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FREE 2018 GLOBAL
ESPORTS
MARKET REPORT

newzoo

TABLE OF CONTENTS

1. FOREWORD & KEY TAKEAWAYS	04
2. METHODOLOGY & TERMINOLOGY	08
3. KEY GLOBAL TRENDS	14
4. GLOBAL OVERVIEW	18
5. RANKINGS	24
GET THE FULL REPORT	27
ABOUT NEWZOO	28



1.

FOREWORD &
KEY TAKEAWAYS

FOREWORD

As a consumer phenomenon, esports continues to grow its huge base of passionate fans across the globe. As a business, esports is now entering a new and critical phase toward maturity. Big investments have been made, new league structures have been launched, sponsorship budgets have moved from experimental to continuous, and international media rights trade is starting to heat up. At the same time, player salaries have soared and the esports ecosystem and viewership hours still very much rely on a select number of globally operating teams and game franchises. Profitability and return on investment is, for many organizations at the heart of the esports economy, a challenge.

An industry survey performed by Newzoo late last year found that the majority of respondents from teams expect esports to take another five to 10 years to mature fully as a business. The same research showed that brands and agencies expect the ecosystem to be fully professionalized in three to five years. This illustrates the current status of the market: great expectations from outside and more conservative views from people within. This year will be pivotal in determining the pace at which esports becomes the global multi-billion-dollar business we all envisage. This year, we anticipate global esports sponsorship and advertising revenues to surpass half a billion dollars. Considering the media exposure esports has created, this is still a relatively small amount.

The full report features key insights on 10 different regions. We also discuss 10 key trends driving the esports, media, and tech industries forward and present our latest forecast scenarios for the esports audience and its economy. A positive development that we have seen at Newzoo is that the biggest consumer, telecom, automotive, and hardware brands are now investing in deeper market intelligence to secure continuous insights on gaming and esports. Finally, gaming seems to be getting the acknowledgment of being, arguably, the world's favorite pastime.

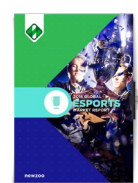


PETER WARMAN
CEO, Newzoo



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KEY TAKEAWAYS

GLOBAL ESPORTS REVENUES UP MORE THAN 38% YEAR ON YEAR

- Global esports revenues will reach \$906 million in 2018, a year-on-year growth of +38.2%. North America will account for \$345 million of the total and China for \$164 million.
- Brands will invest \$694 million in the esports industry, 77% of the total market. This will grow to \$1.4 billion by 2021, representing 84% of total esports revenues.
- The number of Esports Enthusiasts worldwide will reach 165 million in 2018, a year-on-year growth of +15.2%. The total Esports Audience will reach 380 million this year, a year-on-year growth of +13.5%.
- The global average annual revenue per Esports Enthusiast will be \$5.49 this year, up by 20% from \$4.58 in 2017.
- In 2017, there were 588 major esports events that generated an estimated \$59 million in ticket revenues, up from \$32 million in 2016.
- The total prize money of all esports events held in 2017 reached \$112 million, breaking the \$100 million mark for the first year.
- The League of Legends World Championship was the most watched event on Twitch in 2017 with 49.5 million hours. It also generated \$5.5 million in ticket revenues.

2.

METHODOLOGY
& TERMINOLOGY

METHODOLOGY

SIZING THE MARKET WITH A VARIETY OF DATA

Newzoo aims to provide its clients with the best possible assessment of the size of the overall esports market and its future potential. By synthesizing many data points, we provide estimates on a regional and individual country level. Below, we describe our approach in detail to explain what underpins our forecasts, facilitating comparisons with other data sources.

At the highest level, Newzoo focuses on three key metrics for every market: Esports Enthusiasts, Occasional Viewers, and revenues. We define a market as a country, region, or other geographic territory.

The data on Esports Enthusiasts and Occasional Viewers is largely based on our proprietary primary consumer research, which continues to form the basis of our detailed understanding of consumers, esports, and games. In 2018, we will carry out research in more than 28 countries, covering more than 60,000 consumers. Starting in 2009 with six countries, this is now the largest games-related consumer research program in the world.

The Esports Enthusiast and Occasional Viewer ratios resulting from this consumer research are projected against the online population, using population, internet penetration, and urbanization metrics. The urban online population is an important driver of the number of potential esports viewers and an indicator of how much more structural growth a country can expect in the relevant population of potential esports viewers.

The revenue forecasts are based on our predictive esports market model, which incorporates data from multiple sources: macroeconomic and census data, primary consumer research, data provided by our official industry data partners, public event data in terms of viewership and attendees, media reports, and third-party research. We also receive valuable input from clients, including leaders in the esports industry.

Market size estimates and growth forecasts for individual countries and in aggregate for the total industry are validated against our analysis of various contextual metrics. For instance, our market model calculates the average revenue generated per Esports Enthusiast, which is then compared with historic numbers, other regions, GDP per capita, and traditional sports spending. Overall, our forecasts are always the outcome of an iterative process, reviewing the implications of our assumptions on a very granular level.

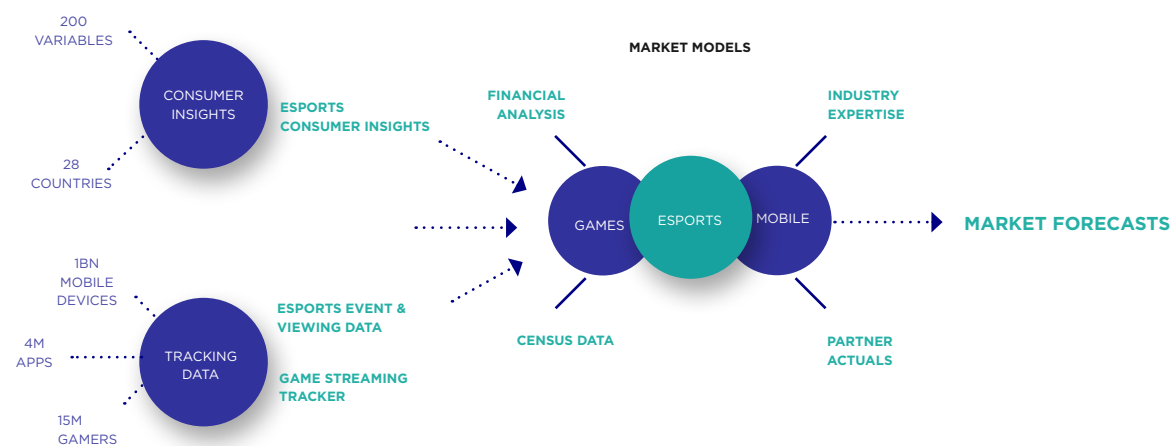
We define industry revenues as the amount the industry generates through the sale of sponsorship, media rights, advertising, publisher fees, and tickets and merchandising. Our revenue numbers exclude prize pools and player salaries, which we consider to be cost items at an industry level, as well as fan contributions to prize pools, which we consider in-game revenues. We also exclude revenues from online gambling and betting

related to esports (e.g., via BWIN, Unikrn). Finally, we do not include capital investments in esports organizations, as we think it is important to distinguish between revenues and investments.

Our historical revenues and growth rates reflect the year-end US\$ exchange rate. Our projected growth rates assume steady exchange rates going forward, but we take into consideration historic growth rates in local currency rather than US\$, as this gives a better picture of underlying growth.

In terms of countries and regions, we define the market size as the amount generated by consumers in that specific territory, as opposed to the amount that companies based in a particular territory generate worldwide.

The methodology and various inputs are visualized by the illustration below.



FULL 114-PAGE REPORT

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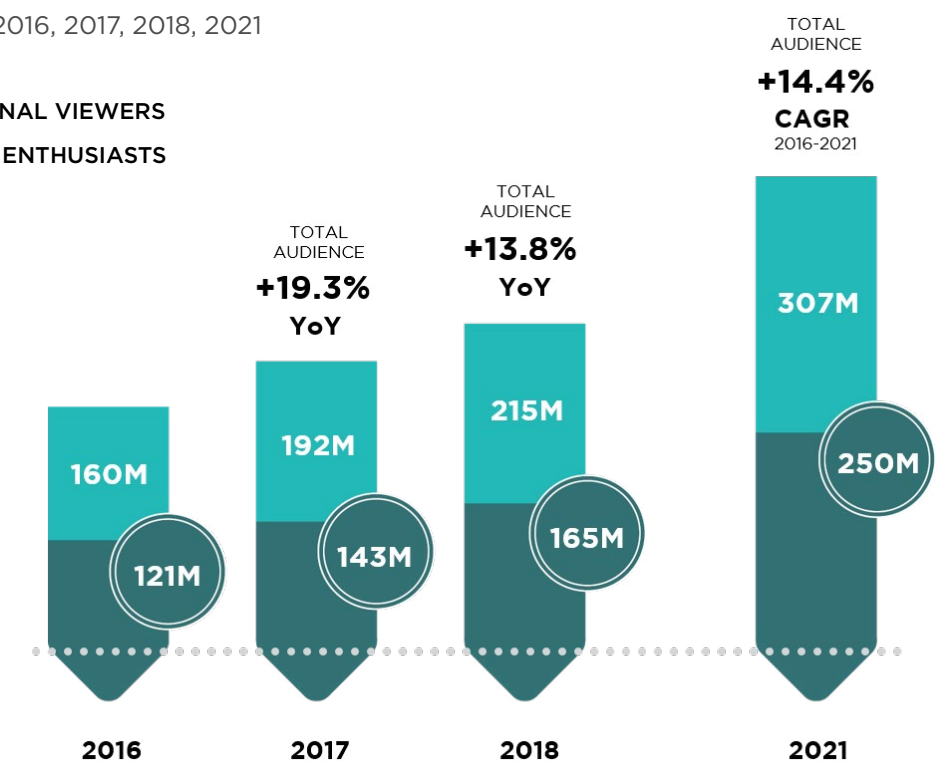
REFINED AUDIENCE DEFINITION

Previously, our definition of Esports Enthusiasts also included people who actively compete in amateur online competitive gaming leagues or tournaments, such as ESL Play, Toornament, and FACEIT. A meaningful number of these highly engaged competitive gamers does not follow professional esports as viewers. Because of the increasing importance of media reach and viewership in the esports industry, we have chosen to provide a sharper focus on professional esports viewership numbers. This, together with minor corrections in growth regions, such as Southeast Asia and the Middle East and Africa, has led to a slightly lower total audience estimate for this year and forecasts going forward.

ESPORTS AUDIENCE GROWTH

GLOBAL | 2016, 2017, 2018, 2021

- OCCASIONAL VIEWERS
- ESPORTS ENTHUSIASTS



TERMINOLOGY

DEFINITIONS OF OFTEN-USED TERMS

Esports. Competitive gaming at a professional level and in an organized format (a tournament or league) with a specific goal (i.e., winning a champion title or prize money) and a clear distinction between players and teams that are competing against each other.

Esports Enthusiasts. People who watch professional esports content more than once a month.

Occasional Viewers. People who watch professional esports content less than once a month.

Esports Audience. All people who watch professional esports independent of frequency: Esports Enthusiasts and Occasional Viewers combined.

Esports Awareness. People who have heard of esports, including the group of people who are aware of esports but are not participants or viewers.

Amateur Competitive Gaming Participants. People who participate in (online) competitive gaming leagues at a pro or amateur level e.g., through FACEIT, Toornament, and ESL Play.

Non-Viewing Amateur Competitive Gaming Participants. Amateur competitive gaming participants who do not watch professional esports content.

Esports Event. A competitive gaming tournament or league in which players and/or teams compete against each other with the goal to win.

Third-Party Organizer. An organization that hosts esports events but does not own or publish the game(s) played at the event.

Online Population. People within a country or region who have access to the internet via a computer or mobile device.

Esports Density. The share of Esports Enthusiasts in the online population.

Players or Gamers. People who play games on a PC, console, or mobile device.

Gaming Peripherals. Gaming-related hardware products, such as mice, keyboards, headsets, controllers, or monitors.

Media Rights Revenues. Revenues generated through media property, including all revenues paid to industry stakeholders to secure the rights to show esports content on a channel. This includes payments from online streaming platforms to organizers to broadcast their content, foreign broadcasters securing rights to show content in their country, or copyright costs to show video content or photos of an esports competition.

Merchandise and Ticket Revenues. Revenues generated by the sale of tickets for live esports events and of merchandise. Merchandise sold by esports teams and event organizers is included, as well as merchandise sold by publishers.

Advertising Revenues. Revenues generated by advertisements served to viewers of esports content. This includes ads shown during live streams on online platforms before or in between games, ads shown on VOD content of esports matches, or advertising on TV around esports content.

Sponsorship Revenues. Revenues generated by teams and organizers through sponsorship deals. This includes all deals relating to sponsoring an event, including product placement, sponsoring teams, and payments by brands for the use of team, event, or game-specific IP rights in their marketing communications. Any advertisements sold as part of a sponsorship package are also included in sponsorship revenues.

Game Publisher Fees. Revenues paid by game publishers to independent esports organizers for hosting events. This excludes investments or spending by game publishers on their own events, as we consider that to be part of their regular marketing efforts.

Revenue per Enthusiast. Average annual revenue generated per Esports Enthusiast (Esports revenues/Esports Enthusiasts).

3.

KEY GLOBAL
TRENDS

KEY GLOBAL TRENDS

CRUNCH TIME FOR ESPORTS AS IT ENTERS ADOLESCENCE

The esports industry is entering a new and crucial phase in which the pace of growth in different areas and other accelerating factors will determine how fast esports will become the mature, multi-billion-dollar industry that we, and many with us, anticipate. Ten key factors that will determine the pace of growth and, ultimately, the size of esports as a business are discussed in this chapter.

THE MANY DIMENSIONS OF GROWTH

1. Franchising provides certainty for organizers, teams, and broadcasters.

In 2017, the implementation of the franchising system in the esports industry kicked off. Major publishers Riot Games and Blizzard Entertainment have now started to operate the North American League of Legends Championship Series (NA LCS) and Overwatch League (OWL) in a franchised structure. This system removes seasonal promotion and relegation of teams participating in the league. Instead, teams have a permanent spot (a franchise) that they own and is, in most cases, tied to a specific geographic location.

Removing relegation has several benefits for the league, participating teams, and interested broadcasters. It offers certainty of participating teams, ensuring that large fan bases are not lost when a team relegates. Broadcasters can broadcast rivalries every year and teams can invest in nurturing talent without the risk of dropping out of the league. The franchising structure is also a recognizable format for content buyers, sponsors, advertisers, and their agencies. Major sports leagues in the United States operate in a franchised system, such as the NFL, MLB, and NBA. These benefits foster longer-term investments from all involved parties, accelerating the growth of the league as a whole.

The success of franchised leagues in attracting media rights buyers and brands with big budgets is an important driver of growth of the total esports industry. The NA LCS and OWL are off to a good start in garnering large content and sponsorship deals. We expect other leagues to try to replicate their success in the next years. However, the NA LCS and OWL are currently heavily focused on the American market where the system is common. If franchising proves to be successful in regions that are not traditionally familiar with the system, it will be a solid base for industry growth.

2. The importance of winning the hearts of local fans.
3. The development of collegiate esports into nurturing and scouting competitions.
4. Team profitability is vital to esports maturing.

THE ACCELERATING FACTORS

5. The current and future identity of mobile esports.

With more than \$50 billion in global revenues in 2017, mobile has grown to be the biggest gaming segment, but its esports scene is still developing. As competitive gaming on mobile rises in popularity, what will the future of esports around mobile titles look like?

The status and future of mobile esports differ per region. Mobile esports in Asia saw explosive growth last year, accelerated by the mobile-first culture of the region. In Asia, mobile esports already has a similar structure to PC-based esports franchises, with many top mobile competitive titles having professional leagues, live stadium events, and millions of viewers. Tencent's King of Glory (Arena of Valor outside of China) is a leading example of this. Not only are "core" competitive mobile games popular in terms of esports, but more "casual" competitive titles, such as Battle of Balls by Shanghai-based publisher Giant Network, are also attracting large crowds. In the coming years, mobile esports will continue to grow in Asia and we expect the most popular mobile esports titles to match their PC counterparts in popularity.

In the West, we expect PC-based game franchises to continue to dominate esports viewership. While many mobile esports initiatives will be launched this year, it will remain a niche within the Western esports scene and take a different path than in Asia. When investigating the different trends and characteristics of PC and mobile gaming in detail, we see distinct but equally successful paths toward success. Because mobile screens travel everywhere, live competitions can be organized anywhere at every level, creating a more casual esports format. We already see communities around games such as Clash Royale organizing competitions in local bars and cafes.

6. Game-changing technology: blockchain, cryptocurrency, and esports.
7. The power to expand viewership through new formats and franchises.

THE SHAPING OF AN INDUSTRY

8. Shifting powers within the esports economy: teams, organizers, and publishers.

9. Media and telecom move in: M&A wave accelerates.

With the huge audiences that esports attracts, it is no surprise that media and telecom companies are showing interest. In 2018, we will see the battle for content increase, especially around top-tier leagues. We expect telecom companies to become even more involved in bidding for mobile streaming rights, as Verizon did with the NFL. The first deals of 2018 already point to an eventful year, including a deal between Twitch and the OWL worth \$45 million per year. Telecom companies are also buying teams to secure unique content.

From a broader industry perspective, the wave of consolidation between media, telecom, and entertainment companies will continue. AT&T already confirmed that it wishes to acquire Time Warner, owner of Turner and Warner Bros. Turner owns and operates ELEAGUE while Warner Bros. publishes games and recently acquired game-video platform Machinima. Disney became the majority owner of BAMTech, which operates digital streams for a variety of sports and, recently, League of Legends. There are also rumors of Tencent or Alibaba aiming to acquire Twitter.

The quest for engaging content is driving this development. In the future, we will see telecom, media, sports, and entertainment converge increasingly. The fact that Chinese tech giants are seeking to increase their footprint in the West adds to the impact of the current M&A wave. Gaming and esports companies will be at the center of this wave that is only just beginning.

10. The role of associations and government involvement.



ALL 10 TRENDS COVERED IN THE FULL REPORT



4.

GLOBAL
OVERVIEW

GLOBAL OVERVIEW

GLOBAL

OVERVIEW 2018



POPULATION	7590.5M
ONLINE POPULATION	3965.9M
AWARENESS	1586.1M
ESPORTS ENTHUSIASTS	165.0M
ESPORTS REVENUES	\$905.6M
ANNUAL REVENUE/ENTHUSIAST	\$5.49

AUDIENCE FORECAST

GLOBAL

In 2018, the global esports audience will reach 380.2 million. Esports Enthusiasts will make up 165.0 million of the total, up from 143.2 million in 2017, and will grow with a CAGR (2016-2021) of +15.6% to reach almost 250 million in 2021. The number of Occasional Viewers will reach 215.2 million in 2018, up from 191.9 million in 2017, and will grow with a CAGR of +14.0% to surpass 306 million in 2021.

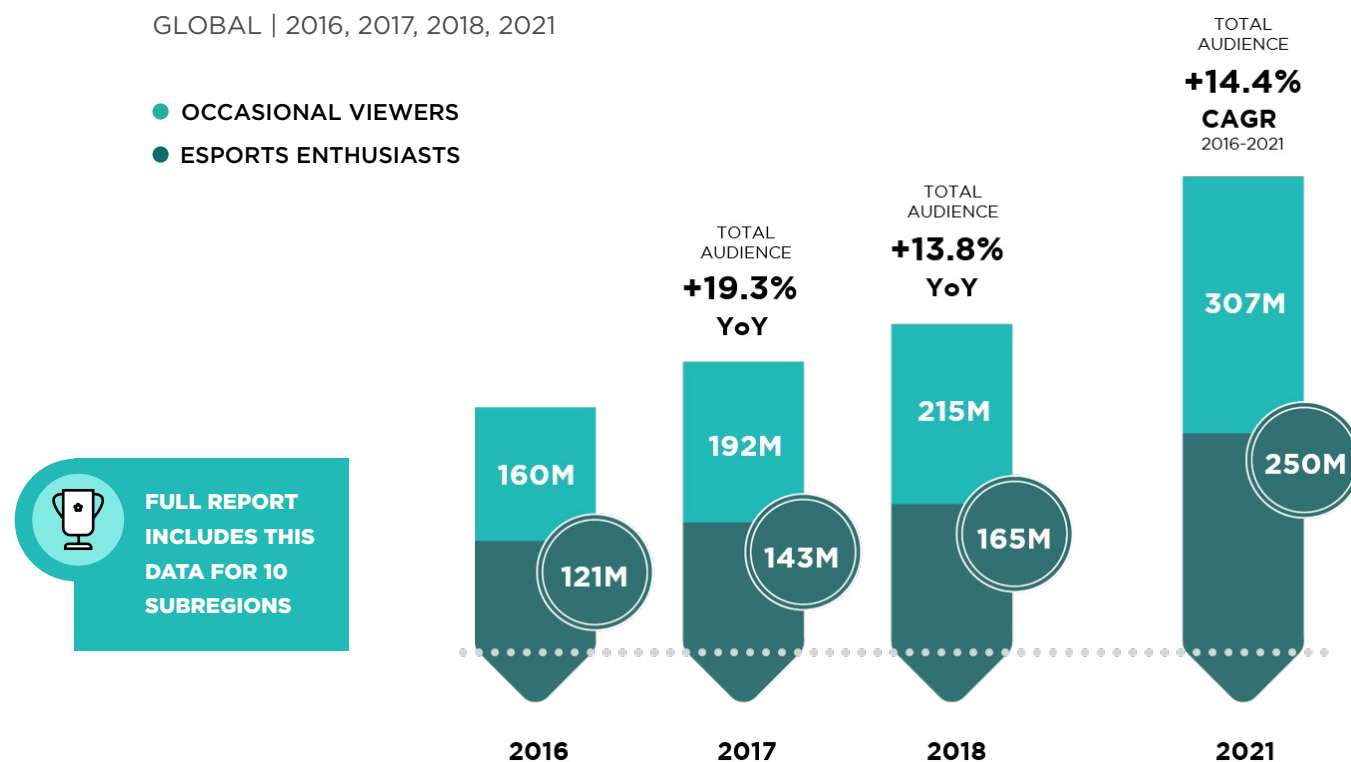
The number of people who are aware of esports worldwide will reach 1.6 billion in 2018, up from 1.3 billion in 2017. China will contribute most to global esports awareness, with 468.3 million people. The increasing exposure of esports as a mainstream entertainment industry is driving the growth in awareness in most regions.

Audience and awareness growth in the emerging regions of Latin America, Middle East and Africa, Southeast Asia, and Rest of Asia is largely driven by improving IT infrastructure and urbanization. The rise of new franchises, such as PLAYERUNKNOWN'S BATTLE-GROUNDS, is an important global growth factor. The influx of young generations, to whom esports is a natural phenomenon, will further drive the growth of the industry's audience.

ESPORTS AUDIENCE GROWTH

GLOBAL | 2016, 2017, 2018, 2021

- OCCASIONAL VIEWERS
- ESPORTS ENTHUSIASTS



REVENUE FORECAST

GLOBAL

Global esports revenues will reach \$905.6 million in 2018, an increase of more than \$250 million compared to 2017. North America will generate the most revenues, contributing 38% of the global total in 2018.

Sponsorship is the highest grossing esports revenue stream worldwide, contributing \$359.4 million in 2018 compared to \$234.6 million in 2017. Growing with a CAGR (2016-2021) of +49.8%, media rights is the fastest-growing revenue stream. By 2021, media rights revenues will more than double compared to 2018, making it the second-largest generator of esports revenues globally.

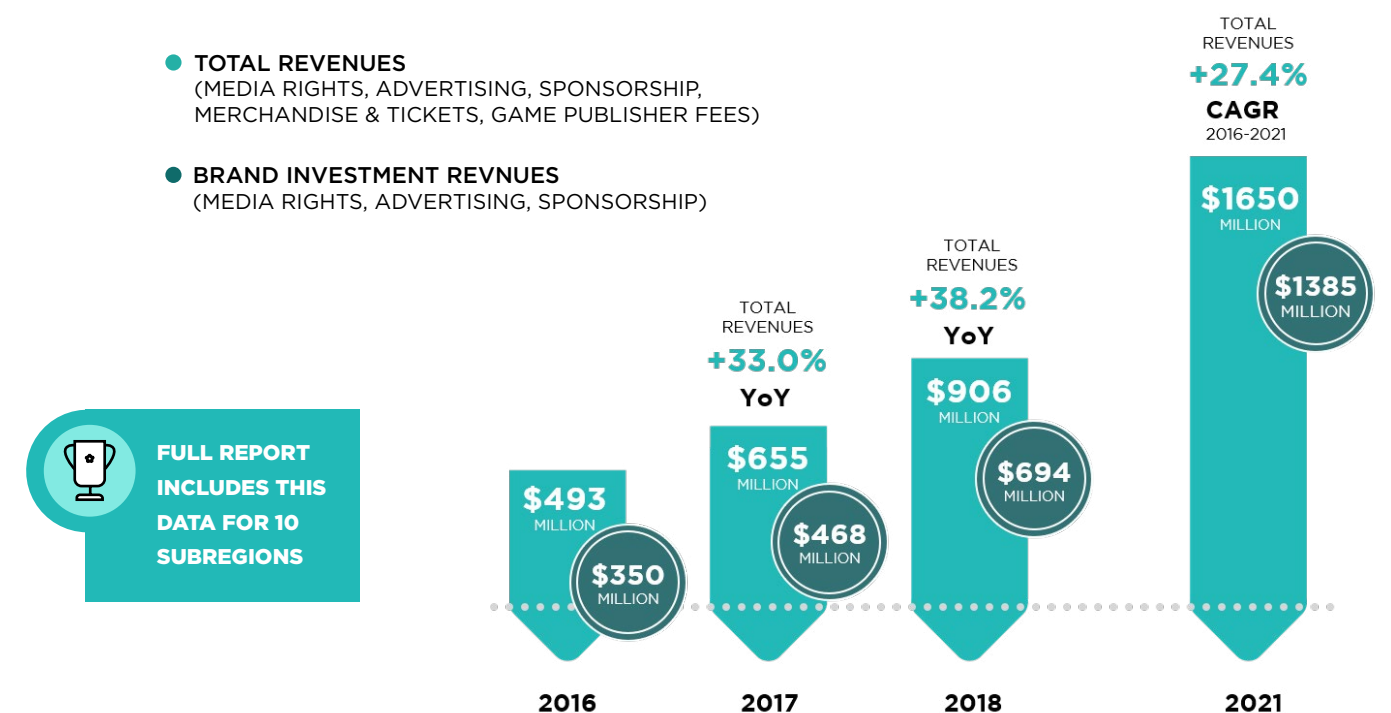
Game publisher fees will remain the slowest-growing revenue generator for esports toward 2021, with a CAGR (2016-2021) of +3.5%. The segment will see some increase in 2018, up \$11.5 million compared to 2017, but is expected to drop entering 2020 and 2021, making it the smallest revenue stream.

More details on our esports revenue model and the different revenue streams can be found in Chapter 2: Methodology and Terminology.

ESPORTS REVENUE GROWTH

GLOBAL | 2016, 2017, 2018, 2021

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



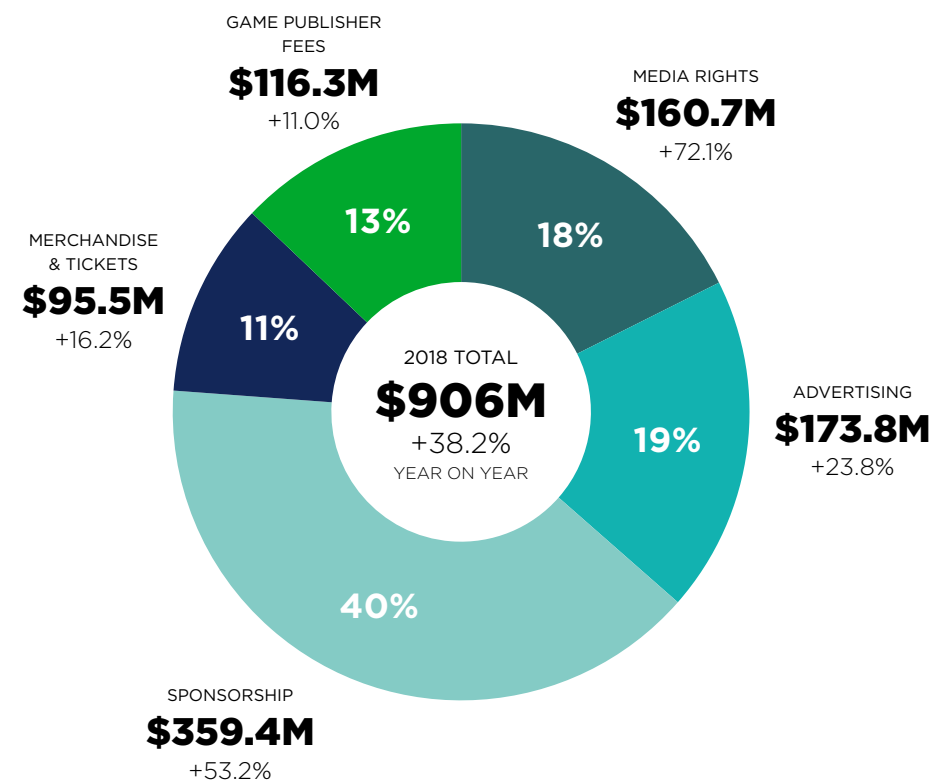
2018 REVENUE STREAMS

GLOBAL

In the coming year, the global Esports Economy will grow to \$906 million, a year-on-year growth of +38%. The majority of this, 77%, will be generated directly (sponsorships and advertising) and indirectly (media rights and content licenses) through investments made by endemic and non-endemic brands that will spend \$694 million, an impressive 48% increase since last year. Consumer spending on tickets and merchandise will total \$95 million, while another \$116 million will be invested by game publishers in the esports industry through partnership deals with white-label organizers. Illustrated by the increase in publisher fees from \$105 million in 2017 to \$116 million this year, esports is not a profitable business for game publishers and we don't expect this to change anytime soon.

ESPORTS REVENUE STREAMS

GLOBAL | 2018





RANKINGS

MOST WATCHED GAMES ON TWITCH

BY ESPORTS HOURS AND NON-ESPORTS HOURS | 2017

The tables below show the most watched games on Twitch worldwide in 2017, by esports hours and non-esports hours. Non-esports content includes pro-players, influencers, or game shows. In 2017, League of Legends was the most watched game on Twitch, by both esports and non-esports hours. This is unsurprising, as it is the biggest esports title in the world with many popular streamers.

PLAYERUNKNOWN'S BATTLEGROUNDS (PUBG), released in early access in March, was the most watched new title on Twitch in 2017. PUBG is most popular as a non-esports title, with some of the biggest influencers on Twitch. PUBG made its first moves into esports last year and is expected to grow its competitive scene in 2018.

FIFA was the only franchise with two versions in the top 50 games by non-esports hours. FIFA 17 generated 48.7 million non-esports hours before FIFA 18 was launched at the end of September. The new release accumulated 41.3 million hours.

GAME	HOURS WATCHED
LEAGUE OF LEGENDS	274.7M
COUNTER-STRIKE: GLOBAL OFFENSIVE	232.9M
DOTA 2	217.9M
HEARTHSTONE	76.9M
OVERWATCH	25.2M
STARCRAFT II	21.2M
HEROES OF THE STORM	19.6M
ROCKET LEAGUE	17.3M
STREET FIGHTER V	11.5M
SMITE	10.7M
SUPER SMASH BROS. MELEE	9.8M
SUPER SMASH BROS. FOR WII U	7.0M
WORLD OF TANKS	5.2M
TOM CLANCY'S RAINBOW SIX: SIEGE	4.7M
WORLD OF WARCRAFT	4.7M
PLAYERUNKNOWN'S BATTLEGROUNDS	4.5M
CALL OF DUTY: INFINITE WARFARE	3.7M
HALO 5: GUARDIANS	2.5M
CALL OF DUTY: WWII	1.8M
VAINGLORY	1.6M
H1Z1	1.6M
INJUSTICE 2	1.5M
CLASH ROYALE	1.5M
FIFA 17	1.3M
TOTAL TOP 25	959.3M

TOP 25 GAMES BY ESPORTS HOURS WATCHED ON TWITCH | 2017

TOP 50 GAMES
BY NON-ESPORTS HOURS
WATCHED ON TWITCH | 2017

GAME	HOURS WATCHED
LEAGUE OF LEGENDS	742.5M
PLAYERUNKNOWN'S BATTLEGROUNDS	534.6M
HEARTHSTONE	364.1M
DOTA 2	230.5M
OVERWATCH	213.3M
COUNTER-STRIKE: GLOBAL OFFENSIVE	185.0M
IRL	181.9M
WORLD OF WARCRAFT	129.6M
GRAND THEFT AUTO V	122.1M
H1Z1	87.3M
FORTNITE	82.0M
MINECRAFT	69.1M
RUNESCAPE	62.2M
TALK SHOWS	59.5M
TOM CLANCY'S RAINBOW SIX: SIEGE	53.1M
HEROES OF THE STORM	49.7M
FIFA 17	48.7M
PATH OF EXILE	48.4M
DESTINY 2	48.1M
CREATIVE	47.3M
DESTINY	44.1M
FIFA 18	41.3M
WORLD OF TANKS	40.5M
POKER	39.3M
DEAD BY DAYLIGHT	37.6M
CASINO	33.5M
BLACK DESERT ONLINE	30.9M
FOR HONOR	28.3M
CALL OF DUTY: WWII	28.0M
SMITE	27.8M
STARCRRAFT II	26.2M
MAGIC: THE GATHERING	24.1M
WARFRAME	23.3M
ARMA 3	22.8M
RUST	21.6M
ROCKET LEAGUE	21.2M
THE LEGEND OF ZELDA: BREATH OF THE WILD	21.1M
ARK	20.8M
DARK SOULS III	20.6M
FRIDAY THE 13TH: THE GAME	19.4M
RESIDENT EVIL 7 BIOHAZARD	18.4M
CLASH ROYALE	17.7M
DIABLO III: REAPER OF SOULS	17.2M
NBA 2K17	16.2M
GWENT: THE WITCHER CARD GAME	15.8M
STREET FIGHTER V	14.9M
MUSIC	14.8M
THE ELDER SCROLLS: LEGENDS	14.0M
TEKKEN 7	13.8M
E3 2017	13.5M
TOTAL TOP 50	4087.6M



FULL REPORT INCLUDES
TOP 50 EVENTS BY HOURS
WATCHED ON TWITCH AND
TOP 50 COUNTRIES BY
ESPORTS ENTHUSIASTS,
SPLIT PER REGION.

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THE FULL GLOBAL ESPORTS MARKET REPORT

KEY TOPICS & DATA POINTS

- THE ESPORTS INDUSTRY: A PROFILE OF KEY PLAYERS & ORGANIZATIONS
- 10 KEY TRENDS SHAPING THE MARKET
- THE ESPORTS MARKET (2016-2021): GLOBAL & 10 SUBREGIONS
- RANKINGS: TOP COUNTRIES & EVENTS PER REGION
- EVENT CALENDARS PER TITLE
- THIRD-PARTY RESEARCH
- TERMINOLOGY & METHODOLOGY

REGION SCOPE

- NORTH AMERICA
 - LATIN AMERICA
 - EASTERN EUROPE
 - WESTERN EUROPE
 - MIDDLE EAST & AFRICA
 - CHINA
 - SOUTH KOREA
 - SOUTHEAST ASIA
 - REST OF ASIA
 - OCEANIA
- 10 SUBREGIONS

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

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Our landmark reports. In-depth market forecasts, and trends ensure you never miss an opportunity. Includes quarterly updates and access to our forecast dashboards.

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Metrics that come straight from the source. Track your market, optimize marketing, and product development while keeping an eye out for blue-ocean opportunities.

CONSUMER INSIGHTS

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STARTING AT \$25K



CUSTOM SERVICES

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STARTING AT \$50K



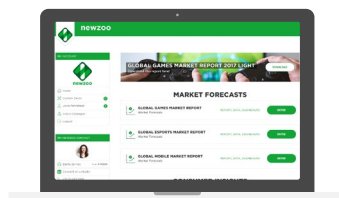
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Our ultimate subscription involving all our market intelligence, support, and expertise.

STARTING AT \$100K



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NEWZOO CLIENT PORTAL

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QUESTIONS?

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MARKET VS. BUSINESS INTELLIGENCE:

BRIDGING THE GAP
Newzoo now offers the majority of its market intelligence services in tableau, enabling clients integration with their business intelligence.