

Asia-Pacific Fantasy Sports - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Asia-Pacific Fantasy Sports Market is expected to register a CAGR of 14.07% during the forecast period.

Key Highlights

- The increasing popularity of players, the emergence of sports leagues, growing investment in digital and internet infrastructure, and the launch of fantasy sports applications as other means to connect with their favorite sports are some factors driving the market's growth.
- In recent years, the introduction of multiple sports leagues in badminton, football (rugby), basketball, and cricket has driven a shift in sporting culture. Technology advancements and increasing smartphone and internet penetration have accelerated the growth of sports in the Asia Pacific region. An enthusiastic fan base has emerged, with a growing number of people participating in, discussing, and competing in these sports, which has changed how fans engage in sports and fueling the growth of fantasy sports.
- Increased internet penetration and usage of low-cost smartphones among the urban and rural populations, and realization of monetization through revenue streams, like in-app purchases, pay-per-download, and subscription services, by gamers, and in-app advertisements, incentive-based advertisements, etc., by the ecosystem, have been driving the growth of fantasy sports market.
- Awareness about the legality of fantasy sports is expected to encourage the participation of more users. At the same time, fantasy sports operators are also starting to promote their products intensively and making conscious efforts to preserve and maintain the credibility of their website or application by partnering with official sports leagues.
- During the beginning of the COVID-19 pandemic, many live sports were put on hold, and had to deal with a consequent financial fallout. Various platforms and operators for fantasy sports have expanded owing to increased audience engagement, leagues, and clubs, which has driven the market's growth. After the pandemic, many live sports have resumed, and the market has rapidly

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grown.

APAC Fantasy Sports Market Trends

Ease in Internet Access and High Smartphone Penetration Drives the Market Growth

- One of the major market drivers for online gambling and fantasy sports is the convenience offered compared to other channels, particularly when betting is conducted through a connected mobile device such as a smartphone. Bets are placed through computers, smartphones, and other connected devices through the internet. With the increase in the proportion of bettors who place a bet using mobile internet, there are increasing growth opportunities for the market.
- All major fantasy sports competitions are computer and internet-enabled. There are three main mechanisms for protecting computerized systems: patents that confer exclusive commercial rights on the owners of inventions that are new, useful, and innovative; copyright that confers exclusive publication, distribution, and usage rights upon the authors of original literary and other works and subject matter, including computer programs and databases; and trade secrets protection that allows for an action for breach of confidence to be brought where confidential commercial information is at risk of misuse.
- In Asia, according to Eurostat and United Nations, China had the highest number of mobile connections in February last year, with 1.63 billion connections, followed by India with 1.1 billion connections. Australia had 31.89 million mobile connections as of February last year. However, Australia has one of the highest penetrations of smartphones and is expected to reach 80.1% by 2025. Australia has a share of 5% of 5G mobile connections of total connections in 2020, which is expected to reach 59% by 2025. Similarly, South Korea and Japan's 5G connections are expected to increase to 73% and 68% by 2025.
- Patents provide superior protection of computer-related inventions because, unlike copyright, which protects the code of a computer program from being copied, and trade secrets that prevent employees from disclosing commercially valuable confidential information, patents can be enforced against competitors who use the patented technology, regardless of whether the competitor independently developed the technology without copying, learned of the technology from a dishonest employee, or developed it by reverse engineering.
- GSMA stated that the surge in the volume of mobile internet consumers is expected to be complemented by a five times increase in data consumption. Hence, the market is expected to be enhanced with a young population, high internet volumes, engaged online users, and improved paying propensity by the previous year. According to Ericsson, the 5G mobile subscription in North East Asia in the current year is expected to be 1029.18 million.

India is Expected to Witness Fastest Growth

- Sports in India are undergoing significant change, and given India's massive fan base and economic muscle, the future holds massive potential for sports-related activities. The previous year, the Indian Union government set up an inter-ministerial panel to regulate online gaming and formulate a mechanism to determine whether a game format is skill-dependent. In India, the popularity of online gaming, especially of online fantasy sports platforms (OFSPs), can be estimated readily through the Indian Premier League (IPL). The rapid growth of the market in recent years has been supported and validated by the IPL. In IPL last year's edition, Lucknow Super Giants, one of the two new teams, had 'My 11 Circle', an online fantasy sports platform, as the principal sponsor.
- According to the Indian Government's NITI Aayog discussion draft, fantasy sports are expected to attract FDI of almost INR 10,000 crore (USD 1224 million) over the next few years, generating more than 5000 direct and 7000 indirect jobs in the short to medium-term. Such instances are expected to drive the market's growth in the region.
- In addition to cricket, many fantasy sports platforms in India provide contests for sports such as kabaddi, soccer, hockey, etc.

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Since performance in these sports requires one to be relatively well-versed in the sport, the addition of kabaddi, soccer, car racing, hockey, etc., in sports leagues is expected to drive the market's growth. According to the Federation of Indian Fantasy Sports, the number of registered fantasy sports users in India was approximately 160 million.

- India has one of the biggest fan bases for cricket, with matches attracting massive betting in India. Illegal networks primarily manage offline sports betting in India. However, online sports betting has been gaining prominence in recent years, as fantasy sports betting offers transparent platforms with several options to place bets on different sports events. The fast-streaming data about live sports events can also help these bettors make informed choices. Dream11, MPL (Mobile Premier League), Halaplay, MyTeam11, and CricPlay are some of the fantasy sports apps in India.
- Further, the Federation of Indian Fantasy Sports (FIFS), a self-regulatory industry body founded by Dream11, stated that participants under 18 are not allowed to use their apps. Participants also need to comply with "Know Your Customer," or KYC, guidelines, which are used for verifying a person's identity. Additionally, as fantasy sports sites only accept digital payments, game users must be financially independent and have access to digital banking tools. Due to the market's expansion, this further strengthens the transparency and traceability of funds.
- In March last year, EarnU, a crypto-friendly fantasy sports platform, entered the Indian market ahead of the Indian Premier League (IPL). The platform provides a play-to-earn experience to the audience across various sports and e-sports based on prediction games. The platform allows users to make predictions online on a sport and earn rewards for correct predictions on major sports and e-sports.

APAC Fantasy Sports Industry Overview

The Asia-Pacific fantasy sports market is moderately fragmented. The companies utilize strategic collaborative initiatives such as partnerships, mergers, innovations, and investments to increase their market share and profitability. However, with technological advancements, smaller to mid-size companies are increasing their market presence by securing new contracts and tapping new markets.

In October 2022, Mumbai City FC, an Indian Super League (ISL) team, announced a new exciting partnership with Dream Sports Group, India's leading fantasy sports website. Dream11 has been appointed the team's official fantasy sports partner for the league's current season.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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