



BRITISH
ESPORTS
ASSOCIATION

Esports: The world of competitive gaming

An overview

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What is esports?

Esports (electronic sports) is competitive video gaming, where people play against each other online and also at spectator events in indoor arenas, usually for a cash prize.

Esports is played by both amateurs and professionals and tournaments are usually mixed gender. Esports can be played on PCs, consoles and mobiles.

Depending on the game, the format can be 1v1, 3v3, 4v4, 5v5 and 6v6. At the top level, leading global teams and players can earn significant sums in wages and prize money each year.

There are currently around 30 different recognised esports titles, including:

- ◆ Multiplayer online battle arena (MOBA) games such as League of Legends and Dota 2
- ◆ First-person shooters (FPS) like CSGO, Call of Duty and Overwatch
- ◆ Fighting games like Street Fighter and Smash Bros
- ◆ Sports-based titles including FIFA, PES and Forza and more



WHAT IS ESPORTS?

Is it a game, is it a sport?

- ◆ Each country classifies esports differently: a sport, a game or a 'mind sport'
- ◆ Esports falls under various Ministries depending on the country: Sport, Culture, Digital, Youth and Education
- ◆ In the UK esports is 'classified' as a game (like chess and bridge)
- ◆ Some consider esports a sport as it involves humans competing against one another and there are elements similar to sport, for example teams, fans, arenas, merchandise
- ◆ There are over 45 established national esports associations. Some have been recognised by their Sports Ministry and have national teams
- ◆ Esports will feature at the 2022 Asian Games as a medal event



HOW BIG IS IT?

A £1 billion industry

Global esports revenues are set to reach around **\$700 million in 2017**, doubling over the last two years, with around \$110 million coming from Western Europe.

Esports revenues are on an upward projection and are expected to reach **\$1.5 billion by 2020 (£1bn+)**.

Analysts estimate there are around **400 million viewers** globally in 2017, and this is set to rise to 600 million in 2020.

A YouGov report found that **35% of British adults (18.3m people) are aware of esports**, while 7% (3.6m) have watched it.

In 2016 there were 100 professional tournaments globally, with some having huge prize pools. The Dota 2 International had a **\$20 million+ prize pool** in 2016, with the winning team of five players winning \$9 million (\$1.8 million each).

HOW IT WORKS?

Who sets the rules?

The publishers and developers set the rules – and penalties - within their own games, and either approved third-party tournament organisers or the publishers themselves will enforce these during tournaments. Some games, such as CSGO and Call of Duty, are age protected, for example the latter is 18+.

There are organisations like the Esports Integrity Coalition (ESIC), a not for profit members' group who set recommendations to prevent match manipulation, betting fraud and doping. Others like the World Esports Association (WESA) have attempted to develop elements of regulation and player representation for certain leagues.



Photo credit: Multiplay/Katy Eyre/iEventMedia

WHO WATCHES?

78%

of viewers are male

65%

Over half of Esports enthusiasts are high income earners according to Newzoo and 65% have full time jobs

Accustomed to buying "merchandise"

33%

have purchased in-game items

20%

have bought either physical or virtual event tickets

60%

are aged between 16 and 30

40%

indicate they are likely to attend an Esports tournament

15%

have paid for Esports related apparel

KEY PLAYERS

Broadcasting revolution



- Twitch is the market leading online streaming platform with over 100m viewers a month
- Bought by Amazon in 2014 for \$950 million
- 75% of users are male, 73% are aged between 18-49
- Fans watch esports matches and other game content
- Traditional broadcasters like BBC, Sky & BT Sport have experimented with various esports content

Featured Games Games people are watching now



Counter-Strike: Glo...
460,873 viewers



[League of Legends](#)
258,019 viewers



The Legend of Zeld...
85,736 viewers



Hearthstone
40,034 viewers



Heroes of the Storm
39,431 viewers



Dota 2
27,989 viewers



Overwatch
25,988 viewers



FIFA 17
21,717 viewers



PLAYERUNKNOWN...
20,477 viewers



H1Z1: King of the Kill
18,013 viewers

KEY PLAYERS

Players and teams

There are hundreds of professional esports players (those contracted and salaried) in the world at the moment. The number of UK professional esports players is low, estimated at less than 100.

At a more amateur level, prize pools in UK vary from a few thousand pounds to nearer £20,000 for the top grassroots tournaments.

Some of the most well-known esports teams include Optic Gaming, Evil Geniuses, Team SoloMid, Cloud9, SKT, NRG and Immortals. Teams can be bought and sold for millions, with investment coming from VCs, celebrities and sports clubs.

The biggest esports orgs in the UK include Fnatic and Team Dignitas (with the latter being acquired by a consortium backed by North American basketball brand Philadelphia 76ers in 2016).



KEY PLAYERS

Behind the scenes

There are **many different organisations** involved in esports, from games developers, to tournament organisers, venues, teams, platforms and advisory services.

In terms of **developers and publishers**, some of the most well-known include Valve, Riot Games, Microsoft, Activision Blizzard, Capcom, Hi-Rez Studios and EA Sports.

Major **tournament organisers** include ESL, Major League Gaming (MLG), ELeague, DreamHack, Gfinity, Multiplay and others such as Facelt, which has held the ECS CSGO finals at Wembley SSE Arena.



The British scene

Within Britain, tournament organisers include Gfinity, Facelt/ECS, Multiplay/GAME and ESL UK, who all have their own offices and studios based here. Tournaments include the Gfinity Elite Series, Multiplay UK Masters, ESL UK & Ireland Premiership and more.

Other organisations like EGX also host events in conjunction with tournament organisers. There are other grassroots initiatives like epicLAN.

Retailer GAME recently opened a series of 'Belong' stores focused on competitive gaming. Different stores around the UK take part in esports competitions against one another.

Big venues used for esports in Britain include the Wembley SSE Arena, Birmingham NEC, London Excel and the O2 Arena (Indigo room).



Some parts of global tournaments are sometimes (but not permanently) based here, for example the League of Legends World Championship, Call of Duty World League, ESL CSGO Pro League, ECS CSGO Finals and the Vainglory Spring Championship (pictured).

Other companies and brands

Apart from Twitch, other platforms such as YouTube, Facebook and Facelt are used in the esports world.

Many large sports clubs are involved with esports and have bought existing teams or hired their own players over the past year, including West Ham, Philadelphia 76ers, Miami Heat, Schalke, PSG, Manchester City and others.

There are other types of other companies involved in esports, such as legal practices, publications, sales, marketing and talent agencies to content production companies and more.

Several bodies have been established, including the Esports Integrity Coalition, the World Esports Association, the Professional Esports Association and national associations around the world, like the British Esports Association.

More and more brands are getting involved in esports as it taps into a key 16-30 demographic, and even younger than that.

Endemic and non-endemic sponsors are investing in esports, including HP, Coca-Cola, Red Bull, Disney, Lionsgate, ESPN, American Express and more.



THE BENEFITS OF ESPORTS

The positives

Research shows playing esports can help:

- ◆ Increase perceptual and cognitive skills
- ◆ Decision making, reaction times and multitasking
- ◆ Stimulate brain growth
- ◆ Positive social and communication benefits
- ◆ Promote teamwork and develop communities
- ◆ Provide cyber and transferable skills
- ◆ Improve dexterity and concentration
- ◆ Provide a number of intrinsic emotional rewards - making you happy!

Esports is very engaging with younger audiences in particular, and esports, when done in moderation, is also a beneficial alternative to watching passive media like television or using social media.

Playing esports requires quick thinking and involves the participant directly, and there is a strong sense of community.



Photo credit: Multiplay/Sammy Lam/iEventMedia

THE BENEFITS OF ESPORTS

Education, education, education

Schools, colleges and universities are starting to take notice of the needs of this industry. Some have started to introduce esports modules into their courses, including establishments in Canada, Sweden, the US and others.

What's being planned in the UK:

- ◆ Staffordshire University has introduced the first full BA (Hons) Esports degree in the UK, starting in September 2018.
- ◆ The University of York and University of Leicester have partnered with ESL to add aspects of esports to some of their courses. De Montfort and Coventry universities are also exploring the idea of esports modules in their courses, while SCL is looking at esports.
- ◆ Qualification provider AIM is looking at adding esports to some of its existing Higher Education courses (Level 2/3).
- ◆ The British Esports Association and Ukie also sit on the London South East Colleges Digital Skills Advisory Board.
- ◆ More than 100 UK universities are part of the National University Esports League, which runs tournaments for students to take part in.



THE BENEFITS OF ESPORTS

Forging career paths

Esports is creating thousands of new jobs across the world. This, in turn, is creating a fresh demand for people with specific skills.

Esports job roles: A snapshot

- ◆ Professional player
- ◆ Coach
- ◆ PR/Marketing executive
- ◆ Sales/partnerships manager
- ◆ Business management
- ◆ Production crew
- ◆ Shoutcaster/host
- ◆ Journalist/content creator
- ◆ Product manager
- ◆ Admin/referee
- ◆ Community/social media manager
- ◆ Event manager

Leading global teams and players can earn significant sums in wages and prize money. More and more pro teams are also employing nutritionists, fitness staff and psychologists.

PRO TOURNAMENT



THE DOTA 2 INTERNATIONAL 2017
PRIZE POOL \$24.7M

DEDICATED ESPORTS ARENA

**BRITISH
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GFINITY ELITE SERIES 2017, LONDON

Who are the British Esports Association?

We are a not-for-profit organisation established in 2016 to support and promote esports in the UK.

As a national body, our aims are to foster future British talent, increase the awareness of esports and provide expertise and advice. We are focused on the grassroots level of esports and are not a governing body.

We hope to help educate the masses – including parents, teachers, media and government – around what esports is and its benefits.

We are a member of Ukie and the Sport and Recreation Alliance.

Our three goals are to **Promote, Improve and Inspire.**

- ◆ **Promote** esports in the UK and increase its level of awareness
- ◆ **Improve** the standard of UK esports
- ◆ **Inspire** future talent





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www.britishesports.org