eSports Education Scans and Research

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Executive Summary

It is hard to imagine, but only a decade ago, almost no one would have foreseen that eSports would become the billion-dollar business it is today. eSports and its related activities are growing exponentially, drawing fans, developing talents, attracting major investors and sponsors, formalizing governing bodies. The global eSports economy is on track to exceed the $1 billion dollar mark for the first time in 2021*

Academic institutions are vying for relevance and market share in this burgeoning industry. They are raising funds from ticket sales, media rights and merchandising, continually buying and selling teams and players, building state-of-the-art training facilities, and growing their fan bases through increasingly sophisticated marketing efforts.

Like their traditional sports counterparts, scholarships are now being offered, stadiums are being built, and training regiments are being developed that rival anything else in a college-level sports program.

Despite this massive growth and popularity, there remains an entrenched skepticism about what eSports is and the benefits it can have for academic programs.

This report aims to provide a wide variety of insights and examples of what eSports could offer to a post-secondary institution (PSI) and provide a roadmap and recommendations for possible implementation at RRC Polytechnic (RRC). While our research and interviews yielded many different ways in which eSports could be implemented at a PSI one singular conclusion became apparent
- *eSports is too big and too popular to ignore.*

*https://www.vancouvereconomic.com/wp-content/uploads/2021/02/Vancouver-eSports-Strategy-2021-Desktop-Spreads.pdf

eSports: an Overview

Is it a Sport?

Before proceeding, it is essential to qualify what eSport is as there are various interpretations of that definition. With eSports encompassing so many different components, it can be challenging to find one perfect summation. Furthermore, misperceptions further complicate whether it is, in fact, even a sport at all. It is only natural then to have many competing opinions about its definition.

To address the question of is a sport or isn't we should first look at how to define sport itself and some of the bias that we attach to that definition.

The Global Association of International Sports Federation defines a sport with four criteria:
1. *Is it physical?*
2. *Does it have accepted rules?*
3. *Is it competitive?*
4. *Does it have a global governing body?*

eSports currently meets all of these criteria to varying degrees. The amount of physicality in the actual game play is minimum, but the amount of physical conditioning required of top eSport athletes is not. This argument of a sport requiring an intense physical component overlooks activities like bowling, darts, F1 racing and many other popular activities. This narrow definition also serves to act as a gatekeeper for an activity that has already surpassed most traditional sports in popularity and players.

Based on the GAISF's definition it is safe to conclude that **we eSports meets the threshold to be considered a sport.**

What is eSports?

For the sake of this presentation, eSports will be defined as:

The professional or semi-professional competitive video gameplay in an organized format (tournament or league) with a specific goal/prize, such as winning a championship title or prize money.

This definition does not include the myriad other industries, education, activities, and supports surrounding that single central component but simplifies the core activity easily.

An excellent way to understand eSports' true scope and potential from an academic perspective is simply removing the "e." We are all aware that a successful sports program requires a substantial investment and commitment from post-secondary institutions, from coursework to facility, staff, and league play. The same applies to eSports.

With this common baseline of knowing what eSports is and accepting it as a legitimate sport, we can begin to understand what it might represent for RRC.

Why eSports?

As long as video games have been around, their effects on young people have been debated. eSports, where players (and teams)compete for an audience, is where the competitive and social aspects of gaming intersect. The positive impacts of gameplay and its massive global following are making eSports more respected and accepted by wider communities, including academic institutions.

What that implementation looks like across organizations varies greatly depending on budget, commitment and experience.

eSports lacks the physical exercise component of traditional sports which accounts for much of the reluctance to accept it as a true sport. When educators realize the amount of training, time and resources it takes to compete at a high-level, that reluctance starts to breakdown.

While eSports doesn't require physical perfection, it does provides a mental workout comparable to chess. It's other cognitive benefits are well documented but some of the highlights include:

- Hand-Eye Coordination
- Math Skills
- Critical Thinking
- Focus and Concentration
- Technology Skills
- Team Building

Contrary to the widespread misperception that games are a solitary pursuit, eSports encourages social engagement. Communication and teamwork work, both critical skills for the modern workforce, are essential for success in eSports.

PSIs are actively embracing eSports, but you'll also find eSports teams, leagues, clubs, and extracurricular activities throughout the education system's as well as in the community. So with this near ubiquity, the questions beccome:

How do we foster this passion for eSports into education?

How do we create safe spaces for students to learn and engage with eSports?

The Benefits of eSports

Improve visual acuity & attention (Green & Bevelier).

Foster scientific reasoning (Clark; Steinkuehler & Duncan; NRC).

Accelerate language learning (Young et. al.).

Improve digital and print literacy (Gee; Leander; Steinkuehler).

Increase problem solving skills (Adachi & Willoughby).

Associated with higher math achievement (Bowers & Berland).

Strongly associated with technology fluency (Hayes).

A Timeline of eSports

Over the last decade, accelerated by massive technological advancements, particularly online networking connectivity, the global gaming market has exploded. Playing video games competitively has always existed and is a significant component of its appeal. From the high-score leader-board of a coin-op Pac-Man game to the LAN (Local Area Network) parties of the 1990s to the massive spectacles of today's premiere tournaments, video game competition continues to evolve.
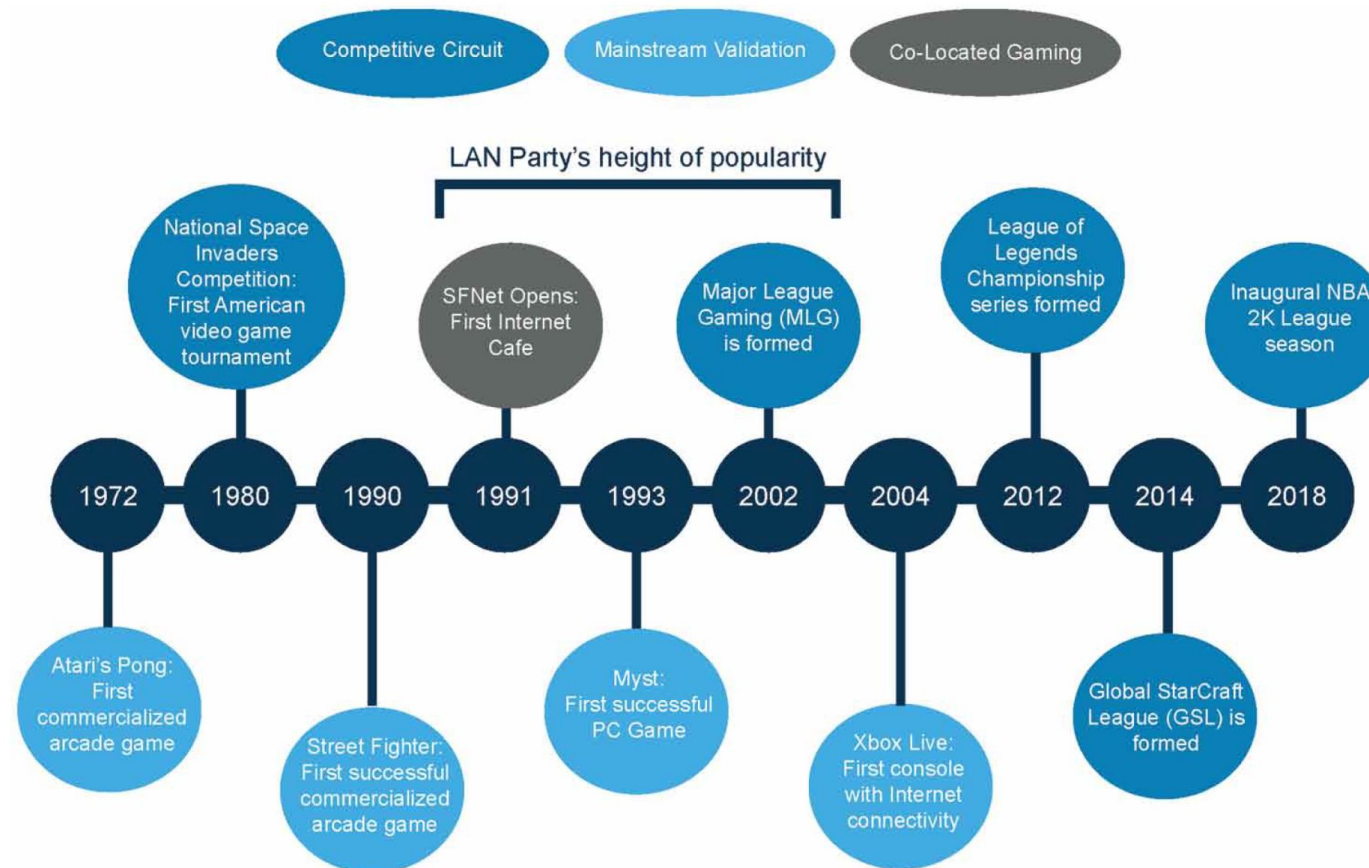
Incredible Growth

eSports can be seen as a direct product of the global video game juggernaut (estimated as a $150+ billion dollar industry). However, the element of sport that is such a central component does distinguish it from traditional videogames and creates a genuinely unique category of play.

eSports has hit the mainstream, attracting mainstream and celebrity investors and has been featured as a plotline of network television shows. While the majority of broadcasts stream online, broadcast rights have also been acquired by the likes of ESPN, exposing the sport to non-traditional audiences, Entering this public consciousness is furthering the legitimacy, business opportunities, and popularity of the sport.

No significant eSports industry currently exists in the Province, which is both a challenge and a growth opportunity. However, the amount of adjacent industries is substantial and offers vast opportunities for job creation. In addition, Esports is unique as it sits at the crossroads of many disciplines, including management, communications, tourism, game development, broadcast, event planning and many others.

eSports Around the World

While nascent, the global eSports market is a highly competitive and vibrant industry. Large scale tournaments and events as large as 45,000 ticketed seatings can be compared to other popular sporting events in the world. The current record viewership is the Free Fire World Series 2021 finals held in Singapore with a 5.4 million peak viewers.

While eSports as an industry had its beginnings in South Korea and the US during the late 1990s and early 2000s, recent demands for more eSports contents are coming from China, Southeast Asia, and India.

In China especially, the growing demands for eSports content has led to a talent gap for not just professional eSports athletes, but also broadcasters, event management, and other form of employment to support the growing industry.

The popularity of eSports in the Asian regions have provided some fascinating development:

- eSports made its debut as a sporting event in the Southeast Asian Games in 2019.
- eSports will also be premiered in Asian Games 2022.

eSports by the Numbers

- At 8% of total global network traffic, gaming consumes a massive amount of network capacity.
- Global eSports revenues will grow to over $1 billion in 2021, a year-on-year growth of +14.5%, up from $947.1 million in 2020.
- In 2021, $833.6 million in revenues—over 75% of the total market—will come from media rights and sponsorship. This will grow to $1.1 billion by 2024.
- The global games live-streaming audience will hit 728.8 million in 2021, growing +10.0% from 2020. It will grow to 920.3 million by 2024, a compound annual growth rate of +9.2%.
- Twitch is in the top 30 most popular websites in the world, with 15 million daily unique visitors and over two million daily broadcasters.
- Twitch captures 84% of live-streaming viewership in North America.
- If Twitch were a traditional broadcast network, its concurrent viewership would have surpassed CNN, Fox News and ESPN in 2018.
- The four most significant eSports events in 2018 generated 190M hours of online viewing (Impey, 2018).
- Of the top 15 best-selling video games, 7 of them are eSports titles.
- Unlike traditional sports, the vast majority of eSports viewership is online. According to Nielsen, more than 80% of eSports is consumed on Twitch.
- The average starting North America League of Legends Championship Series player salary is now over $320,000
- League of Legends generated roughly 1.5 billion hours watched.
- Professional eSports teams train for up to 8 hours a day, have coaches, trainers, and nutritionists on staff, and players receive base salaries, just like any pro sports league.

ESPORTS REVENUE GROWTH

GLOBAL | FOR 2018, 2019, 2020, 2023

TOTAL
REVENUES

$1556.7M
+14.9%
CAGR 2018-2023

TOTAL
REVENUES

$1100.1M
+15.7%
YoY

TOTAL
REVENUES

$950.6M
+22.4%
YoY

$776.4M

2018   2019   2020   2023
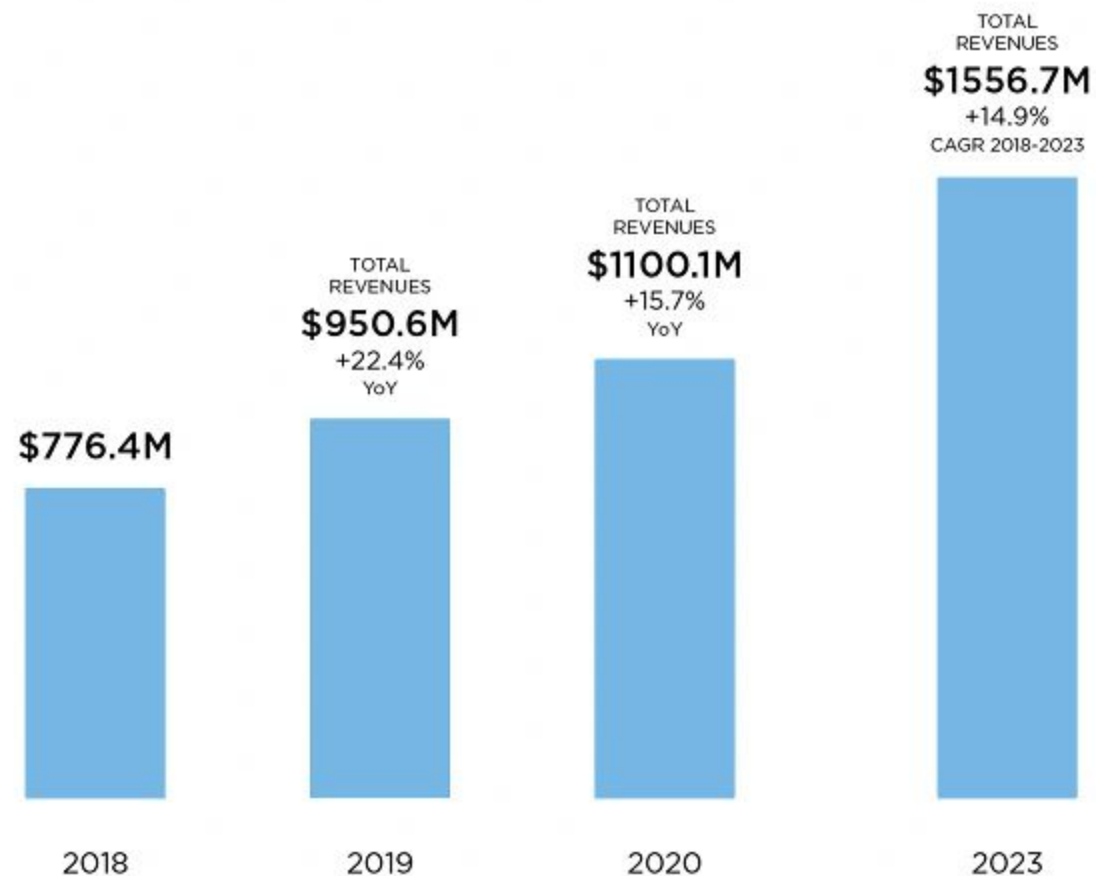
Esports Are More Popular Than Many Traditional Sports

Estimated Global Following 2019 (in millions)

| | Soccer | eSports | Cricket | Field Hockey | Tennis | Volleyball | Table Tenis | Basketball | Baseball | Rugby | Golf |
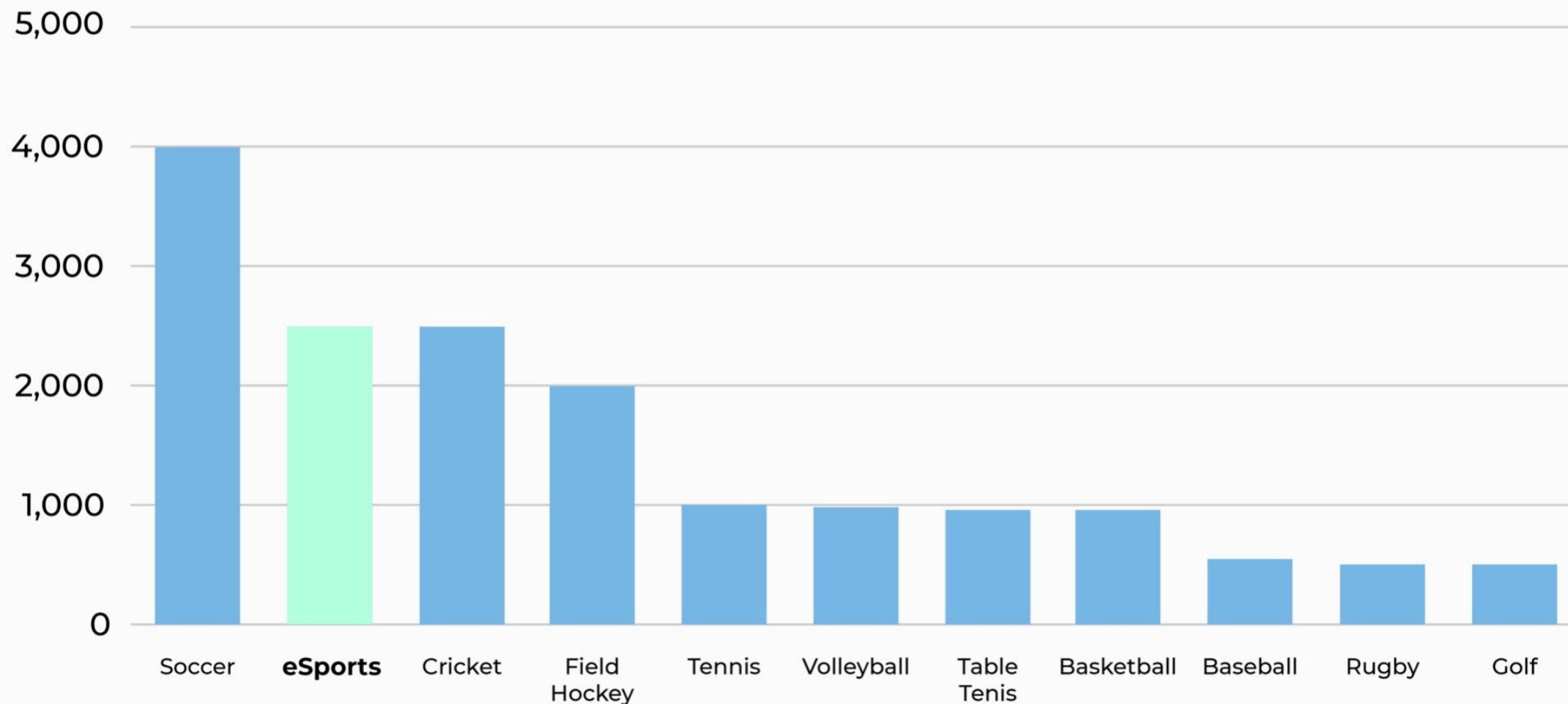
Source: IBISWorld - June 2019; Newzoo - December 2019

eSports Viewership and Fan Growth by League

Projected Esports Viewers in the United States (2021)

League	Viewers
NFL	141M
Esports	84M
MLB	79M
NBA	63M
NHL	32M
MLS	16M

eSports Viewership and Fan Growth by Year

Esports Global Fan Growth

Year	Fans
2016	270M
2017	365M
2018	411M
2019	451M
2020	495M

Broadcast Participants

With such an abundance of content globally fans have many options for tools and channels where where they are able to interact with their favourite content

While there has been coverage by traditional broadcasters such as ESPN, and many media conglomerates now have stakes in eSports teams the majority of the conversations happens online and on streaming channels.

With viewership surpassing every traditional sport except for soccer there are millions of viewers tuning into streams on platforms like Twitch (see chart).
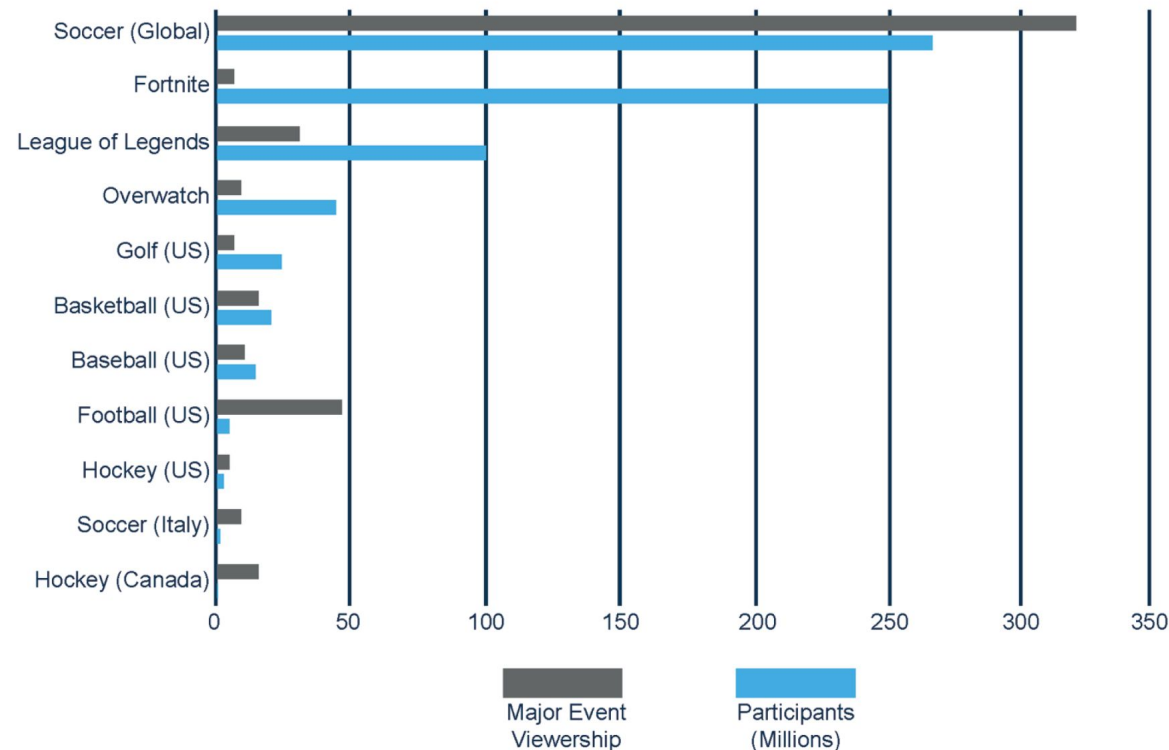
eSports Tools of the Trade

Free and accessible online tools make the process of running an eSports event simple. The Manitoba eSports Association (MESA) for example has a tournament platform, a website where players can easily register and a YouTube channel which is used to host video content. They have Twitch page where people can subscribe to and watch the games whenever they go live. They have an active Discord where they are consistently communicating.

With everyone on on some kind of social platform MESA feels it is pretty easy to connect and organize.

Mel Penner, ED of MESA commented
"I didn't have to create anything on my own. We're already all over these platforms. You just have to pick and choose which ones suit your league. And of course, leagues have been being developed for a long time. So you have a model to probably create yours from. "

Top 5 eSports Titles by the Numbers

#1 - Dota 2

$276,489,612.77 in prizes

4139 Players

1545 Tournaments

 # 2- Counter-Strike: Global Offensive

$122,248,726.32 in prizes

14347 Players

5917 Tournaments

#3 - Fortnite

$108,281,355.70 in prizes

4866 Players

740 Tournaments

#4 - League of Legends

$87,171,295.20 in prizes

7858 Players

2632 Tournaments

#5 - StarCraft II

$35,672,079.78 in prizes

2104 Players

6205 Tournaments

Title Selection

With so many popular titles available for play, an important question to ask is which games students should be playing? Many different factors go into that answer, but according to the North America Scholastic eSports Federation (NASEF)* some important considerations are:

Cost and Accessibility of a Game
Keeping costs down and making sure play is accessible is a major consideration. While sponsorships and partnerships can help, it is important to investigate pricing as games are pay-to-play.

Diversity of Playership
There are different types of diversity that are at play with eSports. Player demographics like race, age, gender and access to technology are all essential to consider.

Popularity
The more popular the game, the greater the chances that more players are familiar with the gameplay and want to participate. Selecting a strategy-based game like Hearthstone will not appeal to players who like shooters like Fortnite.

Ratings
All games are rated on a scale by the Entertainment Software Rating Board, or ESRB from E (Everyone) all the way to M (Mature). Choosing games for competition that are rated no higher than T (Teen) is good practice. Regardless of the rating, there should always be an open dialogue between students and administration who supervise gameplay. PSIs who support the play video games in an official capacity should be mindful of ratings as well as the themes featured within games to ensure that an experience that is keeping with their codes of conduct is provided.

Title Selection

Game Titles for Everyone
- Brawlhalla | Blue Mammoth Games
- Clash Royale | Supercell
- FIFA 19 | EA Sports
- Hearthstone | Blizzard Entertainment
- NBA 2K19 | Take-Two Interactive
- NHL 19 | EA Sports
- Rocket League | Psyonix
- Smash Melee | Nintendo
- Smash Ultimate | Nintendo
- Splatoon 2 | Nintendo

Game Titles with Supervision | Open Communication (aka T for Teen)
- Apex Legends | Respawn Entertainment
- Dota 2 | Valve
- Fortnite | Epic Games
- League of Legends | Riot Games
- Overwatch | Blizzard Entertainment
- Teamfight Tactics | Riot Games

Game Titles with Mature Content

Games we understand people play, but the content is pretty mature. For the more veteran gamer
- Call of Duty (franchise) | Activision
- Counter-strike: Global Offensive | Valve Corp
- PlayerUnknown's BattleGrounds (PUBG) | PUBG Corp.
- Tom Clancy's Rainbow Six Siege | Ubisoft

Every student is unique, and what is appropriate for one student may be completely different than another. Title selection will be a process of consultation and constant evaluation.

Anatomy of a Tournament

Understanding how eSports functions from an organizational perspective is important when considering how much time and resources to its activity. At the centre of the eSports universe is the tournament. This game play exists at vastly different scales, from a single person competing online from home to multi-million dollar spectacles in massive stadiums. How Pro Leagues work is important in understanding that despite their scale and complexity they are all basically bracketing systems.

The following example will be based on Rainbow Six
https://www.ubisoft.com/en-ca/eSports/rainbow-six/siege/about/program

One year is equivalent to one season and runs from March to February. Teams complete in a points system for regional play.

Four Regions compose the League

1.   North America
2.   Europe
3.   Latin America
4.   Asia Pacific

The top four teams from each region qualify for the Six Major Invitational (The Championship)

Within each of these regions are sub-leagues who are all trying to advance to the top league and avoid relegation. What this means, and where eSports differ wildly from traditional sports, is that any grassroots team could advance through tournament wins to the championship. eSports is an equalizer as all the athletes are competing in the same game and have opportunity for advancement which creates tremendous engagement from fans.

Seeing the Whole Picture

It is easy to look at eSports with too narrow a lens. If we make the mistake of only focusing on the select few players at the centre of it, we lose sight of all the roles, viewers and industry around it.
(see graphic)

It's amazing to see how many resumes we get for roles, but I would say 90% of 95% of the resumes we receive have nothing with e-sports on it. As a hiring manager, that is a plus - seeing a degree. I'd put those on the top of my list.
Matty Kirsch
-Lead Creative Producer - Fortnite and The Fortnite World Cup (Contractor)

It is clear to see that the "center of the target" is too small for a market like Manitoba to concentrate on when it comes to job creation. However, when examining the human skills created by eSports and the number of fields that are adjacent to the benefit of both academic and community play become very apparent.

2.2B Gamers

427M eSports Unique Viewers

110M eSports Competitors

27000 Elite eSports Athletes
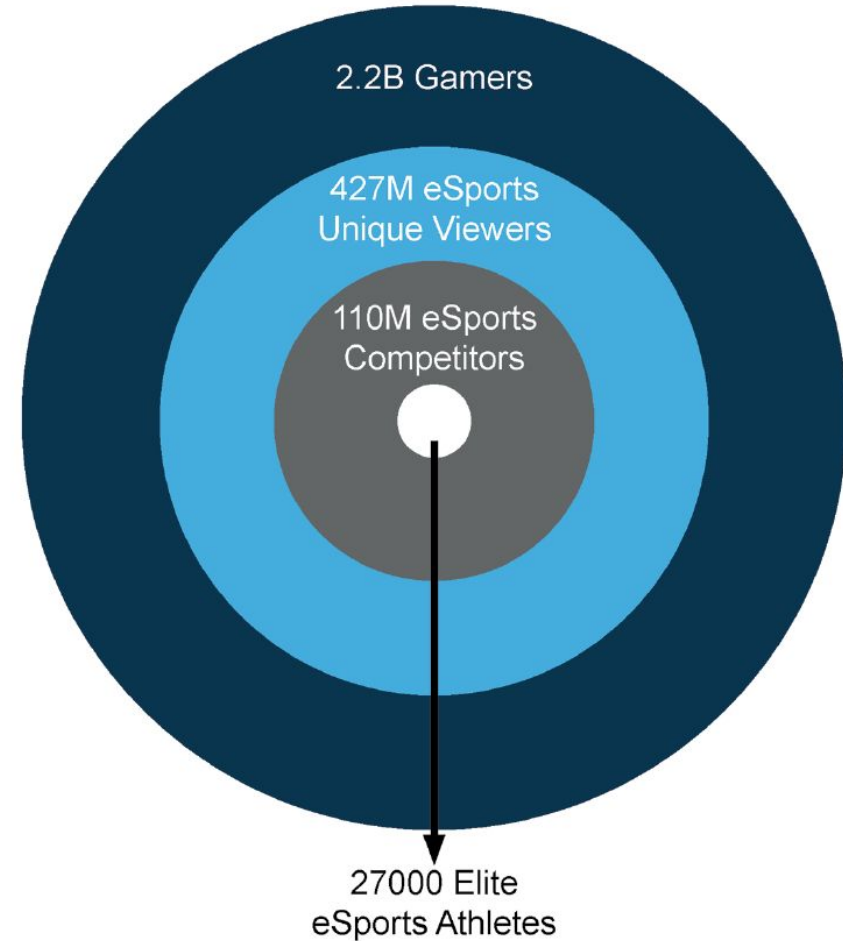
ESPORTS RELATED PROFESSIONS

PERFORMANCE OPTIMISATION
- PERFORMANCE MANAGEMENT
  - Head of Esports
  - Executive Officer
  - Media Trainer
  - Head of Scouting
  - Data & API Collector
  - (Team) Manager
  - (Video) Analyst
  - Head Coach
  - Career Manager
- HEALTH MANAGEMENT
  - Physical Trainer
  - Physical Therapist
  - Sport Medicine Physician
  - Sports Director
  - Performance Psychologist
  - Wellness and Mental Coach
  - Nutritionist or Dietitian
- High Level Player

MEDIA
- Journalist
- Photographer
- Editorial Manager
- Editorial Assistant

EVENTS ORGANISATION
- Event Project Leader
- Executive Producer
- Runner
- Translator
- Event Director
- Administrator or Referee
- Observer
- BROADCAST
  - Broadcast Distribution
  - TV Manager
  - TV/Live Producer
  - Broadcast Manager
  - Content Analyst
  - Stage Manager
  - Security Engineer
  - Replay Operator
  - Video Producer
  - Set Assistant
  - Stream Director
  - Live GFX
  - Stream/VOD Monitoring
  - Cameraman

ENTERTAINMENT
- Desk Analyst
- Video Maker
- Host on Stage
- Streamer
- Caster

EDUCATION
- Teacher
- Researcher
- Instructor
- Association Manager

INFORMATION & TECHNOLOGY
- Network Architect
- Network Technician
- Technical Producer
- Network Engineer
- Light Engineer
- Sound Engineer
- Director
- Software Architect
- Balancing Manager
- Software Engineer
- Data Engineer
- GAME SUPPORT & DEVELOPMENT

COMMUNICATION
- Press Officer
- PR Officer
- Internal Communication
- External Communication
- Communication Corporate
- Content Editor
- DIGITAL
  - Social Media Optimiser
  - Community Manager
  - Traffic Manager
  - Web Marketer
  - Web Designer
  - Web Developer
  - Mobile Developer
  - Artistic Director
  - 3D Graphic Designer
  - Graphic Designer
  - Creative Strategist
  - Post Editor
  - Video Editor

ADMINISTRATION

BUSINESS
- LEGAL
  - Legal Manager
  - Lawyer Attorney
  - Legal Counsel
- FINANCIAL
  - Financial Manager
  - Budgeting Manager
  - Financial Analyst
  - Accountant Treasurer
- HUMAN RESOURCES
  - HR Manager
  - Recruitment Officer
  - Training Manager
  - Mobility Manager
- COMMERCIAL
  - Business Developer
  - Head of Reception Areas
  - Rights Purchaser
  - Rights Reseller
- SERVICE
  - Apparel Provider
  - Facilities Provider
  - Hardware Supplier
  - Software Supplier
  - Insurance Provider

SALES MARKETING
- Head of Product
- Head of Advertising
- Trade Marketing
- Trade Merchandising
- Head of Licensing
- Head of Sponsoring
- Head of Sales Marketing
- Head of Partnership
- Head of Localisation
- Brand Manager

eSports Related Fields

NOC CODES

0015	Senior managers - trade, broadcasting and other services, n.e.c.
0512	Managers - publishing, motion pictures, broadcasting and performing arts
5224	Broadcast technicians
5226	Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts
5227	Support occupations in motion pictures, broadcasting, photography and the performing arts
5231	Announcers and other broadcasters
5121	Authors and writers
5222	Film and video camera operators
5225	Audio and video recording technicians
0213	Computer and information systems managers
4012	Post-secondary teaching and research assistants
0213	Computer and information systems managers
2147	Computer engineers (except software engineers and designers)
2174	Computer programmers and interactive media developers
2281	Computer network technicians
0124	Advertising, marketing and public relations managers
1123	Professional occupations in advertising, marketing and public relations
5227	Support occupations in motion pictures, broadcasting, photography and the performing arts
1226	Conference and event planners
0513	Recreation, sports and fitness program and service directors
4167	Recreation, sports and fitness policy researchers, consultants and program officers

eSports Stakeholders

There are many stakeholders in the eSports ecosystem and understanding their relationship and power dynamics is challenging. Everyone wields influence in different capacities and can have competing interests.

Publishers
The model of eSports differs from traditional sports as the games are the exclusive IP of publishers. For example, the NFL does not own the sport of football; they own a league where football is played. Activision owns the game League of Legends and therefore gets to set the rules and have tremendous influence over how the game is played.

The publisher's risk of developing a title that can run in the hundreds of millions of dollars grants them this centralized ownership and let them set the direction. This makes them arguably the most important overall stakeholder in eSports.

Streaming Platforms
With the majority of content being consumed online the streaming platforms are vital for getting the content out to fans. Twitch and Youtube dominate this space but many smaller companies are looking to disrupt this industry.

Teams and Players
At the centre of the sport are the teams and players competing in hundreds of titles.

Broadcasters
Broadcasters cover tournaments and can produce supporting content around the sport.

Developers
Developers create and distribute the game itself . They can either act as tournament organizers or license that privilege out to a third party.

Fans
Millions of fan worldwide consume eSports content and fuel the industry.

eSports Stakeholders
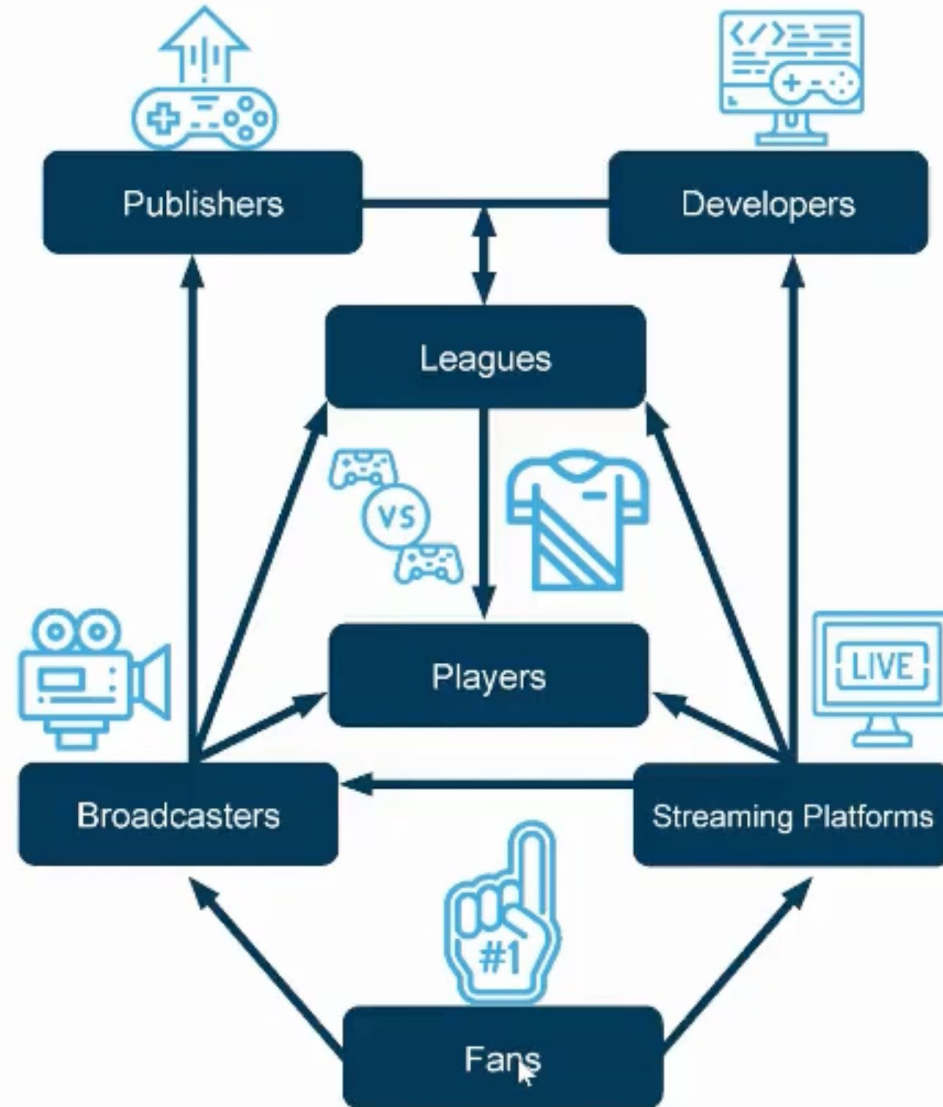
eSports in Manitoba

Jurisdictional Scans: Types of College eSports and Games

Findings: Games Competed
In the research, the team discovers a list of popular games that PSIs are competing in various eSports leagues, intramurally, locally, and nationally.

The types of games can be categorized into two types:

- Competitive Games: Valorant, League of Legends, Call of Duty: Warzone, Apex Legends, Fortnite, Rainbow 6: Siege, Overwatch

- Competitive Sports: FIFA 2022, NBA 2K21, Rocket League

In Manitoba, the games that are most competed, based on Manitoba eSports Association:

- League of Legends

- Valorant

- Rocket League

eSports Community Case Study - MESA

Established in 2019, Manitoba eSports Association (MESA) is the province's largest Non-Profit eSports association. They are community driven, providing an active and fun environment where players of all skill levels, ages and backgrounds can participate. They offer a variety of opportunities to players and talent and support other groups who are doing the same.

They focus on four key areas

1. Education

2. Events

3. Partnerships

4. Content Creation

eSports Community Case Study - MESA

The Manitoba eSports Association MESA was formed to cater to the 99% of gamers who are not at a pro-level. Creating community-driven events foster passion for games and give players who might not have ever thought of themselves as athletes the chance to compete. They also hope to bring in more women, minorities and indigenous players in a sport dominated by white males and feel creating an inclusive environment where all are welcome is the best way to expand this base.

During the pandemic, MESA has had to shift its focus away from live events and has hosted an online league. The key is consistency; having tournaments run with a level of quality and frequency elevates the "realness" for participants. MESA provides the organization, prizing and production value to their tournaments. They organize different leagues based on both game titles and skill level, which offers entry points for everyone to find a game and competition level that suits them.

The biggest challenge that MESA faces is not related to either interest or the pandemic but rather the reluctance of Sport Manitoba to classify eSports as a sport. This official recognition would go a long way to legitimize their activities and open up funding opportunities to improve and expand on their activities.

eSports Community Case Study - MESA

Mel Penner, the Executive Director, of MESA feels that two things are essential for eSports to be successful at PSIs. The first is getting it recognized as a sport to release the same funding and support that traditional sports receive; the second is scholarships to attract talent.

Right now, schools are missing out on opportunities due to their failure to recognize the potential and reach of eSports.

"We had an individual at U of M who did end up making it to the pro league, and he got no recognition from the school. It was really exciting. We cheered him on; we were watching the stream, he got scouted to a team. He played on a team. He went to the world championship of League of Legends. He, it was just incredible to see this kid from Winnipeg come and play like that it was unheard of at the time. "

Canadian PSIs have been slow to act and implement programs compared to the rest of the world, particularly with the US.
Mel Penner states,
"there's a huge distinction between Canada and the US because eSports is federally recognized at least in the United States. Schools have incredible amounts of funding and sponsors that are coming in to support these programs. They have incredible facilities for your scholarships. It's, it's just insane to see how much development there has been in the United States for e-sports. When you look at Canada, it's not federally recognized; there's no one at a provincial or federal level that actually thinks that eSports is a legitimate thing. And that's why it's been really hard for associations and groups to receive funding."

Clearly, there is a need and opportunity for RRC to potentially lend its voice towards advocacy efforts that might lead to policy change. This would benefit not just the potential efforts by the College but the entire ecosystem.

eSports and PSI Policies

Creating rules of engagement and utilizing existing codes of conduct will set the tone for online spaces that a group manages. Having accountability, transparent processes and ramifications for actions are all needed. Additionally, having a safe online space requires any organization that is planning eSports gameplay to be committed to maintaining it in an ongoing capacity.

Moderation and creating safe virtual spaces are not easy, advises David Bellocchi from Red Bull. "*…it's a joint effort between a lot of people. It takes a lot of eyeballs and a lot of brains because something could happen at two o'clock Eastern in the morning, and nobody's awake to see it, and then it (ie. a racist or sexist comment) lives on a server for an extended until someone catches onto it.*"

Automation is also required to help minimize the amount of toxicity and negative content online. Platforms like Discord have been working to improve and automate their systems to prevent bots and spamming.

Another good example is filtering out and placing safeguards at the front end over who gets access to a server. Requiring names and emails attach accountability which is always the best line of defence.
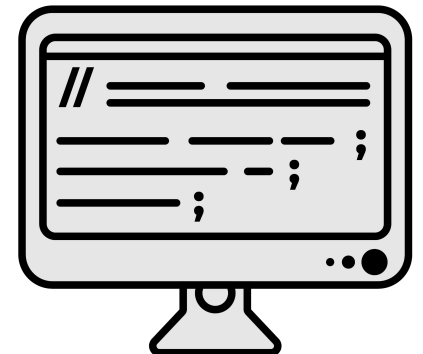
eSports and Sponsorship

Sponsorship

Massive companies in the tech space and beyond want to be involved and are investing big budgets into eSports. It is not hard to understand why, as they can reach huge audiences which equal or exceed traditional professional sports.

David Bellocchi from Red Bull sums up their approach to working with PSIs
"We want to be there as a partner. That's just kind of one of the core values of how we do our marketing. It depends on the scale, how many students there are, facility size, of course. We want to work collaboratively to make sure we're there where the gamers are. "

Red Bull sees eSports as a massive opportunity for marketing and outreach efforts and a major sponsor globally. They point to their relationship with St. Clair's College as a good model.

"Our goal is to grow collegiate gaming and gaming as a whole so it is amazing when an academic institution can give an opportunity to students who otherwise might not go to school. They are teaching in a different, more creative way which really speaks to the individual. Students are getting jobs immediately right out of the classroom. They are getting the confidence and then starting to do things on their own, which is critical because e-sports is so entrepreneurial."

Corporate Partners

Matt Kitch has years of experience with the biggest names in corporate sponsorship when it comes to eSports. He has run large-scale tournaments for the likes of Epic Games, now he oversees content production at [VENN](). VENN is a live 24/7 network for gaming, streaming, eSports and entertainment audiences. Broadcasting live from Los Angeles, VENN offers original programming produced in-house and in partnership with some of the biggest names and creators in gaming, pop culture and lifestyle spaces.

Matt urges a proactive approach to sponsorship and insists that companies are always seeking ways to engage with the eSports demographic. He commented;

"Tap into Ubisoft; they could be a perfect fit into what a PSI could be doing. Plant that seed right now because it is great to get support from the developer side."

Manitoba has a wide range of corporate partners to help support programming. Bell, Telus, Red Bull and Ubisoft, for example, have all made sizeable investments in eSports. These companies have marketing budgets allocated exclusively for eSports and could potentially help elevate programming. Managing these partnerships from both a sponsorship and workforce development perspective will be imperative to any eSports program that RRC wishes to create.

Challenges to Sponsorship

Just like traditional sports, sponsorship possibilities in eSports present many revenue opportunities. The potential is tremendous, with everyone from Telcoms, hardware manufacturers, and Cola companies looking to market to this very appealing (and hard-to-reach demographic).

PSIs caution that assuming that large infusions of corporate sponsorship are going to arrive as soon as the program begins is misguided. It takes time to build up audiences and prove value to sponsors. Relationship building with the sponsors is an important role to have in any eSports program and can call for a dedicated human resource.

In fact, eSports communities face many challenges when it comes to revenue, mainly the ability to secure funding for initiatives and develop sustainable models. (see graph)

Top challenges reported by esports grassroots community leaders

Challenge	Value
Securing funding/revenue development	53
Accessing broadcast/production equipment	30
Securing prizes	41
Lack of access to event-appropriate venues	23
Securing sponsorship	35
Marketing efforts/generating awareness	35
Other	7

Top challenges for creating esports content

Challenge	Value
Equipment	107
Sponsorship	76
Marketing/awareness	105
Business/brand development	60
Other	6

source: Vancouver-Esports-Strategy-2021-Desktop-Spreads

eSports Around the World

Jurisdictional Scans: United States

Case Example: [University of Irvine California](#) (UCI)

- UCI is another great example of a heavily invested and committed PSI into the development and growth of its eSports team.

- The program was founded in 2016 through the collaboration of student leaders, UCI's gaming community, administrations, and faculty members. The program is currently sponsored by iBuyPower, Oakley, Logitech, and Rockstar.

- The program's facilities include an arena for their teams to train or for students and non-students to rent by the hour, a dedicated website with staff listing and affiliated faculty members, and vibrant social media channels.

- The team is tied with the various academic programs offered by UCI.

- The program also hosts intramural tournaments for less competitive students. These tournaments also serve as a scouting program for their more competitive teams.

Jurisdictional Scans: Asia

Observation:

While the demand for eSports content is growing at a rapid pace in Asian regions, there are a lot of difficulty developing the right talents to satisfy that demand. For example, while China boasts a slew of eSports programs in their university systems, many programs focus either on developing athlete talents or coaching capabilities. Talent gaps exists in the other aspect of the industry, such as event planning, business administration, operations, and management. There are also reports suggesting that these degrees in China are highly niche and does not correspond well with other adjacent industries, such as sports entertainment and broadcasting.

Furthermore, China's restriction on gaming media consumption may provide some incentives for potential professional gamers and students to focus to other places, such as Canada.

While there are several leagues in different formats around the world, one of the more interesting leagues for PSIs is the Indonesia eSports League (IEL), a nationwide league of top universities in Indonesia. The league consists of over 30 universities participating in two of the biggest competitive games in Southeast Asia: DoTA 2 and PUBG Mobile. The league also includes a slew of sponsors, organizing bodies, and broadcast partnerships. IEL may also be the largest active eSports league in the collegiate or university setting in the world, based on the number of participating PSIs.

Conclusion:

Since Canada has a reputation as an academic destination for many Asian students, it would not be surprising if prospective students are examining the eSports facilities or offerings that are provided by Canadian PSIs as part of the student's collegiate application process.

PSI Case studies

Jurisdictional Scans: Types of College eSports and Games

The project team has performed a jurisdictional scan on multiple colleges and polytechnics across Canada. From this research, the team summarizes patterns, organization, and competitive structure of these eSports organizations.

Methodology:

The team performed a scan on various websites, social media, and other channels that relate to post-secondary institutions and eSports. The summary will include a few case examples of successful eSports organizations at post-secondary institutions.

eSports Academic Case Study - Lethbridge College

Lethbridge College has only recently started exploring eSports options for programming, and as of now, these activities have been confined to league/tournament play only.

Students can compete in tournaments and intramural leagues hosted by the Lethbridge College Students' Association (LCSA). The College also sponsored its first eSports student-athletes to play in national tournaments, including through the newly formed Canadian eSports League (CCEL)

The benefits that **Todd Caughlin,** Manager of Athletics & Recreation Services, sees in participation with the CCEL is
"It gives us an identity, and that is why we commit to it. It provides legitimacy that you're participating in something that's real. That means if you are a student at Lethbridge college, you'll be wearing the Kodiaks colours, participating on the Kodiaks e-sports team in an event. So now we have structure, we have realness."

eSports Academic Case Study - Lethbridge College

Lethbridge is currently one of 12 institutions from across Canada taking part in the inaugural Canadian Collegiate Athletic Association (CCAA)

Beyond that legitimacy, the CCEL offers other practical benefits. For example, becoming a member gives access to bylaws, structures, policies, and procedures that help get things started.

As to what prompted the College's initial interest in exploring eSports and how he built consensus, Todd continues.

"I was in Vegas, and the hotel was hosting an international e-sports championship; I walked in, and I got goosebumps; it was awesome. When I got back, I thought we could fire this up. We have the academic structure and the support structure at this institution with our virtual reality programs, our DCM multimedia, our student association our business marketing; all those pieces are here to develop an academic program that will benefit our entire institution. That's how I approached this and presented the idea to my upper administration."

Todd admits there is a long way to go and that they are only in the first stages of building a well-rounded program for the College. Tournament play is an essential point of entry in the world of eSports.

eSports Academic Case Study - Lethbridge College

As for the future, the College's roadmap includes:

•Fielding a Varsity Team for competitive inter-school play

•Supporting recreational play in the form of intramurals through student groups

•Supporting community play at high-school levels to serve as a feeder system into the University

The College will need to invest in key roles such as sponsorship, managers, coaches, and academic program development to support this growth.

Todd concludes by saying.
"It is scary for me to say, because I do have the sports background and I am an athletic director, but I see the sustainability of e-sports is going to go a lot longer and probably become way more diverse than a good chunk of participant sports . That and the sponsorship opportunities for e-sports are off the charts."

eSports Academic Case Study - Mount Royal College

Mount Royal currently offers an eSports Management Certificate. However, rather than develop the content in-house, Mount Royal took the route of licensing its program from the University College Irvine. This programming decision provides cost savings for the college while also providing access to UCE's best-in-class courses.

When they first explored the concept of starting a program, Mount Royal was advised to make eSports part of existing certificate programs such as event management. However, finding the right subject matter experts to lead that coursework custom proved difficult and expensive, so they decided to license content instead. Brad Mahon, the Dean of Continuing Education from Mount Royal, commented. *"eSports is an emerging industry, and we saw the opportunity to get in at the beginning but want to be cautious."*

eSports Academic Case Study - Mount Royal College

Mount Royal's desire to offer eSports was motivated by a shift in moving their academic offerings to be aligned with the jobs of the future. They examined what those roles were and found that many were attached to eSports.

He cautions, however, that PSIs should not expect instant growth and revenues from spinning up an eSports program. Mount Royal's program has managed to break even financially since it began, and numbers have been modest. Low enrollment could be tied to the global pandemic, the current lack of league play, or Mount Royal's early stage of development. Whatever the cause, revenue shouldn't be the only metric measured. Brad Mahon elaborated, "With this program, Mount Royal was presented in a positive manner. We are seen as innovative and pioneering, and those are the kinds of things that we want to attach to the faculty."

Another issue that PSIs will have to contend with is governance. Competing interests can arise as different departments look to establish ownership over eSports activities. IT/Networking, athletics, culinary, broadcast, student groups and facility management could all be tasked to work together as eSports straddles so many areas. How this is managed at an administrative level will determine how successful a program becomes.

Mount Royal is optimistic about the future; they are developing a fifth and sixth course and exploring areas for work-integrated learning. Once restrictions from the pandemic ease, they hope to host large tournaments in their event space and drive interest in eSports.

Brad Mahon's final piece of advice to any PSI looking to get started in eSports is *"programming licensing is a way for institutions to be nimble and responsive,…leverage that story and make a splash about it and build a campus community around e-sports because I think that's what it needs."*

eSports Case Study - St Clair's College

While major facility builds dedicated to eSports are now common in the US, Europe and Asia, Canadian post-secondary institutions have been slower to invest.

The amount of capital investment required for this kind of dedicated infrastructure is significant. However, to field a world-class program this is fast becoming the price of admission. Like football stadiums and gymnasiums, eSports at a professional level requires the capacity for fans and the technology to make a big event happen. While few Canadian PSIs have been ready to make that investment, one outlier is St. Clair's College. St. Clairs is set to open the doors on its state-of-the-art facility in 2022 as part of a $23 million project.

This facility will be over 15,000 square feet, the largest in Canada. This facility will be the largest publicly accessible facility of its kind. St. Clair's varsity eSports teams will compete across seven titles in this facility, including League of Legends, Fortnite, Overwatch, Valorant, Rocket League, Call of Duty, and Rainbow Six: Siege.

eSports Facilities Case Study - St Clair's College

St. Clair's has made this investment to position itself as *the* destination college for students, gamers and eSports enthusiasts.

"This new eSports facility is the last piece of the puzzle for us. We have top-tier academic, varsity and club eSports programs, but now they will be able to intermingle under one roof, allowing for an unparalleled degree of synergy," said eSports Director Shaun Byrne.
See eSports Administration and Entrepreneurship Overview

Features include:
- 64 Gaming PCs
- Dedicated training facilities for varsity teams
- 6v6 competition stage
- eSports Classroom featuring broadcast studio and the latest industry equipment
- Three dedicated VR spaces connected directly to the broadcast studio
- Five separate soundproof streaming rooms
- Console gaming lounge featuring eight stations for drop-in and play

As is the case in facility builds aboard, St. Clair's is designed to be multi-functional. Plans are in place to host a variety of events and learning opportunities.

The combination of the academic program, team play and facility will provide work-integrated learning opportunities that allow students to be part of the planning, development and delivery of eSports events. This will broaden skills in commentary, broadcast production, coaching, team management and marketing.

eSports Academic Case Study - Durham College

The eSports program at Durham College has been active for just over two years. An instructor with a passion for gaming brought the idea to the Executive Level and helped get the idea off the ground. Seeing the growth potential and being excited by the entrepreneurial nature of the industry, Durham created both an academic program and a Varsity team.

While the COVID-19 pandemic has been particularly challenging for a program trying to establish itself, eSports has seen many positive developments in its short time at Durham.

With lockdowns, the program has been moved 100% online during the pandemic. While this is less than ideal, Durham has maintained critical corporate sponsorship during this uncertain time. Both Monster Energy and Lenvano have renewed yearly commitments with the program. Additionally, the cancellation of live events and tournament play dramatically impacts revenue generation, so continuing to demonstrate value to sponsors has been critical.

eSports Academic Case Study - Durham College

While the College has both an academic and Varsity program, they operate independently and serve very different audiences and purposes. Durham College see it as important for PSIs to offer both to be seen as credible in the space.

Durham College currently supports over 40 eSports athletes competing in eight games and has established a good reputation racking up some major wins. The athletes have very modest scholarships to play and are scouted just like any other student-athlete. Despite lacking the full-ride scholarships that US schools can offer, Durham does everything it can to legitimize the experience of being an eSport athlete (press coverage, free gear, training facilities, etc.) Despite its limitations, the team has excelled and travelled nationally, ranked in major leagues, placed and won in tournaments, and seen former students go pro.

Exposure like this is vital and turned the Varsity program into a calling card for the College. In addition, it draws interest and attention from prospective students and gains media attention which is a net positive for Durham.

eSports Academic Case Study - Durham College

The academic program meanwhile consists of a one-year program certificate program with a diploma required. This course pulls largely from sports and business management students. Topics covered include IT, Law and Project Management. The course is looking to prepare graduates for roles as:

- Event coordinator
- Team manager
- Team recruiter
- Venue/arena manager
- League organizer
- Creative lead
- Gaming expert
- Shout Caster
- Journalist/writer/blogger
- Content creator
- Producer
- Marketing specialist
- Community brand manager
- Esport entrepreneur

https://durhamcollege.ca/programs/esport-business-management-graduate-certificate

eSports Academic Case Study - Durham College

Academic Program

The curriculum was developed in-house at Durham, and tuition is $3000 for domestic students and $14,000 for international students. The program has only been operating for one full cycle, and enrolment, according to Durham has been "modest."

The College is currently reevaluating this course and looking to make the entry point easier for students. One of the issues cited as being the most problematic is the disparate levels of skills the students are entering the course with. For example, a student who enters with an IT degree is not necessarily looking to become a writer. So how do you teach the breadth of skills required within the industry while keeping the course work engaging?

According to the College, a general degree covering everything that goes into eSports might have been overly ambitious in retrospect.

https://durhamcollege.ca/programs/esport-business-management-graduate-certificate

eSports Academic Case Study - Durham College

Facility Build

Durham decided to invest in a 4000sq ft multi-use facility when a suitable space opened up on campus. They viewed this investment as essential for the varsity program's success.

The facility is the home to Durham eSports athletes, a space where they can train and compete. It was also designed for multi-use, so the student body has access to the fleet of 50+ consoles and PCs. The facility hosts viewing parties, offers summer camps, can be booked for private events or just be a place for students to relax. The College wanted to ensure that all students had access to the space and see it as social space as much as classroom.

"We feel like this is the right time to offer eSports at the varsity level," said Ken Babcock, director, Athletics and Recreation, DC. "Today's younger generation are already extremely connected to video games and as technology continues to advance and future generations become more versed with the digital world, eSports will only continue to grow. I think it is already on its way to becoming as popular as more traditional sports, especially with the National Collegiate Athletic Association taking notice. We look forward to welcoming students to the college while also being able to offer them a chance to compete on DC's varsity eSports team."

https://durhamcollege.ca/new-notable/college-news/durham-college-embraces-eSports-with-construction-of-gaming-arena-2

eSports Academic Case Study - Durham College

Challenges

Durham identified many challenges to the program, and most are not unique to the eSports industry. Proximity to employers was cited as a concern. Due to the College's geography, which is removed from the critical mass of the GTA, they find it challenging to make those connections for students to the workforce.

From an operational point of view, IT, broadcasting, facility management, and licensing complexity are all ongoing considerations for the College that need to be maintained in order to deliver a high calibre of a program.

Recommendations

Durham College was open with its journey into eSports and expressed that collaboration and sharing were important for PSIs. With the industry in its "Wild West" stage, it is essential to leverage the lessons of others to avoid repeating costly mistakes.

Running consultations, attending conferences and securing executive-level buy-in were other must-haves in Durham's opinion.

Making sure you are current and that you listen to students is also critical. *"They know what's real and what's not in this space."*

eSports Academic Case Study - Durham College

Estimated Costs

Modelling pricing at the high-end of eSports is difficult and irrelevant for the scope of this report. However, Durham's more modest program is worth examining, broadly speaking from a cost perspective.

Durham College estimated costs of running and maintaining their program per year at:

- $250,000 of HR cost

- $175,000 for eSports varsity program

- $100,000 for the academic program with yearly upgrade costs at $30,000

- $80,00 for instructors

- $100,000 for facility upkeep, hydro, and equipment costs

please note initial build costs were not available

Case Example: Durham College (Ontario) Summary

- The program was founded in 2018 as part of a four-phase eSports plan, which includes an eSports club, varsity program, integration to current curriculum, and development of future curriculum.

- The program started of with the construction of its 3000 sq. feet arena to train students and host eSports events.

- The eSports team is placed within the varsity athletics department, but runs independently.

- The program is sponsored by Lenovo and Monster.

- The college currently competes in the National eSports Collegiate Conference (NECC) and Ontario Post-Secondary eSports League (OPSE).

Overview: Jurisdictional Scans

Findings:

- There are basically two categories of eSports involvement by post-secondary institutions (PSIs):

- Competitive: a league team (or several) to compete in inter-collegiate tournaments

- Casual/Recreational: Hosting intramural or open competitions

- PSIs with serious investments into eSports have a strong administrative, marketing, and events planning team. These teams may also include support from sponsors and partnerships.

- Competitive PSIs tend to align their eSports teams together with the rest of their collegiate sports team (including utilizing their sports brands and mascots).

- More committed PSIs also combined the eSports team with their academic programs (linking eSports with degree/certificate programs).

- Casual and recreational focuses on single tournaments or events rather than multi-event leagues.

- Some PSIs may not be aware of competitive players representing them without open support from the PSI.

Challenges, Financial Modelling and Recommendations

Challenges to eSports Program Development

- Through our research and interviews, the following were listed as the critical challenge to developing a successful eSports program.

- Infrastructure remains a crucial barrier to the implementation of eSports implementation. This is both in terms of equality of access to broadband and hardware necessary to participate in play. These barriers are especially pronounced outside of urban centres.

- Lack of reliable pathways at the k-12 level for interested students to learn or engage in eSports. Creating a streamlined and approachable pathway for eSports within large bureaucracies is a slow process requiring both time and patience.

- There are currently no curriculum standards for eSports in Manitoba. (see examples of NASEF curricula)

- There is no standardized code of ethics or conduct. Since there is no single governance body, there can be a lack of accountability where participants and fans can be held accountable for their actions.

- There is a major gender imbalance when it comes to eSports. No data exists for Manitoba, but a recent BC report states that 89% of its eSports community identify as male.

- There is a lack of qualified instructors in the eSports ecosystems. This creates a significant inconsistency in terms of the program available in K-12 and would also be a challenge at the post-secondary level.

- There is a lack of resources at the community level to secure both the funding and prizing to support league play.

- There is a lack of funded positions dedicated to eSports, and this creates instability. eSports initiatives require large amounts of consensus building, networking and focus. Placing this burden on existing staff positions or student groups does not allow a program to reach its full potential.

Financial Modelling

ESports represents a tremendous opportunity for colleges, universities and PSIs. Increasing numbers of institutions are developing both competitive leagues, scholarships and academic content around it.

When compared to traditional sports programs, eSports investments are very attractive to budget-conscious institutions. Leaving out multi-million dedicated arena builds, for now, getting something simple up and running is relatively inexpensive. Investments in computers, peripherals, connectivity and furniture are all that are required.

This doesn't mean that these are the only costs associated with getting gameplay off the ground. Costs for personal, marketing, IT, software, support staff, and rentals should all be factored into the budget.

Cost Estimates

One study which provides cost estimates is based on fielding a varsity team. Varsity play is defined as any competitive play that has a coach attached to it. NACE (National College of eSports) reports the average cost of starting a higher education eSports program is $41,000US, and the average program draws 15 students in its first year.*
https://edtechmagazine.com/higher/article/2019/08/game-building-collegiate-eSports-program-ground

Financial Modelling

Private enterprise has developed around eSports and offers a host of products and services to help academic institutions smoothly run and maintain their programs. Gameplan is one such option that offers a full-service package that analyses gameplay, schedules training sessions and has supporting course-work.
https://gameplan.com

 eSports Academics is another private company looking to help PSIs develop content that is aligned with what the industry is demanding. Their mission is to bridge the gap of amateur organizations with educational programs while evolving eSports education with innovative curricula.

These are just a few examples, and with so many pathways for entry, it can be difficult to provide exact numbers. The analogy cited during interviews around pricing was to ask the question, "How much does a car cost?" There is no definitive answer until a precise needs assessment is conducted.

Every institution has a myriad of decisions they will need to contend with around the development of an eSports program that will drastically alter costs. Therefore, full estimations of costs would require further study and be necessary before pursuing any kind of program implementation.

Driving any on-campus eSports activities requires a balance of utilizing existing technologies and space and investing in critical components. Beyond the hardware and the facility through at the centre of any successful initiative will be the support staffers (including IT professionals, educators and even athletic directors) who will be guiding the program.

Recommendations

Based on our research and interviews we would like to provide the following recommendations as good first steps when considering the adoption of eSports play and possible curriculum adoption at RRC

Short-Term - Advocacy, Community Building and Research

▪ Advocate for the Province of Manitoba/Sport Manitoba to recognize eSports as a sport

▪ Support community leagues and eSports program in K-12

▪ Support a micro-credential in eSports at a high-school level

▪ Support tournament play on campus with tournaments and prizes

▪ Host "Watch Parties" of major championship tournaments at the new innovation center when conditions permit

▪ Investigate how eSports lessons could fit in with current academic programing

▪ Investigate how licensed academic content could fit in with current academic programing

▪ Adapt current codes of conduct to anticipate issues

▪ Survey current students about they'd like to see eSports adopted on campus

▪ Support the Manitoba eSports Association

▪ Explore how existing interdisciplinary courses at RRC could connect with eSports programming.

   (animation, business development etc.)

Recommendations

Mid-Term - Hiring, Building and Logistics

- Hire a dedicated resources to be the single point of contact for all RRC's eSports efforts

- Create a small training centre on campus

- Invest in ICT infrastructure

- Join CCEL

- Continue to support community and K-12 leagues

- Work with local agencies (New Media Manitoba, Economic Development Winnipeg) to attract game publishers to open locations in Manitoba

- Work alongside the K12 schools in developing eSports curricula to make eSports an accredited course by Manitoba Education.

- Host a provincial tournament event

Long-Term - Creating a Varsity Program

- Hire a coach and manager

- Create better public awareness of eSports including public health implications and career opportunities

- Continue to support community and K-12 leagues

- Train and field a varsity team

- Host a national tournament event

- Investigate a dedicated facility build

Conclusion

Acceptance and the growth of the video game industry and the culture that surrounds it has been accelerating over the last decade. In Canada. According to the Entertainment Software Association of Canada (ESAC) an estimated 64 percent of the population, or 23 million Canadians, played games when surveyed in 2018.

In much of the country, game development represents a sizeable share of the knowledge-based economy. While Manitoba has yet to rival established markets like BC or Quebec, the arrival of Ubisoft Winnipeg proves that we have the talent to support a Triple-A studio and should signal there is room for growth.

According to a report on Vancouver's eSports strategy:

"There is a strong correlation between cities and regions with robust games development hubs and their potential as prominent eSports hubs, and a corresponding trend with core eSports events visiting these provinces' major cities."

For eSports to be successful at a PSI, a larger ecosystem of eSports needs to be successful around it. A common characteristic of cities with strong eSports hubs is the mix of community, industry, government, and academic programs all working together. RRC should, in this reports opinion, strongly consider adopting eSports leagues and academics. Doing so would increase student engagement, infuse human skills into learning, update existing program content and drive revenue and sponsorship.