagues or teams competing in the same games that are popular with at-home gamers, and..
- Players who are watched and followed by millions of fans all over the world, who attend live events or tune in via TV or online streaming.ⁱ

Esports is a descendent of “gamer culture” but now inhabits its own distinct space. In contrast to the narrative- and progression-based video games that inform much of gamer culture, “Esports games are designed and usually continuously improved to provide the best environment where competitors can compete based on their skill.”ⁱⁱ

In gamer culture, the game itself is the art object around which the culture revolves. In esports culture, much of the appeal involves the metagame – the external aspects surrounding the game such as individual player style and team strategy.



Photo: iStock

“

In 2021, esports will continue appeal to a large audience in Vietnam. In contrast to other sports, the digital nature of esports has allowed it to maintain many of its events and tournaments despite the COVID-19 pandemic. The total amount of official prize money announced by leading professional tournament organizers continued its dramatic rise of the last several years, and we had many meaningful activities organized within the esports industry to support virus prevention and to ease the difficulties of people in areas hit by natural disasters. The inclusion of esports in the 31st SEA Games should also help to enhance its perception in Vietnam.

— Mr. Do Viet Hung, Secretary General, VIRESA -
Vietnam Recreational and Electronic Sports Association)



”

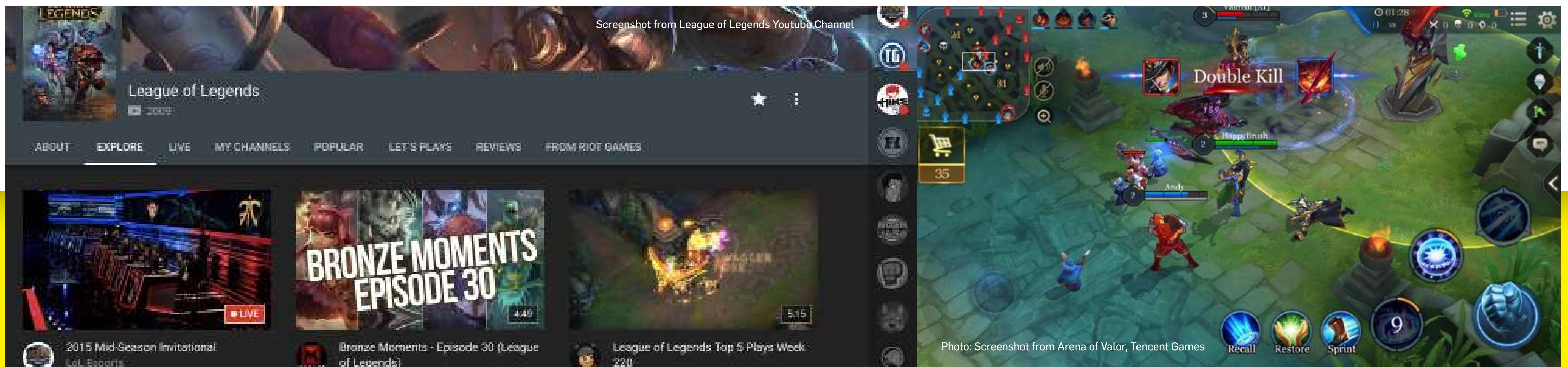


A GLOBAL RISING STAR

Esports is rapidly becoming one of the world's most lucrative industries. It has grown from a niche activity to a global spectator sport that ranks alongside music and film as one of the major players in entertainment.

According to Newzoo, in 2020, the global Esports economy generated revenue of \$947.1 million with an audience of 435.9 million, larger than those of both rugby and golf. In 2021 revenues are expected to break the billion-dollar threshold, reaching \$1.08 billion with an audience of 474 million.ⁱⁱⁱ

Mainstream awareness of esports (and video games in general) has led to rising demand and rapid growth of the esports market. As access to the necessary technology expands, so do its cultural trappings: video content, licensed products, virtual reality, and video game competitions. Video games have transcended niche status to become a genuine realm of pop culture that is redefining how young people consume entertainment.^{iv}





WHY
ESPORTS NOW?

vero  Decision Lab

In 2020, the global Esports economy generated revenue of

\$947.1M

with an audience of

435.9M





As the majority of esports fans are young and highly active online, media and tech giants are increasingly getting involved and more game developers are adding esports-friendly features to their titles. Online broadcasting sites such as Twitch and YouTube Gaming are contributing to this global growth, but the primary income for players comes from investments and sponsorship from some of the biggest companies in the world. As brands from disparate industries have begun to support e-leagues, their investments are growing the industry.^v

In fact, despite the ever-larger tournament prizes, approximately 90% of the esports market consists of sponsorships and marketing.^{vi} This means that outside brands play a massive role in the viability of the esports industry and culture.

Since winnings alone are neither consistent nor sufficient to cover costs (they are generally shared among team members), esports teams and leagues will always be on the lookout for mutually beneficial brand sponsorships.

As a marker of the industry's growth, the League of Legends World Championship 2020 reported 139 million hours of viewership, up from 137 million in 2019.^{vii} This competition in arguably the most popular esports game achieved a peak viewership of 3.8 million during its final match, making it the most-watched esports event of the year and the second most-watched ever (#1 remains a semi-final match from the 2019 World Championship).

Other championships such as the Dota 2 International Championship and the IEM Katowice Major registered 88 million and 53 million respectively, while even the lesser-known Free Fire All-Stars 2020 drew in over 20 million viewers.^{viii}



VIETNAM'S NEW FAVORITE PASTIME

- Several factors contribute to making Vietnam an attractive growth market for the gaming industry:
 - The country is one of the youngest in the region, with more than half of the population under 25, and has been a fast adopter of esports with a steady rise in players and spread of gaming cafes.
 - Gaming or cyber cafes are popular social gathering spots that offer "low cost leisure, entertainment and escape from the confines and constraints of the family environment where there are few freedoms for young people and tradition is still highly valued."^{ix}
- Smartphone penetration in Vietnam is very high, at more than 50 percent of the population. High-speed internet coverage, including 4G networks, continues to grow, allowing users to play on the go.
- The COVID-19 pandemic has reignited an interest in Vietnam's already growing online gaming industry, especially among students and office workers.
- Vietnam has the highest percentage of adult gamers in the world in 2020, at 85%, according to a survey released by German data portal Statista late last year.^x



Photo : GameHome Ho Tung Mau



WHY
ESPORTS NOW?

**Vietnam has
the highest percentage
of adult gamers in the world:
at 85% in 2020.**





WHY
ESPORTS NOW?



Photo : Team Flash - Arena of Valor World Cup (AWC) 2019

- According to statistics collected by VISERA, there are about 40 million gamers in Vietnam, nearly half (18 million) of whom play esports titles.^{xi}
- Esports enthusiasts are the major driving force behind the success of several gaming-focused startups in Vietnam, including Garena, VTC, Appota, and SohaGame.
- Vietnam has named esports as one of 40 disciplines of the 31st SEA Games, scheduled to be held from Nov. 21 to Dec. 2 2021 in Hanoi.
- The current most popular PC esports games in Vietnam are League of Legends and Dota 2, both in the MOBA (Multiplayer Online Battle Arena) genre. On mobile, Liên Quân (aka Arena of Valor, also a MOBA), Free Fire, PUBG Mobile, and League of Legends: Wild Rift are on top.

A Timeline of Esports in Vietnam^{xii}

1996 - 1999

Players focused on LAN-based games such as Age of Empires (AoE), Starcraft, and Counterstrike.

2000-2004

Online games rose in popularity, creating a gamer subculture mostly centered around PC cafés. In 2000, Vietnamese players competed in AoE 2 internationally for the first time.

2004 - 2010

The availability of high-speed internet made online gaming popular. In this phase, amateur and professional tournaments appeared, stirring the online game trend in gamer communities of AOE, Starcraft, and Counterstrike. In 2009, The Vietnamese Esport Group was established, clarifying the State's interest in esports.

2010 - now

The rise of powerful, affordable smartphones and mobile broadband has brought esports into the mainstream. Professional teams have appeared in the national, regional, and international circuits. There have been many national tournaments such as Vietnam Pro League, with total prizes up to 2 billion VND.

Gaming Culture in Vietnam

A February 2020 study by researchers from three international universities – including RMIT in Vietnam – interviewed Vietnamese gamers and those involved in the gaming industry, identifying several characteristics of Vietnamese gamer culture:^{xiii}

- A greater focus on game aesthetics as a motivation to play, compared to Western gamers.
- Dominance of PC and mobile platforms over consoles, due to cyber cafés being the only access most had to gaming prior to the explosion of affordable smartphones.
- A preference for playing on PC for “an enhanced experience,” even among predominantly mobile players.
- A higher level of competitiveness and emphasis on winning compared to Western gamers.
- The use of social media (particularly Facebook) to publicly display scores and compete with friends.
- Similar levels of bad language and aggression to gaming cultures elsewhere (as encouraged by anonymity), but greater shame around this behavior being a “poor representation in Vietnam.”



Photo : Team Flash - Arena of Valor World Cup (AWC) 2019



Characteristics of Vietnamese gamers cont'd

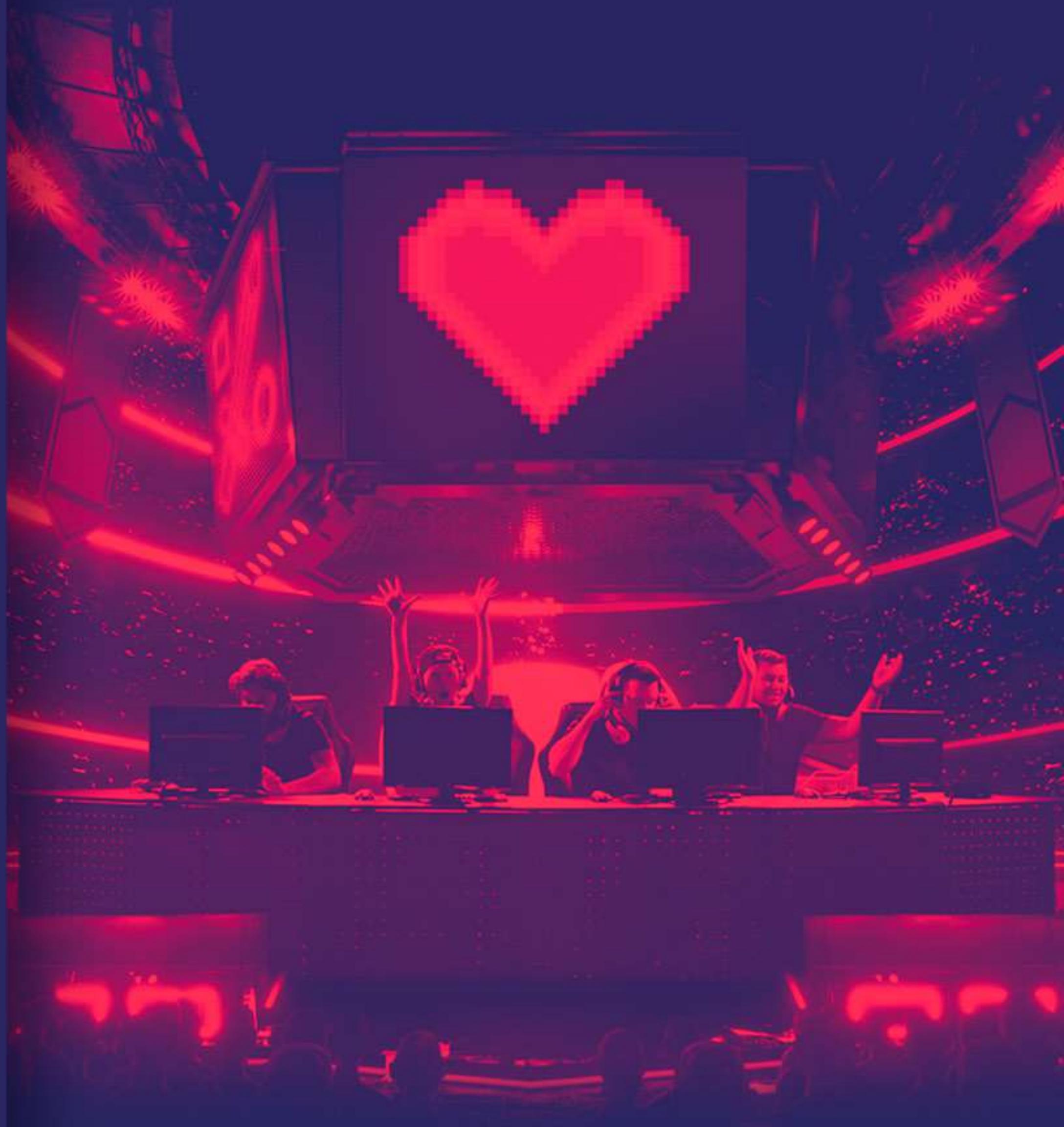


Photo: iStock

- Broad dislike of "freemium" games due to their 'pay to win' aspects which privilege players of higher economic status who can buy in-game advantages to make up for lower skill.
- The sense that online gaming is a rare free speech zone, "a safe space for some where they can speak openly on any topic."
- The central role of the cyber cafe as a "third place" – a social gathering space distinct from work and home.
- The dominance in cyber cafes of "a stereotypical demographic of predominantly younger males with females representing between 5–20 percent of customers depending on the café."
- A growing interest in teamwork and cooperation compared to the early years of gaming, in part due to emphasis from global gaming culture and the popularity of team games such as League of Legends and Dota.

WHO ARE VIETNAM'S ESPORTS FANS?

SEX DISTRIBUTION
ESPORTS PLAYERS
ESPORTS WATCHERS





Vero partnered with ASEAN market research firm Decision Lab to carry out an online survey of Vietnamese people who play, watch, and/or stream games. Based on an estimate of the Vietnamese esports fan community at approximately 7 million people, Decision Lab collected 503 data points, an optimal number to estimate a population parameter at 95% confidence interval with a margin of error of about 4.4%.

Sampling for the esports study was done entirely online. Decision Lab sent out survey invitations to their online panel of over 750,000 respondents who were randomly recruited to represent the online population (in terms of age, gender, and geography).

78% of those who engage in one of the activities also take part in at least one other and only 16% identified as players only who neither watch nor stream.

We asked questions related to their behavior while playing and/or watching esports and how they interact with different brand communications activities to find out how brands can use esports to win customers and cultural cachet.

Respondents needed to be in the 16-40 age group and identify as an esports player, watcher of esports game streaming, and/or streamer of esports games. Naturally, there is significant crossover among these groups.

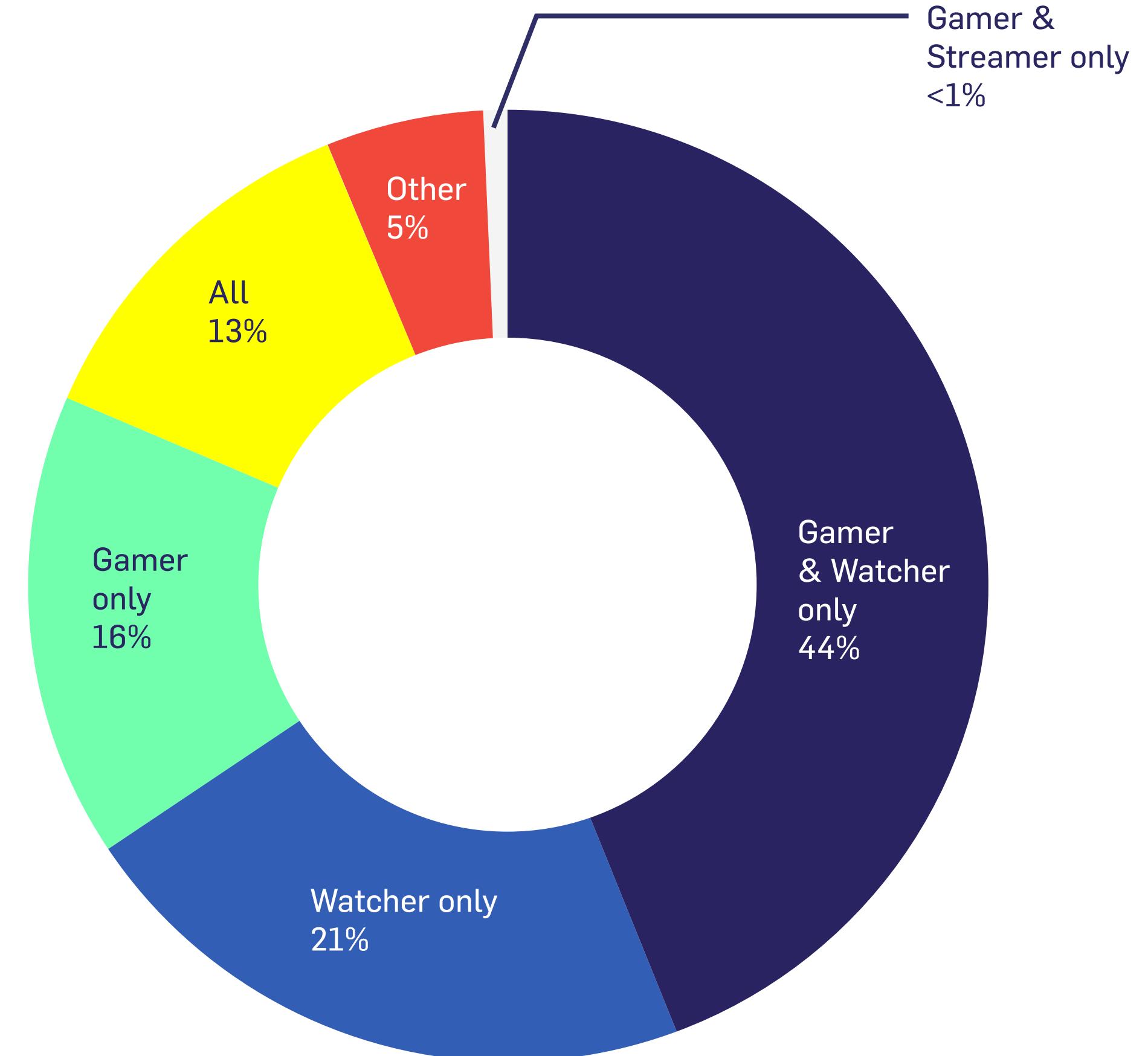


Photo: iStock

Most notably, nearly all streamers (all of whom are players, naturally) also watch their fellow streamers play, making watching streams the most common esports activity. The largest correlation is between players and watchers, who make up 57% of the respondents. 21% identify as watchers only, though it may be the case that many do play the games they watch, but do not identify themselves as "gamers" since they do not play professionally. 54% of our respondents watch streaming more than 2-3 times per week.

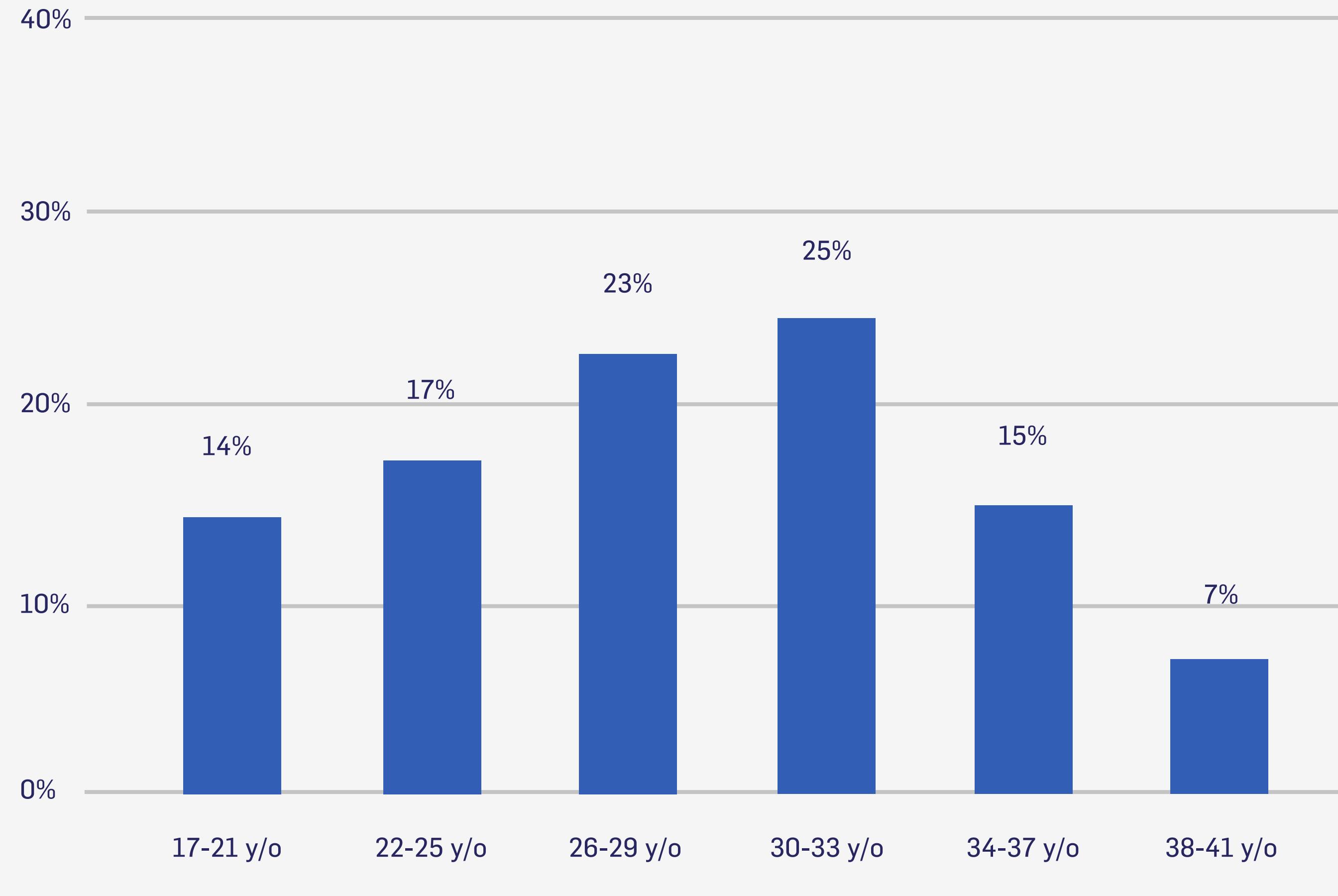
This overlap led Decision Lab to randomly assign a proportion of respondents to either the "player" or "watcher" subgroups, which received different sets of questions. As many of them identify as both players and watchers, we have weighted the charts for each group to reflect the proportions suggested by the study's overall sample. Additionally, due to this overlap we will not contrast the behaviors and preferences of each group with the others, as many of those in our "watcher" group play games just as much as those in the "player" group, and the majority of individuals in the "streamer" group are also members of the player or watcher groups.

Esports audience by Activities



The age demographics of our survey respondents show that esports fans have grown up. While young people have a slight majority, nearly half (47%) of our respondents are 30 or older.

Age group distribution - Esports audience



Q: What is your birthyear ?

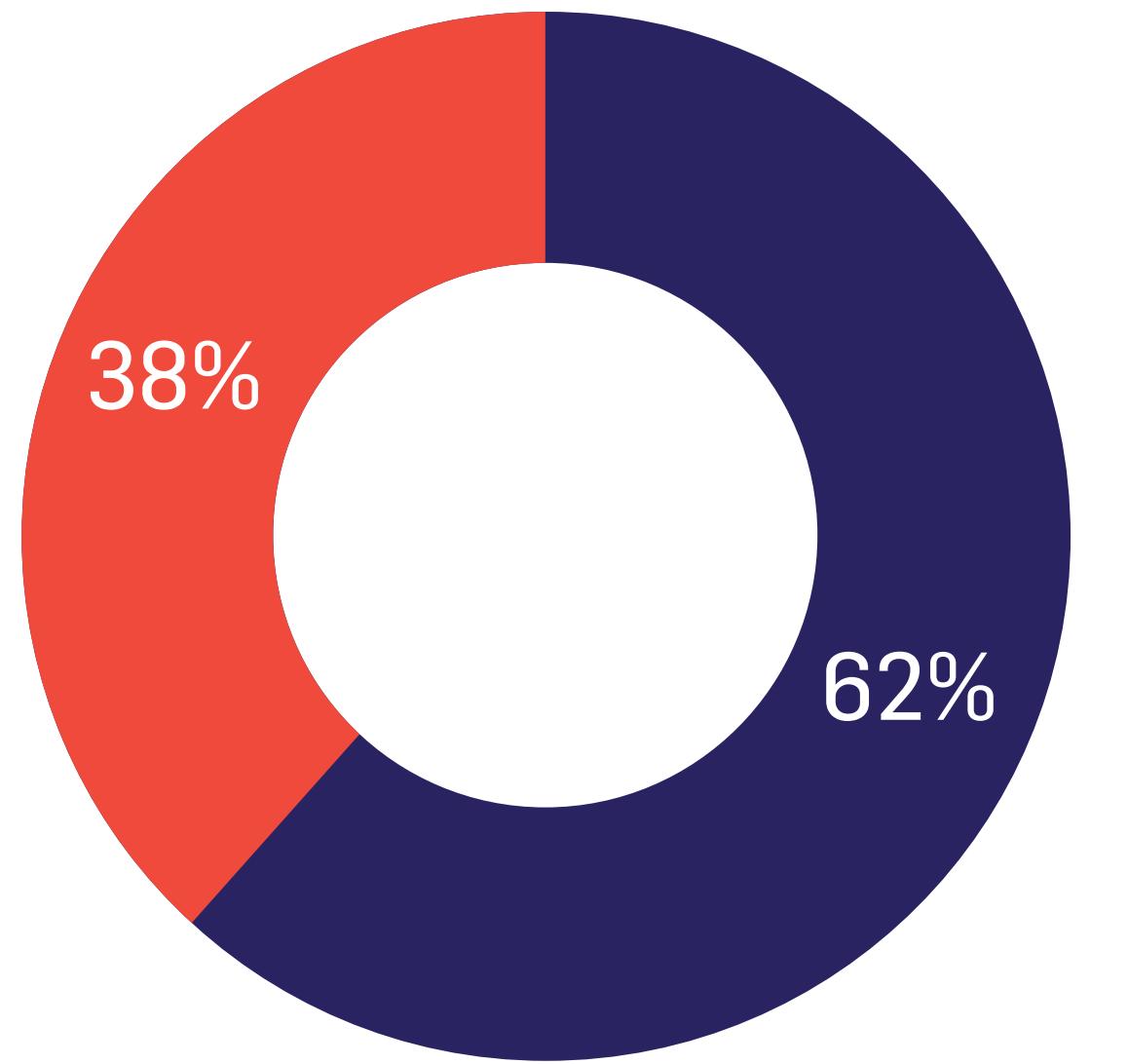
n=503



SEX DISTRIBUTION

Sex - Esports audience

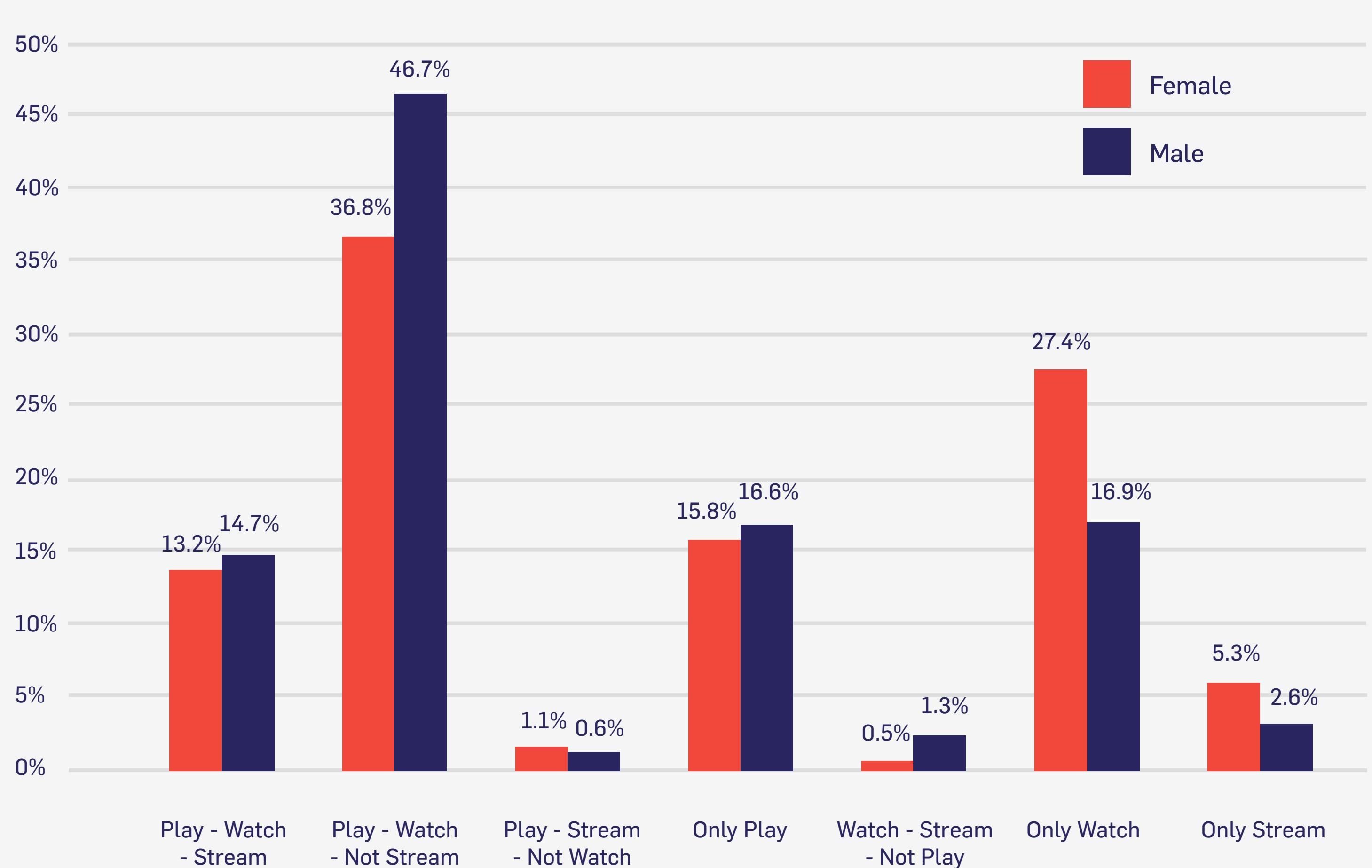
Female Male



n=503

Q: What is your sex ?

Males still dominate esports audiences, but the percentage of female players has grown in recent years to more than one-third of the audience. As widespread internet and affordable smartphones connect millions more people to the world of gaming, the number of genres has exploded, storylines have become more inclusive, and an even wider, more diverse audience is getting in on the action.



In terms of which activities people take part in, differences are minor. Among streamers, there is not a big gap between males and females. There is, however, an interesting sex disparity within the group who are not playing and streaming but still watching other people play: 27% of females prefer watching only, while only 17% of males say the same.



ESPORTS PLAYERS

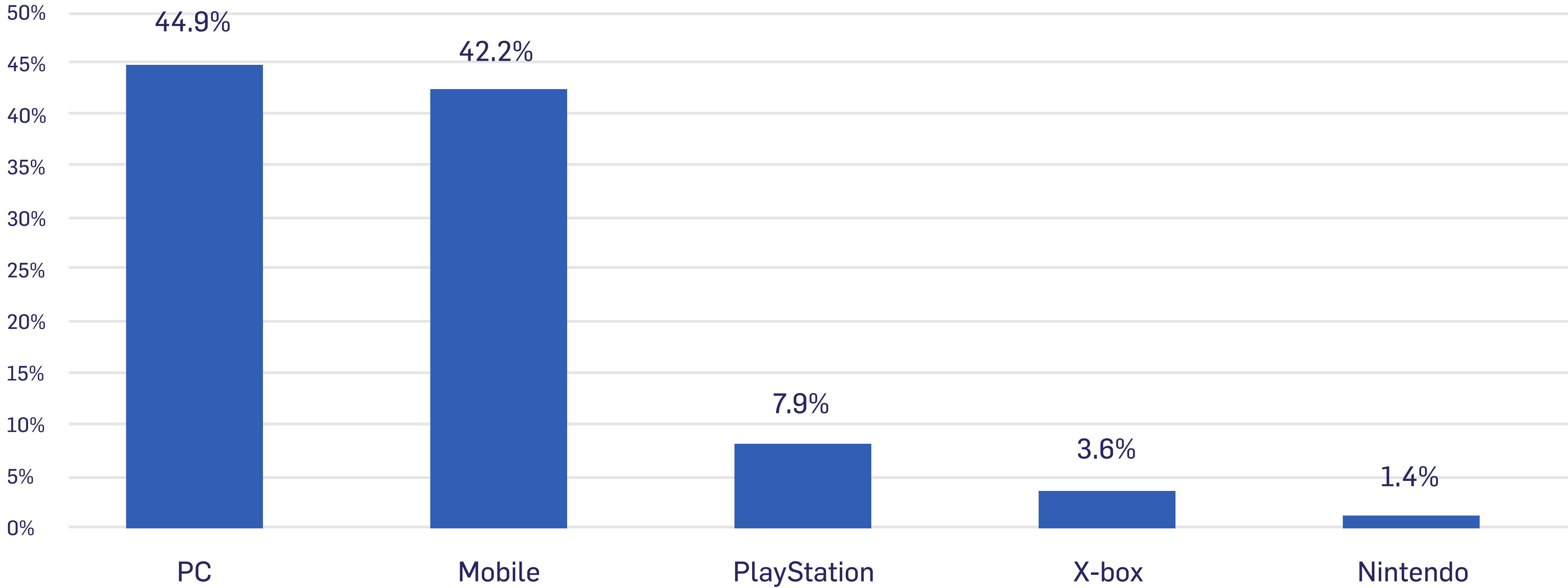
Platforms and games

PC is the original esports platform and still the most popular worldwide. However, as mobile devices have become more powerful, they have expanded the esports player base thanks to their convenience and lower cost. 44.9% of players in our survey report playing esports games on PC, making it the most popular gaming platform in Vietnam. This preference is due to both the common impression that PC is a more immersive experience and its history as the platform of choice at gaming cafés. It also reflects the lack of investment in the country on the part of console makers – of the three, only Sony's PlayStation has official retail and online presence in Vietnam.

Meanwhile the convenience and affordability of powerful smartphones has led to rapid growth in Vietnam's mobile gaming market, to the point that it rivals PC. This follows the regional trend: five out of eight games (and 7 of 10 medals) set to appear in the 2021 SEA Games in Hanoi are mobile titles.^{xiv}

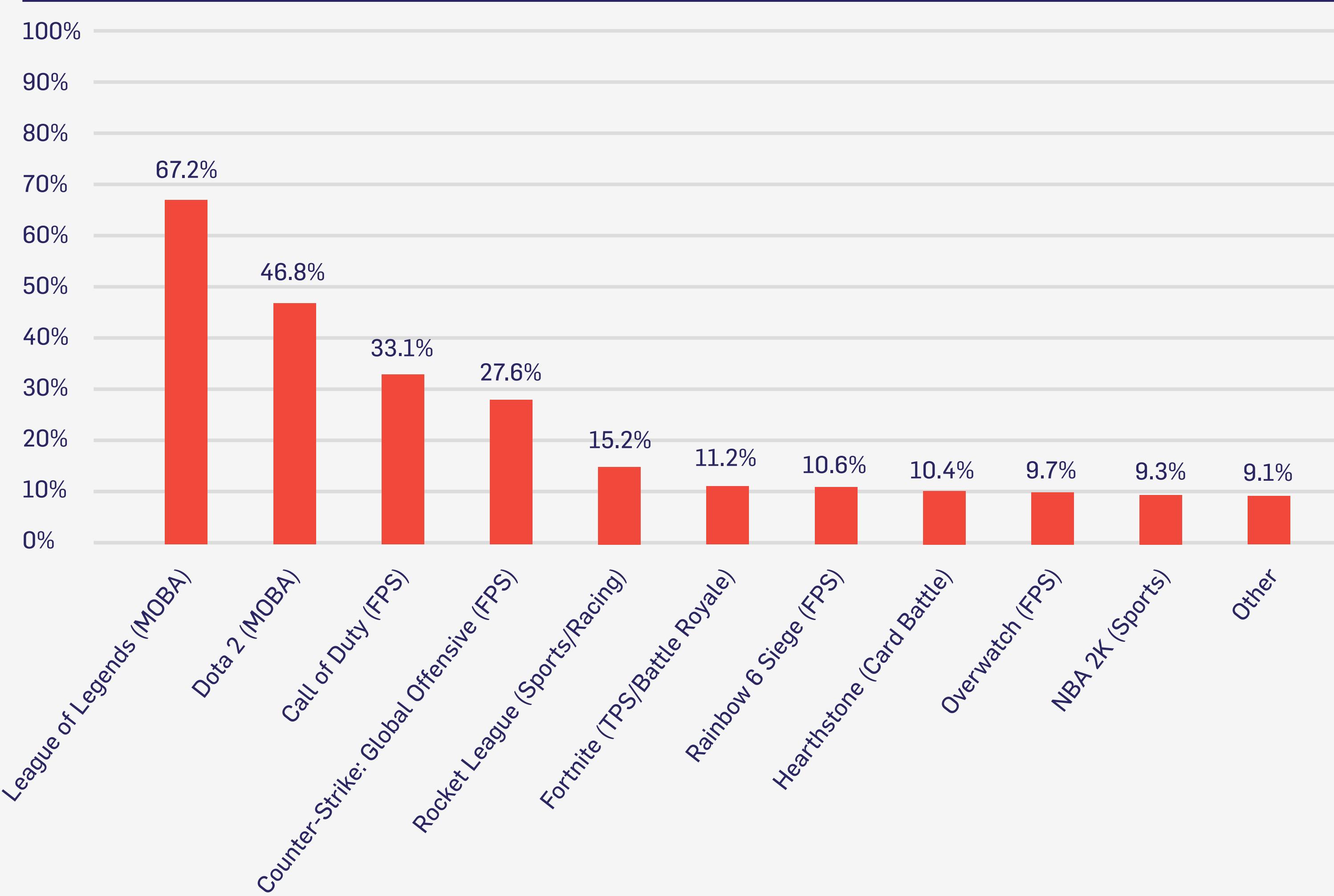
However, PC continues to have strong support (particularly from Gen Z) and is generally considered a more immersive experience. Some titles now employ cross-platform gaming, as popularized by Fortnite. This development makes the platform less important than the game itself – though the platform can affect player performance and the quality of the experience.

Top Gaming Platforms



The most-played game genres in our study were Multiplayer Online Battle Arenas (MOBA), which Vietnamese esports teams tend to excel at, and first-person shooters (FPS). Both genres can be played on PC and mobile, but developers tend to design different versions for each platform and cross-play is rare (with the notable exception of Fortnite).

Most-played Esports Games





“

Mobile esports are a rising trend and will continue to be for the foreseeable future, thanks to the convenience and ubiquity of the platform. In fact, there are more popular mobile games available than PC games, many of which are included in tournaments. Therefore, investment in mobile esports is a suitable adaptation to the gaming market in Vietnam.

— Mr. Lê Minh Trí, Director of Marketing and Esports, Garena Vietnam

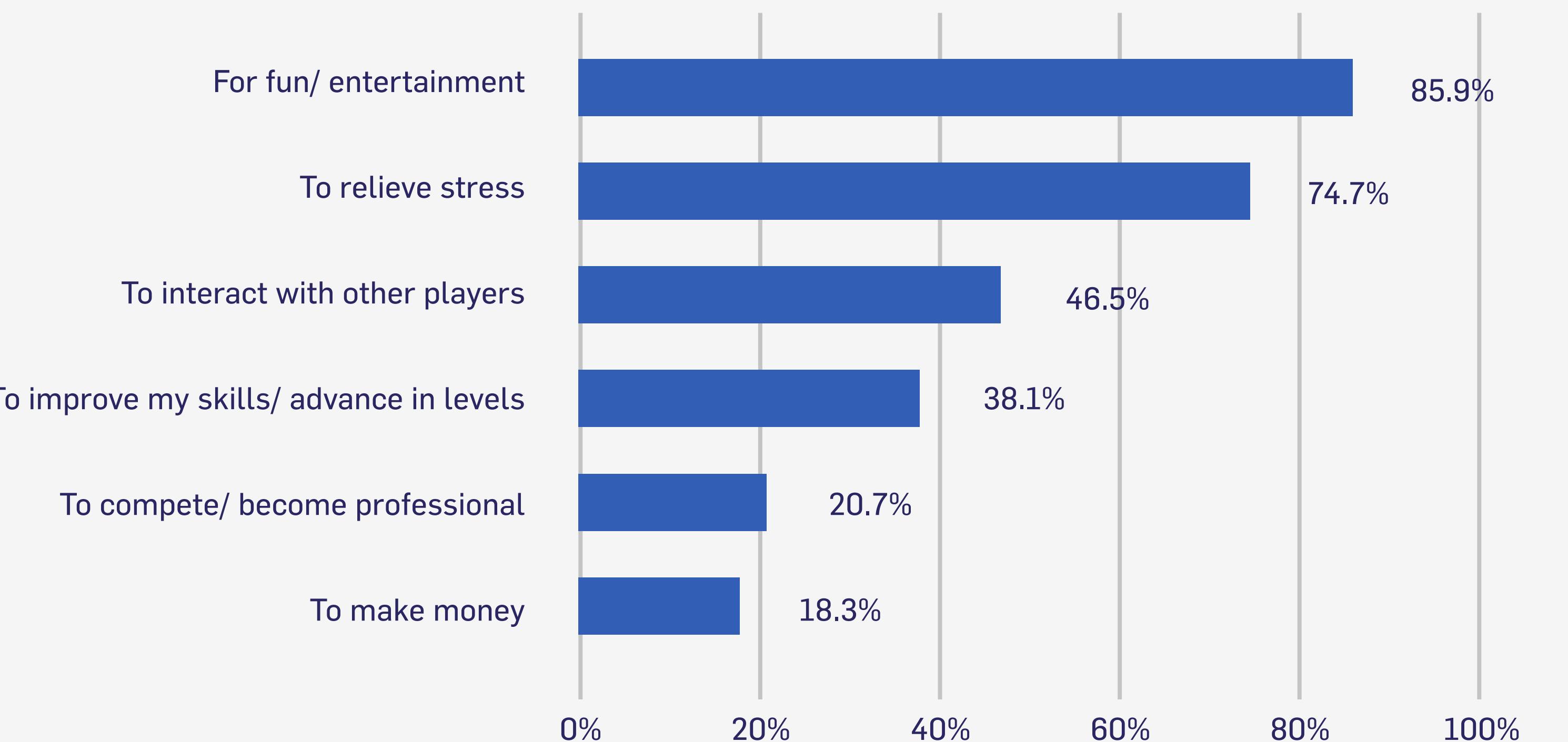


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Social Play

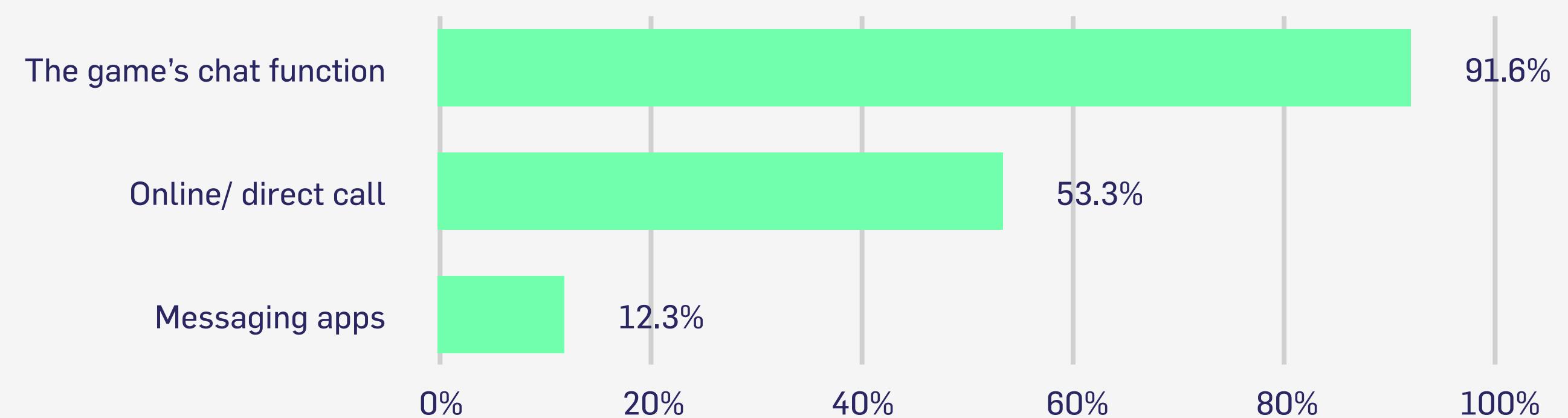
Esports is a rising star in the entertainment industry and a major trend among the young people who make up the majority of Vietnam's population, who often create gaming communities around their favorite games in shared spaces like schools, internet cafes, and bubble tea shops. This organic gamer culture is not a product of esports, but rather a necessary condition for its existence. The esports games that become popular are the ones people like to play (and watch) themselves for entertainment, relaxation, and to fight boredom.

Reasons for Playing

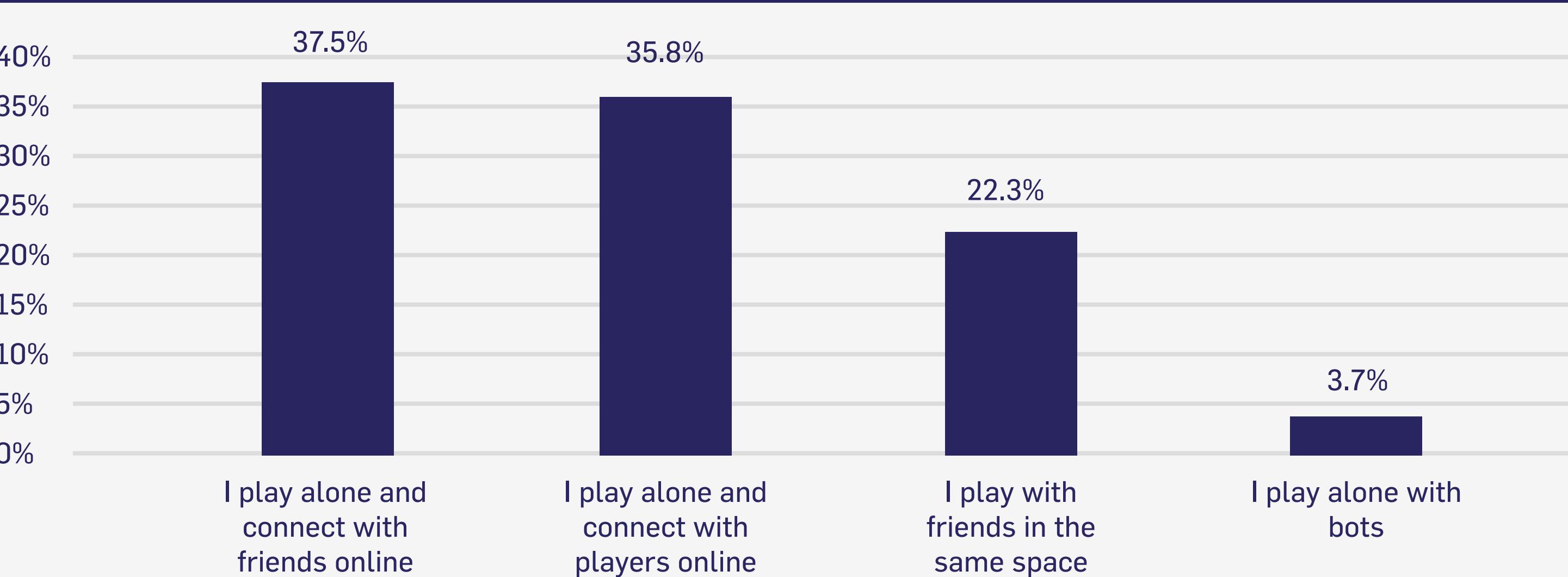


Contrary to the stereotype that gaming is solitary and antisocial, esports games function as social platforms. While most people play for fun and stress relief, 46.5% of players see interaction with others as a primary factor for why they play. These social interactions are conducted via voice and text chat, primarily in-game but sometimes on separate messaging platforms. 73% of players primarily play alone and connect with friends and strangers online, while 22% play in the same space as others (likely gaming cafés), and less than 4% play primarily with bots.

Medium of Gamer Interaction



Social Gaming Preferences



46.5%

**of players see interaction
with others as a primary
factor for why they play.**

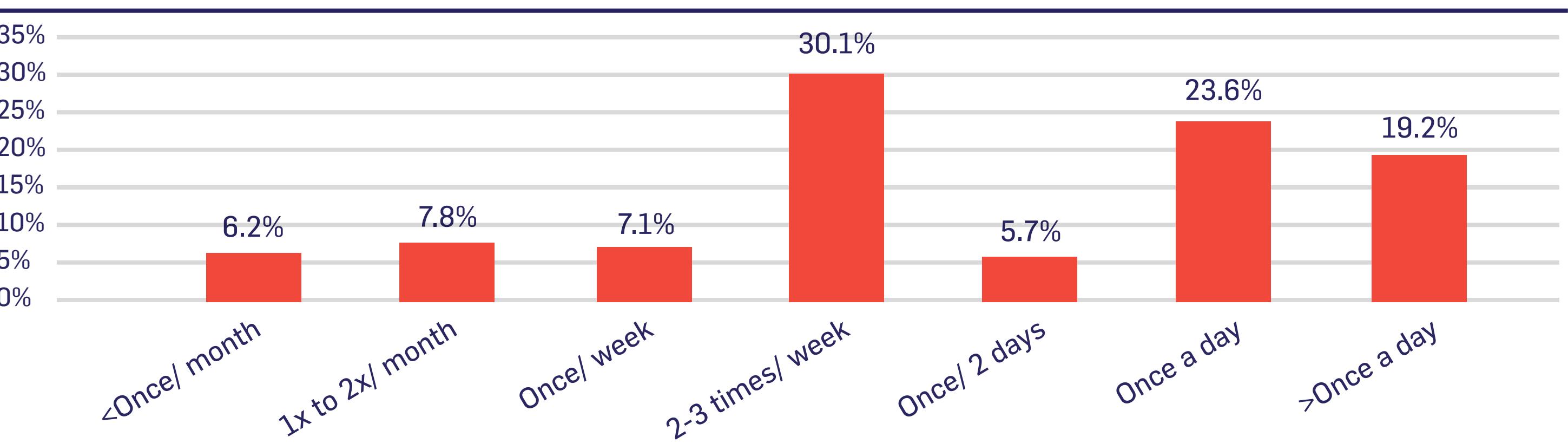


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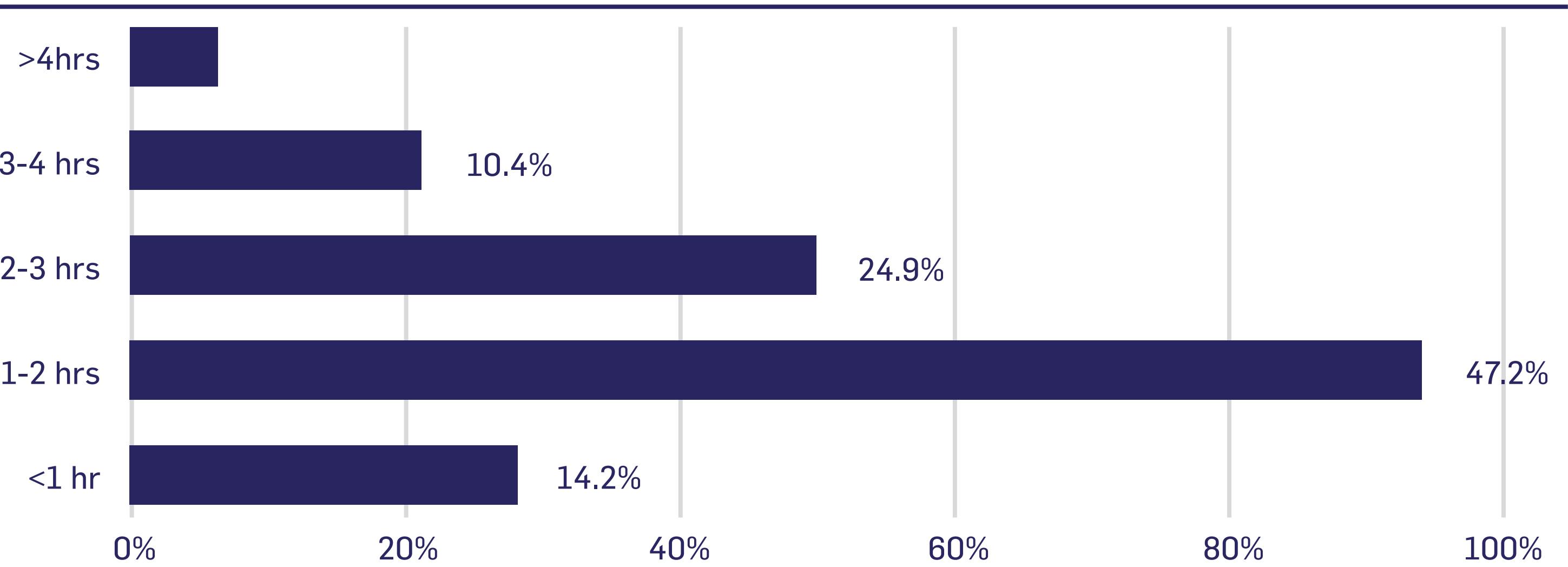
Play Time

Gaming attracts a valuable cross-demographic audience of people who are highly engaged for a considerable length of time. 78.6% of players in the study play at least 2-3 times per week, and 42.8% play at least once a day. A typical gaming session lasts 1-3 hours.

Frequency of playing Esports games



Average duration of each gaming session





We categorize players into four groups based on the amount of time they spend gaming. Brands entering the esports scene tend to focus on power and mainstream gamers, but nearly half of esports players in Vietnam are "casual gamers" who play 5-10 hours per week. While marketers may be tempted to neglect them, casual gamers remain a valid target audience for brands uniquely suited to them.

LIGHT GAMERS

24.8%

<5 hrs/week

CASUAL GAMERS

47.6%

5-10 hrs/week

MAINSTREAM GAMERS

16.4%

11-20 hrs/week

POWER GAMERS

11.8%

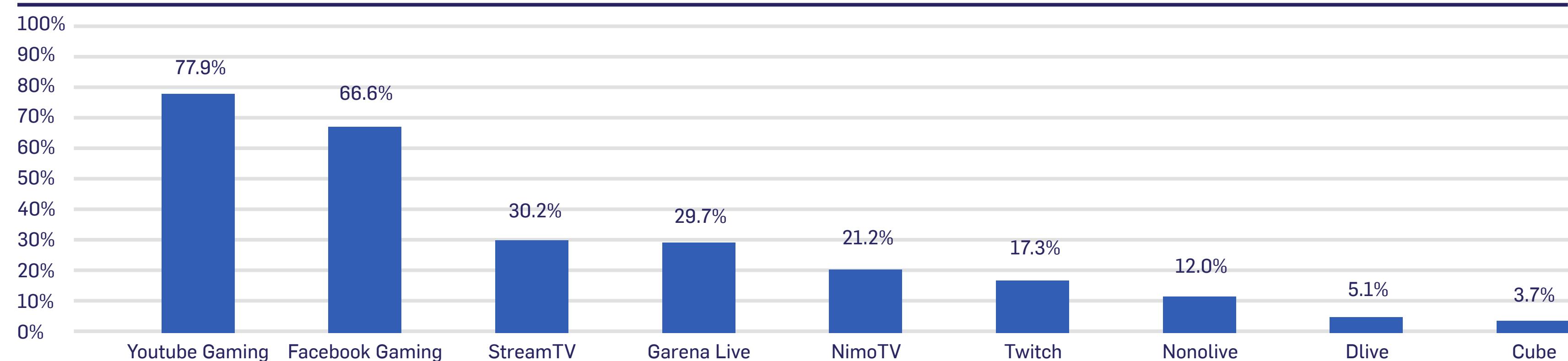
21+ hrs/week

WATCHERS

Platforms and games

According to our research, Youtube Gaming is the most popular streaming platform, followed by Facebook Gaming as a close second, both of which are far ahead of the competition. Globally, Amazon-owned Twitch is by far the most popular streaming platform. Statistics from StreamLabs show that Twitch watching hours surpassed 4.7 billion in Q3 2020, up from 2.8 billion in Q3 2019.^{xv} But in Vietnam, Twitch is in a distant 6th place, far behind Youtube Gaming and Facebook Gaming among both streamers and watchers.

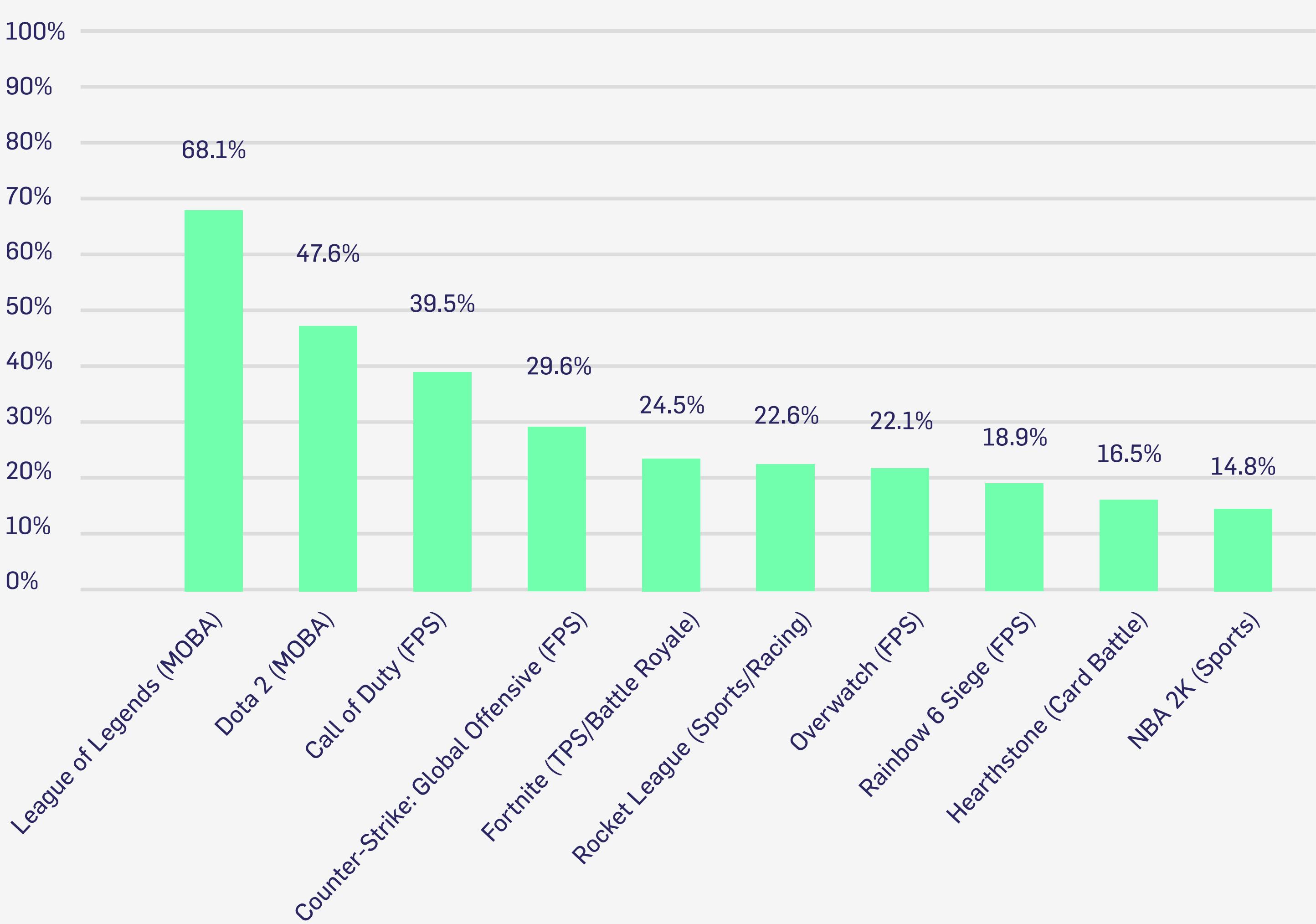
Favorite Streaming Platforms



Vietnam is among the top 5 countries where users spend the most time on Youtube, alongside India, Indonesia, Japan, and Thailand.^{xvi} It is the second-most accessed site in the country, with a user ratio of 59%, while Facebook ranks first with 61%.^{xvii}



Most-watched Esports Games

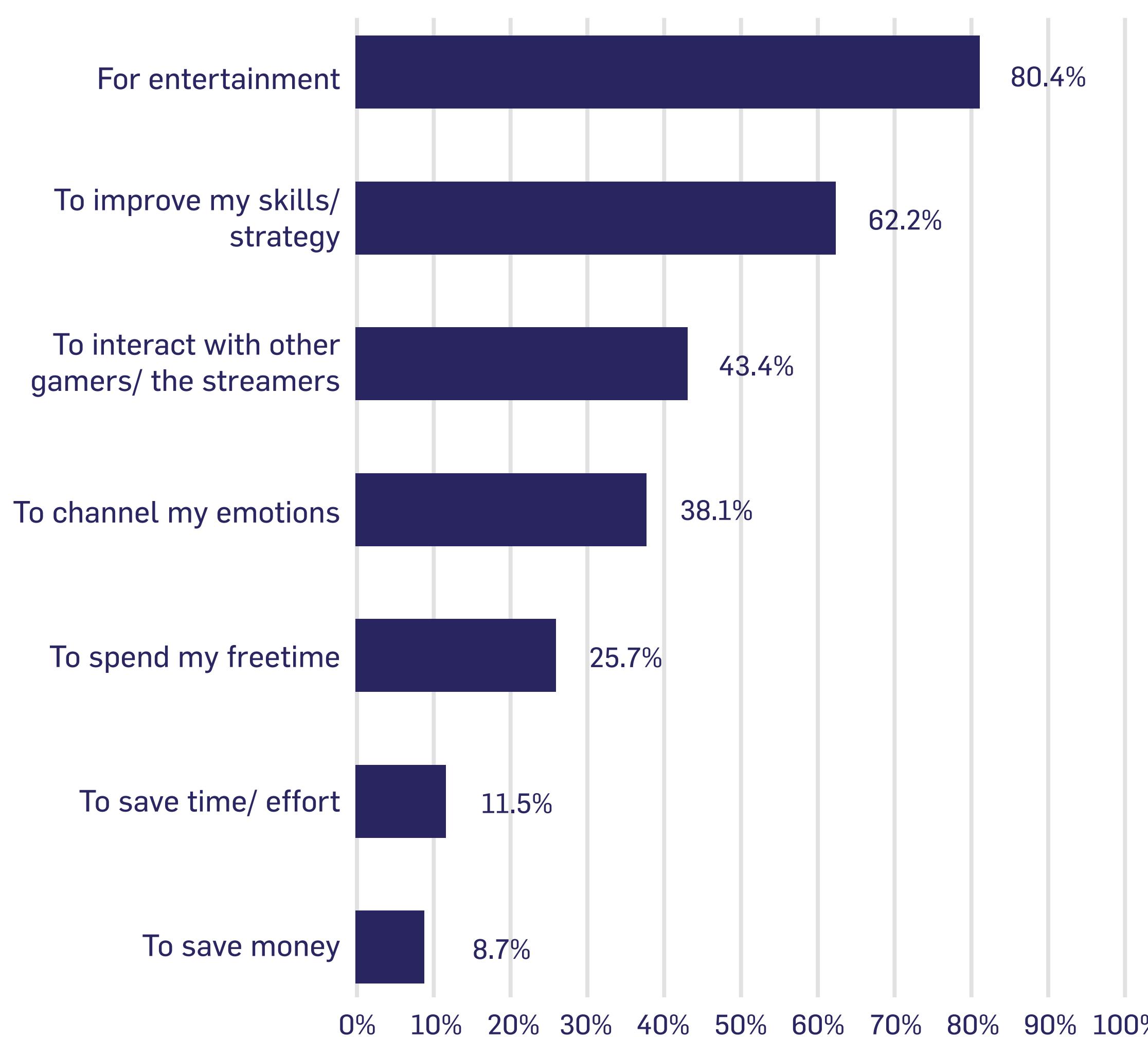


However, Facebook has fallen behind Youtube when it comes to game streaming, perhaps due to its constantly changing algorithms and an interface that is less optimized for streaming than Youtube's flexible, cross-platform video-centric one. The record for most-viewed livestream on Facebook Gaming in Vietnam belongs to Nam Blue, a PUBG player with 137,000 views at peak time, while a livestream with Đô Mixi on Youtube Gaming may attract 238,000 views at peak time.^{xviii}

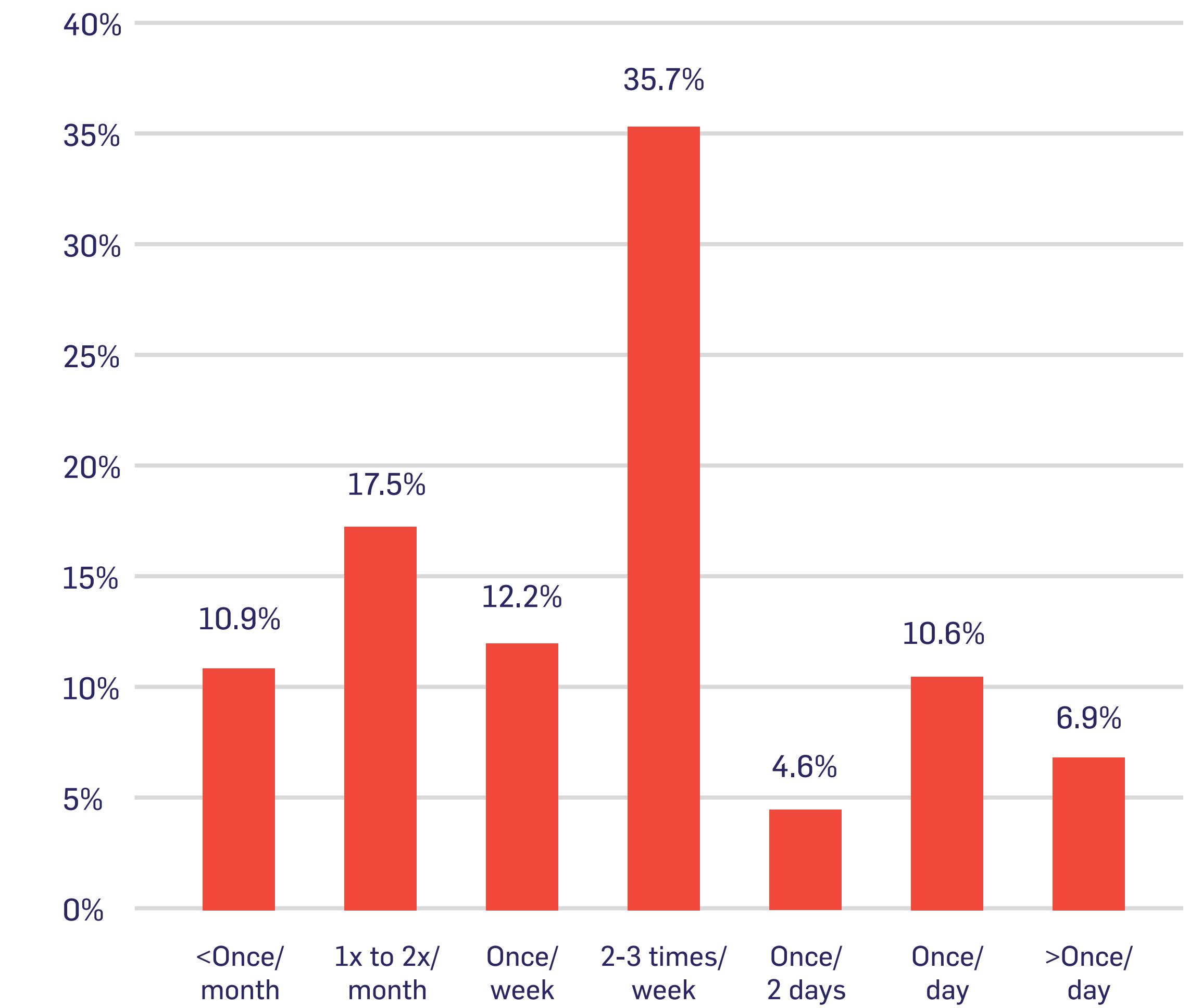
Nonetheless, Facebook Gaming has seen major growth during the Covid-19 epidemic in Vietnam. In 2020, it garnered an 81.37% increase in total views, a 50% increase in engagement, and a 79.6% increase in total reach.^{xi}

The top games Vietnamese spectators watch on these platforms closely mirror people's favorite games to play, with the spectator scene dominated by the MOBA and FPS genres.

Reasons for watching game streaming



Frequency of watching esports streaming



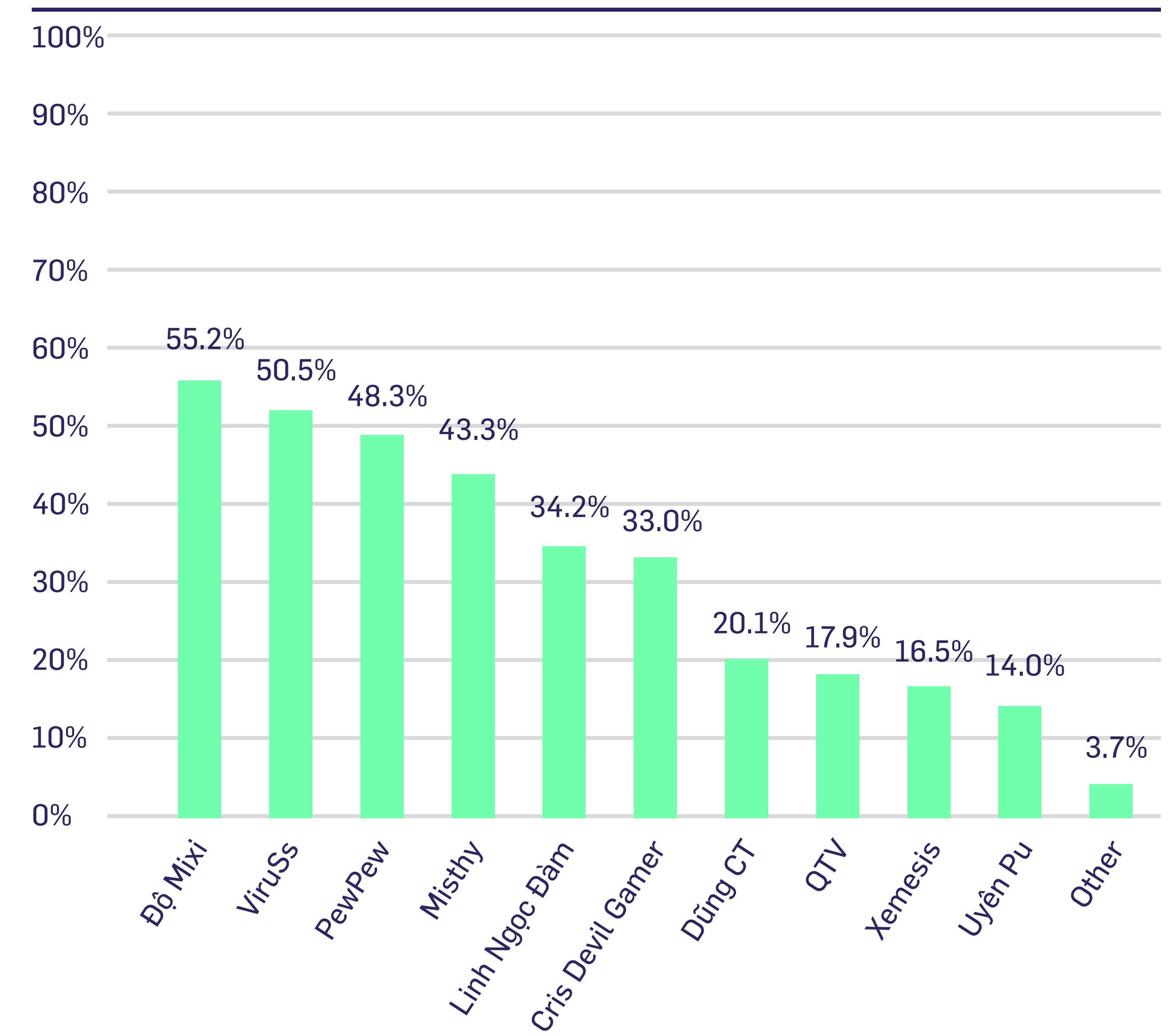
Vietnam's top streamers

Độ Mixi gained popularity playing PUBG and founded Refund Gaming, which won 1st place at PGI 2018 – a global PUBG competition PUBG. While he is no longer active in playing and streaming PUBG, Độ Mixi remains one of the most popular streamers. He has 1 million subscribers on his original streaming platform NimoTV, but his Youtube channel currently has 4.65 million subscribers and his Facebook page has 4.3 million followers. He even aired his first music video “Stream Đến Bao Giờ”, that was a top trending video at its premiere and now has millions of views.

ViruSs started his career as the team leader of Hanoi Dragon – the first pro League of Legends team in Vietnam. He is now known as both a streamer and a music producer. ViruSs currently has over 4 million subscribers on both his Youtube channel and his Facebook page.

Current popular pro players who prioritize competition over streaming – such as Chim Sẻ Đi Nắng, Team Flash, and V Gaming – nonetheless have major fan followings on their personal pages. For instance, Team Flash has 134k followers, but the team leader of team Flash, ADC, has 691k.

Most watched/followed game streamers



Vietnam's top streamers



Độ Mixi



ViruSs



PewPew



Misthy



Linh Ngọc Đàm



Cris Devil Gamer



Dũng CT



QTV



Xemesis

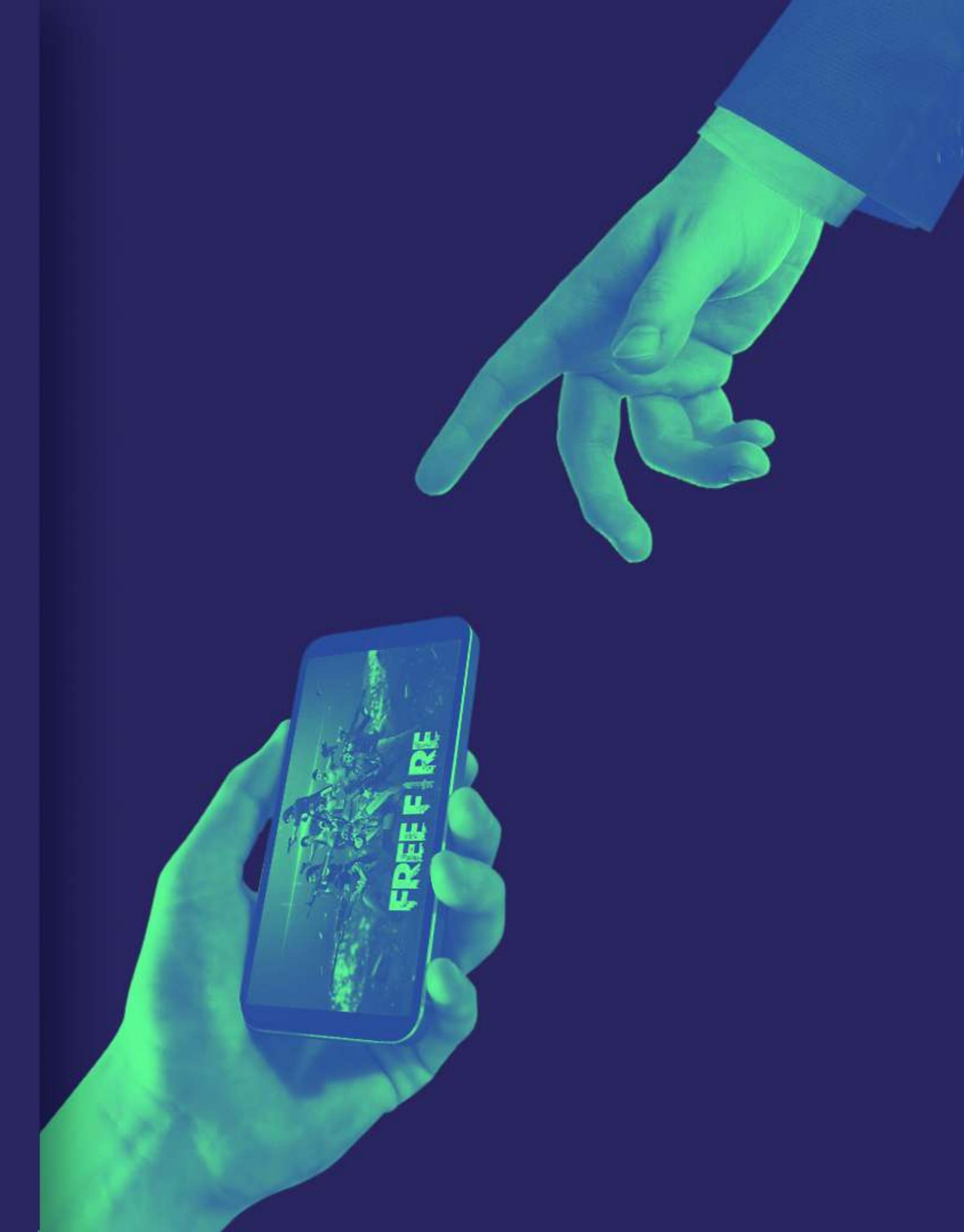


Uyên Pu

Photos: vietnamnet.vn, topreview.vn

HOW CAN BRANDS BRIDGE THE GAP?

ADS
KOL ENGAGEMENT
SPONSORSHIP
UNEXPLORED ALLEYS



Ảnh: Burger King



As most esports fans are young and active online, media and tech giants are increasingly seeking to capture some part of the audience, and more game developers are building esports-friendly features into their titles.

According to a report by WARC,^{xviii} despite COVID-19's negative impact on most global economies, brand investment (in the form of advertising and sponsorship) in esports is set to rise 9.9% worldwide to \$844m in 2021 – though this is less than half the growth rate recorded in 2019 – with the majority (\$615m) spent on the sponsorship of competitors or the tournaments themselves. A further \$229m will be spent on spot ads during esport broadcasts, representative of a 1.7 percent rise at a time when traditional TV advertising is set to fall by 13.8 per cent. Practitioners believe advertising spend will be the key driver of esports growth in the coming years, and investment will top \$1bn in 2022, compared to an estimated \$844m in 2021.

The motivation of watchers to interact with streamers and other followers can be a good opportunity if brands approach it well. For example, Burger King took advantage of Twitch's "donation bot" feature to create a marketing campaign. The bot reads out messages from fans who donate during a stream, but BK has been using it to advertise its latest offers, gaining exposure that would have cost thousands of pounds for as little as £2.50 (82,000 VND.).^{xix}

**Brand investment in esports is set to rise
9.9% worldwide to \$844M in 2021.**

Photo: Honda, Riot Games





“

Despite the rapid growth and development of the industry in recent years, most players and viewers only pay attention to some specific well-known esports games, which are promoted through social media and videos with large amounts of viewers. Therefore, it is necessary for brands involved in the esports arena to stay up to date on the evaluation criteria of tournaments for each game, such as peak concurrent users and total views, to make their investments as effective as possible.

— Mr. Lê Minh Trí, Director of Marketing and Esports, Garena Vietnam



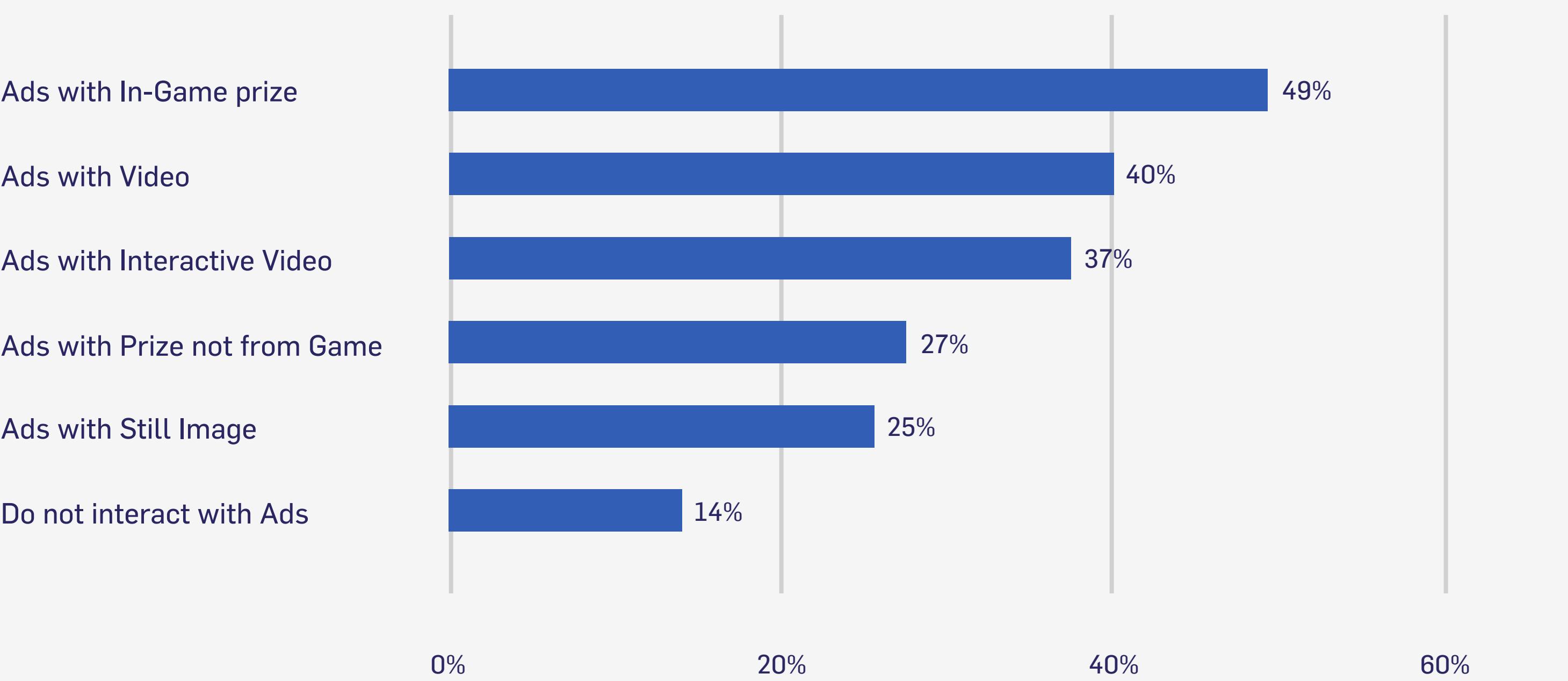
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ADS

Through our research, we found out that advertising is still an effective tactic for brands to communicate with their prospective customers, as 86% of the esports audience claim that they interact with brand advertising efforts.

Among those, ads with in-game prize and ads with video attract the most attention and interaction (49% and 40% respectively). Only 14% of players and watchers claimed that they do not interact with ads at all.

Interaction with Ads - Esports Audience



Q: Which types of ads do you usually interact with?

n=503



86%

**of the esports audience
claim that they interact with
brand advertising efforts.**

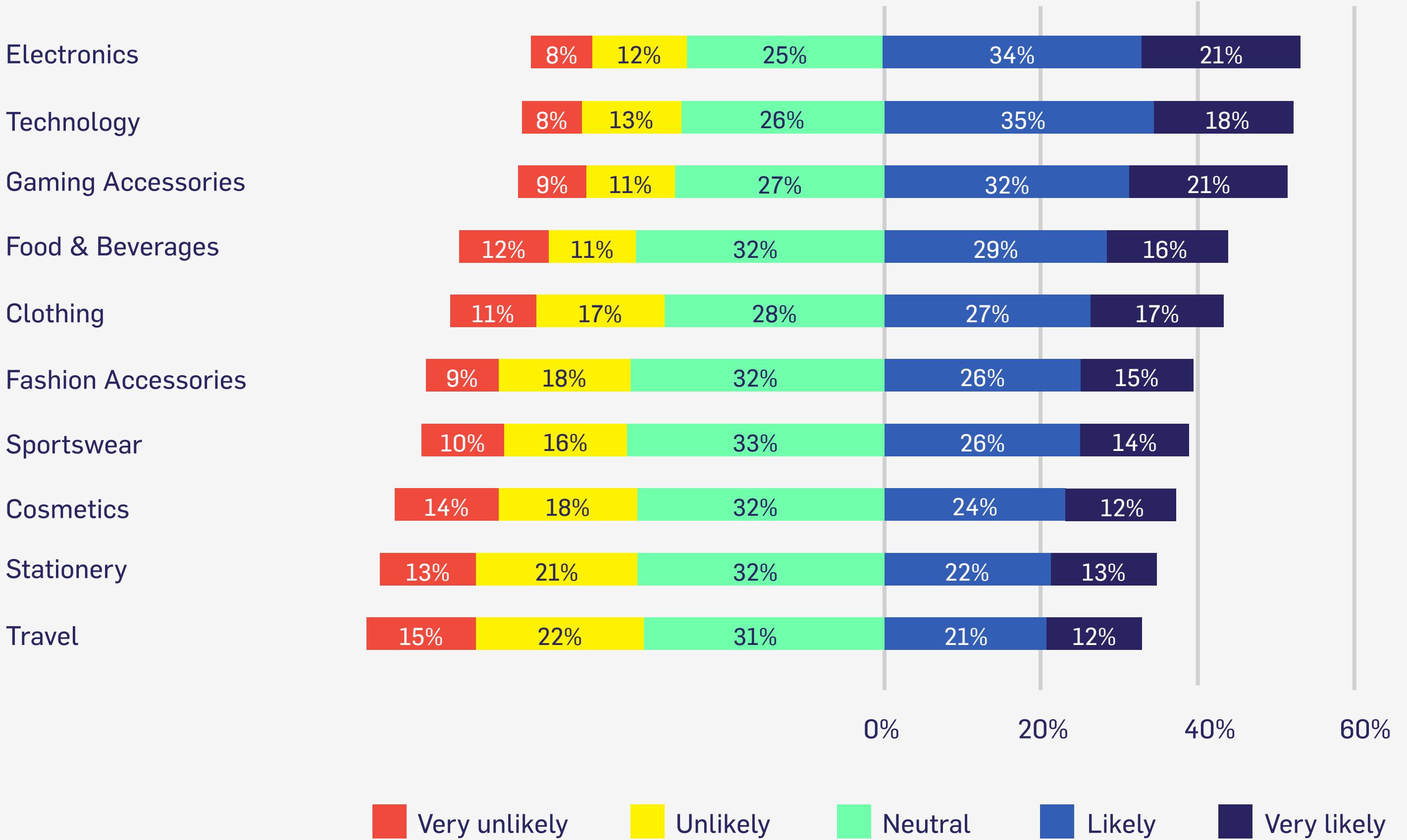
Photo: Getty Images





As expected, in-game advertising appeals to people's interests. They are more likely to purchase products in the categories of electronics (55%), technology (53%), and gaming accessories (53%). However, other industries that are less directly relevant follow close behind, including F&B (45%), clothing (44%), and fashion accessories (41%).

Intent to Purchase Product Category after seeing ads - Esports Audience



Q: Please rate your intention to purchase the following product categories after seeing them advertised on gaming platforms (5pt Likert scale).

n=503

ESPORTS AUDIENCE INTERACTION WITH ADS



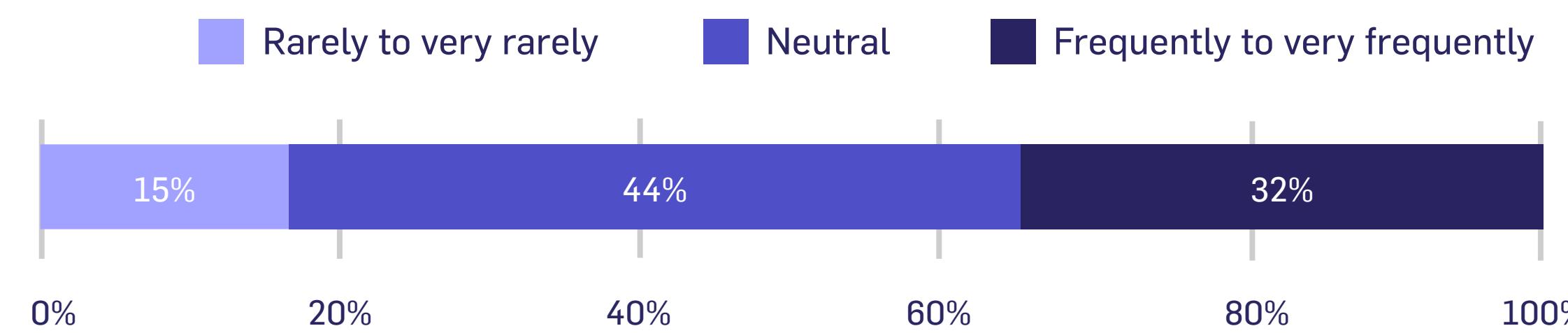
The esports audience interacts most often with the following types of advertisements:



Q: Which types of ads do you usually interact with?

n=503

About 1/3 see ads frequently to very frequently



Q: How frequently do you see ads on gaming platforms?

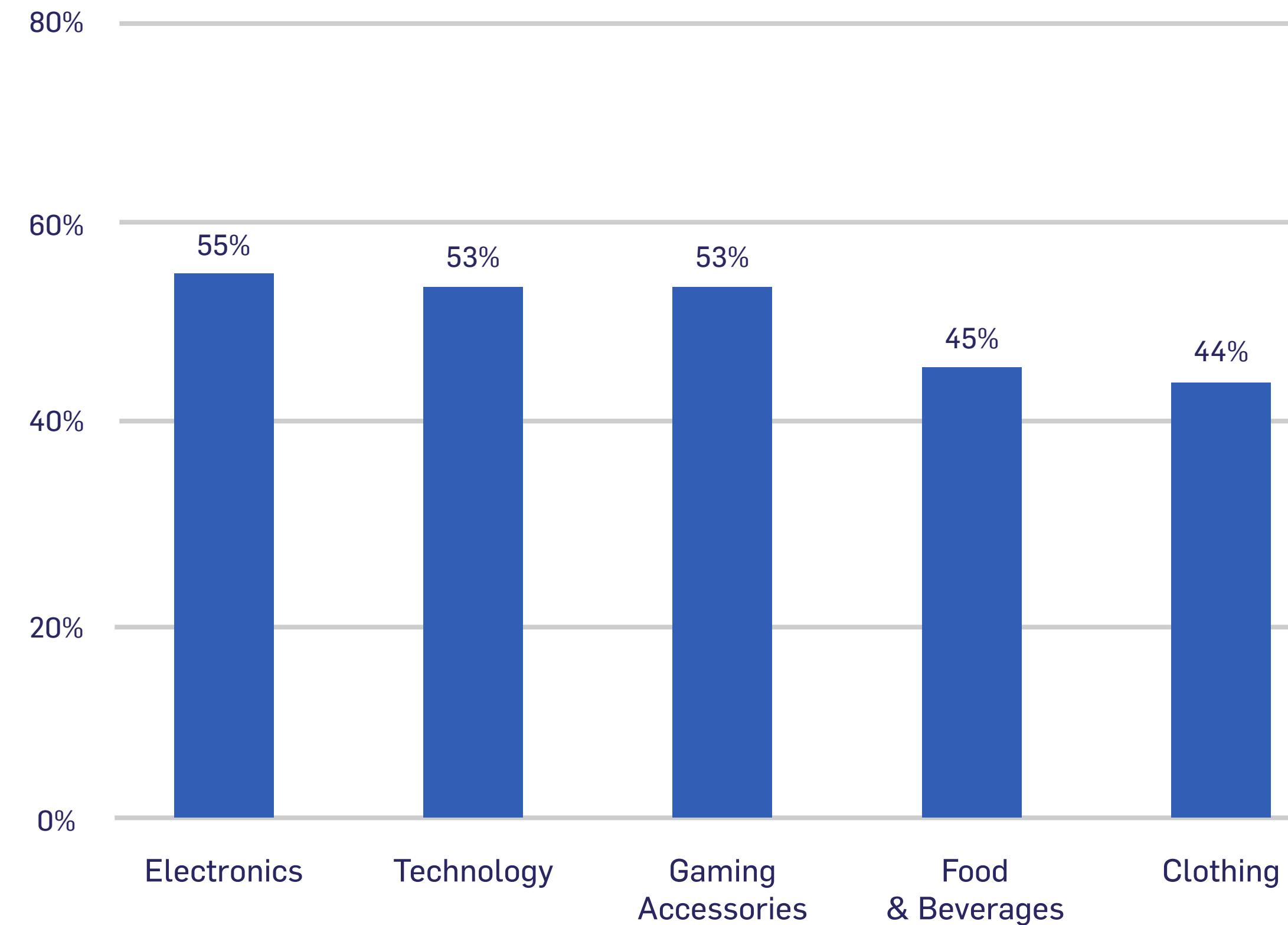
n=503



ESPORTS AUDIENCE INTERACTION WITH ADS



After watching ads, they have highest purchase intent for products relevant to gaming,
e.g. Electronics, Tech & Gaming accessories



Q: Please rate your intention to purchase the following product categories
after seeing them advertised on gaming platforms.

n=503

In-game advertising

In-game advertising has been around for decades already. Adidas billboards were a natural fit for the original FIFA International Soccer in 1994 that reflected the sportswear brand's prominence in real-world FIFA tournaments. In the 90s and early 2000s, some corporations even built entire games around their mascots.^{xx} Since then, in-game advertising has mostly taken the form of billboards and static (hard-coded) advertisements.

Recently, however, technology has opened up many opportunities for brands to take on the next form of in-game advertising: dynamic advertisement. Like out-of-home advertising in real life, this type of advertising is meant to raise brand awareness among gamers rather than drive them to a specific product.

Adidas found new ways to plug their brand into the game. In 2019, they were a sponsor of the FIFA 20 Global Series, and their brand logo was prominently featured throughout the tournament on the in-game object everyone watches the most: the ball. Adidas also had its virtual advertisement shown at the midfield circle during each game of the tournament.

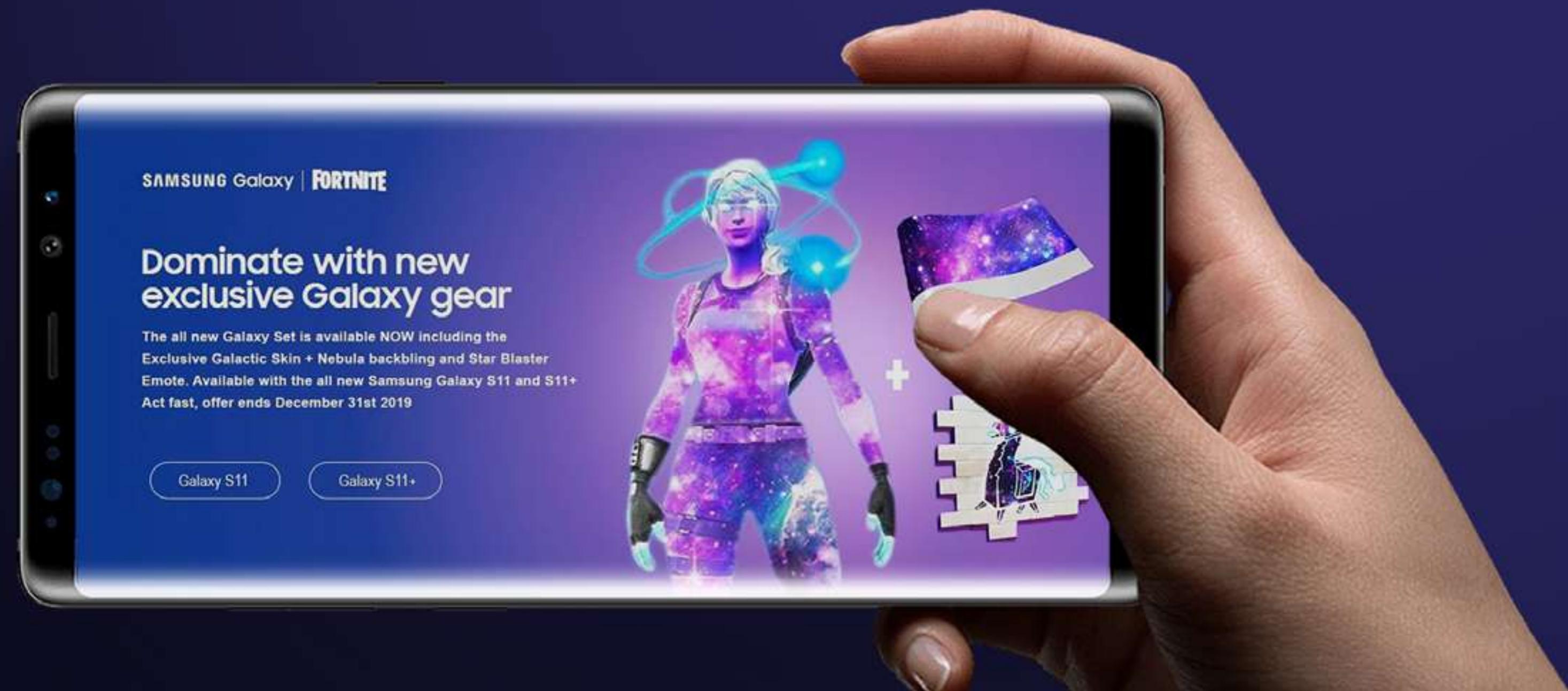


Photo: FIFA 21, EA Sports



Cross- platform advertising

Another form of in-game advertising is hybrid, cross-platform promotion, in which the actual advertising occurs in real life and the audience can receive in-game rewards by interacting with it. For instance, Samsung has collaborated with Epic Games to release the Galaxy Skin in Fortnite, which is awarded to those who download the game onto a Samsung S11 or S11+.





For a Vietnam-specific example, in September 2020 Oishi collaborated with Garena to launch a limited Snack Oishi 4X with packaging featuring characters from Arena of Valor and in-game rewards vouchers inside each pack. ^{xxi}

Photo: Oishi

Case study: Clear Men

Clear Men was struggling to connect with modern Vietnamese men, an audience for whom shampoo brands are seen as much the same. The hair care brand found that gaming and esports are becoming increasingly popular in Southeast Asia and that there are 26 million esports players in Vietnam, the majority of whom are male.

Taking this as its cue, Clear Men used in-game advertising in League of Legends to make its branding appear when opponents were defeated, promoting the idea that Clear Men supports Vietnamese men's success. It also set up a microsite for esports viewers to vote for their favorite teams with the chance of winning prizes and launched a social media minigame. The campaign achieved an ROI of 1312%, garnered 19 million views of the microsite, and had 100% message retention among LoL players.^{xxii}



Photo: Screenshot from League of Legends, Riot Games

TIPS ON REACHING GAMERS

CUSTOMIZE YOUR CREATIVE ASSETS

1 It's important for brands to think beforehand about the platform, choosing the right game and visual to ensure the ad blends in – and ideally creates some extra appeal.

DON'T RUIN THE GAMING EXPERIENCE

2 No gamer appreciates ads interrupting their match. Identify the precise opportunity to expose people to your brand without annoying them.

LOOK FOR OPPORTUNITIES TO INTERACT

3 Esports audiences are more likely to pay attention to ads that are interactive or feature in-game rewards. Research what the games they play currently do.

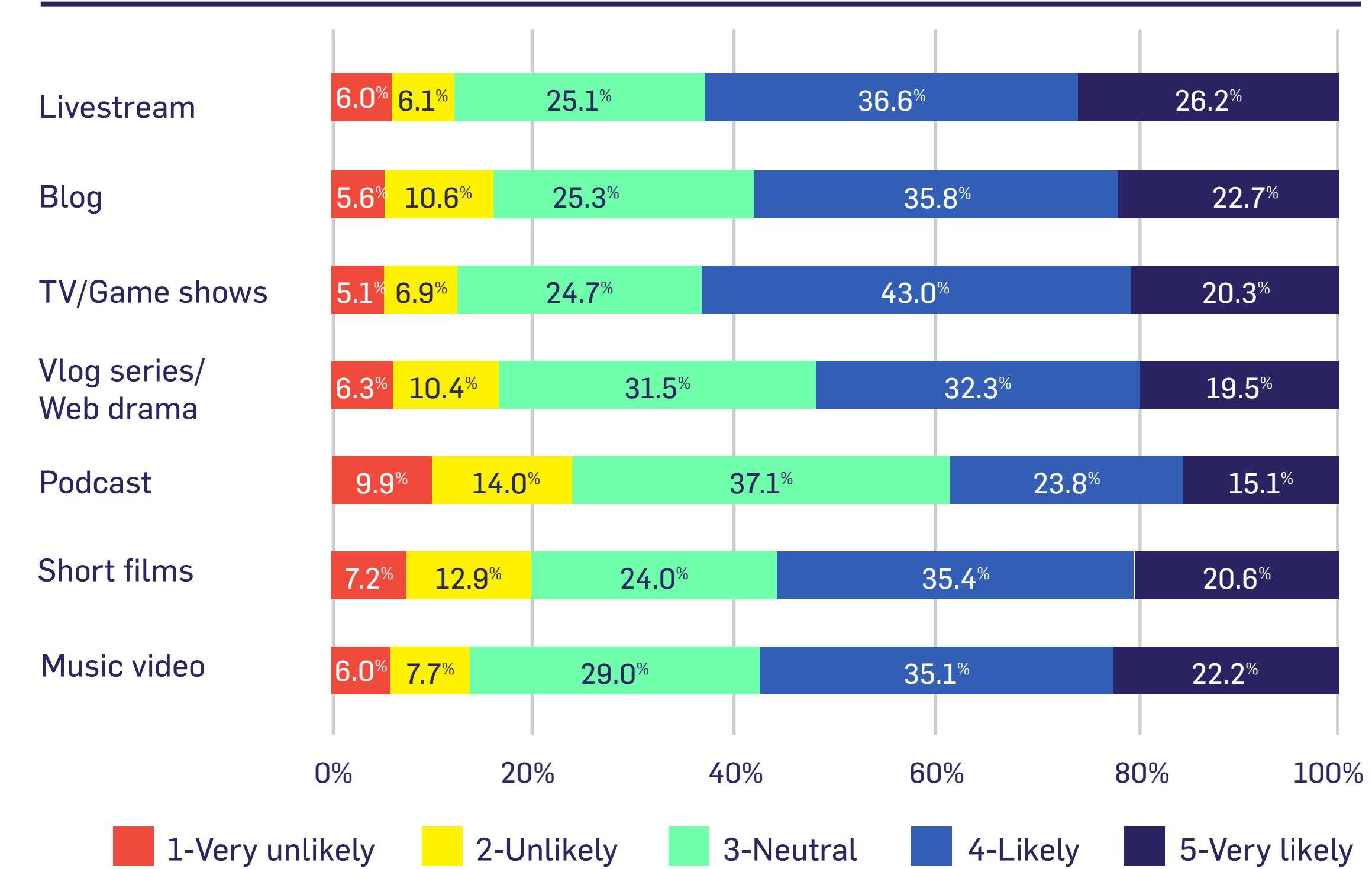
WITH ADS

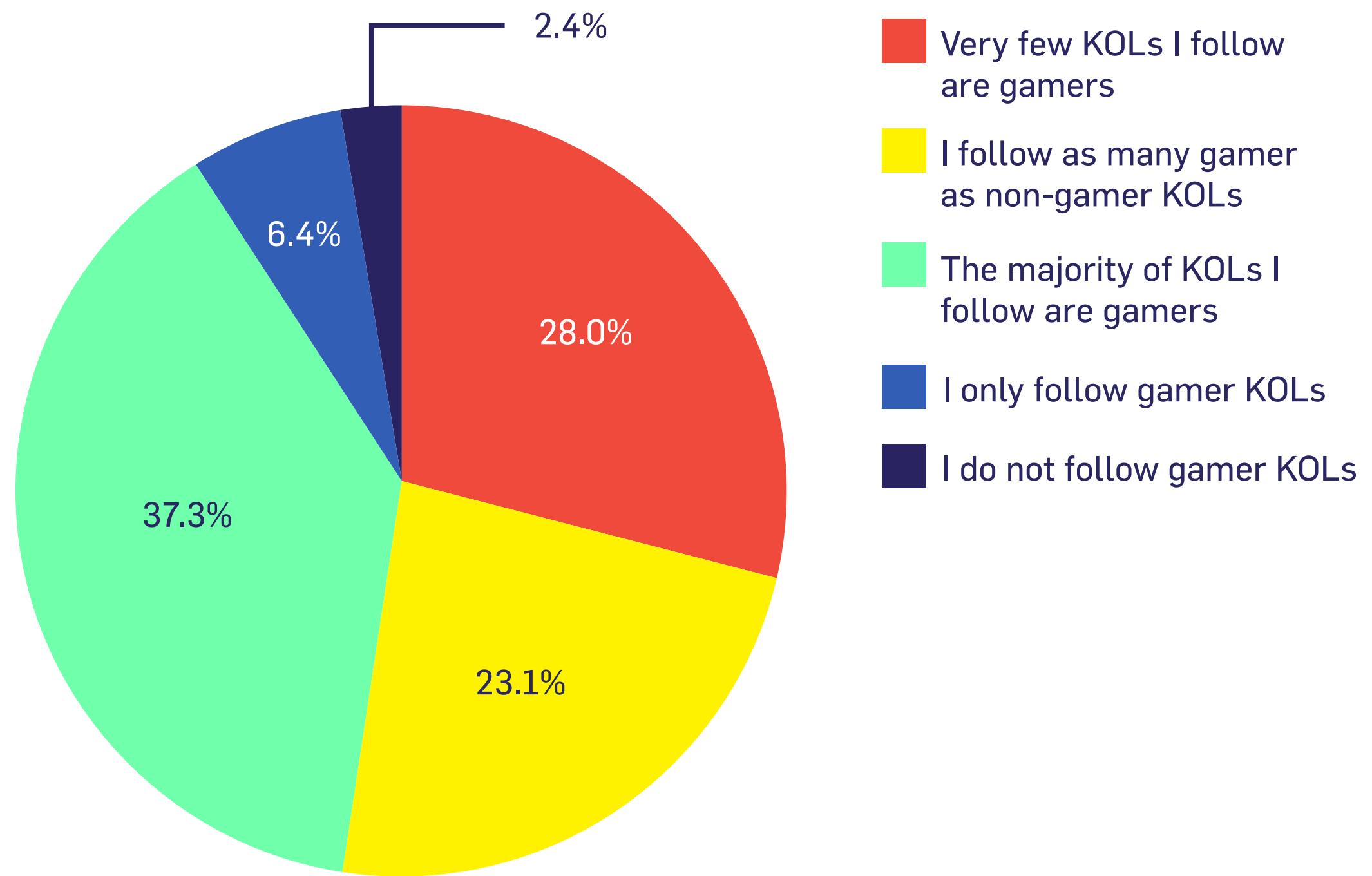
KOL ENGAGEMENT

As esports have developed, pro players and streamers have become minor celebrities – key opinion leaders (KOLs) in their field and beyond. They are not just popular for how they play, but also for their personalities and how they share their daily lives, which means they can be influential even on non-gaming platforms.

In fact, our survey shows that watchers are just as likely to look for their favorite gamer KOLs in TV/game show content as on their streams (63%), while blogs and music videos (58.5%), and even short movies (56%) are nearly as popular.

Intent to consume gamer KOL content

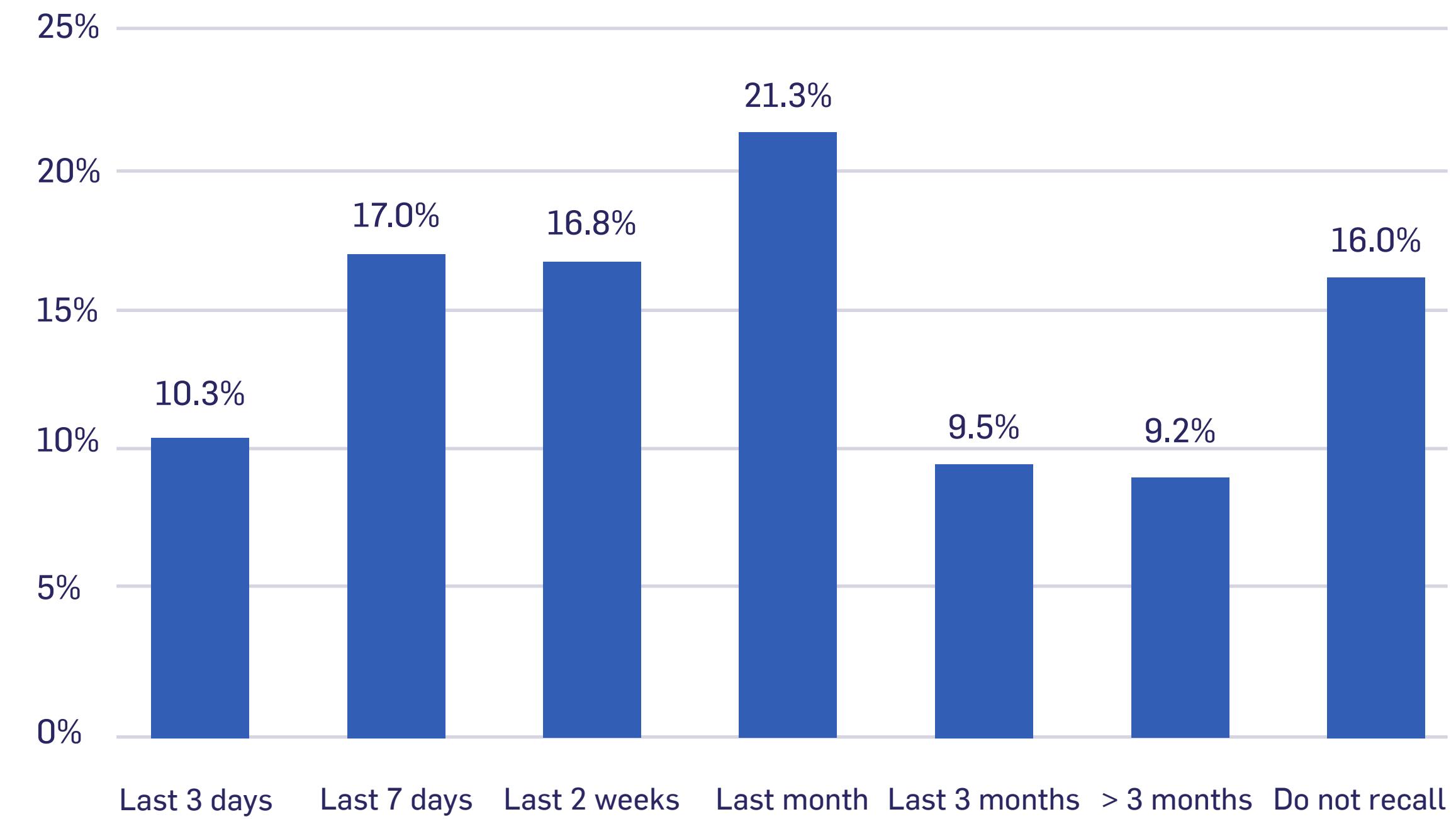


Types of KOL followed

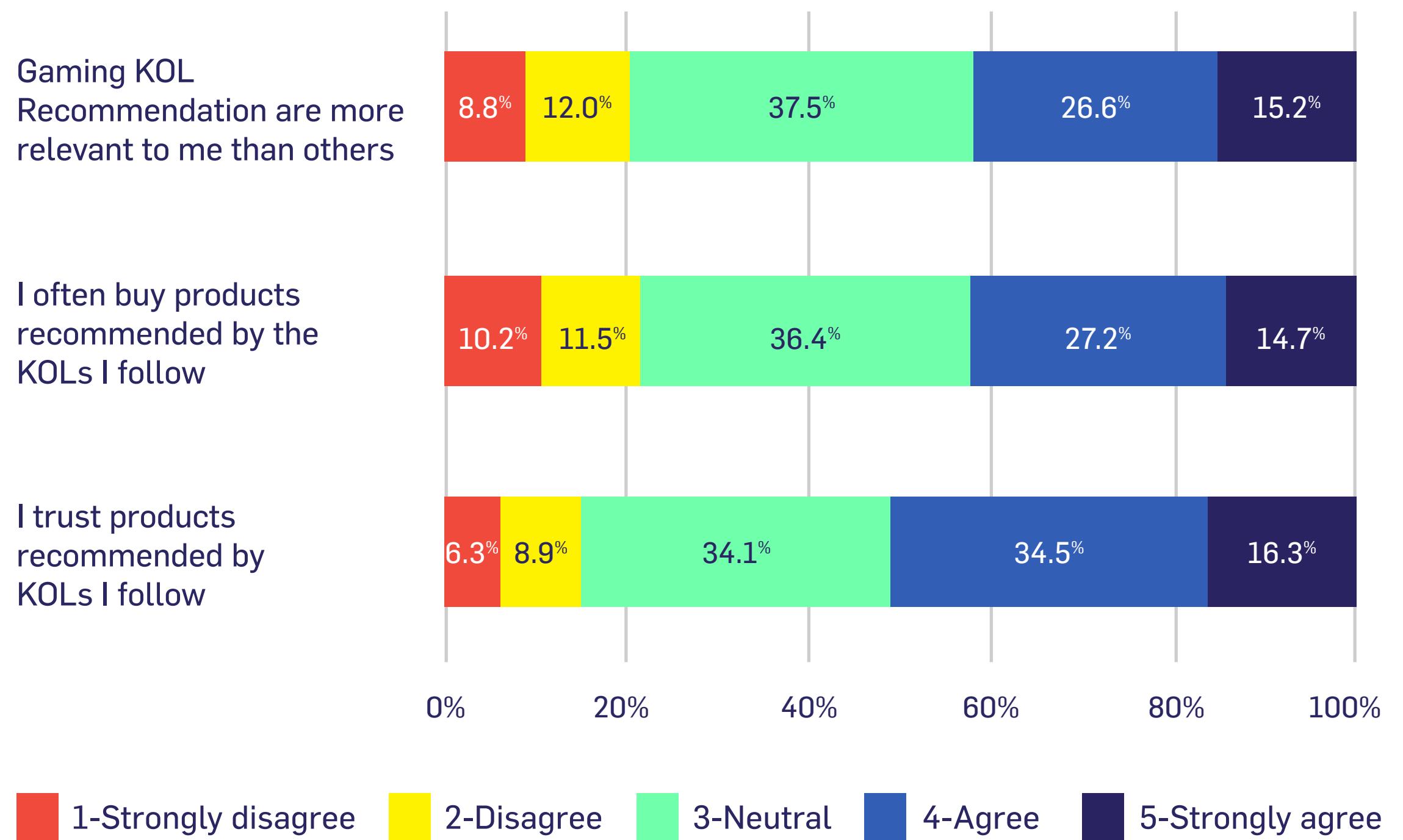
Esports fans are exceptionally devoted: two-thirds of those we surveyed say gamer KOLs make up at least half of those they follow, and 44% primarily or exclusively follow gamer KOLs.

For brands, KOLs are effective at both raising awareness and promoting sales. 65% of watchers say they purchased a product advertised by a gamer KOL in the past month.

Last purchase of a product advertised by gamer KOLs



Types of KOL followed

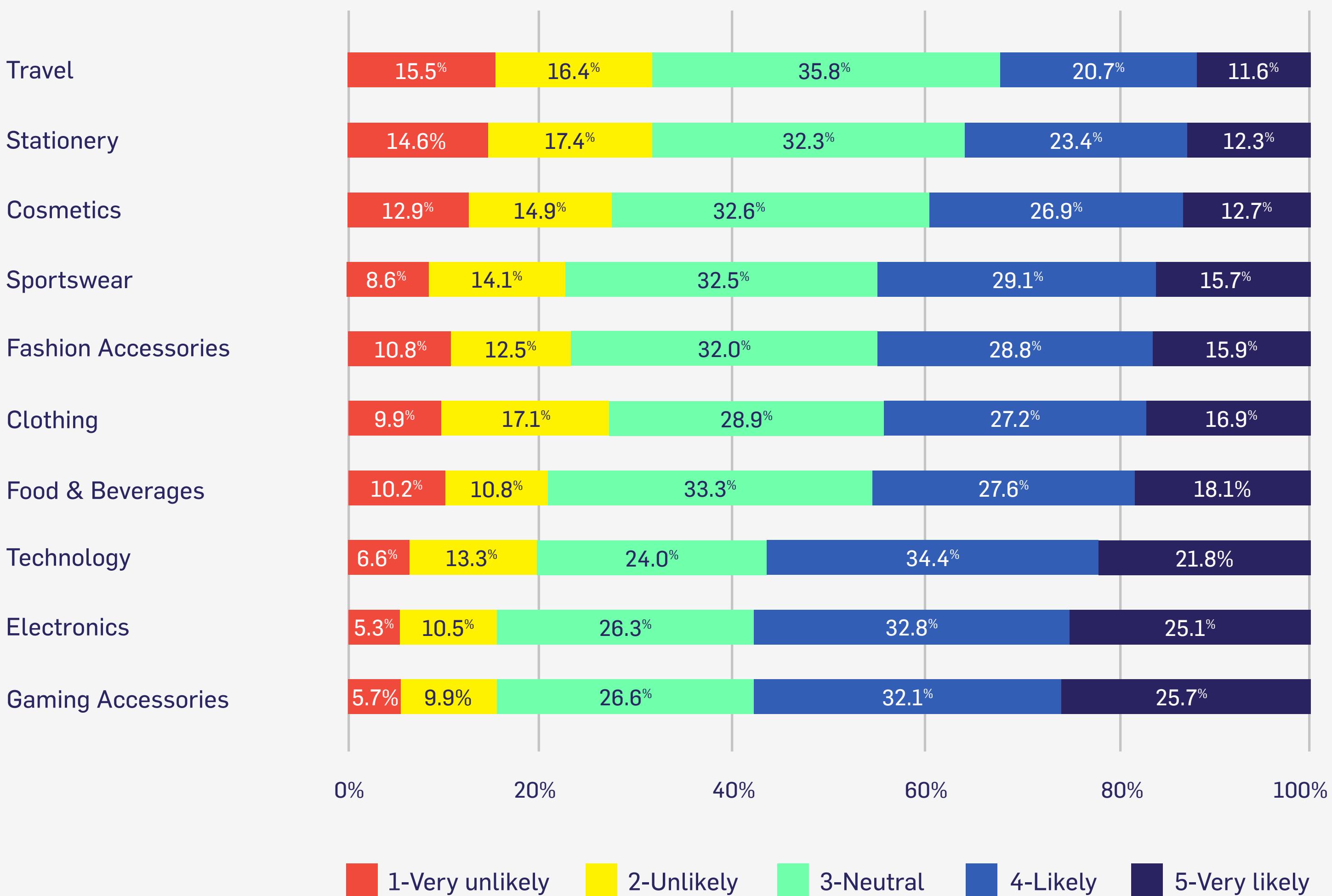


Over half (51%) of watchers trust the products recommended by KOLs they follow, and 42% buy such products often and consider them personally relevant.



As with ads, the products in question do not need to be related to gaming (though it helps). As we see in the chart below, other product categories such as F&B and fashion can be a good fit for the esports audience.

Intent to Purchase Product Categories Recommended by Gamer KOLs



Case study: Adidas

Adidas Original collaborated with the popular streamer Ninja to release a new sportswear collection: "Time In".^{xxiii} The collection was introduced by Ninja himself on his original streaming platform – Mixer – and quickly expanded via different communications material across platforms such as Facebook and Instagram. As a result, adult sizes of the Time In collection sold out within 40 minutes.



How gaming KOLs maintain their followers: Interview with Team Flash

About Team Flash

Originating in Singapore, Team Flash has professional teams in Vietnam playing League of Legends, Free Fire, and Arena of Valor. Their Vietnam team were runners-up at the Arena of Valor International Championship 2018, two-time champions at League of Legends Mobile 2019 and Arena of Valor International Championship 2019, and winners at Arena of Glory Championship 4 times from Winter Season 2018 to Spring Season 2020. Their League of Legends team is also competing in the Vietnam Championship Series (VCS) tournament, which it won in both the Spring and Summer Seasons of 2020.



Photo: Team Flash

Terence Ting, Founder of Team Flash

What is your secret to building content that attracts viewers, and how is your channel different from those of other KOLs?

1

We strive for authentic and engaging content that relates to our audience of young digital natives. Understanding the interests of today's youth and crossing over is key, as is maintaining a consistent brand voice across all our channels.

How do you balance your original content and requirements from brands?

2

At the end of the day, many brands are striving to work with esports teams to engage their audience. We believe in the 80 – 20 rule, in which 80% of our effort remains focused on the original content that brought our fans to us, and the other 20% is focused on slowly bringing branded content into the space.

With your experience of working with different brands, what are your suggestions for better cooperation between brands and KOLs?

3

Brands need to understand what the KOL represents. Each KOL has a unique personality and fanbase, so the approach is never the same. In the case of esports players, winning is one of the key factors to their popularity, but so is building an appealing image. This is the space where brands can get involved and engage the community effectively.

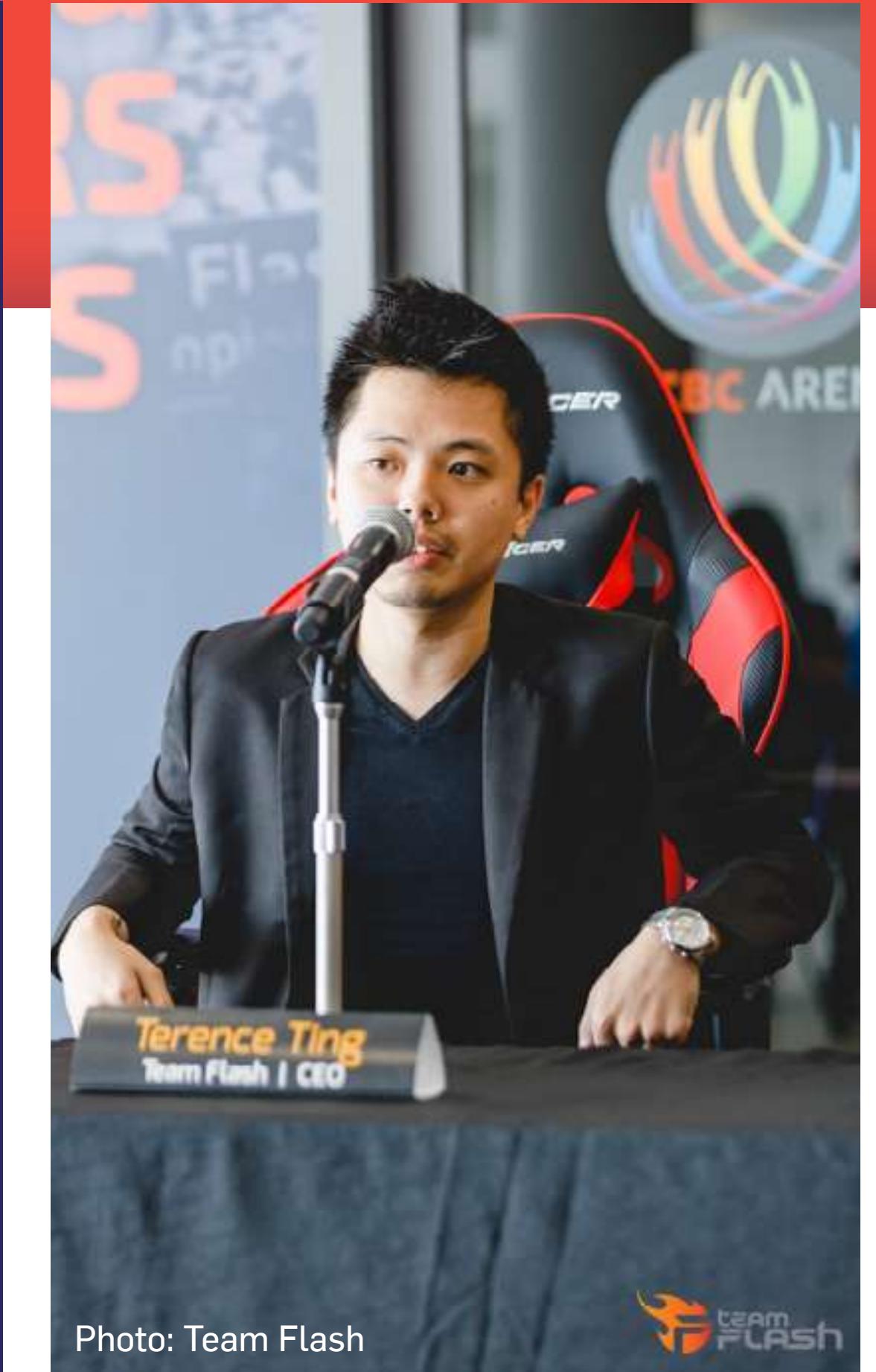


Photo: Team Flash



FL.XB (Member Of Team Flash)

FL.XB plays as a Mid Lane for Team Flash in Arena of Valor. He joined in 2018 and quickly gained popularity when Team Flash won at Arena of Glory Championship in 2018 and 2019 and AWC 2019. Besides being a pro player, he is also a popular streamer.

What is your secret to building content that attracts viewers, and how is your channel different from those of other KOLs?

Beyond showcasing personal skill in tournaments, during livestream sessions I always try to show my personality traits to fans and viewers through some form of entertainment: things like karaoke, freestyle rap, and maphack checking/detecting. I think the combination of gaming skills and entertaining activities is what attracts large amounts of viewers on my channel, and this factor sets me apart from other gamers and KOLs.

1



Photo: Team Flash



How do you balance your original content and requirements from brands?

2

The balance between livestream content and advertising content from brands has always been the main concern, and it's something that the Team Flash media team and I discuss carefully. In order to successfully promote brands and products, I believe the factor or "being myself" should be prioritised. I always make an effort to communicate with viewers during livestream sessions, so I try to insert content advertising in a natural way. For example, I'll ask "which shampoo brands do you guys usually buy?", or "I'm thinking about opening a new bank account. Which banks did you guys choose to open yours?" Besides, content advertising only lasts for 10-15 minutes, and I will spread out mentions of it across the whole livestream session, which tends to last 2-3 hours.

With your experience of working with different brands, what are your suggestions for better cooperation between brands and KOLs?

3

In my opinion, brands should not restrict how KOLs advertise their products. It's important to let us relay messages in their own styles, which is what their audience comes for. One method is to spread messaging out across the stream rather than having it in a single block. This way, it will be able to reach more people, since many viewers do not tune in for the entire stream, and it will avoid annoying people by breaking up the action for too long.



RECOMMENDATIONS

MAINTAIN AUTHENTICITY

1 Audiences stick with KOLs because of their authenticity and personalities. So let them be who they are, and don't expect them to bombard their fans with too much branded content that may degrade the KOLs' reputations. Treat them as your brand's advocates, not its salesmen.

FIND THE PERFECT MATCH

2 Seek out creative relationships with KOLs who organically align with your brand's mission. Good matches tend to last longer, be more genuine and meaningful, and provide better returns to the KOLs and their followers.

BUILD ON CONTENT

3 Have KOLs tell the stories around your products – their relevance and capacity to add value to the audience's lives – by relating their own experiences.

FOR BRANDS

SPONSORSHIP

The modern esports ecosystem is so broad that there is now a diverse selection of routes brands can take to become an esports sponsor, each of which carries a different degree of involvement and risk.

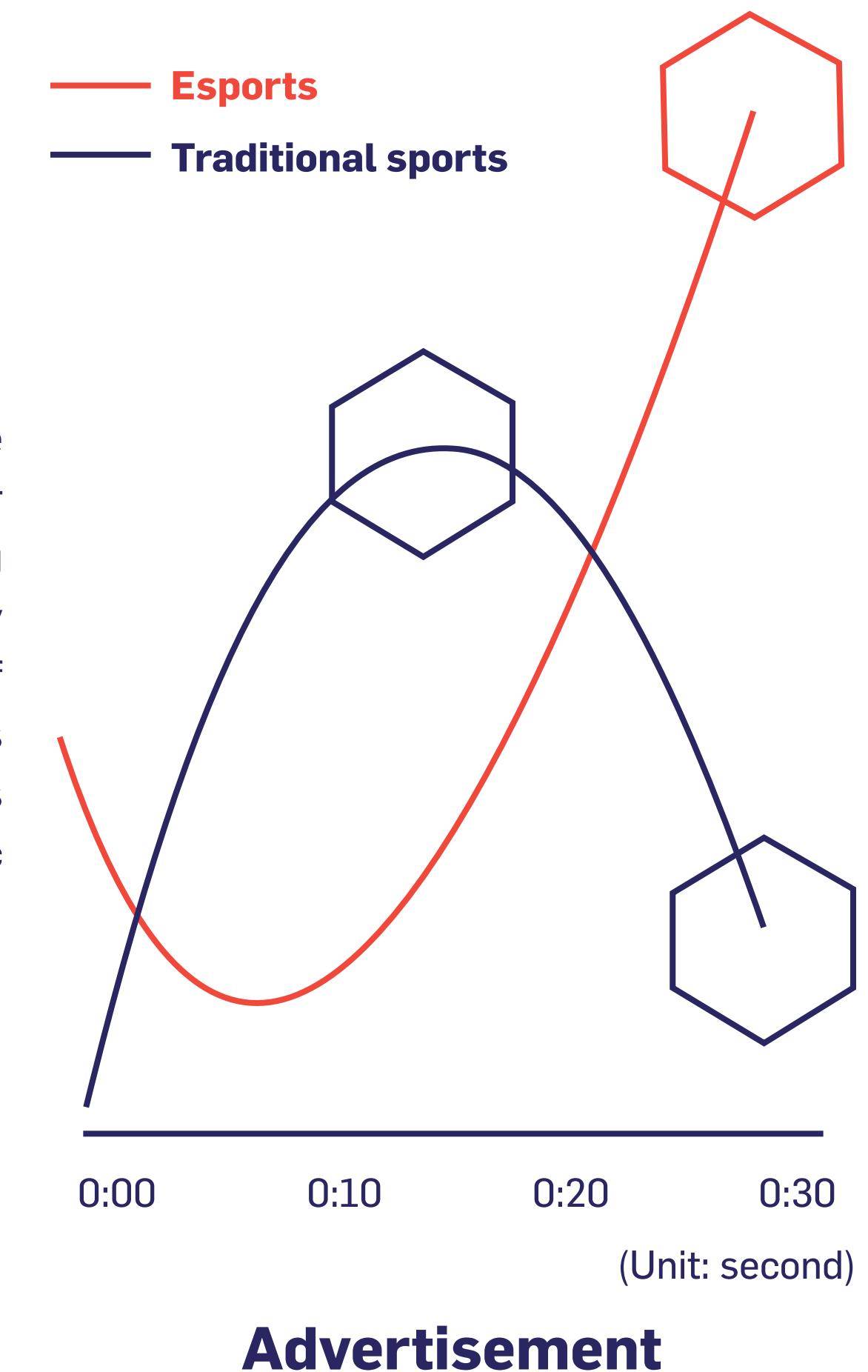
A recent biometric study by Activision Blizzard Media found that esports was better at holding viewer attention during sponsorship ads, resulting in higher performance on lower-funnel brand metrics compared to traditional sports.

During sponsorship ads, immersion was sustained for esports viewers, while for traditional sports audiences it decreased. For marketers, this more consistent immersion is a major strength of esports advertising.^{xxv}

Similar to traditional sports sponsorship, brands do not have to be closely tied to the esports ecosystem (i.e. gaming hardware or general tech) to sponsor esports.

According to McKinsey, while some nonendemic brands worry that their sponsorships will fail to stand out among endemic sponsors, a survey in Germany from December 2019 shows that recall of nonendemic brand sponsors in esports has increased over the past ten years and was recently higher (53 percent) than for endemic brands (43 percent).^{xxvi}

Recall of nonendemic brand sponsors in esports has increased over the past ten years and was recently higher (53%) than for endemic brands (43%).



Credit: Blizzard Media

Team/player Sponsorship

One of the most familiar forms of sponsorship is becoming an official sponsor of an esports team or player. Similar to traditional sports, esports teams wear jerseys featuring their organization and sponsor brand logos whenever they compete.

The advantage of team sponsorship is that the brand will be featured in as many games as the team participates in. Furthermore, as the team grows in terms of reputation and popularity with the increasing interest public have for esports, the brand will eventually become part of the team personality and grow with their reputation.

The shampoo brand Dashing has become the main sponsor of the team Dashing Buffalo and made itself an unforgettable association for their fans. Dashing Buffalo's sneaker sponsor Biti's Hunter also gains from its sponsorship because both its sneakers and esports tap into youth culture.



Photo: Dashing Buffalo

WWW.SAIGONBUFFALO.COM

League/Tournament Sponsorship

Another form of sponsorship is to partner with a game publisher to sponsor an entire tournament. With millions of viewers, tournaments are becoming a major platform for brands to be seen, not just during the event broadcasts but also in social media and coverage of the event by fans and media.

In Vietnam, Viettel Telecom invests in tournaments of Arena of Valor, Free Fire, and FIFA 4.^{xxvii} Viettel also started its own esports team to compete in Arena of Valor in 2019 as an attempt to step into the esports industry, though the team was disbanded in 2020 due to poor performance.^{xxviii}



Interview with Razer

About Razer

Since 2000, gaming hardware and peripheral brand Razer has been sponsoring esports teams in tournaments. In 2012, they formed a singular banner to spotlight the world's elite esports athletes: Team Razer. In 2017, Team Razer grew to include 175 top esports elites from 30 different countries.

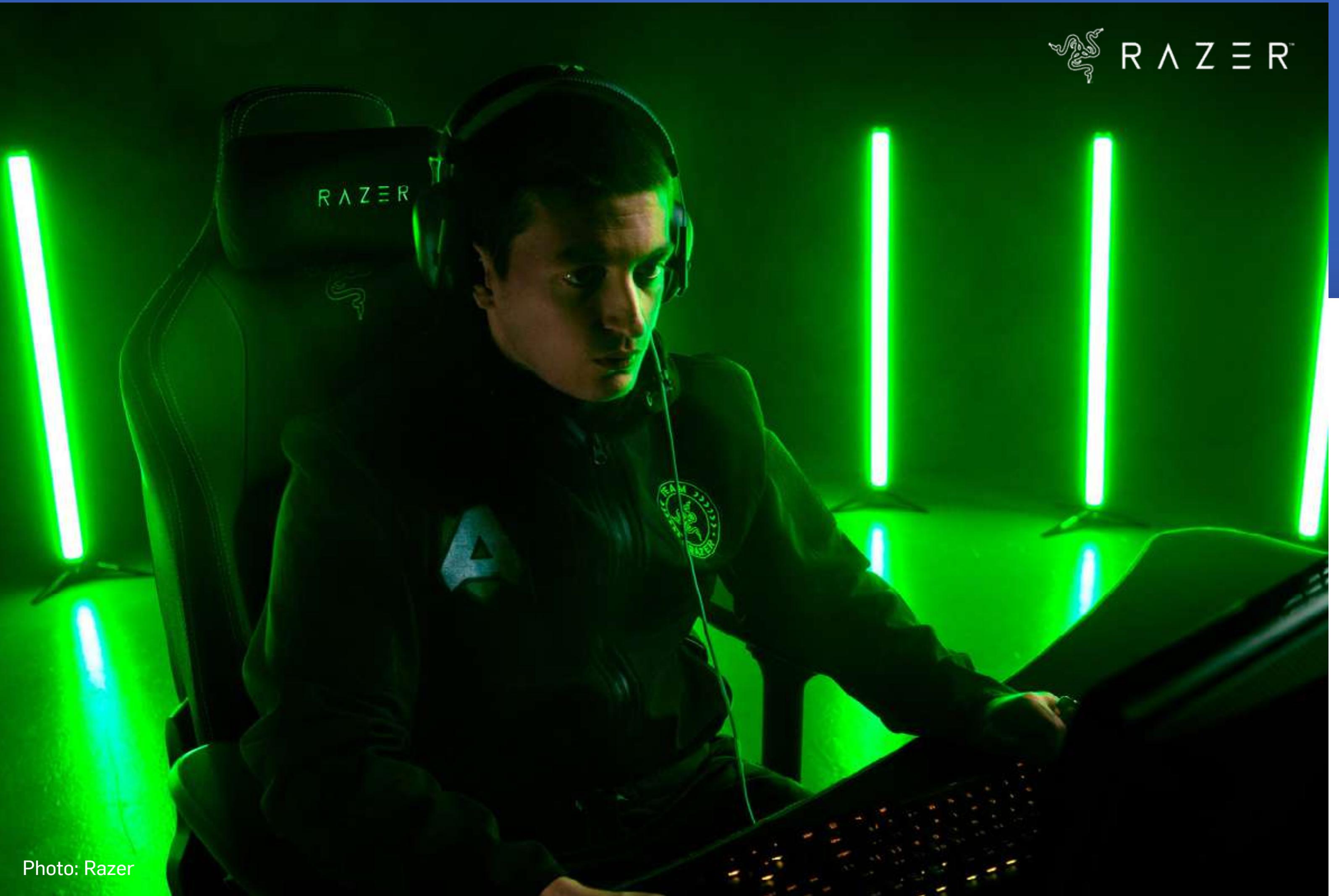


Photo: Razer



Mr. Khang Thai, Senior Global Esports Marketing Manager at Razer

**What is the origin of Team Razer,
and what do you want to achieve with it?**

1

Team Razer is a collection of elite esports athletes formed in 2012 by Razer, under a singular banner. Currently, Team Razer features 22 of the top esports organizations around the world, including teams like mousesports, Alliance, and EDG, as well as individuals like Xian and Fuudo. These teams represent a variety of game genres, including League of Legends, Dota 2, CS:GO and Street Fighter.

While they represent the pinnacle of gaming, we also look to them as an inspiration to the community who can share behind- the- scenes stories of struggles, journeys, and dreams. We hope to showcase the deeper meaning behind the games - the challenges and the hard work that goes into esports – and thereby help to legitimize esports around the world.

In addition, Razer works very closely with our athletes to test new and unlaunched products. With their experience in high-stakes competitions on the world stage, these athletes are ideal testers for new, high-performance gear. This allows Razer to stay on top of our game and continue to innovate as the world's leading lifestyle brand for gamers.



How do you decide what new aspects of esports to branch into?

2

Team Razer is extremely selective about the teams we work with, choosing only those who share our values of sportsmanship, dedication, and teamwork.

This kindred spirit is reflected in our larger esports initiatives, such as Razer's bid to have esports recognized in the Olympics. Team Razer also thrives in a high-performance environment. As such, we ensure that whichever organization is brought on to Team Razer, they represent the top games in their respective regions.

Our Team Razer athletes recently participated in a study conducted by the University of Stirling, which was commissioned by the International Olympics Committee to research esports. The teams shared their experiences as professional players and their insights into the industry.

The 30th Southeast Asian Games, held in the Philippines, had Esports as a medaled event for the first time. Team Razer athletes volunteered their time during the Razer SEA Games 2019 Bootcamps for Dota 2 and Tekken to provide national teams with guidance. This was a key step for the various teams, as some athletes had no big tournament experience at all.

Case study: Mastercard

Since 2018, Mastercard has been the official global partner of League of Legends. It offers numerous promotions for fans at events, including chances to watch games with League of Legends pros from VIP seats and test the gaming PCs the pros will compete on during the World Championship finals. They also leverage that opportunity into creating an integrated, immersive experience for their audiences, including...





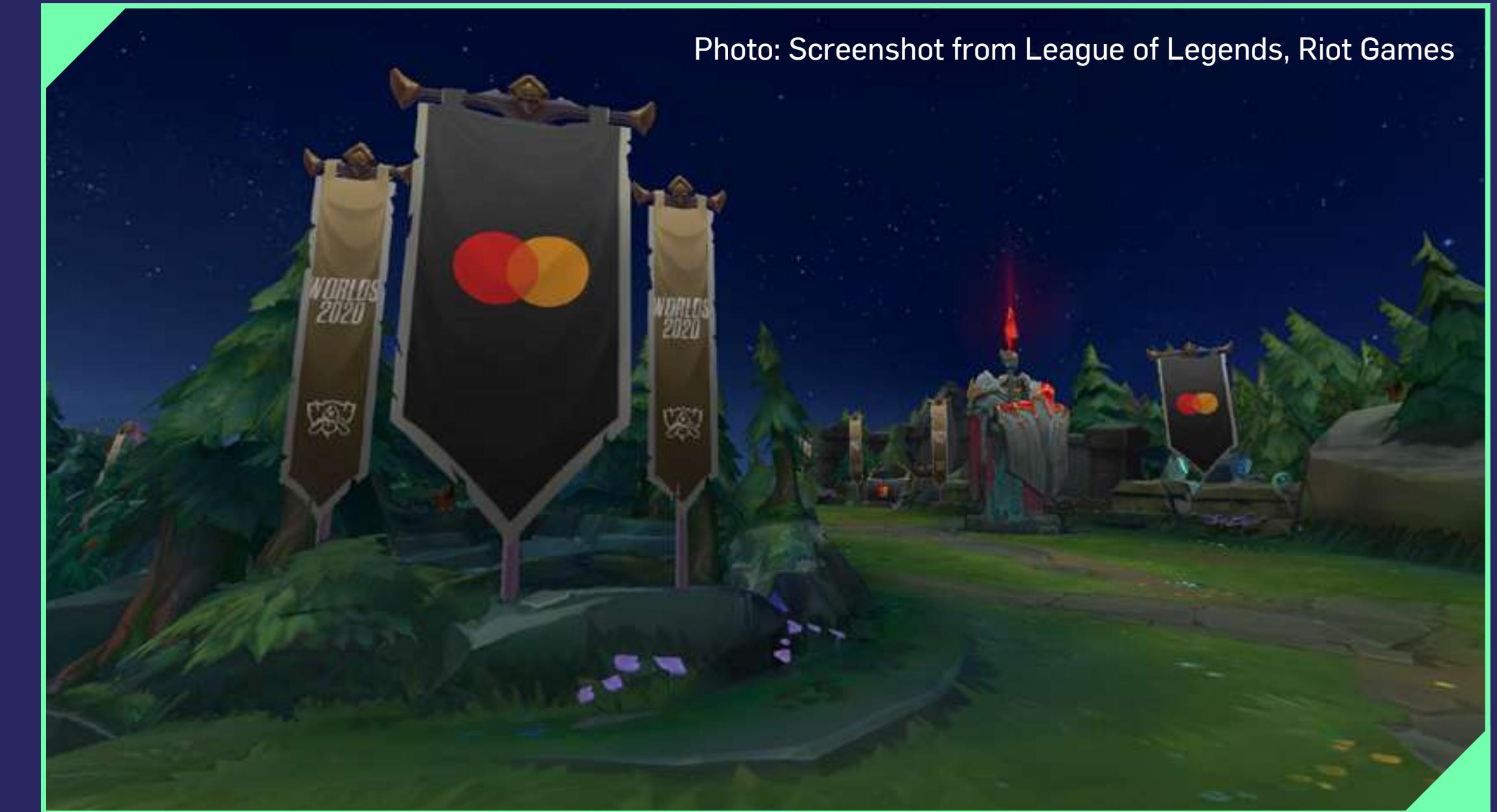
KOL engagement:

Along with announcing the partnership with LoL, Mastercard sent a gift box to streamer/gamer KOLs to open in front of the camera.



Pop-up event:

A three-day experiential pop-up at the League of Legends World Championships in Seoul featured a number of ways that fans and members of the public could get closer to the esports they love: meeting the pro players, attending a streaming party, and joining a shareable alternate reality experience.



In-game advertising:

Mastercard's logo appeared in the League of Legends Summoner's Rift Arena.



RECOMMENDATIONS

UNDERSTAND YOUR AUDIENCE

1 Your audience is not necessarily “esports fans” in general. Which games are they most interested in? Where do they usually find information about those? Which teams are their current favorites? These factors can help you decide which game or team to sponsor.

FIND THE PERFECT MATCH

2 Like any sponsorship, brands need to consider whether a partnership with a particular game or team will fit their brand image before they associate themselves with it. Is the game too violent for the image the brand wants to pursue? Is the team's following younger than the brand's TA?

TURN IT INTO AN IMC CAMPAIGN

3 Sponsorship is not only about giving out money and asking for time and exposure. It's also a great opportunity for a brand to create an integrated communication campaign that engages with their audiences on different platforms.

FOR BRANDS



UNEXPLORED ALLEYS

While esports is growing fast in Vietnam, there are still some ways that brands have used it elsewhere to connect with their audiences that haven't been tried here.

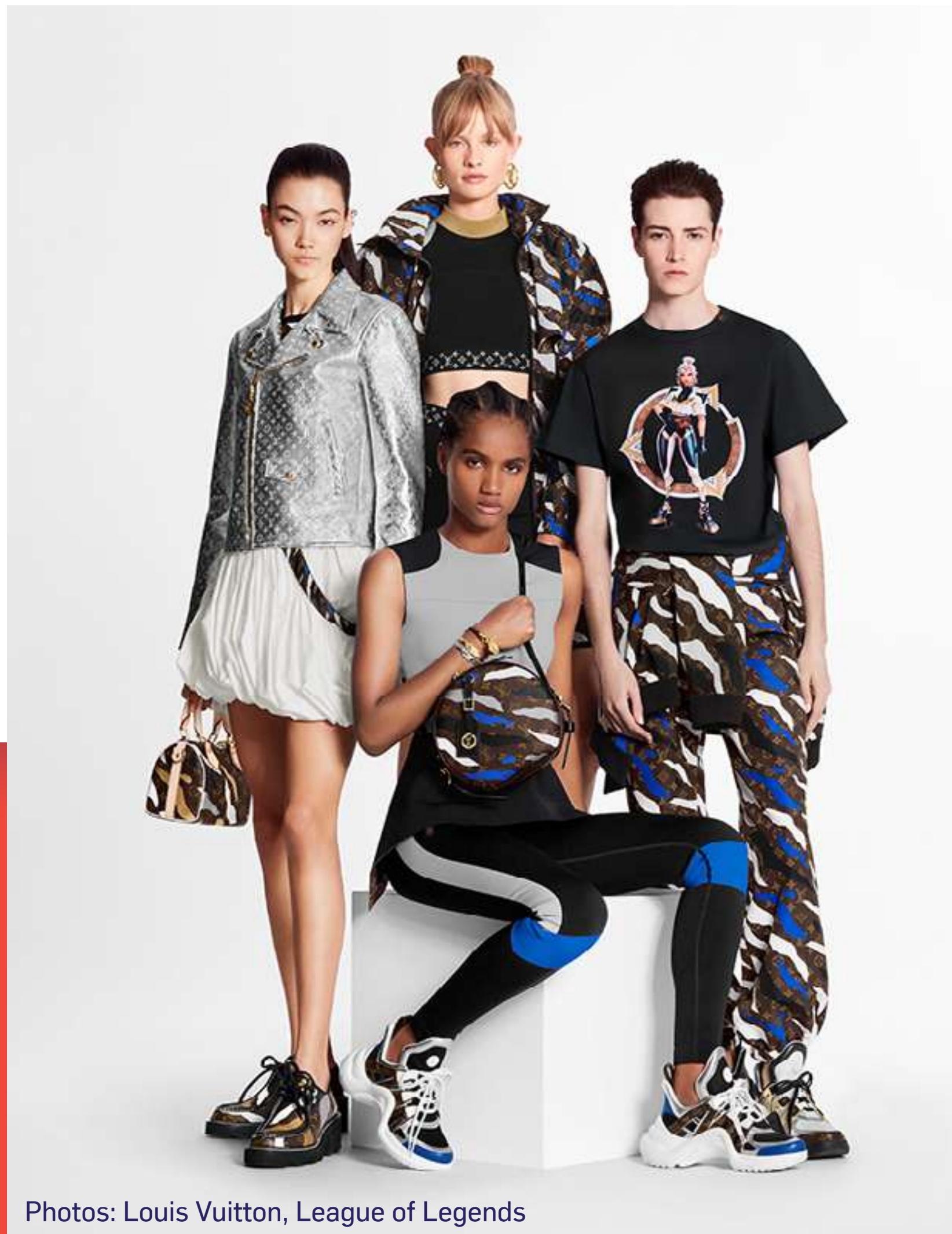


Photo: from Battleborn, Gearbox

Co-creation

One more involved but potentially rewarding approach is for a brand to partner with a game publisher to co-create a new collection that leverages the value of both the game and the brand. This will require more collaboration between the brand and the publisher throughout development and establishment, but it's a great way to profoundly engage with the target audience.





Photos: Louis Vuitton, League of Legends



In 2019, the fashion house Louis Vuitton used co-creation for its capsule collection in collaboration with League of Legends. The collection, branded as LVxLOL, was designed by Nicolas Ghesquière, the fashion label's artistic director of women's collections. It allows players to purchase the outfits for their characters for around \$10 in-game, and LV also released items in real life at prices ranging from a \$170 bandeau to a \$5,600 leather jacket. The collection sold out in less than an hour. ^{xxvii}



Gaming for good

Many modern consumers expect brands to be more responsible and mindful of the communities around them, and none more so than members of Generation Z, which represents a “change generation” that cares about purpose more than direct value and wants to make a difference with their consumption. Globally, Gen Z is more likely to care about social issues and three times more likely to say that the purpose of business is to “serve communities and society”.^{xxviii}

The fact that Gen Z is also a large target audience for Esports means that, as the industry has grown, so have the number of charity events and campaigns linked to online gaming. Among the most noticeable is a team-up between War Child UK and several partners to host several video game sales, tournaments, and KOL streams, with a percentage of proceeds going to children affected by conflict.^{xxix} And in 2019, KFC collaborated with PUBG, SEGA and KOYO to support Special Effect in the “Chicken for Charity” campaign, in which gamers participated in a live PUBG tournament on Twitch, with all funds going to support Special Effect’s life-changing work with disabled gamers.^{xxx}

Gen Z represents a “change generation” that cares about purpose more than direct value and wants to make a difference with their consumption



The demographic trend holds true in Vietnam as well. Research from Tomorrow Marketers shows that 60% of Vietnam's Gen Z care about social issues and want to take part in making the world a better place.^{xxxii} Vietnamese members of Gen Z don't tend to separate marketing and business ethics: 65% say they research the origins of the products they buy, and 70% of Gen Z in Vietnam say that they prefer brands with positive and ethical images. ^{xxxii} The esports scene in Vietnam has thus far not embraced cause-based events, but an upcoming program from Saigon Children is set to change that, with others likely to follow.



“

Like many other consumers, esports fans are paying more attention to the social commitments of the products they purchase and prefer to buy from companies that care about their impact on the world and are giving back.

For non-endemic brands, this is an exciting opportunity to engage a community with an exceptional growth rate. By giving esports fans an innovative way to understand your CSR commitment via the platform they love, you can raise awareness of your cause with much less competition than you would find on traditional platforms.

— Mrs. Angelique Masse Nguyen, Head of Fundraising and Communications, Saigon Children's Charity

”



CONCLUSION

**KEY LESSONS FROM THE STUDY
EXPECTATIONS FOR THE NEAR FUTURE**



KEY LESSONS FROM THE STUDY

Along with the rapid growth of the esports industry, we are witnessing a significant increase in gaming content creators. Unlike traditional spectator sports, most people who watch esports also actively play the games. And rather than just consuming the content provided by esports gamers, many players and watchers are also actively creating content, some with high production values. In this hyper-connected world, brands should consider the esports industry a “co-business” rather than a “show-business”. Using teams and players to help deliver messages, they can work directly with esports audiences as co-actors.

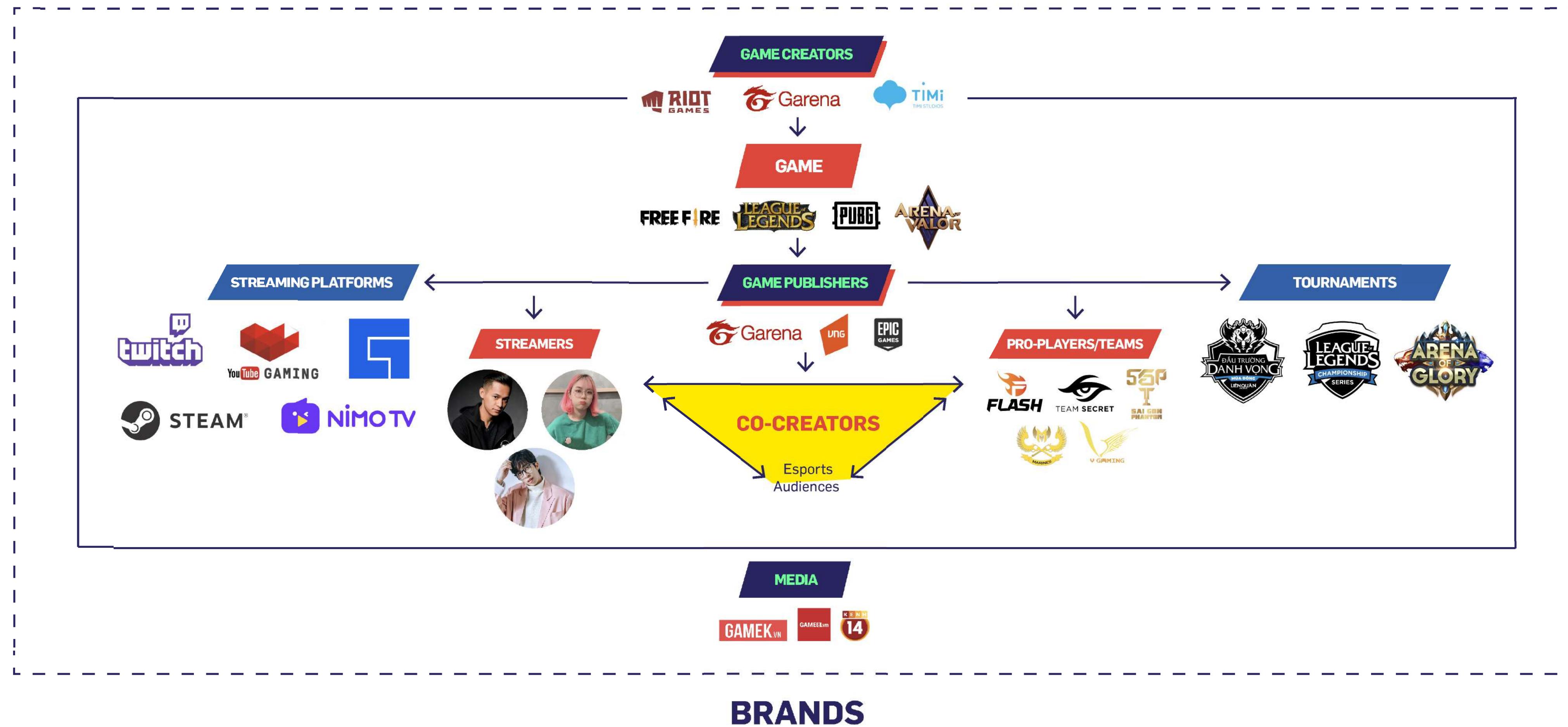


Photo: iStock

In this hyper-connected world, brands should consider the esports industry a “**co-business**” rather than a “show-business”. Using teams and players to help deliver messages, they can work directly with esports audiences as co-actors.



ESPORTS MEDIA ECOSYSTEM





Esports is no longer for a niche audience, but is approaching the popularity of mainstream sports.

Like traditional sports, esports attracts both casual and hardcore fans. The good news for brands is that esports is no longer confined to a niche audience, but is approaching the popularity of mainstream sports. Although the majority of the esports audience are men, it is no longer unusual for women to join their ranks. Esports audiences also range widely in terms of age, income, and occupation. Even casual gamers, who only spend 5-10 hours per week playing esports, are a viable target audience with strong buying power.

Esports will join bowling, triathlon and jujitsu to become one of the official sports at the 31st Southeast Asian (SEA) Games. This will also create a complex ecosystem that engages with the community, opens more space for content creators, and expands viewership by bringing people together socially through the shared joy of competition.

EXPECTATIONS FOR THE NEAR FUTURE

Esports in Vietnam is booming as both an industry and a culture, which is evident from the large investments brands are pouring into it and the fact that their communications strategies are moving closer to traditional sports marketing.

We have already seen efforts from different players to bridge traditional sports and esports. Since its launch in 2018, martial arts association ONE Championship has turned ONE Esports into the largest esports championship series in ASEAN.

They hold events across Asia and have partnered with Dentsu to produce and broadcast dedicated esports content, including live events, documentaries, reality shows, blogs, magazines, and streaming content with ONE Championship athlete Demetrious "Mighty Mouse" Johnson.^{xxxv}

In Vietnam, leading media agency POPS has established its sub-media ecosystem POPS esports, through which they acquire esports players, organize esports events, and provide esports content.

However, more than a standalone media channel, certain games could become owned communications channels for brands, as Adidas has done with FIFA. This will require confidence from brands in the long-term viability of the market, which we hope this report contributes to.

When that happens, the ad-hoc activities that we see in esports at the moment will be replaced with strong investment from publishers, brands and content creators – making esports a brand channel that is powerful enough to offer its audience high-value, interactive experiences.



ABOUT VERO

For a communications agency, Southeast Asia is one of the most exciting places in the world: young, growing fast, and full of opportunity.

At Vero, we are all about this region. We are an integrated agency born in Southeast Asia, with offices in Bangkok, Yangon, Ho Chi Minh City, and Jakarta, and presence throughout the region via partner agencies. We are intimately familiar with these markets – their cultures, media, business environments, and government policies.

With our roots in public relations, we appreciate the value of dialogue between businesses and their audiences and stakeholders. We know how to help our clients create lasting connections, and we are well-versed in the digital ecosystems that are vital to maintaining them.

To us, the agency business is all about teamwork – with clients, influencers, and especially each other. Our ever-expanding world-class team includes communication specialists, creative designers, social strategists, planning talent, and many more – all working together to solve problems, manage crises, and build communities for our clients.



Photo: iStock

ABOUT DECISION LAB

Decision Lab is on a mission to deliver agile, connected, and decision-focused market research.

Brands in Asia are experiencing disruption as consumers adopt new technologies and interact with products and campaigns in new ways. We work with progressive clients who understand the need for digital fluidity and informed decision-making.

Decision Lab helps clients by delivering a strong foundation for decision-making based on three core pillars: consumer understanding, strategy and planning, and marketing execution.

These services all center on delivering speed and flexibility by connecting brands seamlessly with consumers. They are powered by our three primary assets: The largest online community for research in Southeast Asia, partnerships with leading technology providers in the industry, and an international team of Decision Consultants with the flexibility to design custom studies and apply the best tools for each market.





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