Esports Arenas are Coming to Your Campus Soon: The Planning Factors You Need to Know
Learning Objectives

• What is esports and why you should pay attention
• Planning for esports and the Campus Impact
  – Budget Considerations
  – Desirable Adjacencies & Interchanges
  – Programming
  – Infrastructure
  – Space Planning
Esports: A multiplayer video game played competitively for spectators…

*That fosters a spirit of teamwork, inclusivity, and wellness…*
*And prepares young adults for real world jobs and challenges.*
Number of 2018 viewers (in millions)

- NCAA Final Four
- Super Bowl
- League of Legends World Championship

[Bar chart showing viewership comparison]
## Final Results

<table>
<thead>
<tr>
<th>Place</th>
<th>Team</th>
<th>Points</th>
<th>Prize Money</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>BUGHA (USA)</td>
<td>59</td>
<td>$3,000,000</td>
</tr>
<tr>
<td>2nd</td>
<td>PSALM (USA)</td>
<td>33</td>
<td>$1,800,000</td>
</tr>
<tr>
<td>3rd</td>
<td>EPIKWHALE</td>
<td>32</td>
<td>$1,200,000</td>
</tr>
<tr>
<td>4th</td>
<td>KREO</td>
<td>30</td>
<td>$1,050,000</td>
</tr>
<tr>
<td>5th</td>
<td>KING</td>
<td>30</td>
<td>$900,000</td>
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<tr>
<td>6th</td>
<td>CRUE (Sweden)</td>
<td>27</td>
<td>$600,000</td>
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<tr>
<td>7th</td>
<td>SKITE (France)</td>
<td>26</td>
<td>$525,000</td>
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<tr>
<td>8th</td>
<td>NAYTE</td>
<td>26</td>
<td>$375,000</td>
</tr>
<tr>
<td>9th</td>
<td>RIVERSAN (USA)</td>
<td>24</td>
<td>$300,000</td>
</tr>
<tr>
<td>10th</td>
<td>FATCH (Canada)</td>
<td>24</td>
<td>$225,000</td>
</tr>
</tbody>
</table>
NACE: PERCENT OF MEMBERSHIP W/ TEAMS FORMED

League of Legends: 90%
Overwatch: 80%
Rocket League: 70%
Hearthstone: 60%
Fortnite: 50%
CS: GO: 40%
Super Smash Bros: 30%
Apex Legends: 20%
Rainbow Six: Siege: 10%
NBA2K: 0%
THE AMERICAN GAMER
KEY CONSUMER INSIGHTS

NUMBER OF GAMERS
160.3M

TOTAL GAME REVENUES
$25.1Bn

#2 MARKET IN THE WORLD

AGE/GENDER
ACTIVE MOBILE PLAYERS*

52% MALE
11%
15%
13%
14%
18%

*PLAYS MORE THAN ONCE A MONTH

WATCHES VIDEO CONTENT
49%
OF PEOPLE WHO WATCH GAMING VIDEO CONTENT
WATCH LET’S PLAYS OR WALKTHROUGHS

CROSS-PLATFORM GAMERS
37%
OF GAMERS PLAY PC, MOBILE & CONSOLE GAMES

OWNS A GAMING HEADSET
40%
OF ALL GAMERS OWN A GAMING HEADSET

TRADELINE
ESPORTS AUDIENCE GROWTH
GLOBAL | FOR 2018, 2019, 2020

TOTAL AUDIENCE

2018
222M
173M
395M

2019
245M
198M
443M

2020
272M
223M
495M

newzoo.com/esportsreport
2018-2022 GLOBAL ESPORTS MARKET
FORECAST PER SEGMENT TOWARD 2022

+9.0%
TOTAL MARKET CAGR
2018-2022

newzoo.com/esportsreport
2019 ESPORTS REVENUE STREAMS | GLOBAL
INCLUDING YEAR-ON-YEAR GROWTH

$456.7M
+34.3%

$251.3M
+41.8%

$189.2M
+14.8%

$103.7M
+22.4%

$95.2M
-3.0%

$1.1Bn
2019 total esports revenues,
+26.7% year on year.

Newzoo's esports revenue figures always exclude revenues from betting, fantasy leagues, and similar cash-payout concepts, as well as revenues generated within games.

© Newzoo | 2019 Global Esports Market Report
Evolution of the Gaming Market

Macro trends are driving the exponential growth in gaming and esports.

- Launch of Traditional Console Gaming
- Proliferation of Mobile Devices
- Growth of New Media Channels
- Establishment of Esports Professional Level
- Validation of Gaming as Mainstream Lifestyle
- Democratization of high speed internet access
- 5G
Major Brands Active in Esports Sponsorship

Endemic and non-endemic brands validate the mainstreaming of esports.
Esports Organizations

- 160 + Member Institutions
- 170 Newly Created
- 270 + Chapters
Esports Careers

- Professional Player
- Coach/Analyst
- Shoutcaster/Host
- Broadcast Production Crew
- Journalist/Content Creator
- PR/Marketing
- Sales/Partnership Manager
- Team Owner/Manager
- Social Media Manager
- Event Manager
- Agent
- Statistician, Lawyer, Finance
- Game Developer
- Invent Your Own Career

Ryan Morrison - Agent
COMPUTER SCIENCE/ENGINEERING
BROADCAST PRODUCTION
**PRO’S**
- Familiar with Athletes
- Hosting Tournaments
- Sponsorship Opportunities
- Recruitment of Talent
- Branding & Imagining
- Recruitment & Retention

**CON’S**
- NCAA Has Not Embraced
- Compensation to Players
- Title IX Issues
- Potential On-Line Gambling

**PRO’S**
- Student Life Responsibility
- More Student Focused
- Sponsorship Opportunities
- Open to Entire Campus
- Compensation Shared
- Recruitment & Retention

**CON’S**
- Players can leave easier
- Hosting Tournaments
- Branding & Imagining
- Management Structure

**PRO’S**
- Compensation Potential
- No Restrictions

**CON’S**
- No Formal Recruitment
- Less Campus Focused
- Isolation of Players
- Lost Sponsorships
- Uncontrolled Imagine
- Hosting Tournaments
- Branding & Imagining
- Multiple Campus Representatives
5,000+ SF

Full Sail University
- Opened 2019
- $6 million
- 11,200 SF
- 100 Athletes in Play
- 500 Guest Capacity
- Concert Level PA System
- 10 Million Pixels of LED Wall
- Full Production Studio
- Flexible Plan
2,000-5,000 SF

Univ. of California Irvine
- Opened 2018
- $250,000 + Sponsored Equipment
- 3,500 SF
- 80 Gaming PCs
- Console & Community Corner
- Broadcast Station
- Offers 10 Scholarships valued at $15,000 each
Central Maine CC
• Opened 2019
• $200,000
• 1,600 SF
• 30 Gaming PCs
• 5 Console & Community Stations
• Esports Management Degree Program
• Part of Admissions Tour
500-2,000 SF

Columbia College, MO
- One of First In the Nation - 2016
- $300,000
- 840 SF
- Repurposing Existing
- Enrollment Focus
- 10 Gaming PC
- 2 Console Lounges
- Player Lounge
- Branding & Imaging
- Championship Team
500-2,000 SF

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BUDGET

- $43,000 - Average Equipment Startup
- $20,000 – Furniture, LED Screens, Jerseys/Gear, Branding
- $40,000-$60,000 Esports Coach Salary
- Locate your Arena:
  - Use Existing Space $
  - Renovate Existing Space $$
  - New Construction $$$$ 
- Sponsorship Opportunities
<table>
<thead>
<tr>
<th>Programming</th>
<th>New Construction</th>
<th>Repurpose</th>
<th>Interior Renovation</th>
</tr>
</thead>
<tbody>
<tr>
<td>$350-$500/SF</td>
<td>• SITE WORK</td>
<td>$180-220/SF</td>
<td>$80-120/SF</td>
</tr>
<tr>
<td>• SITE WORK</td>
<td>• Upgrade Entry</td>
<td>• Upgrade MECH/ELEC</td>
<td>• Service/Support</td>
</tr>
<tr>
<td>• Parking/ Sidewalk</td>
<td>• Upgrade Lighting</td>
<td>• Upgrade TELECOM/AV</td>
<td>• Upgrade MECH/ELEC</td>
</tr>
<tr>
<td>• Site Grading</td>
<td>• Public Areas</td>
<td>• Upgrade TELECOM/AV</td>
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<td>• Public Areas</td>
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<tr>
<td>• Public Areas</td>
<td>• Upgrade/Replace MEP</td>
<td>• Upgrade THEMATIC LIGHTING</td>
<td>• Competition Space</td>
</tr>
<tr>
<td>• Entry Lobby/ Lounge</td>
<td>• Upgrade Telecom/AV</td>
<td>• Practice Rooms</td>
<td>• Thematic Lighting</td>
</tr>
<tr>
<td>• Restrooms</td>
<td>• Storage</td>
<td>• Team Lounge</td>
<td>• Practice Rooms</td>
</tr>
<tr>
<td>• Service/Support</td>
<td>• Esports</td>
<td>• Coaches Office</td>
<td>• Team Lounge</td>
</tr>
<tr>
<td>• Mechanical Systems</td>
<td>• Competition Space</td>
<td>• Broadcast/AV Room</td>
<td>• Coaches Office</td>
</tr>
<tr>
<td>• Electrical Systems</td>
<td>• Thematic Lighting</td>
<td></td>
<td>• Broadcast/AV Room</td>
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<td>• Coaches Office</td>
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<td></td>
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<tr>
<td>• Competition Space</td>
<td>• Locker Rooms</td>
<td></td>
<td></td>
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<tr>
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<tr>
<td>• Broadcast/AV Room</td>
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</table>
• Hardware
  – PC’s with high end graphics cards,
  – High Resolution Monitors
  – Gaming Keyboards
  – Gaming Mouse
  – Gaming Headsets
  – Private Gaming Server

• Bandwidth
  – Needs to be hardwired. Use existing infrastructure or build dedicated pipeline

• In game infrastructure
  – Heartbeating
  – Random Seeding or Skill Level Matching
  – Anti-Cheating Systems
SPACE PLANNING

• Define esports for your campus
• Identify Key Adjacencies & Interchanges
• Identify User Groups
  – Varsity Athletics
  – Club Sports
  – Recreational
  – Public/Community Events
• Building Code Analysis
  – Exiting
    (more than 50 occupants = 2 exits)
• Plan for the Future
  – Flexible Furniture & Power
  – Expansion Space
SPACE PLANNING

• 30 SF/Gaming Station
  – 24 Station Arena x 30SF = 720 SF
• 120 SF/Coaches Office
• 60 SF Secure Storage Closet
• 300-400 SF Lounge
  – Large enough for couches, common viewing area, kitchenette
• 120-200 SF War Room/Conference
• 240 SF Analyst/Broadcast Studio
• 200 SF Production Room
• 6 SF/Per Audience Seat (not including aisles)
• 300 SF Performance Stage (Team of 6)
30 SF/Gaming Station
24 Station Arena = 720 SF
120 SF Coach Office
150 SF War Room
200-400 SF Lounge
30 SF/Gaming Station
24 Station Arena = 720 SF
30 SF/Gaming Station
24 Station Arena = 720 SF

300 SF Stage Area
6 SF/Audience Seat
240 SF Broadcast Room
200 SF Production
Design & Branding
Design & Branding
Design & Branding

Esports
Design & Branding

Esports
The Tradeline Three

• Define *esports* for *your* campus
• Identify Key *Adjacencies* and *Interchanges*
• Plan for *Growth & Evolution*
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