

GAMING TRENDS



GAMING AS A PLATFORM

Platforms such as Twitch and Steam now operate as social media platforms. These platforms can facilitate interactive experiences such as fashion shows, music, concerts and movie showings, providing numerous opportunities for sponsors and promoters.

5G PENETRATION

5G connectivity continues to roll out globally and by the end of 2021 it is forecast that 16% (more than 700 million) of all active smartphones will be 5G ready by the end of 2021. By 2023 this is expected to reach 2.1 billion. Enabling gaming anytime, anywhere.

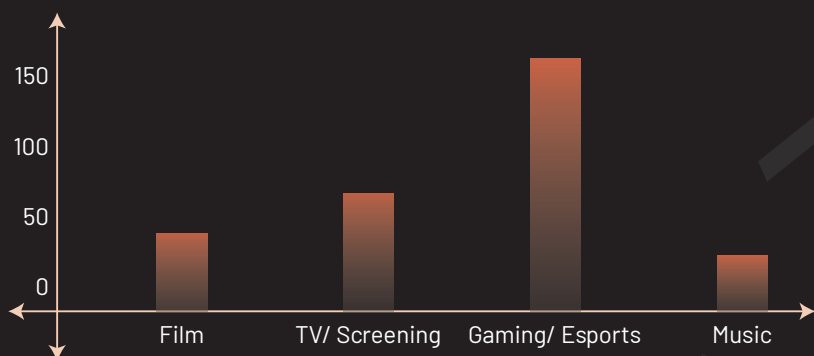
KEY STATS

- 2020 global gaming revenues were estimated at US\$159.3 billion. By 2023 this figure is expected to reach US\$200 billion.
- In 2020 there was 2.7 billion gamers worldwide. This is expected to grow to 3 billion by 2023.

Source: Newzoo's Global Games Market Report, 2020

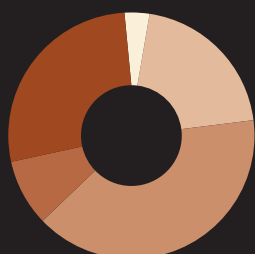
2020 INDUSTRY REVENUE

US\$ Bn 200



Source: Motion Pictures Association, Billboard

SEGMENT BREAKDOWN



Browser pc Games \$3.0 Bn -13.4% YoY	Smartphone Games \$63.6 Bn +15.8% YoY	Console Games \$45.2 Bn +6.8% YoY
Downloaded/ Boxed Games PC Games \$33.9 Bn +6.7% YoY	Tablet Games \$13.7 Bn +2.7% YoY	

Source: Newzoo's Global Games Market Report, 2020

ESPORTS TRENDS

TRADITIONAL SPORTS WILL INCREASINGLY LOOK TO ESPORTS

With pro sporting events being opened up behind closed doors or with limited crowds, sports organisations around the world – from the LA Lakers to Manchester United spent 2020 increasing their Esports presence.

ESPORTS AUDIENCE TO GROW

Esports is entering popular culture, in large part due to the social component of live streaming. In 2023 total viewership is expected to reach 650 million people. With younger audiences increasingly disengaging from traditional TV, marketers and promoters will increasingly see Esports and gaming as a vehicle to engage with younger demographics.

SPONSORSHIP GROWTH

By 2020 an estimated US\$1 Billion will be spent on Esports media rights and sponsorships.

KEY STATS

- Global Esports revenue grew US\$1.2 billion in 2020, a year on year growth rate of +15.7%.
- The global Esports audience grew to 495 Million in 2020, a year on year growth rate of +11.7%.

Source: Newzoo's Global Games Market Report, 2020

2019: SPORTS VS. ESPORTS PRIZE POOL

Rank	Name	Winnings	Game	Event
01	Rory McIlroy	\$15,000,000	Golf	FedEx Cup
02	Hossein Ensan	\$10,000,000	Poker	World Series of Poker
03	Rafael Nadal	\$3,850,000	Tennis	US Open
04	Topias "Topson" Taavitsainen	\$3,100,000	Dota 2	The International
05	Sébastien "Ceb" Debs	\$3,100,000	Dota 2	The International
06	Johan "N0tail" Sundstein	\$3,100,000	Dota 2	The International
07	Anathan "Ana" Pham	\$3,100,000	Dota 2	The International
08	Jesse "JerAx" Vainikka	\$3,100,000	Dota 2	The International
09	Kyle "Bugha" Giersdorf	\$3,100,000	Fortnite	Fortnite World Cup
10	Novak Djokovic	\$3,100,000	Tennis	Wimbledon
11	Simon Pagenaud	\$2,600,000	Racing	Indy 500
12	Tiger Woods	\$2,000,000	Golf	The Masters
13	Denny Hamlin	\$1,500,000	Racing	Daytona 500
14	Michael Van Gerwen	\$600,000	Darts	PDC Championship
15	Egan Bernal	\$550,000	Cycling	Tour De France

*Does not include NBA, NFL, MLB, NHL, MLS

Source: Gamingstreet.com

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P.A.C. Capital Global Esports Fund

The structural transition of gaming into both a social and competitive activity is creating numerous opportunities for investors within the Gaming and Esports space. Currently on market there are numerous passive Esports investment options. The P.A.C. Capital Esports fund is an Australian first, and one of only a few globally, offering active global equity exposure to the gaming and Esports thematic. The fund is a high conviction, concentrated portfolio of the most outstanding global gaming and Esports companies. The fund leverages sector opportunities by investing in the best opportunities (long and short) in gaming and Esports companies.

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