



BRITISH
ESPORTS
ASSOCIATION

Esports: The world of competitive gaming

An overview

July 2019

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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 is inclusive. It's open to all, regardless of gender, physical ability and so on. Esports can be played on PCs, consoles and mobiles.

Depending on the game, the format can be 1v1, 2v2, 3v3, 4v4, 5v5, 6v6 and so on. At the top level, leading global teams and players can earn significant sums in wages and prize money each year.

There are currently around 40 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, Rocket League and sim racing games like F1 and more



WHAT IS ESPORTS?

Is it a game, is it a sport?

- ◆ Each country classifies esports differently: some like Poland recognise it as a 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
- ◆ The International Olympic Association (IOC) has been studying esports in recent years



A £1 billion industry

Global esports revenues are set to reach around **\$1.1 billion in 2019**, a year-on-year growth of 26.7%.

Esports revenues are still on an upward projection and are expected to reach **\$1.8 billion by 2022 (£1bn+)**.

Analysts estimate there are around **450 million viewers** globally in 2019 – equating to some 200 million enthusiasts and 252 million occasional viewers.

A YouGov report back in 2017 found that **35% of British adults (18.3m people) are aware of esports**, while 7% (3.6m) have watched it.

Hundreds of tournaments take place every year, with some having huge prize pools. The competition with the largest prize pool is the Dota 2 International, which had a **\$25 million+ prize pool** in 2019. Bear in mind amateur tournaments tend to have prizes that are a far cry from the likes of this, usually in the thousands rather than millions.

Sources: Newzoo unless stated otherwise

HOW IT WORKS?

Who sets the rules?

The game publishers and developers set the rules – and penalties – within their own games, while 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+. You can see the latest version of [British Esports' age guide here](#).

There are also organisations like the Esports Integrity Coalition (ESIC), a not for profit members' group who set recommendations to prevent match manipulation, betting fraud and doping.



Photo credit: Multiplay/Katy Eyre/iEventMedia

KEY PLAYERS

Broadcasting revolution

- Twitch is the market leading online streaming platform with over 15m unique daily visitors
- Fans can watch esports matches, streamers and other game content
- It was bought by Amazon in 2014 for \$950 million
- 81.5% of Twitch users are male, 55% are aged between 18-34
- Traditional broadcasters like BBC, Sky & BT Sport have experimented with various esports content

Popular categories



Dota 2
147K viewers
MOBA



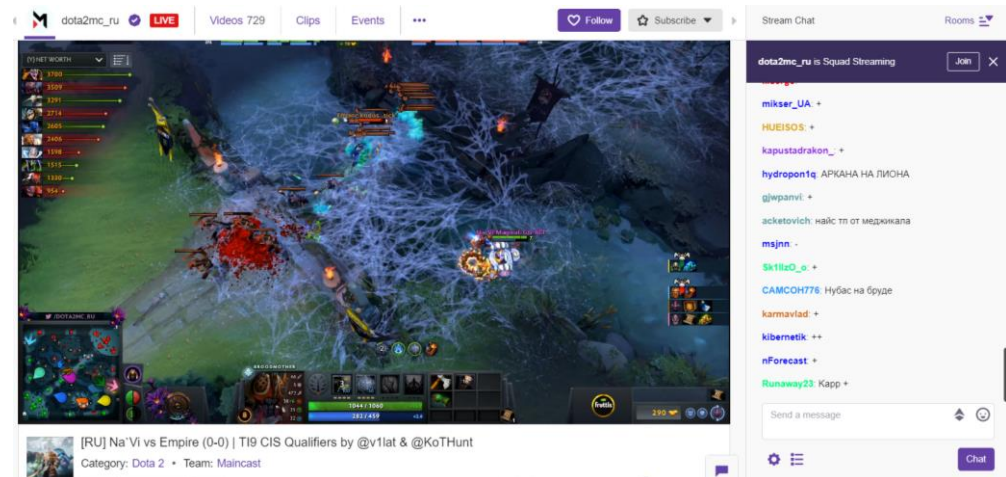
Teamfight Tactics
114K viewers
Strategy



Fortnite
113K viewers
Shooter



Just Chatting
102K viewers
IRL



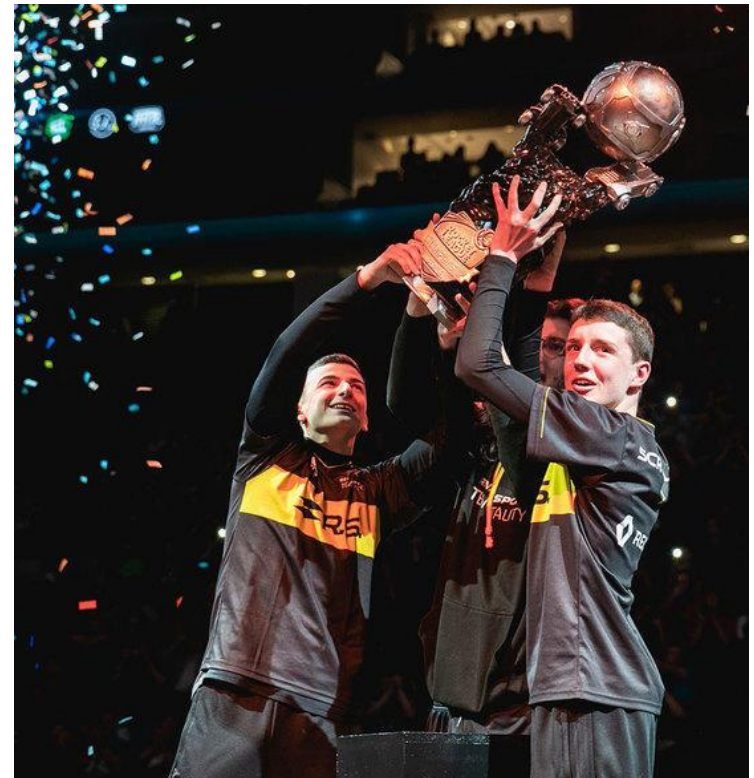
Players and teams

There are hundreds of professional esports players (those contracted and salaried) in the world. 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 and more. Teams can be bought and sold for millions, with investment coming from venture capitalists, funds, celebrities and sports clubs.

The biggest esports orgs based in the UK include Fnatic and Excel Esports.



Team Renault Vitality win the Rocket League Season 7 finals with British player Kyle 'Scrub Killa' Robertson (pictured right)

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, Epic Games and EA Sports.

Major **tournament and event organisers** include ESL, Major League Gaming (MLG), ELeague, DreamHack, Gfinity and others such as Facelt, which has held the ECS CSGO finals at Wembley SSE Arena as well as the Facelt Major in 2018.



The British scene

Within Britain, tournament organisers include Gfinity, Facelt/ECS, GAME and ESL UK, who all have their own offices and studios based here.

Other organisations like EGX also host events in conjunction with tournament organisers. There are other grassroots initiatives and LANs like epicLAN and Insomnia Gaming Festival.

Retailer GAME has 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 Arena Birmingham.



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

Other companies and brands

Apart from Twitch, other platforms such as YouTube, Facebook, Mixer, Caffeine and more are involved 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 few years, 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, as well as 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. Some of these have joined the European Esports Federation.

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

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. It's an exciting team activity that has links to computing education, STEM subjects and the development of digital skills.

Research shows playing esports can help:

- ◆ Promote character development
- ◆ Increase perceptual and cognitive skills
- ◆ Decision making, reaction times and multitasking
- ◆ Boost social and communication skills
- ◆ Promote teamwork and develop communities
- ◆ Provide cyber, digital and other transferable skills
- ◆ Improve dexterity and concentration
- ◆ Increase student attendance levels
- ◆ Provide a number of intrinsic emotional rewards - making you happy!



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 happening in the UK:

- ◆ Staffordshire University introduced the first full BA (Hons) Esports degree in the UK, which started in September 2018
- ◆ Many other universities and colleges are getting involved. The University of Roehampton has a UK esports scholarship, Teesside University is offering an MA in esports and Leeds United Sports college has an esports academy to name a few. [There's more info here.](#)
- ◆ Qualification provider AIM added 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 have esports teams, which take part in tournaments hosted by the likes of the NUEL and NSE



THE BENEFITS OF ESPORTS

Forging career paths

Esports has created 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

BRITISH
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THE CS:GO FACEIT LONDON MAJOR —
SEPTEMBER 2018

BRITISH ESPORTS CHAMPIONSHIPS

BRITISH
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BRITISH ESPORTS CHAMPIONSHIPS FINALS – APRIL 2019

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

We run the British Esports Championships for schools and colleges

We are a member of Ukie, the Sport and Recreation Alliance, the Welsh Sports Association and the Creative Industries Federation.

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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