

# WELCOME TO



How to win the game when playing games?

15th of February 2020

Mika Kuusisto

CEO

ENCE Esports







## ENCE fan song “EZ4ENCE” tops charts and hits Valve

A fan song was released during the IEM Katowice CS:GO Major, which hit top of the charts in Finland, Sweden, Norway, Denmark, Poland and Czech Republic on Spotify. The song currently has 14 Million streams on Spotify and YouTube.

Song is also first ever team song implemented as a music kit to CSGO by Valve.

# ONE OF THE WORLD'S BEST CS:GO TEAMS

2019 saw ENCE break into the elite of CS:GO esports, with the team making a historic run into the finals of IEM Katowice 2019 CS:GO Major.

Throughout the year, the team had 6 finals appearances and won 2 championships along the way and at peak hit world ranking #2.





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JOONA "SERRAL" SOTALA WON 4 TITLES  
IN 2019 AND WAS NAMED THE WORLD'S  
BEST STARCRAFT II PLAYER 2<sup>ND</sup> YEAR  
IN A ROW

#EZ4ENCE



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# ENCE ENTERED PUBG ESPORTS IN 2019

ENCE signed a fully Finnish roster of o1ne in March, 2019 and the team competed in the PUBG European League played in Berlin, Germany.

We started out strong by winning PEL Phase 1 in a convincing manner. Through out the year, ENCE maintained its position as a main stay in the European League.





# OUR FANS IN KEY FIGURES

ENCE attracts "hard to reach" demographic of young adults, who's biggest media consumption comes through channels such as Twitch, YouTube and Instagram. Over 90% of our followers are male.

800K+

FANS ACROSS SOCIAL  
MEDIA PLATFORMS FOR  
TEAM AND PLAYERS  
CUMULATIVELY

80%+

OF OUR FANS ARE  
BETWEEN THE AGES OF  
18 AND 34

51%

OF OUR FANBASE  
FOLLOW ESPORTS EVERY  
WEEK\*

73,6%

OF OUR FANBASE  
CONSIDER THEMSELVES  
"SUPERFANS"\*



## How did we get here?

First line-up in 2013 – “The Vision”

ENCE Rebooted in 2016 – “The Truth”

4th time the charm – “Never give up”

From #193 to #30 in 3 months – “#EZ4ENCE”

Follow the vision and EXECUTE – “From a meme to a dream”

“Vision Without Execution Is Just Hallucination”  
— Thomas A. Edison





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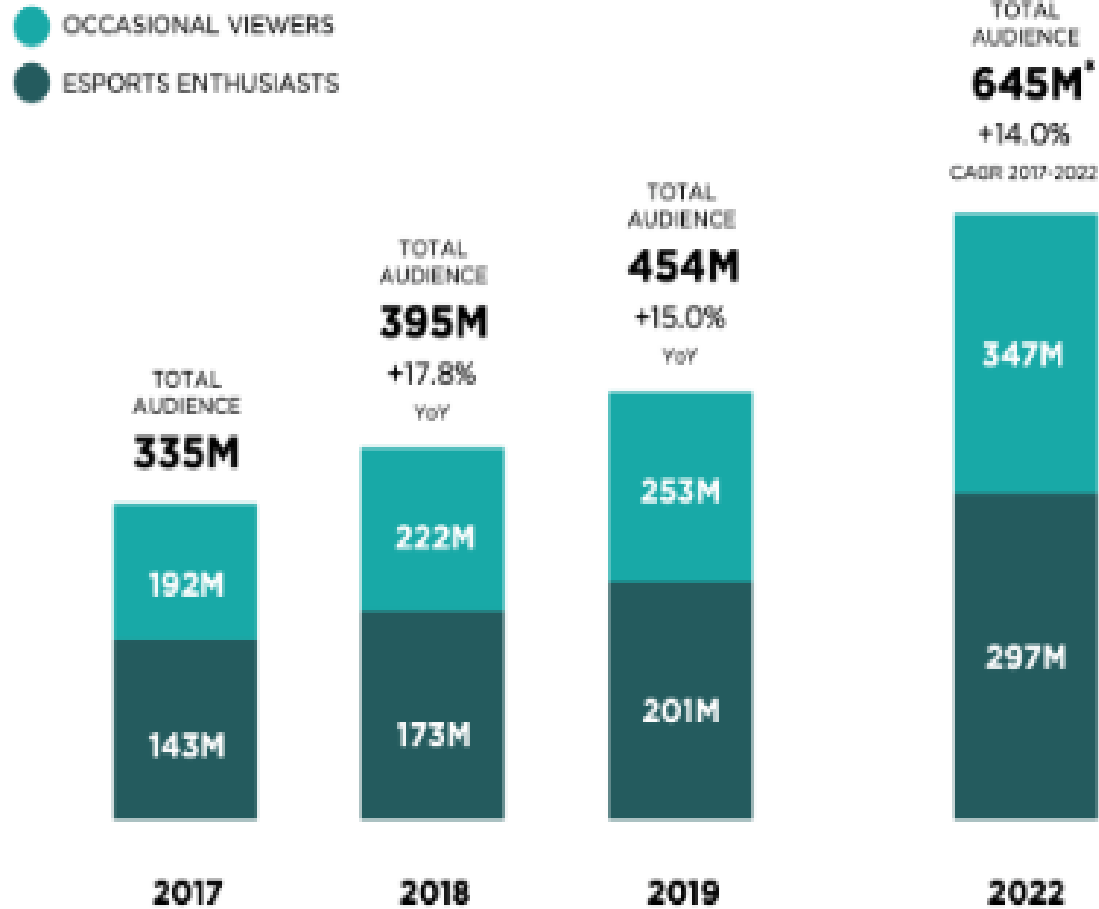
# ESPORTS AUDIENCE & REVENUE





# ESPORTS AUDIENCE GROWTH

GLOBAL | FOR 2017, 2018, 2019, 2022



\*Due to rounding, Occasional Viewers (347M) and Esports Enthusiasts (297M) add up to 645M.

©Newzoo | 2019 Global Esports Market Report

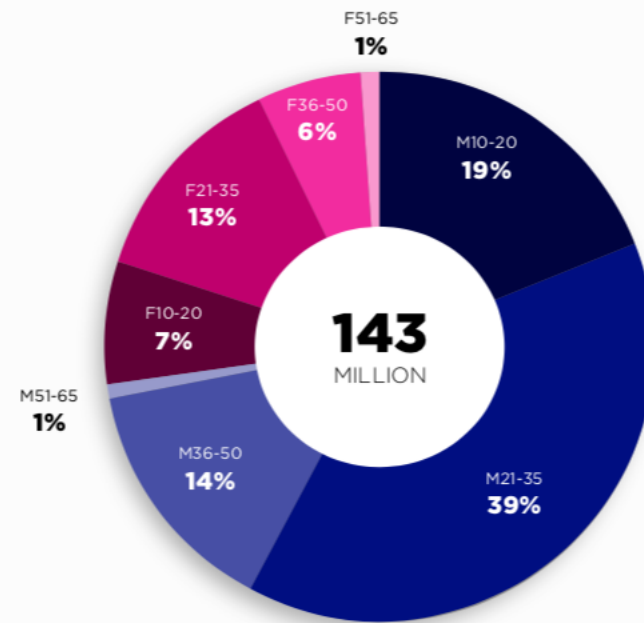




## AGE/GENDER

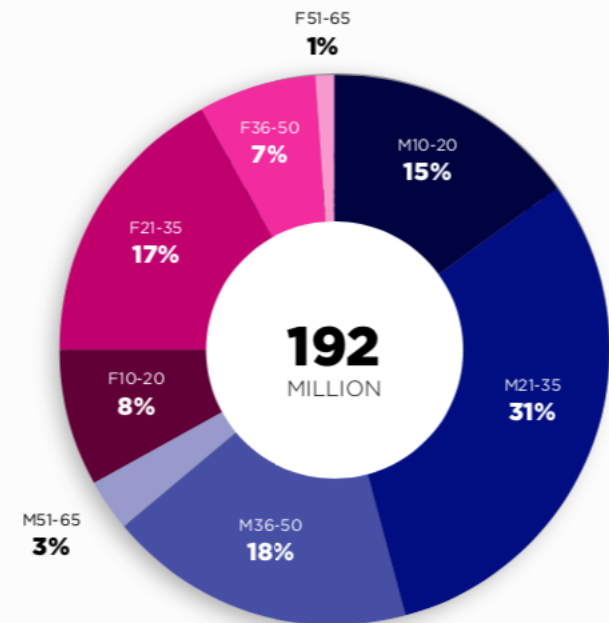
### ESPORTS ENTHUSIASTS

GLOBAL | 2017



### OCCASIONAL VIEWERS

GLOBAL | 2017



Source: Newzoo Consumer Insights





## 2019 ESPORTS REVENUE STREAMS | GLOBAL

INCLUDING YEAR-ON-YEAR GROWTH

**\$456.7M**

+34.3%



SPONSORSHIP

**\$251.3M**

+41.8%



MEDIA  
RIGHTS

**\$189.2M**

+14.8%



ADVERTISING

**\$103.7M**

+22.4%



MERCHANDISE  
& TICKETS

**\$95.2M**

-3.0%



GAME  
PUBLISHER FEES

**\$1.1Bn**

2019 total esports revenues,  
**+26.7%** year on year.

Newzoo's esports revenue figures always exclude revenues from betting, fantasy leagues, and similar cash-payout concepts, as well as revenues generated within games.

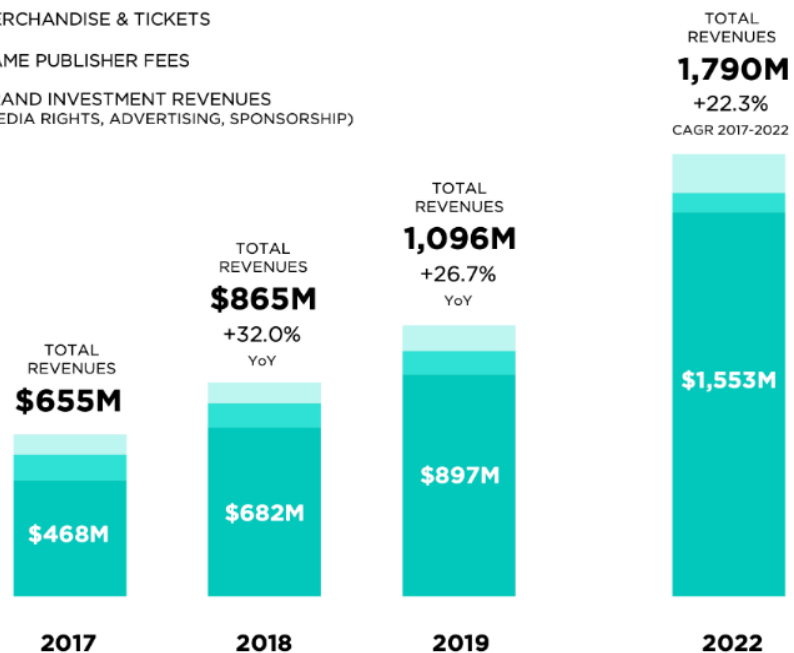
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## ESPORTS REVENUE GROWTH

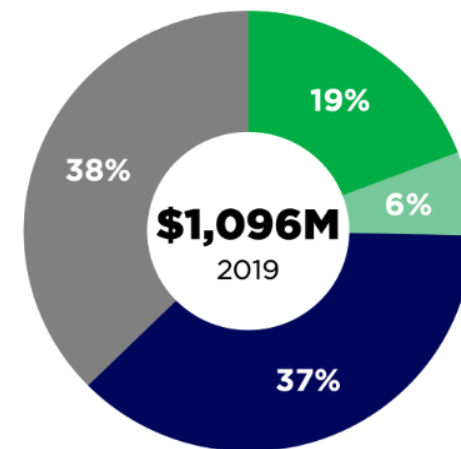
GLOBAL | FOR 2017, 2018, 2019, 2022

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



©Newzoo | 2019 Global Esports Market Report

North America  
will generate  
**\$409M**  
in 2019, or 37% of global  
esports revenues



● CHINA ● S.KOREA ● NAM ● REST OF WORLD



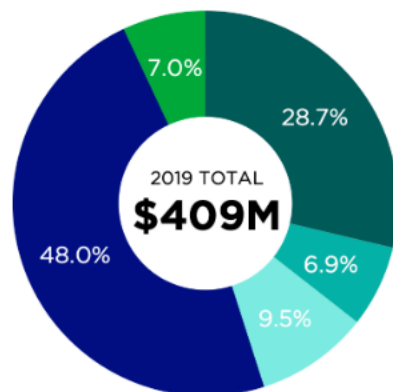


# 2019 GLOBAL ESPORTS ECONOMY

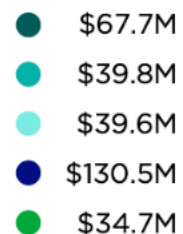
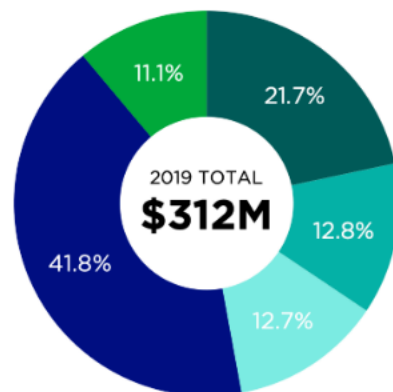
REVENUES FLOWING INTO THE ESPORTS ECOSYSTEM BY REGION

Media Rights   Merchandise & Tickets   Advertising   Sponsorships   Publisher Fees

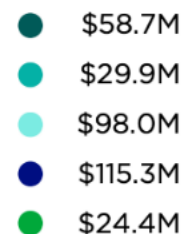
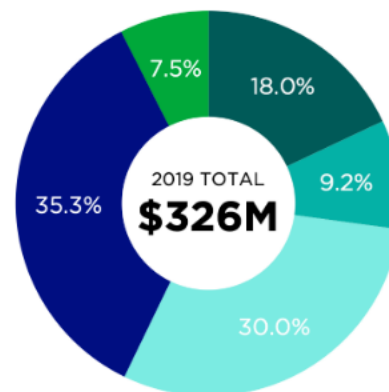
## NORTH AMERICA



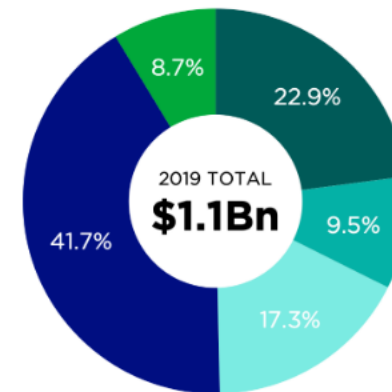
## EUROPE



## ASIA



## GLOBAL\*



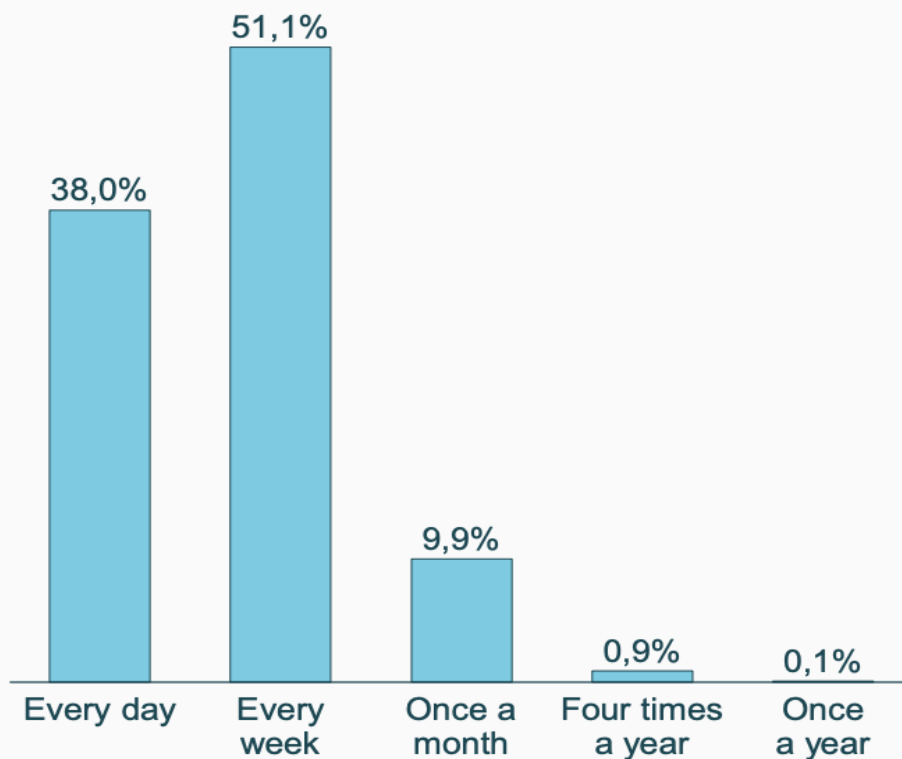
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# WHO IS ENCE FAN?



# ENCE FANS ARE DEEPLY ENGAGED

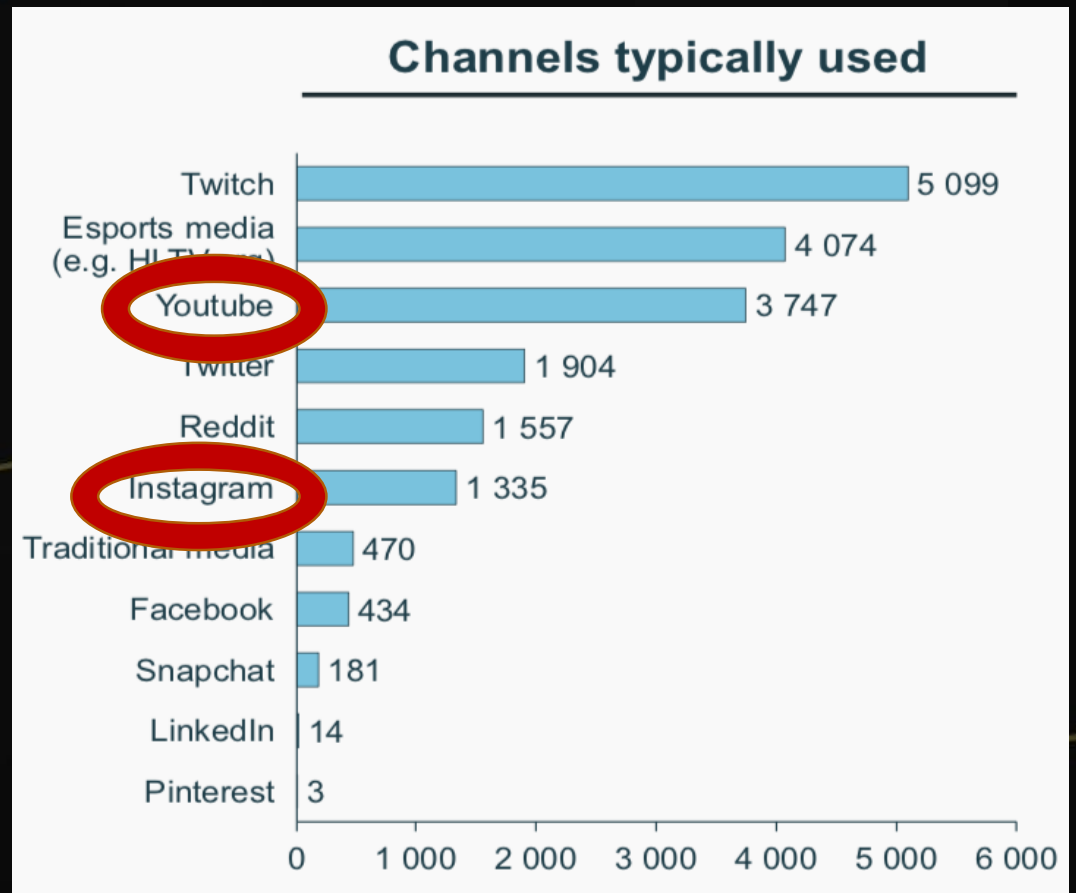
**Intensity of following esports**



- Based on a survey conducted by Aalto University in June 2019
- +6000 responses
- Merchandise delivered to +100 countries in 2019 to date
- Content being consumed regularly in +35 countries
- +80% between the age of 18-35
- +90% male



## What media ENCE fans use?







## Main channel differences

- Twitch = following tournaments and streamers
- Twitter = fan dialogue (also Discord!)
- Instagram = visual moments and stories
- Youtube = live the life of a pro

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WHERE'S #€4ENCE?





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# ENCE REVENUE STREAMS 2019

Sponsorships  
40%

Prize money,  
digital items  
35%

Merchandise  
15%

Other  
10%



# Brand integration is based on a hybrid between digital and analog assets



Earned media with physical products  
(Jersey)



Digital platforms with brand visibility

# Case TELIA: ENCE Recommendations & services

## HUIKEA LIITTYMÄETU ENCE:N FANEILLE





Tartu ENCE-fanien huippuetu! Juuri nyt saat Rajaton 200 M -liittymän etuhintaan 22 €/kk 12 kk, jonka jälkeen 32,90 €/kk. Lisäksi saat Asus ENCE XXL -hiirimatton (arvo 39 €) kaupan päälle. **Etusi yhteensä 133,80 €!**

Ole kuitenkin nopea - **tarjous on voimassa vain 30.4. asti.**

Tarjous koskee vain uusia numeroita ja numeronsiirtoja Telialle.

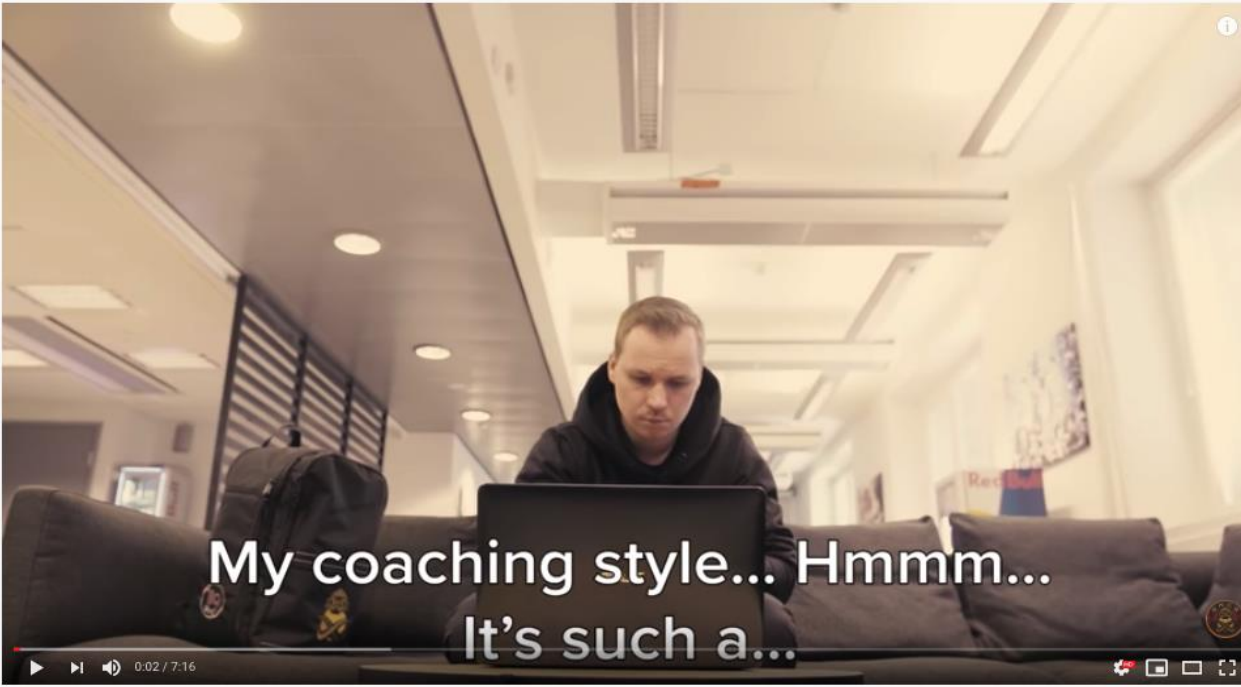
~~29,90~~ **22,00 €/kk**



Telia esports	Telia X ENCE	Assembly	Telia Esports Series	Pelilaitteet
<div>Asus</div> <div><b>ENCE XXL -HIIRIMATTO</b></div> <div></div> <div><b>39,00 €</b></div> <div>Tai osissa alk. 1,09 € / kk</div>				
<div>Samsung</div> <div><b>GALAXY S10E</b></div> <div></div> <div><b>799,00 €</b></div> <div>Tai osissa alk. 22,20 € / kk</div>				
<div>Samsung</div> <div><b>GALAXY S10</b></div> <div></div> <div><b>949,00 €</b></div> <div>Tai osissa alk. 26,37 € / kk</div>				
<div>Samsung</div> <div><b>GALAXY S10+</b></div> <div></div> <div><b>1049,00 €</b></div> <div>Tai osissa alk. 29,14 € / kk</div>				



# Case ASUS: “Philosophy of Coaching”



My coaching style... Hmm...  
It's such a...

#EZ4ENCE  
ENCE TV - Philosophy of Coaching - Slaava "Twista" Räsänen  
63,463 views · Apr 17, 2019

ENCE TV  
57.4K subscribers

We sat down with CS:GO team coach Slaava "Twista" Räsänen about his philosophy to coaching our Counter-Strike team. How does the process look like from his perspective and what type of help does he feel like he can deliver to the guys?

SHOW MORE

127 Comments SORT BY



# 10x Revenue Opportunity

## ESPORTS FAN

25 to 32 year old male  
High household income  
Not monetised  
Digital native  
Global audience  
Global games

## TRADITIONAL SPORTS FAN

+50 years old  
Median household income  
Fully monetised  
Analog  
Local audiences  
Local games

Spends 10x more than  
an esports fan

## WHY ESPORTS?

- Audience growth is non-questionable and only starting to head towards mainstream
- 18-30 years old male is very challenging to reach
- Audience is digital native → activities and activations are easily measurable
- Authenticity and fan involvement deliver sustainable results
- 10x immediate growth opportunity



# Mika Kuusisto

Chief Executive Officer



Thank you  
**#EZ4ENCE**