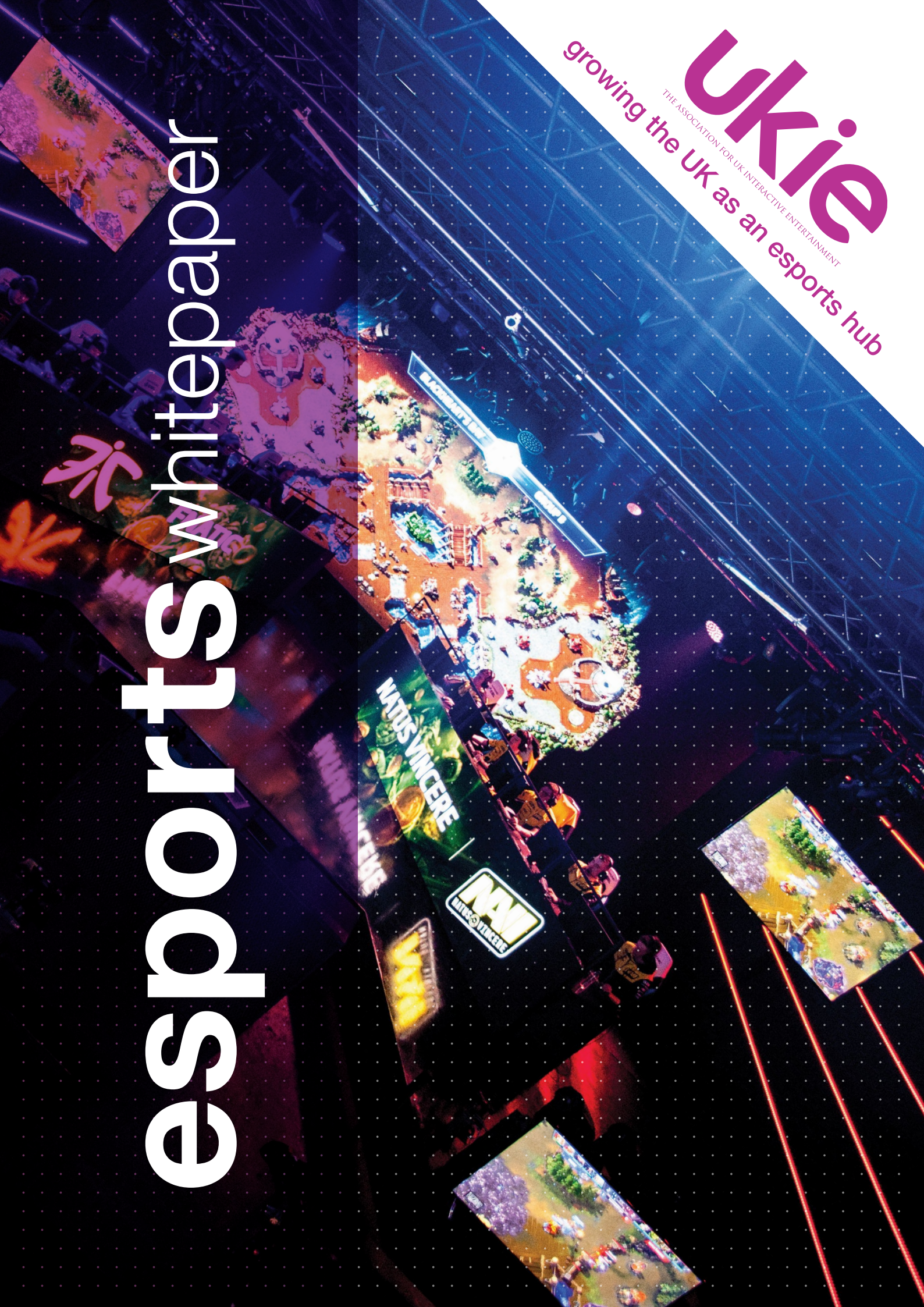


esports whitepaper

ukie
THE ASSOCIATION FOR UK INTERACTIVE ENTERTAINMENT
growing the UK as an esports hub



A big thank you to all the interviewees who contributed to this paper, the Ukie esports group and Newzoo. A special thanks to Purewal and Partners and Chris Higgins for their input into drafting this paper.



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foreword - Dr Jo Twist OBE

CEO Ukie

“

**Like the video games that fuel it,
the esports sector is now one
of the fastest growing, most popular
and vibrant categories of entertainment
in the digitally driven economy.**

”

A global audience of millions regularly watches professionals playing games competitively and a professional ecosystem is fast taking shape.

The audiences and prize pools for major tournaments rival and often exceed those of traditional sporting events and big brand sponsors are looking at the opportunities to reach passionate fans.

Esports – and in particular live tournament events – offer huge opportunities across the UK in job creation, local economic growth, tourism, new skills development, and giving a clear signal to the world about our ambitions around technology, innovation and creativity. The aim of this whitepaper is to give some context of this global industry which is born digital and has already reaped huge rewards globally. It is also to identify the opportunities and highlight the ways in which the UKbased esports sector can work with government and other stakeholders to make the UK a key destination for the global esports industry.

Ukie represents the major esports stakeholders in the UK including publishers such as Activision, EA and Hi-Rez; league and event operators including ESL, Gfinity, FaceIT and Game/Multiplay; digital broadcast platforms such as Twitch and Azubu; teams including Team Dignitas and Fnatic; and grassroots organisations like the National University Esports League.

This paper represents the conclusion of a dialogue and consultation process over several months with many of these key stakeholders.

As well as generating recommendations for how to grow the sector in the UK, this process explored the wider regulatory landscape surrounding esports and generated many views on how the sector can continue to develop responsible self-regulatory practices and how current regulatory frameworks would best fit the esports sector.

This paper is a first step at defining some of the key drivers for the UK sector. Some of these areas are explored here (such as suggestions around immigration and skills) but there are plenty of other discussions to be had, and we hope that this is the start of an ongoing discussion around esports. The businesses that we represent are committed to growing the esports in a responsible way that benefits players, businesses and consumers. And Ukie, together with its members and the wider sector, is committed to working with decision makers to support to promote and grow the esports opportunity in the UK.

The esports sector wants to maintain an open and informative relationship with government and the wider business and investment sector. The sector also wants to ensure that all discussions with policy makers are accurate and represent the views of the widest possible UK esports sector.

The UK's existing, well respected business and regulatory landscape already provides just the right ingredients for such a fast evolving sector to grow. By combining industry commitment with political and practical support at national and local levels - collectively promoting and encouraging the sector - this country's schools, universities, towns, cities, regions and nations can become the breeding grounds for the best esports players, leagues, broadcasters, sponsors and tournaments in the world.



introduction

Esports are played and watched by millions of people around the world. In South Korea, esports has risen to the level of a national pastime, with players and teams treated as household names. In other countries, public support has seen esports being introduced into school curriculums. Esports has been instrumental in regenerating the economy of whole cities, like Katowice in Poland, which is becoming internationally recognised as an esports destination.

The UK already has a well-established esports fanbase yet it lags behind some other international markets as a major esports destination (as you can see in the international comparisons section below).

This country however is uniquely placed to become a global hub for esports.

Firstly, the UK is host to a concentrated combination of businesses from the worlds of video games, traditional entertainment, sports, event management, consumer brands and now esports operators.

Secondly, UK consumers are known for their early adoption of video games, other entertainment media and technology.

Thirdly, the UK's existing business, legal and regulatory frameworks already provide a strong platform for esports businesses to grow.

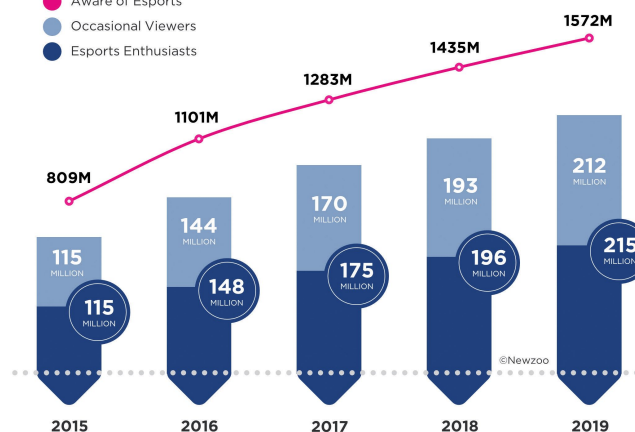
And finally, the UK's well established interactive entertainment sector provides a ready-made ecosystem in terms of skills, creativity and support services on which to build esports.



ESPORTS AUDIENCE GROWTH

GLOBAL | FOR 2015-2019

- Aware of Esports
- Occasional Viewers
- Esports Enthusiasts

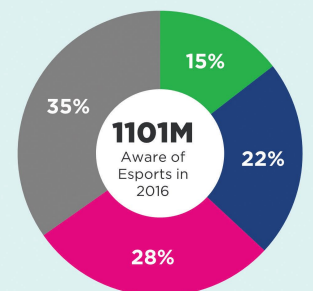


©Newzoo | May 2016 Quarterly Update | Global Esports Market Report Premium

China provides

28%

of total global awareness of esports in 2016



● NAM ● EU ● China ● Rest of World

what is esports?

“
esports is a natural evolution of multiplayer gaming. Playing and watching esports builds communities and is innately social”

Interview responsee



Esports is the practice of playing video games competitively, usually over the internet or via networked computers in venues. Players perform either solo or in teams and at the top of the esports eco system receive prize money for winning, often in the millions of pounds. It is now one of the fastest growing and vibrant digital industries in the world.

Video games have always had a competitive element that lend themselves perfectly to attracting spectators, tapping into the human desire to watch highly skilled people do something at the highest level. Whilst competitive games tournaments have been held for the last 30 years, highly organised mass participation esports events, being broadcast to millions started to emerge in South Korea in the 2000s.

The continued growth of video games as a cultural medium, coupled with faster broadband speeds and improved access to technology, has allowed esports to develop into a multi-million pound, multinational sector in its own right.

Viewing figures for major tournaments, broadcast primarily via the internet but increasingly on live television, are now rivalling and often exceeding traditional sporting events.

The global esports audience is millions strong, with a total estimated count of 292m people worldwide in 2016. This audience is primarily young, with 73% of all esports fans in the under 35 age bracket, and tech-savvy. Many of this group no longer consume broadcast television, radio or read newspapers due to the development of internet alternatives and are more likely to subscribe to services streaming video (Netflix, YouTube), music (Spotify, Apple Music) and news sites.

As a gateway to this elusive demographic, esports is starting to attract traditional media businesses and heavy investment through sponsorship and advertisement.

what is esports? continued

“

73% of all esports fans are in the under 35 age bracket

”

The extended component parts of the sector and commercial opportunities around them will produce estimated global revenues of \$493m in 2016, with a year-on-year growth of 51.7%. By 2019, esports will be a billion-dollar industry. [1 Newzoo]

The increasing involvement of internationally recognised, big brand sponsors and innovative crowd funded models have seen professional teams compete for prize pots sometimes exceeding \$20 million (£15.6m) at The International 2016, being watched live by audiences in football stadiums of 40,000 as well as online in their millions.

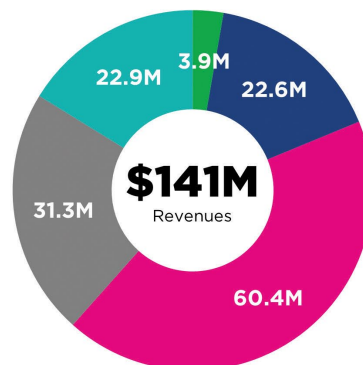
Games like Vainglory are bringing esports mechanics to mobile platforms which is only going to further fuel growth for the sector. There is also early interest for how esports could be applied to cutting edge technologies such as virtual reality and augmented reality.

EXAMPLE ANALYSIS: 2016 ESPORTS REVENUE BY BUSINESS MODEL IN EUROPE & GROWTH RATE TOWARD 2019

Europe | 2016

2015-2019 CAGR

34%



- MEDIA RIGHTS
- MERCHANDISE & TICKETS
- ONLINE ADVERTISING
- BRAND PARTNERSHIP
- ADDITIONAL GAME PUBLISHER INVESTMENT

EXAMPLES OF BRANDS AND MEDIA COMPANIES THAT RECENTLY HAVE GROWN THEIR ESPORTS INVOLVEMENT



why esports matters

How a thriving UK esports sector can help in the UK and globally:

Esports is one the fastest growing and exciting digital entertainment sectors in the world:

- + Estimated global esports revenues are growing at a double digit rate: 2016 revenue is estimated at \$493m and by 2019 esports is predicted to be a billion-dollar industry. [1]
- + Major tournaments fill huge stadiums: over 100,000 fans visit Katowice in Poland every year and Wembley Arena has seen tens of thousands of people attend major esports events, including two of the world's largest games, Valve's CounterStrike: Global Offensive and Riot Games' League of Legends (where in 2015 Fnatic, a globally leading UK-based team, reached the LCS Worlds semi-finals).
- + Prizes at major esports events rival or even exceed those in traditional sports. For example, the 2016 DOTA 2 finals saw a record prize pool of \$20.1 million, with \$9m awarded to the winning team (larger than the 2015 NFL Superbowl prize and more than 1 twice the 2014 NBA finals prize²). The largest prize pool held on British soil to date was the \$765,000 ECS Season One final held at Wembley SSE Arena and organised by UK-based FaceIT and Twitch.
- + Top esports events attract millions of viewers: the League of Legends 2015 Worlds tournament saw over 360 million hours of esports broadcast and the tournament final had 36 million viewers TV broadcast is growing via deals with Turner in the US, Sky in UK/EU, and other deals in several countries.
- + Traditional sports are beginning to recognise esports' potential. For example, the UK's own Team Dignitas was recently acquired by American investors and owners of the NBA basketball team the Philadelphia 76ers. Football clubs including West Ham and Manchester City have signed FIFA esports players (the popular football video game franchise and some clubs (including the German football club Schalke) have gone further and acquired teams in top esports including League of Legends.
- + Esports are increasingly a part of the wider cultural mix, engaging millions of young people in the UK. Multiplay's Insomnia event, sometimes known as the Glastonbury of Gaming, includes esports alongside other activities and attracts tens of thousands of attendees to the NEC in Birmingham each year.

A thriving esports sector can:

- + **Drive economic growth throughout the UK** - esports tournaments can fill stadiums and attract big international brands, connecting them up to online global audiences of millions. Hosting major esports events can bring tens of thousands of people to towns, cities and regions throughout the UK and internationally, encouraging tourism and boosting the local economy.
- + **Provide highly skilled jobs.** Companies in the esports sector require people with entrepreneurialism and technological savvy. Esports is also driving the creation of new categories of jobs including esports commentators and analysts and is also creating synergies with existing jobs such as sports psychologists and broadcasters. As importantly, the popularity of esports is also driving the market for video games, including games developed in the UK, and the growth of jobs in the game development, retail and events sector.
- + **Create a diverse and hugely accessible ecosystem** – low barriers to entry means players from all backgrounds and abilities can compete in esports on level digital playing fields - further growing the spectator fanbase. Esports are inherently social and can engage young people with technology and team based, strategic thinking - opening opportunities for young people to discover careers in esports, the games sector and wider digital creative professions.

“

esports creates jobs for roles that have not existed before.”

Interview respondent

esports in the UK

The UK's esports audience is set to grow from 6.5m in 2016 to 8m in 2019 with a cumulative annual growth rate of 7.5%

**The UK's esports audience is
expected to reach 8 million
in 2019**

However, this growth does not match that of other major esports markets and a number of barriers are in place that are preventing the UK from truly becoming a world leading esports hub:

- + Low levels of awareness and understanding of the esports sector amongst the wider UK population, policy makers, potential investors and commercial sponsors at a local and national level
- + No coordinated support from policy makers throughout the country to support commercial growth of the sector and attract big international esports tournaments
- + Little celebration or promotion of the achievements that British esports has achieved to date and is working on right now
- + No coordinated support for improving skills and inspiring the next generation of highly skilled talent to play, make and produce esports in the UK - creating a talent pathway from grassroots to professional
- + Inadequate broadband reach and low connection speeds hampering both the playing and watching of esports and the development of esports games

1 <http://www.dota2.com/international/overview/>

2 http://www.espn.com/espn/story/_/id/13059210/esports-massive-industry-growing

3 http://www.lolesports.com/en_US/articles/worlds-2015-viewership

“

Esports can really act as a facilitator of growth for local areas in the UK”

Interview responsee

The UK, with its tradition of embracing video games and their wider cultural influence, its early adoption of digital platforms and its inherent entrepreneurial and sporting excellence, is perfectly placed to become a global hub for esports.

Major esports companies are already recognising the potential for growth in the UK and there are currently several established tournament series running throughout the UK and major esports focused publishers and developers such as Activision Blizzard, EA and Hi Rez have significant regional offices in the UK.

In recognition of the value of esports the UK's largest specialist gaming retailer, Game, last year acquired Multiplay, one of the UK's longest established esports businesses, for £20 million.

Multiplay have held events that include a qualifier for the \$1,000,000 COD XP tournament in Los Angeles, their own global Starcraft 2 tournaments (ESET UK Masters and the IGN Pro League Qualifier) and more recently, their Truesilver Championship, a \$30,000 Hearthstone tournament.

The UK is starting to see some other significant events being hosted here: ESL hosted their CS:GO Pro League Season 3 broadcasts from their Leicester studio, and hosted the \$750,000 prize pool finals at the O2 Indigo in Greenwich, London; the largest prize pool held on British soil was the \$765,000 ECS Season One final at Wembley SSE Arena; the largest prize pool organised by a solely British organisation is the \$125,000 Gfinity Summer Masters tournament at their dedicated arena in Fulham Broadway.

Major British cultural venues are recognising the value of esports as shown by the Gfinity organised tournament held this year at The Royal Opera House in London.

The UK is already seeing investment in esports facilities around the country. ESL UK have invested in a state of the art esports studio in Leicester that has up to 30 cameras running at 4k providing the highest quality HD broadcasts to global audiences and Gfinity have transformed the Vue cinema in London's Fulham Broadway to be able to host over 600 people watching world class competitive tournaments.

At a professional team level, there are many UK players and teams operating internationally and attracting the attention of international investors and sponsors – leading teams Team Dignitas and Fnatic are headquartered within the UK. There is however a shortage of top homegrown UK superstars playing esports at the very highest level and a limited flow of talent coming from amateur esports leagues. This requires more support for training facilities for top players such as the potential National Training Centre at Pinewood and to support more sustainable grassroots initiatives.

The importance of growing grassroots UK talent has recently been recognised by ESL UK's commitment to growing their UK Premiership on the two tenets of stability and sustainability; giving UK teams the chance to compete in a professional league with the aim of filling the UK's current skills gap of world class esports teams and players.

There is also evidence of the growing strength of the UK's grassroots esports sector to be seen in initiatives such as the National University Esports League (NUEL), which has over 3000 players representing 110 of the UK's universities.

New initiatives originating in the UK are bringing esports to new audiences, such as the egames tournament to be played by national teams for pride and medals in a model similar to the Olympics.

Major high street retailer, Game, have also recently launched a new initiative this year to bring esports to the high street with their esports and competitive gaming zone, in their shop in the Manchester Trafford Centre - giving consumers access to the best games technology and a chance to take part in some competitive game playing.

“

technology doesn't differentiate between age, gender, disability or ethnicity”

Interview responsee

the ingredients for success

what can the UK learn from other countries?

The UK's esports audience is set to grow from 6.5m in 2016 to 8m in 2019 with a cumulative annual growth rate of 7.5%

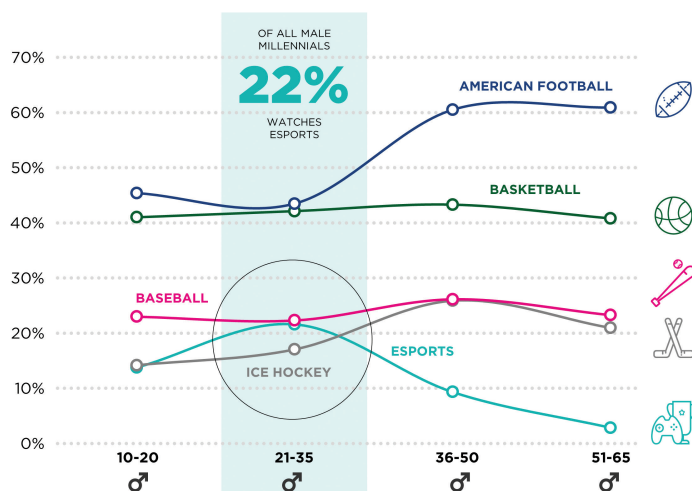
Whilst the UK esports sector is growing, it lags behind other major esports destinations. These and other countries already provide templates for what success looks like and what can be done if the UK is to match the ambition of some of the biggest esports markets in the world.

	China	South Korea	USA
Total regional esports revenue (2016)	\$73.3m	\$37.3m	\$176.7m
Predicted esports revenue and growth rate (2019)	\$188.6m (45%)	\$62.7m (21%)	\$447.3m (39%)
Esports audience in 2016 (% of global)	106.2m (36%)	53.4m (23%)	46.7m (16%)

All estimated figures provided by Newzoo

POPULARITY OF (E)SPORTS BY AGE

AMONG MALE MILLENNIALS | AMERICAN SPORTS* AND ESPORTS**



*Includes Americans who have indicated that they have viewed the sport in the past three months.
**Includes Americans who have indicated that they watch esports content at least once per month (Esports Enthusiasts).
Derived from Newzoo's Esports Consumer Insights performed in 27 countries.



76%

of Esports Enthusiasts state that their esports viewing is taking away from hours they used to spend on viewing sports



65%

of Esports Enthusiasts in the US actively uses Instagram vs. 44% of online population

South Korea:

esports as national pastime

Audience size: 53.4m

South Korea leads the ways in having esports as a deep and ingrained part of its culture and having the world leading infrastructure to support it.

It is a highly technologically advanced country with high levels of public support for esports. Famed for their dominance in the Real-Time Strategy game StarCraft, national television broadcasts weekly matches in the country's own league. This has made household names of many of their biggest players who continue to operate at the top level of big global competitions.

Esports cannot exist without widespread, high speed broadband. South Korea, with its huge esports audience, shows the clear link between fast broadband and growth in esports - leading the world with an average broadband speed of 26.7 MB/s per connection and an esports audience of 53.4m (23% of the global total).

The USA:

monetizing a fast growing sector

Audience size: 46.7m

Whilst other countries may have a broader cultural understanding of esports, the US is quickly catching up and esports is starting to rival traditional sports viewing. 22% of millennial age male Americans watch esports, more than the number who watch ice hockey and equal to the number regularly watching baseball. Esports revenue still has significant room to grow. If esports represented the same 'per fan' revenue values as more established industries such as the NBA, today's \$493m global revenue would be closer to \$2.5bn. [1]

Esports' ability to reach new, younger audiences is also being recognised by LA 2024 (hosts of the 2024 Olympic Games) who have recently pledged to harness the growing global popularity and technology of esports as a way of reinvigorating global youth's connection to the Olympic Movement.

The importance of friction free immigration for players is recognised in the USA. Players attending tournaments in the US can be provided athlete or P1 visas in order to more easily enter the country, state senators have intervened in order to resolve immigration disputes that could prevent players attending their events

Germany:

providing the right support for players

Audience Size: 6.4m

The importance of wider support to attract and support big tournament can be seen in Germany, which is the home country for one of the world's largest tournament operators, ESL, who hold several major tournaments for most of the main esports games. Germany provides the support for the esports sector to thrive. For example it has facilities like the ESC gaming centre, for teams to hire with high-speed fibre internet connections and other facilities to use as training grounds when arriving early in the country to prepare for one of the many major tournaments hosted in Germany or throughout Western Europe, short train or plane rides away.

Scandinavia:

Esports education

Audience size: 2.7m

Scandinavia is considered one of the centres of European esports and Sweden, Norway and Finland have had long public exposure to professional gaming as a career path and entertainment option.

This popularity has lead both Swedish and Norwegian education ministries to introduce an esports curriculum track of physical education currently taught by at least two secondary schools. The Swedish curriculum, in place at Arlandagymnasiet High School in Märsta, teaches physical education, alongside nutrition and psychology, with dedicated lessons on esports, the tactics of winning Counter-Strike matches and communication techniques.

China:

The biggest esports audience in the world and superstar players

Audience size: 106.2m

China is the leading single nation in esports audiences and revenues. China also gives a good example of how acceptance of video games at a cultural level leads to huge growth in esports. In 2015, the percentage of internet users in China playing online games was 56.9% (391.5m)⁵ and the ensuing popularity of esports in China is reflected in the country's appointment of Warcraft III player Li "Sky" Xiaofeng as a torch bearer for the Olympic relay prior to the 2008 Beijing Games.

¹ <https://newzoo.com/insights/infographics/uk-esports-audience-2016/>

⁵ Statistical Report on Internet Development in China, January 2016, P.67. Chinese Internet Network Information Centre <http://cnnic.com.cn/IDR/ReportDownloads/201604/P020160419390562421055.pdf> (obtained October 2016)

⁶ <http://www.gosugamers.net/dota2/news/31787-valve-seeks-cooperation-with-senator-to-helpsonneiko-cema-and-cty>

recommendations

“The UK needs a strategy to attract big international tournaments and we need Westminster and local government to understand and support the sector”

Government, industry and the investment community can work together to make the UK an esports powerhouse and to play a constructive role in the growth of global esports. A thriving esports sector creates jobs and makes a clear statement about the UK's ambition to be a world leader in technology, innovation, digital trade and the creative industries. This can be achieved through implementing the following recommendations:



Strategy and infrastructure

1. The sector to work with the Department for International Trade, local government and LEPs to **develop a joined up strategic approach and compelling trade and investment offer to major tournament holders, IP owners and brands** to attract the biggest esports events and broadcasts to the UK and enabling UK companies involved in the sector to succeed internationally.
2. Government to **incentivise the delivery of superfast broadband that matches market leaders such as South Korea (which has an average broadband speed of 27MB second) and develop a strategy for the UK to become a world leader in 5G.**
3. The sector to further coordinate itself as an industry group, possibly via **a UK esports council for all major organisations and expert individuals involved in esports in the UK** to share information and encourage and facilitate the sharing of best practice between esports businesses, related organisations and other sectors.
4. Industry and government to **develop a methodology for more accurately measuring the UK esports sector.**

Esports present a huge opportunity at a national level but also for towns and cities throughout the country to become globally recognised esports destinations.

The UK also has a long heritage of creating, managing and hosting some of the biggest sporting events in the world (whether that's the Premier League, the Rugby World Cup or London 2012).

This has often involved shaping bids in partnership with government to attract famous sporting tournaments and put on UK events that are on a par with the best in the world. This experience should be used to attract the biggest esports events to the UK.

The main role for government, on a national level but also increasingly through Local Enterprise Partnerships (LEPs) and Local Authorities, is to work with the sector to actively promote and encourage esports in the UK.

The ambition should be to integrate esports opportunities into the government's trade and investment work and the growth strategies for LEPs and local authorities around the country, and proactively encourage major esports businesses and tournaments to be established in towns, cities and regions throughout the UK.

A fast internet connection is the lifeblood of esports. Without it games cannot be made, players cannot compete with each other and there is no connection with the global audience of tens of millions of esports fans who power the growth in esports. So, with esports being watched by a global audience of millions, largely through online streaming services, connectivity through top quality high speed broadband is an absolute necessity if the UK is to become a global esports destination.

Government should continue with its plans to roll 2MB/s broadband out to 95% of the UK population. However, with countries like South Korea having an average connection speed of more than 26MB/s the UK needs to look to improving the speeds that UK consumers can access and to have a strategy in place to become a world leader in 5G technology.

The recent government announcements of further funding for a new Digital Infrastructure Investment Fund and the further development of 5G are welcome in this respect.

There is a need for the esports sector to speak with a clear voice to the UK government; to better promote the sector; to continue to work closely with existing regulatory bodies; to better support UK esports initiatives at all levels; and to better coordinate the sector's strategic voice and vision for the UK. Ukie together with its members and other stakeholders will continue to build on the work it has already done to fulfill this role (through its existing Esports Group) with a wider commitment to support the esports sector.

“

The sector needs to think about long term opportunities and to continue working towards more professionalisation.”

Interview respondent

To support this work the industry should regularly come together to discuss the right approach to key issues. One solution would be for a new council to meet twice a year - made up from representatives of Ukie's existing Esports Group and other stakeholders.

This council would not have any executive powers or governance over the sector but will help to ensure all UK esports related activity is strategically aligned and information is shared to enable the best possible outcome for the sector. The council would also collectively scan the horizon to ensure that the UK esports sector can continue to take a responsible approach across all aspects of the eco system.

As the sector develops it will become increasingly important to have more detailed economic information and employment figures for the esports sector. The current SIC code system does not currently accurately capture the size of esports as a separate sector. Industry initiatives such as Ukie's UK Games Map should build on research currently undertaken by companies such as Newzoo, to more accurately capture esports businesses and government should consider how official statistics can more accurately capture the size of esports in the UK.

recommendations continued





Skills, talent and diversity

5. government to consider the needs of esports businesses and players in policy debates around **skills and immigration**. The industry and government to consider **how esports roles could better integrated into the existing Tier 1 and Tier 2 Visas process and ensure friction-free access to the highly skilled talent needed by the games and esports sectors**.
6. the UK's already world-leading **games industry education courses to include esports modules** - to be implemented via **undertaking a skills review of current esports job roles** and application to existing course contents.
7. **esports companies to actively support sustainable initiatives that promote and inspire diverse participation of esports**. To work with partner organisations, such as the national Digital Schoolhouse programme, to host tournaments and other initiatives that encourage diverse participants and audiences.
8. **fifteen UK esports ambassadors to be created to promote esports in the UK and internationally**, picked from a diverse mix of players, developers, publishers and event organisers, and to be added to the UK's existing Video Games Ambassadors scheme.

The esports industry needs a highly skilled workforce. Hosting and streaming live esports events requires commentators, online community moderators, analytics experts, network engineers and audio visual producers amongst others. It also requires innovative techniques at the production and broadcast level.

The growth in esports can also drive the market for video games. Making the games played as esports requires a blend of maths, science and computing combined with art and creativity. Whilst the adoption of coding on to the UK's national curriculum has been a big boost to the games sector, there must be a continued focus on STEM skills combined with the creativity required to make innovative digital content.

With tournaments happening around the world and professional teams increasingly made up from players from many different countries, who may only need to be in a country to take part in a competition for a couple of days at a time, restrictive immigration policies could become a major barrier to the UK becoming a major esports destination.

Esports players and other professionals therefore need to be recognised as a highly skilled and inclusive profession and the UK's immigration system must not place barriers for players competing in UK-based tournaments or when they wish to base themselves in this country.

The sector should therefore review how esports visas for highly skilled esports players and employees can be best integrated into existing immigration policies and procedures, possibly through working with one the 'competent bodies' that exist in the UK to endorse applications for Tier 1 Exceptional Talent Visas (for example Tech City is the designated competent body for digital technology).

There is the potential for esports to be open to an even wider audience - creating a bigger consumer fanbase and a bigger pool of UK players. Anyone with an internet connection and a computer can compete in esports and amateur players from a diverse range of backgrounds can move through the ranks to become professionals. The sustainable support of this grassroots and amateur scene is key to the long term success of esports in the UK.

Whilst there are female esports players and leagues more needs to be done to encourage not just women but more people from diverse backgrounds to consider esports as career or as players or professionals.

One of the first places to start encouraging the next generation of diverse talent into the esports sector is through the UK's already well established games industry courses at universities and colleges. Initially this should take the form of guest lectures from esports developers, players and tournament holders but there is scope to develop more formal educational resources, better tailored to improving the skilled workforce the esports sector needs.

There is also scope for existing programmes to include and support more esports initiatives including Ukie's Digital Schoolhouse programme (powered by PlayStation) which applies innovative teaching methods to engage 15,000 primary and secondary age children throughout the country with digital skills. Digital Schoolhouse is currently establishing an esports competition, with a particular focus in using esports to engage pupils from a diverse range of backgrounds and vulnerable students with technology and team based activities.

More could be done to encourage people to consider careers in the esports sector through having esports representation in existing initiatives like the Video Games Ambassadors scheme of over 300 industry volunteers across the country who inspire children and young people to work in the games industry. However, a full review of the skills required by the sector now and in the future is required that will determine where specific action and intervention is required in this area.

conclusion

Esports presents a huge opportunity to the UK. Whilst the market will continue to grow and develop naturally, combined commitment from government and industry to actively promote the sector, integrate it into policy thinking around growth and infrastructure plans (particularly regionally) and boost the talent flow into the sector will give the UK the inertia it needs to become a world leader in esports and play its part in growing the sector globally.

To ensure a sustainable future for esports in the UK, the UK esports industry needs to be at the forefront of esports thinking that recognises the constantly shifting and multinational nature of esports but nonetheless identifies common objectives for the UK.

Having a collective vision for attracting the biggest and best tournaments will put the UK on the map as a global hub for esports. This will in turn further raise awareness of the sector, leading to further investment that can start to further fuel the sustainable grassroots support that the UK sector needs - inspiring a new generation of diverse talent into the industry: making the best new esports games; beating the best players in the world and producing world class esports events on a par with the UK's reputation for hosting other global sporting events.

As stated in this paper, having a successful esports sector in the UK would create economic growth and inspire new skills but there are also other benefits. We should look to countries like South Korea for inspiration, not just in terms of the immediate benefits to their economy that esports has brought to them but also in terms of the broader statement esports makes of a country embracing innovation and making a statement to millions of young esports fans about the forward looking approach to technology and new, modern industries.

The UK has all the ingredients to emulate other esports market leaders. With a commitment from the sector and government to work together, to deliver the recommendations in this paper and to continue to evolve common goals, this country can reach the very top of the esports leagues.





ukie esports group

Activision Blizzard UK
Azubu
Bandai Namco Games UK
Bastion
Zenimax Europe Ltd / Bethesda
Softworks
Brown Betty
CE Europe
Channel Four Television
Charles Russell Speechlys
Dingit
Dovetail Games
Born Ready Games
ESL
European Gaming League
FACEIT
Fnatic
GAME Retail
Gamer Network
Gfinity
Ginx TV
Green Man Gaming
Hamkins
Hi-Rez Studios
KOEI TECMO EUROPE
Kybele Studio
Level 3 Communications
MarkMonitor
Microsoft
Multiplay
NCSOFT Europe
Nintendo UK
The National University eSports
League
PayPal
Premier
Purewal & Partners
Reloaded
Sheridans
SKARA The Blade Remains
Sony Interactive Entertainment
Europe
Space Ape Games
Splash Damage
Swipe Right PR
Take 2 Interactive
Team Dignitas
TS Information Technology
Twitch
Ubisoft
Warner Bros. Interactive
Entertainment
Women in Games

ukie members

505 Games
A Brave Plan
AIME
Altered Gene Studios
Ansible PR & Communications
Ant Workshop
Antstream Games
AppyNation
Archtor
ARM
Atomicom
Autodesk
BadLand Games UK
Barog Games Labs
Bee7
Beloudest
Big Bit
Blazing Griffin
bluegfx
Boolean Technologies
Boss Studios
Brandculture Sport & Entertainment
Brunel University London
Burke & Best
Cambridge Game Creators Network
Cape Guy
Carbon Digital
Cardboard Sword
Casual Games Association
CBBC
CCP Games
Centresoft
Chilled Mouse
China Business Solutions
Coatue
Code Arthur
Code Kingdoms
Crash Lab
Crvantech
Crossover Sheffield Doc/Fest
Cubic Motion
Curve Digital Entertainment
Dakko Dakko
Darbatron
Dashine Electronics
De Montfort University
deltaDNA
Desk Dragons Interactive
Dimoso
DNA
DR Studios
Draw & Code
East2West
Eaton Smith
Edidou
Electronic Arts
Endemol Shine

Epic Games
Escape Studios (Pearson College)
Escape Technologies
ExCel London
Exertis Gem
Exient
Fan Studio
FC Business Intelligence
First Touch Games
Flamin Galah
Flix Interactive
Focus Multimedia
Foot Anstey
FreeJam
Freekstorm
Funsolve
Future Games of London
FuturLab
GameBench
GameGrin
Gamer Camp Studios (Birmingham)
City University
Games Britannia
Games London
GamesAid
GameSparks
Gamewagon
Gamification Nation
Genba Games
Get Games
Goldborough Studio
Goldsmiths, University of London
Good Catch
Ground Shatter
Halo Financial
Harbottle & Lewis
Hardlight
Hidden Armada
Huddersfield University
Ian Hamilton Design & Consultancy
Improbable
Incendium Games
Indigo Pearl
Innovation Birmingham Campus
Interactive Opportunities
International eGames group
International Games Developers
Association
Internet Advertising Bureau
Ipsos
ISM
Johnny Atom Productions
Joyful Works
Kalypso Media UK
Kartridge
King
Kiss
Koch Media
Konami Digital Entertainment
Kuju
Kumotion
Lab42
Leapfrog
Lick PR
Liquid Crimson
Localize Direct
London South Bank University
Ludus Magnus
Mad About Games
Magic Notion
Marmalade
Marvelous Games
Matata Corporation
Maximum Games
MCM Expo Group
Mechabit
Mediatonic
Mercia Fund Management
Merge Games
MHT Game
Middlesex University
Milestone
Milky Tea
Milton Keynes College
Modern Dream
Moov2
Myriad Associates
National Film & Television School
nDreams
Nerd Monkeys
Nescot
Nesta
NetEase
NetNames
NewBay Media Europe
Next Gen Skills Academy
Nibiru
Nordic Games
Northern Ireland Screen
Norwich University College of the
Arts
Nosebleed Interactive
Oculus VR
Omni Systems
omuk
OPM Response
Opposable Games
Osborne Clark
Pandabox Games
PaperSeven
Pataphysics
Payload Studios
Perpetual Europe

Piggyback Interactive
Pinewood Studios Group
Pixel Toys
Pixelbomb Games
Plan of Attack
Playdom
Player Research
Playmob
Playniac
Playrise Digital
PlayStack
Pole to Win Europe
Pollen VC
Polygon&Pixel
Polymath Aspire
Polystream
Pomegranate
Pqube
Press Space
Prospect Games
Queen Mary College for Commercial
Law
R8 Games
Rantmedia
Rare
Raspberry Pi Foundation
Ravensbourne
Reality Games
Reflection
Renaissance PR
Replay Events
Revolution Software
Rift Group
Ripstone
Rising Star Games
Robo Pixel
Rocabee
Rocket Lolly Games
Rogue Vector
Roll7
Russells Solicitors
Saffery Champness
Secret Sauce
SEGA Europe
Sheffield Hallam University
Six to Start
Sketchbook Games
Skillssearch
Soccer Manager
Sold Out Sales & Marketing
Solihull College
Sony DADC
Southampton Solent University
SpecialEffect
Spilt Milk Studios
Sports Interactive
Square Enix
SRS Investment
Staffordshire University
State of Play
Steel Media
Stick Sports
Stormlantern
Strike Gamelabs
Swallowtail Games
System 3 Software
Tag games
TAKEOFF
Tandem Events
Tangentix
Target Media
Teeside University
Testronic
The Arts University College at
Bournemouth
The Chinese Room
The Creative Assembly
The Games Tribe
The Secret Police
The Tall Trees
The Tiniest Shark
The Trailer Farm
TinyBuild
To Play For
TT Games
Two Tails
Unity Technologies
Universally Speaking
University Centre Grimbsy, Institute of
Further & Higher Education
University of Abertay Dundee
University of Central Lancashire
University of Chester
University of East London
University of Hull
University of Leeds
University of the West of Scotland
University of Westminster
University of York
Upload Agency
Utopian World of Sandwiches
Uzone Network Technologies
Warchild
Warwickshire College
Waterfront Entertainment
We Heart Dragons
West College Scotland
Wired Productions
Wired Sussex
Woodshires
World Gaming Executives
Xiotex Studios
YoYo Games

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