



**The introduction of
Japanese esports
gaming market
&
Wellplayed INC**



Yuya TANIDA

Representative director, CEO Wellplayed, Inc.

Mr. Tanida joined Kadokawa Contents Gate in 2010 and engaged in IP digital content production. After joining Marvelous in 2013, as a producer of smartphone application, he produced gaming titles for Asian market.

In November 2015, Mr. Tanida founded Wellplayed in order to boost Japanese esports market. Wellplayed has strengths in planning, consulting, and event management with a view from the player's and publisher's perspectives.

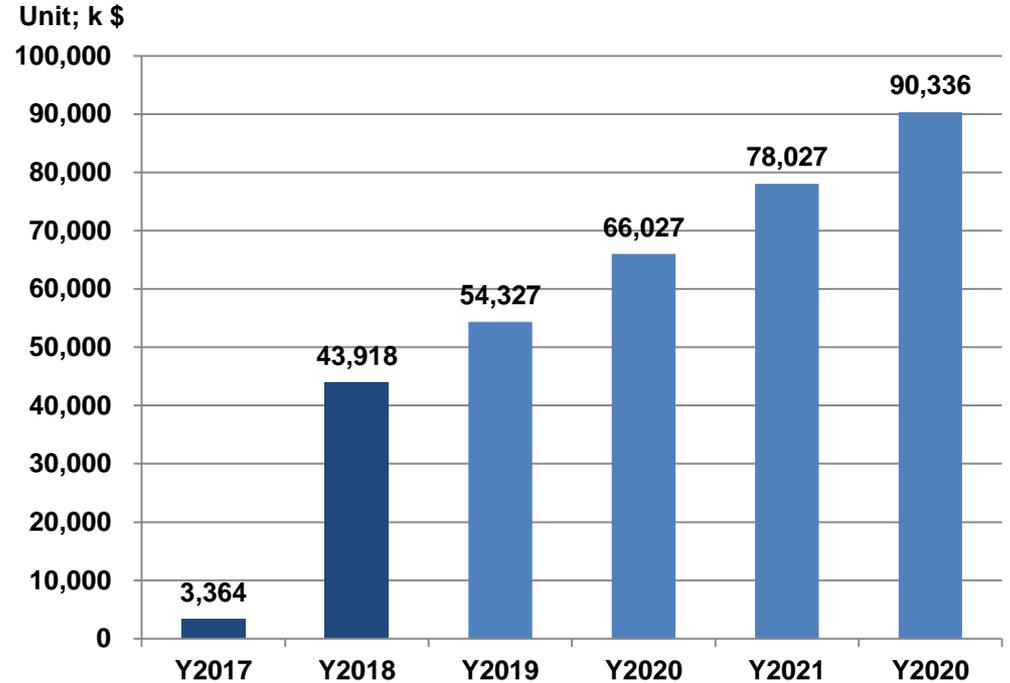
Mr. Tanida, himself, also an esports player. He was ranked 4th in Asia for Street Fighter 4 AE (Player name; Akahossy, Zangief)

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Japanese esports market

Market size

Japanese esports market has just begun. It is expected to grow rapidly next few years and will be over \$90M in 2020, Tokyo Olympic Game Year.



Sources; Gzbrain
1 USD = 110JPY

*Y2017/Y2018 Actual, After Y2019 Forecast

Characteristics

We believe that it is not easy to adapt the current business model of esports outside of Japan's to Japanese market directly. It should be modified to Japanese market.

GLOBAL

PC games are used as the global standard
“More Prize” “More Players” comes since PC titles are played all over the world.



Dota 2 『The International 2018』

Valve Corporation

Game Publisher organizes the esports Competitions

JAPAN

Console games and SP games are popular.
Game publishers just started to invest esports.

JeSU (Japan esports Union) was established in 2017, which built new “Professional License System” in order to solve regulative problems related with rewards and gambling.

Market potential

Japanese have been familiar with watching esports titles already!
A lot of influencers (streamers) upload the Let's Play Videos and attract a lot of Japanese audience.

Gamer Population
49.2 million

Let's Play Viewers
25 million



One of our cases

Youtube 「CLASH ROYAL LEAGUE Asia」

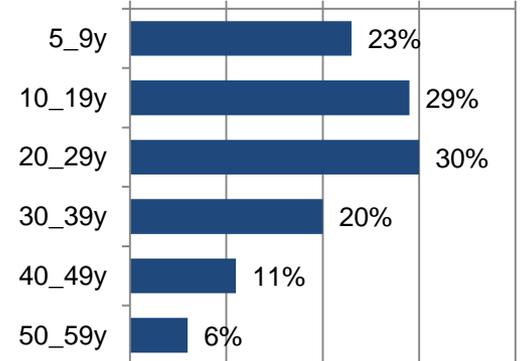
Youtuber, who is popular in Japan who knows "Clash Royal" well, introduces players and leagues. The number of viewers increased in a way that casual viewers and core viewers could all enjoy it, and it became the most popular league content in Japan

More than 25,000 concurrent connections.

This number shows this event is one of the most popular contents in JP.

Let's Play Viewers

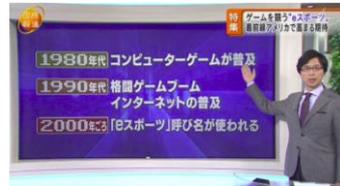
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Mass media coverage

NHK News

*National Broadcasting



TV *entertainment programs



Newspapers



Big PR opportunities toward 2020

Big opportunities for esports

Tokyo Olympic

August, 2020



National Sports Festival of Japan

From September, 2019 and every year



Asia Games

August, 2018



N高等学校

**Japanese Gold Medalist
“Wining Eleven”**

From Our Group Net School

Tokaigi 2018



“Tokaigi2018”

**The First
Pro-Licensed Events in Japan
Prized Tournament**

“IOC Official Event”



There are huge potential for esports in Japan

Watching
Playing Video



More than **25 million** people are watching Playing Videos.



Enjoying Casual games



49 Million Game Players are enjoying different kinds of games in Japan.



Game Communities
organize events



Users Communities are leading game events or competitions. They are still key players for game market in Japan.



PR methods of Japanese game publishers

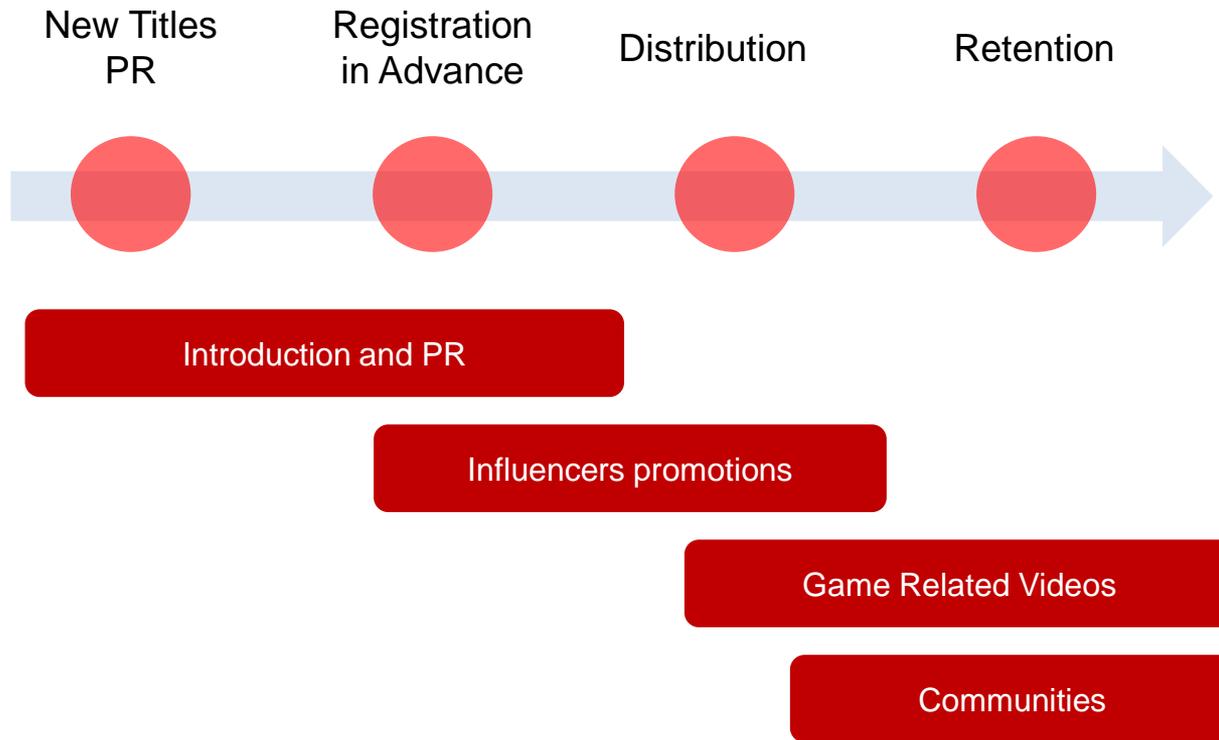
There are mainly 4 steps to promote the games in Japan.

Step1 ; New title PR shall be held on Game magazines and website.

Step2 ; Using influencers shall attract new users as well.

Step3; Game related videos shall motivate users to continue to play.

Step4; Communities are important. Once they become friends and create the communities, they have more motivations to continue it because they need “connections”.



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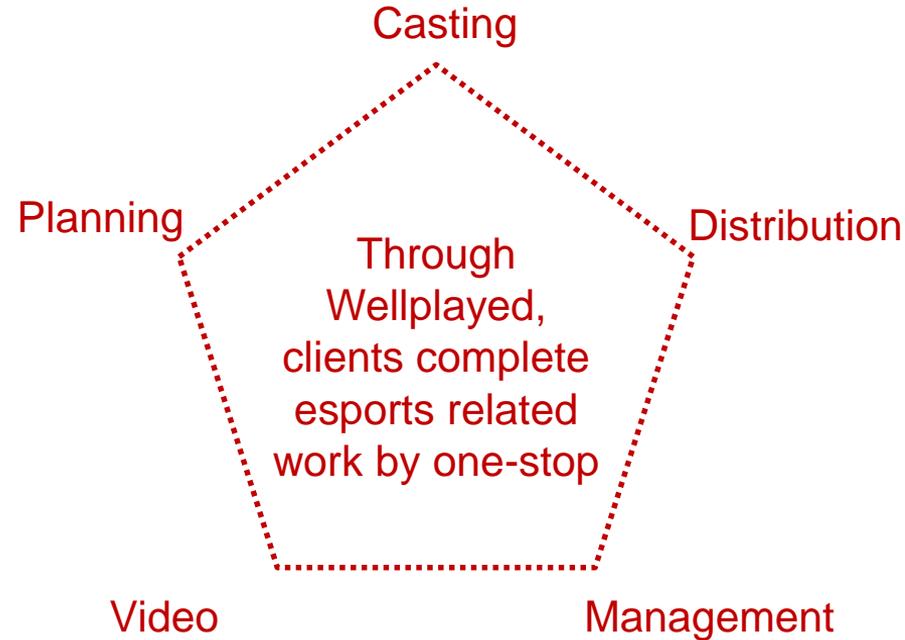
Overview of Wellplayed

What's Wellplayed Inc?

The first Japanese company specializing in esports

Event planning, contents production, tournament management, consulting etc.

Providing one-stop service in esports area



Create a reason for users to play long-run outside the game
Create various values beyond mastering the game

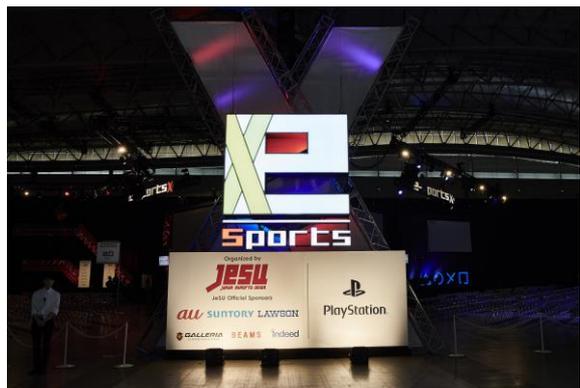
Nowadays, consumers can easily access to high-quality games for free. The gaming industry changing from making a reason to get it handed to **how to get the user's disposable time**. Gaming companies are exposed to a fierce battle, how to keep the time they acquired

What does it mean to keep playing this game?

What is the purpose of continuing this game?

We believe esports should be the one of the answers to create new value in keeping playing games

Wellplayed: making the best of Japan's e-sports scene



Tokyo Game Show 2018
esports-X Stage Produce



Clash Royale League
Asia Japan Region



TEKKEN TWT Japan
"Wellplayed Challenger"



Wellplayed League
X
Clash Of Clan



Thousands to tens of thousands of online qualifiers

Hero candidate born in offline tournament final

Through overseas tour and media interview, become real Hero



Kentsumeshi, who won in May, was invited to the Asian Crown Cup in China for his high performance. By closely documenting his overseas tour, he successfully distributed his activities and thoughts. As a result, a lot of his fans emerged, and he started a professional esports career.

The esports documentary, an engine for creating the next heroes

**SUP
ERC
ELL**