

University Facilities for the Sciences  
and Advanced Technologies 2019

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

TRADELINE®

HASTINGS + CHIVETTA

# Presenters



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President/Principal in Charge  
Hastings+Chivetta Architects



Will Schenck  
Associate, Project Designer  
Hastings+Chivetta Architects



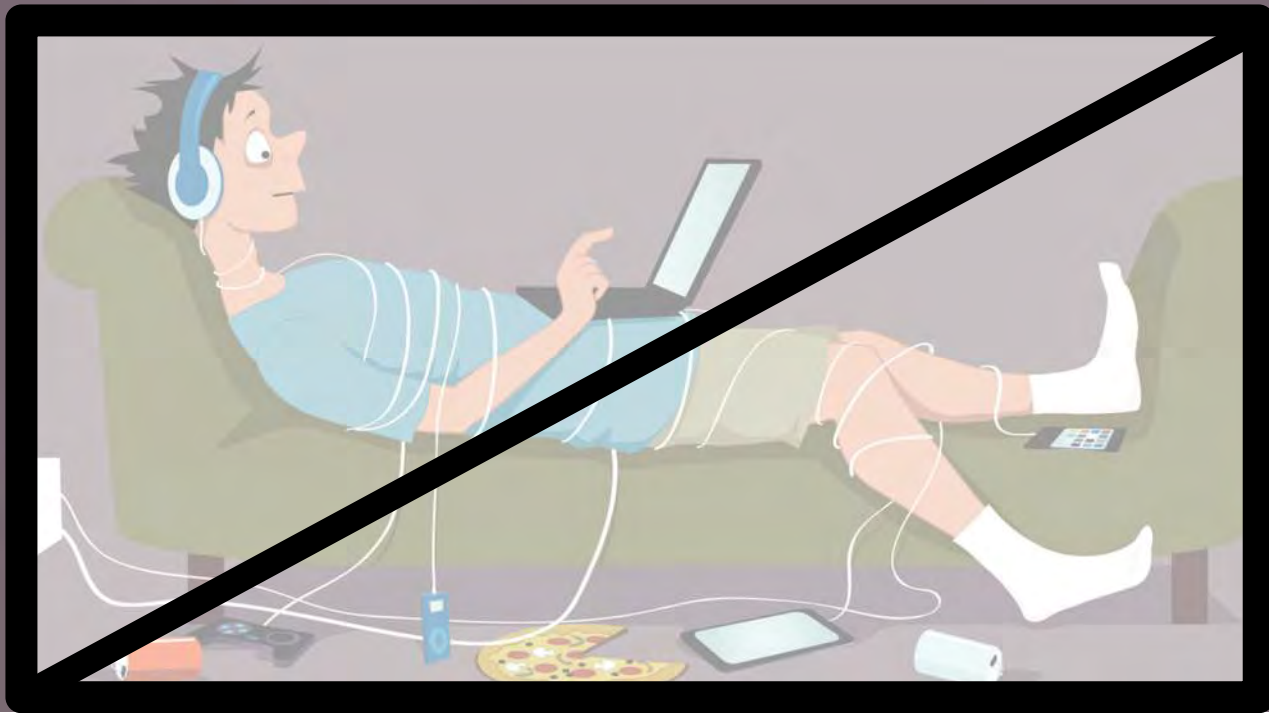
# Learning Objectives



- 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



# What is esports?



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

50M

100M

150M

200M





## Number of 2018 viewers (in millions)

NCAA FINAL FOUR

SUPER BOWL

50M

100M

150M

200M





## Number of 2018 viewers (in millions)

NCAA FINAL FOUR

SUPER BOWL

LEAGUE OF LEGENDS WORLD CHAMPIONSHIP

50M

100M

150M

200M



mixer





You Tube GAMING



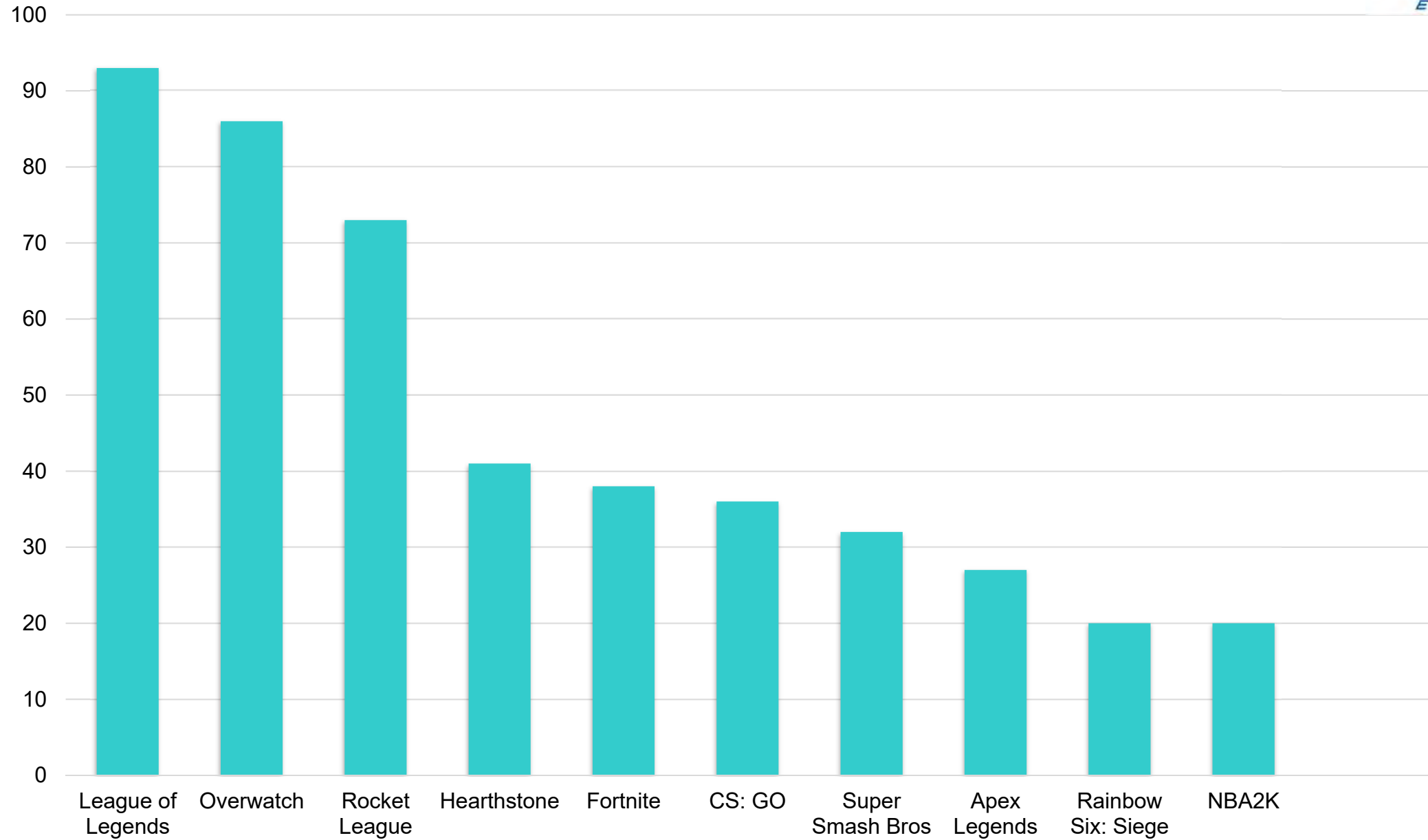


# FINAL RESULTS

<b>#1</b>	 <b>BUGHA</b>	<b>59 PTS</b>	<b>\$3,000,000</b>
<b>2ND</b>	 <b>PSALM</b>	<b>33 PTS</b>	<b>\$1,800,000</b>
<b>3RD</b>	 <b>EPIKWHALE</b>	<b>32 PTS</b>	<b>\$1,200,000</b>
<b>4TH</b>	 <b>KREO</b>	<b>30 PTS</b>	<b>\$1,050,000</b>
<b>5TH</b>	 <b>KING</b>	<b>30 PTS</b>	<b>\$900,000</b>
<b>6TH</b>	 <b>CRUE</b>	<b>27 PTS</b>	<b>\$600,000</b>
<b>7TH</b>	 <b>SKITE</b>	<b>26 PTS</b>	<b>\$525,000</b>
<b>8TH</b>	 <b>NAYTE</b>	<b>26 PTS</b>	<b>\$375,000</b>
<b>9TH</b>	 <b>RIVERSAN</b>	<b>24 PTS</b>	<b>\$300,000</b>
<b>10TH</b>	 <b>FATCH</b>	<b>24 PTS</b>	<b>\$225,000</b>



# NACE: PERCENT OF MEMBERSHIP W/ TEAMS FORMED





# THE AMERICAN GAMER

## KEY CONSUMER INSIGHTS



NUMBER OF GAMERS

160.3M

TOTAL GAME REVENUES

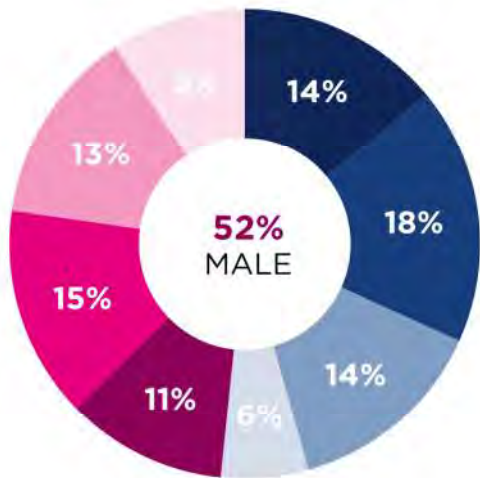
\$25.1Bn

#2

MARKET IN THE WORLD

### AGE/GENDER

ACTIVE MOBILE PLAYERS\*



\*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%

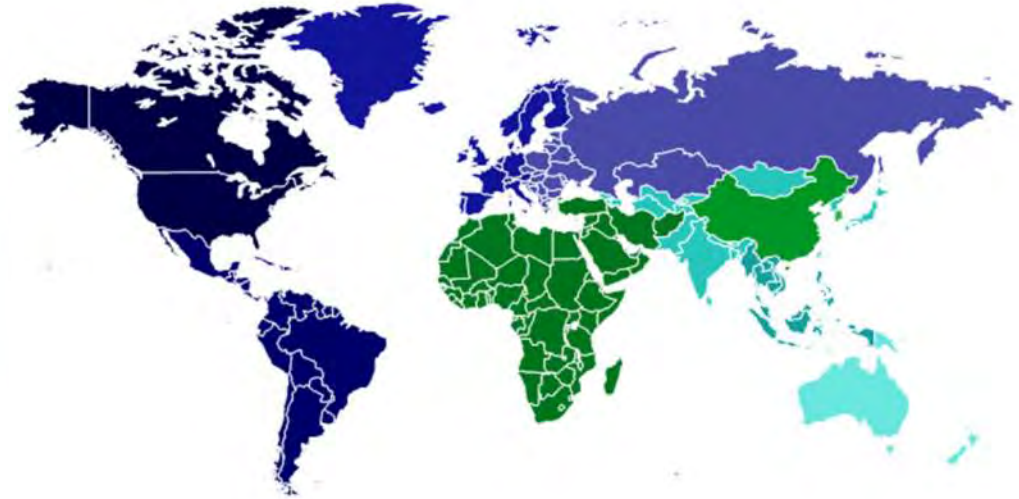
OF GAMERS PLAY PC, MOBILE & CONSOLE GAMES



### OWNS A GAMING HEADSET

40%

OF ALL GAMERS OWN A GAMING HEADSET



2019

Population	7,672.2M
Online Population	4,120.7M
Esports Awareness	1,757.5M
Esports Enthusiasts	201.2M
Esports Revenues	\$1,096.1M
Annual Revenue per Enthusiast	\$5.45

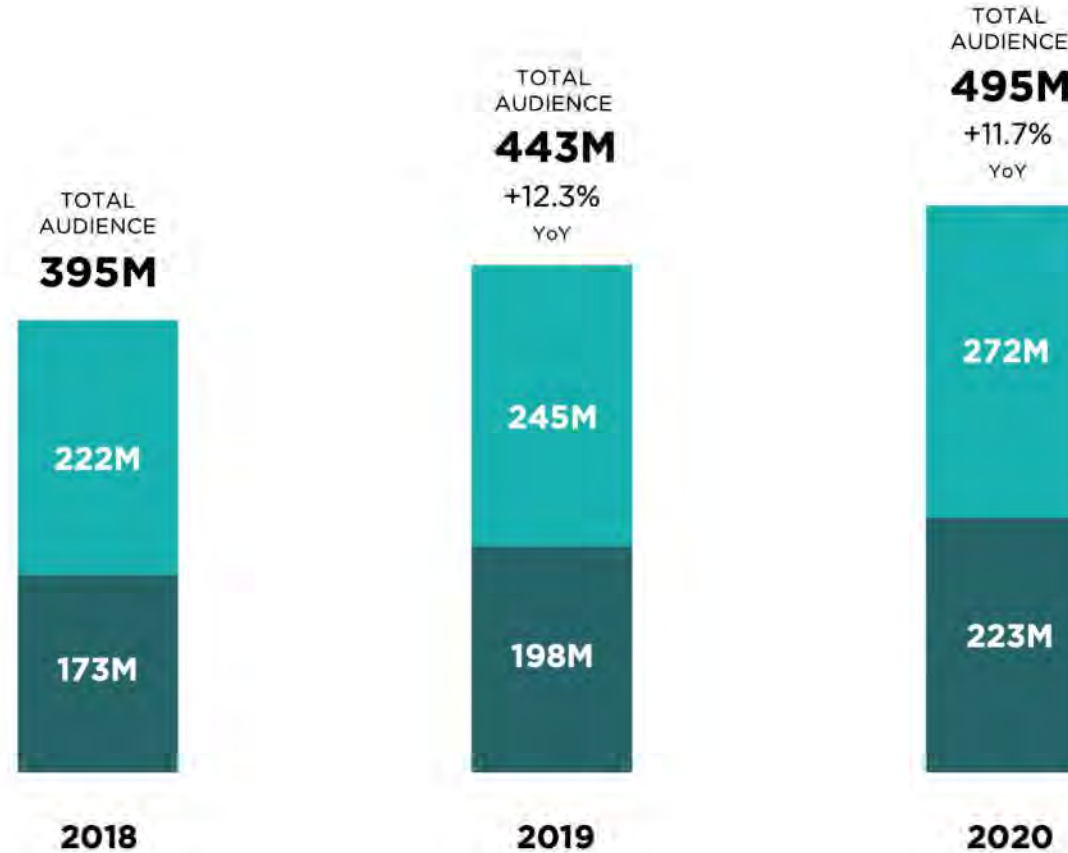




# ESPORTS AUDIENCE GROWTH

GLOBAL | FOR 2018, 2019, 2020

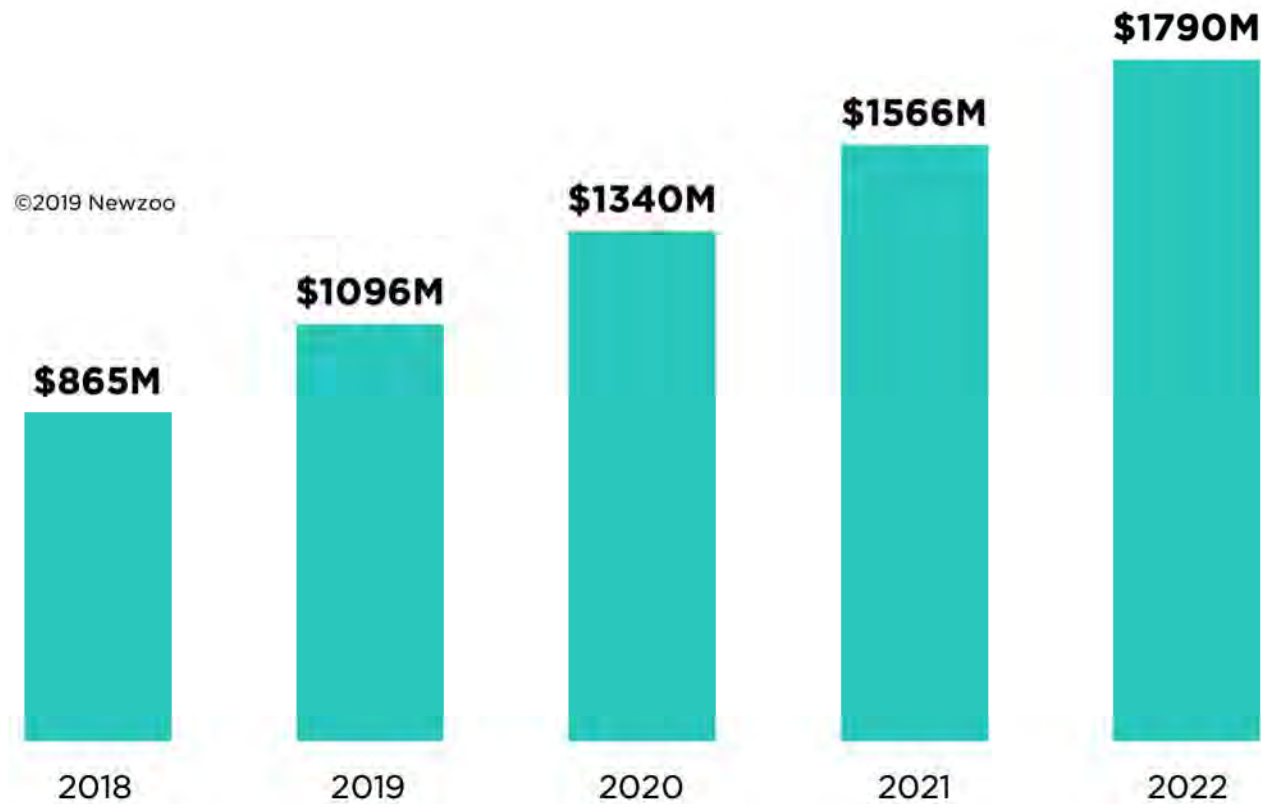
- OCCASIONAL VIEWERS
- ESPORTS ENTHUSIASTS





# 2018-2022 GLOBAL ESPORTS MARKET

FORECAST PER SEGMENT TOWARD 2022



**+9.0%**

TOTAL MARKET CAGR  
2018-2022





# 2019 ESPORTS REVENUE STREAMS | GLOBAL

INCLUDING YEAR-ON-YEAR GROWTH

**\$456.7M**

+34.3%



SPONSORSHIP

**\$251.3M**

+41.8%



MEDIA  
RIGHTS

**\$189.2M**

+14.8%



ADVERTISING

**\$103.7M**

+22.4%



MERCHANDISE  
& TICKETS

**\$95.2M**

-3.0%



GAME  
PUBLISHER FEES

**\$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.





# Investor Presentation

NASDAQ: SLGG

April 2019



# 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



# Major Brands Active in Esports Sponsorship

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





# Esports Organizations



~~160~~ + Member Institutions  
170



TESPA™

270 + Chapters



ELECTRONIC GAMING  
FEDERATION

Newly Created

# 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

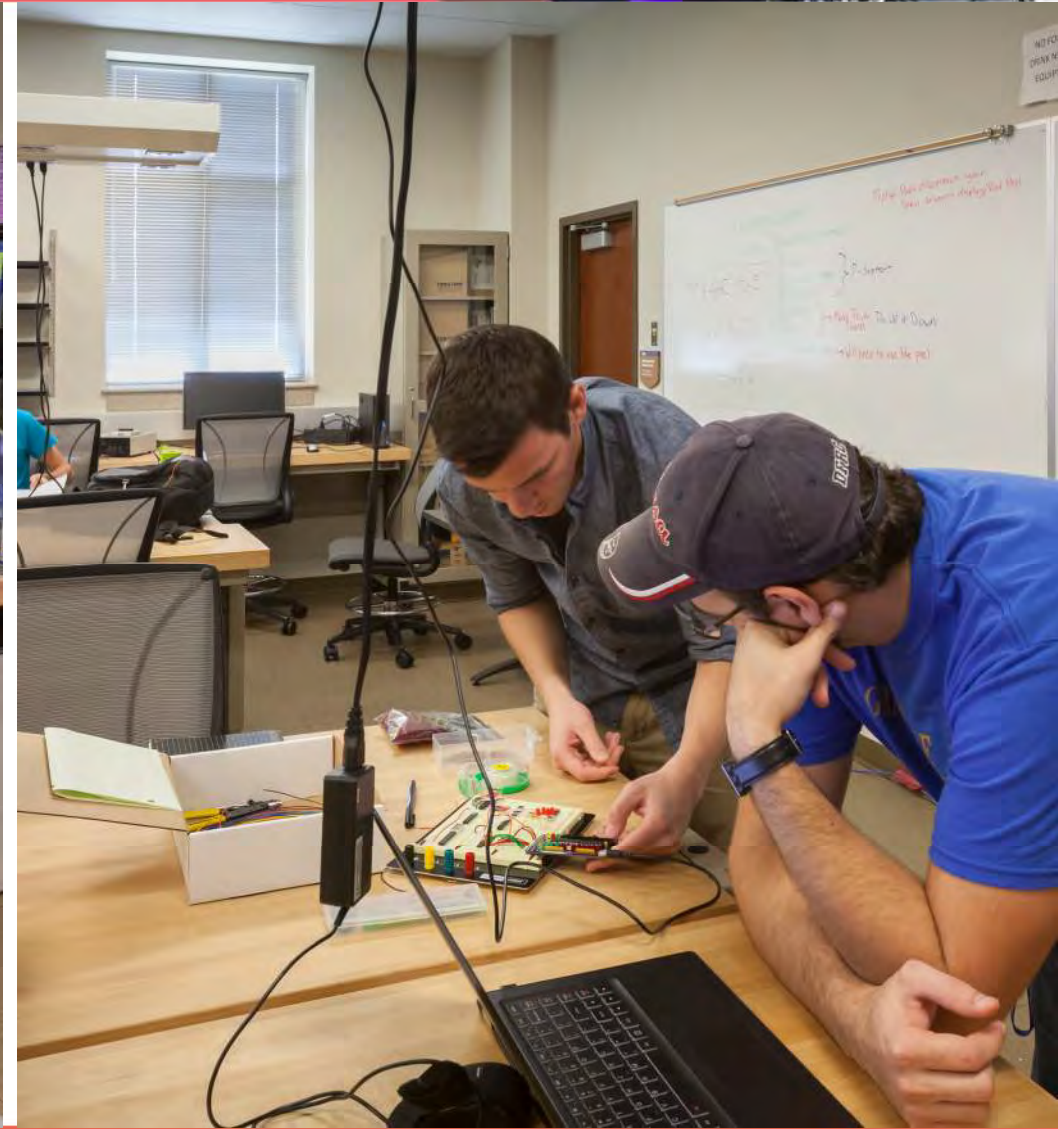
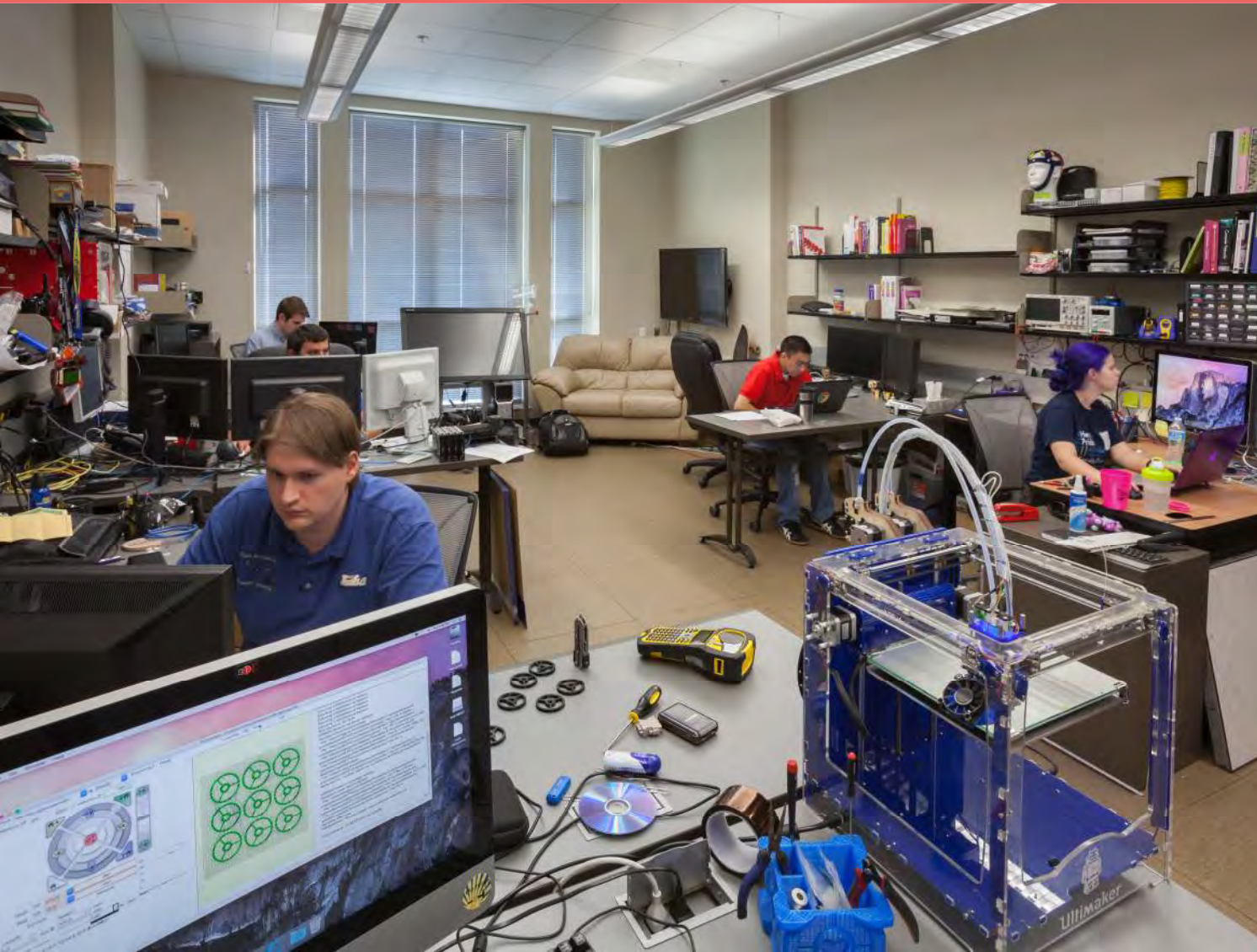


Ryan Morrison - Agent





# COMPUTER SCIENCE/ENGINEERING





# SPORTS SCIENCE





# BROADCAST PRODUCTION





# WELLNESS















# ORGANIZATIONAL STRUCTURE



## ATHLETICS

- **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

## CLUB SPORT

- **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

## REC / INDIVIDUAL

- **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





# 500-2,000 SF

## 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





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# BUDGET

- \$43,000 - Average Equipment Startu
- \$20,000 – Furniture, LED Screens, J
- \$40,000-\$60,000 Esports Coach Sal
- Locate your Arena:
  - Use Existing Space \$
  - Renovate Existing Space \$\$
  - New Construction \$\$\$\$
- Sponsorship Opportunities



**msi**

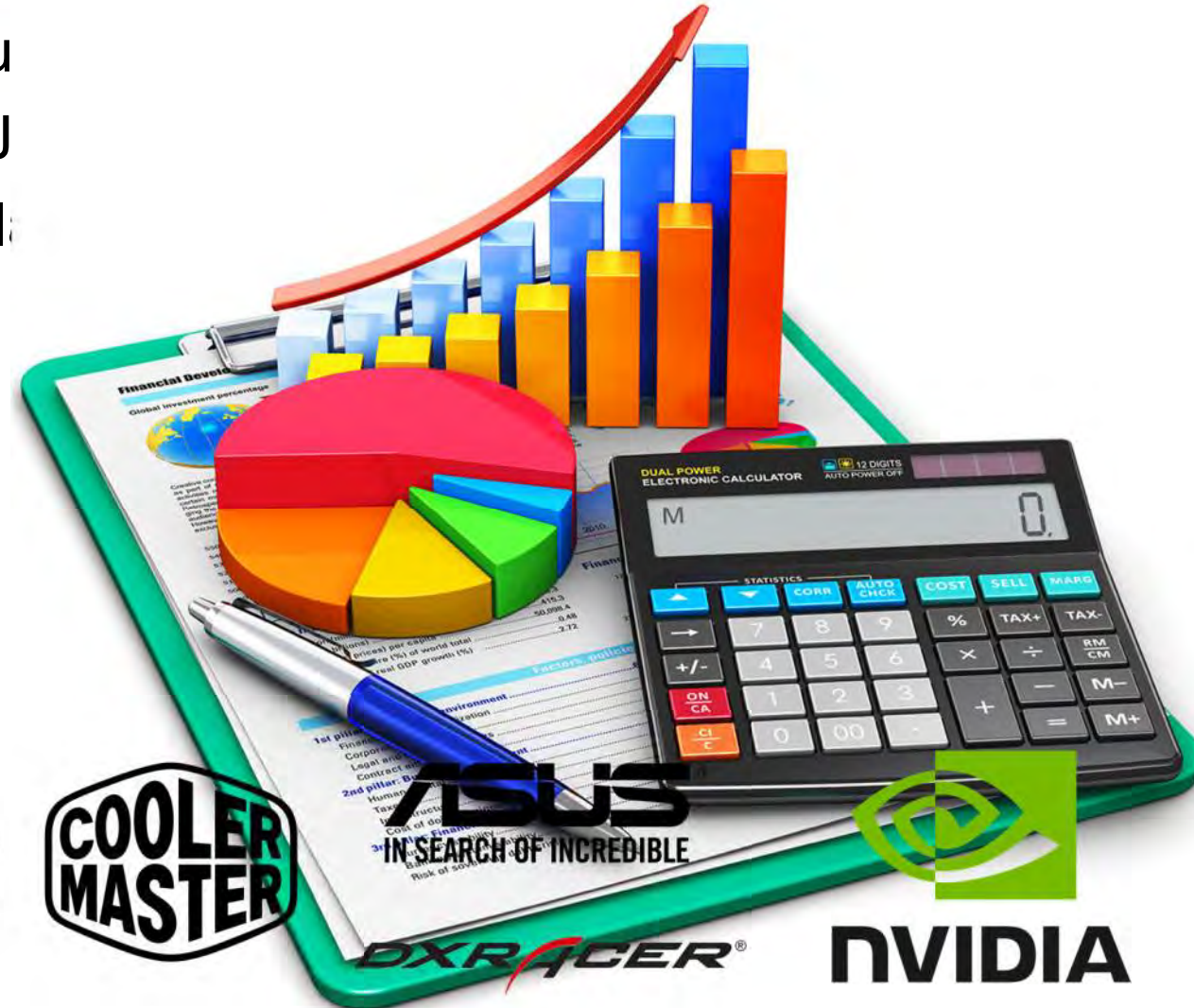


**ASUS**  
IN SEARCH OF INCREDIBLE

**DXRACER**



**NVIDIA**





# PROGRAMMING

## NEW CONSTRUCTION

**\$350-\$500/SF**

- **SITE WORK**
  - PARKING/SIDEWALK
  - SITE GRADING
  - SITE LIGHTING
- **PUBLIC AREAS**
  - ENTRY LOBBY/LOUNGE
  - RESTROOMS
- **SERVICE/SUPPORT**
  - MECHANICAL SYSTEMS
  - ELECTRICAL SYSTEMS
  - TELECOM/AV SYSTEMS
  - STORAGE
- **ESPORTS**
  - COMPETITION SPACE
  - THEMATIC LIGHTING
  - PRACTICE ROOMS
  - TEAM LOUNGE
  - COACHES OFFICE
  - LOCKER ROOMS
  - BROADCAST/AV ROOM

## REPURPOSE

**\$180-220/SF**

- **SITE WORK**
  - UPGRADE ENTRY
  - UPGRADE LIGHTING
- **PUBLIC AREAS**
  - UPDATE/ADD RESTROOMS
- **SERVICE/SUPPORT**
  - UPGRADE/REPLACE MEP
  - UPGRADE TELECOM/AV
  - STORAGE
- **ESPORTS**
  - COMPETITION SPACE
  - THEMATIC LIGHTING
  - PRACTICE ROOMS
  - TEAM LOUNGE
  - COACHES OFFICE
  - LOCKER ROOMS
  - BROADCAST/AV ROOM

## INTERIOR RENOVATION

**\$80-120/SF**

- **SERVICE/SUPPORT**
  - UPGRADE MECH/ELEC
  - UPGRADE TELECOM/AV
- **ESPORTS**
  - COMPETITION SPACE
  - THEMATIC LIGHTING
  - PRACTICE ROOMS
  - TEAM LOUNGE
  - COACHES OFFICE
  - BROADCAST/AV ROOM

# INFRASTRUCTURE



- 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

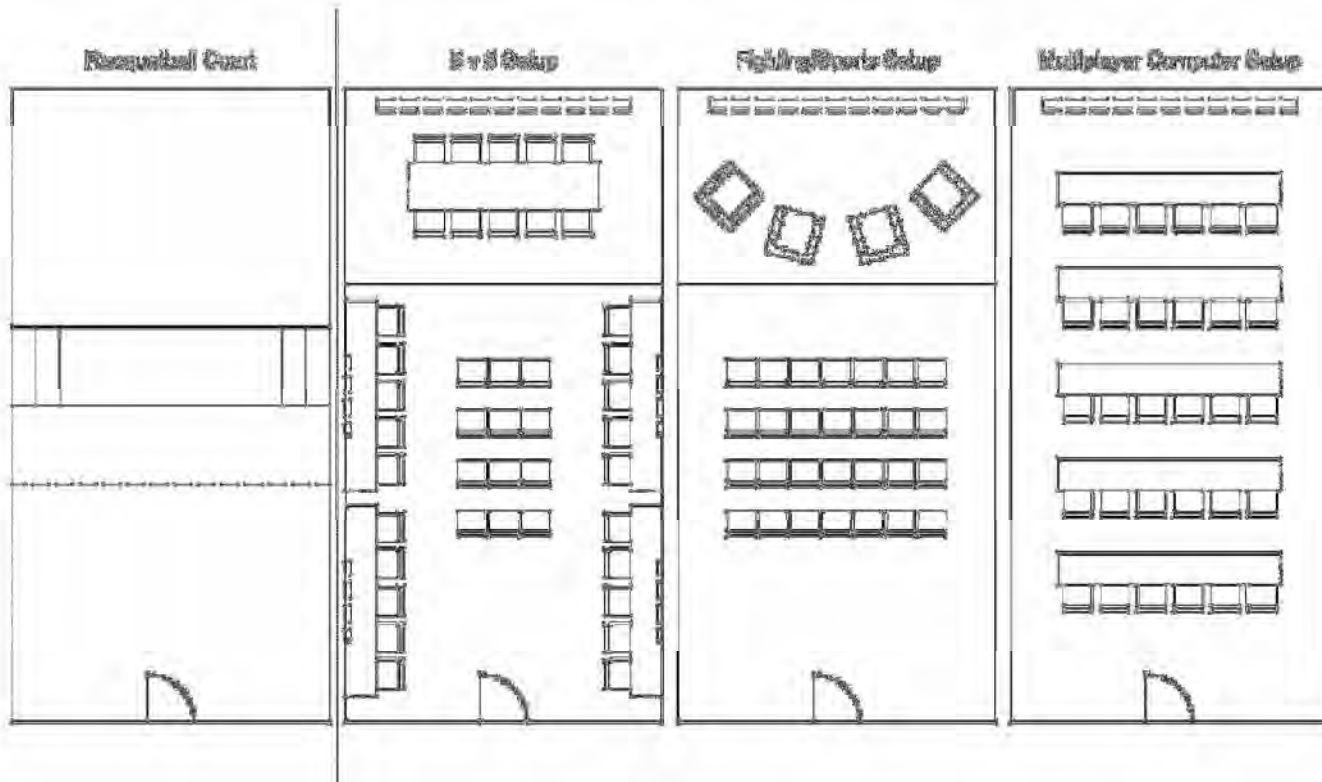


# SPACE PLANNING

- 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

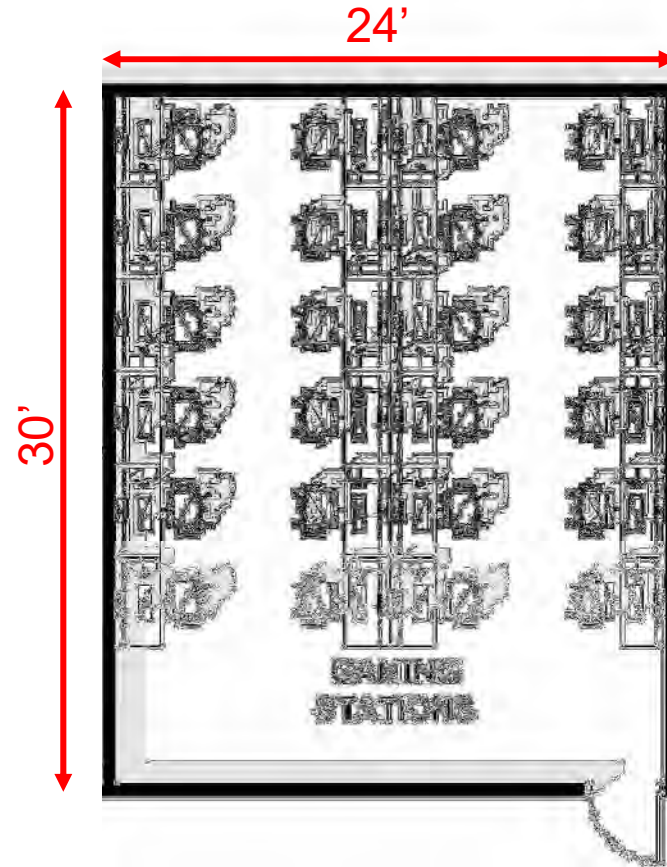




# SPACE PLANNING



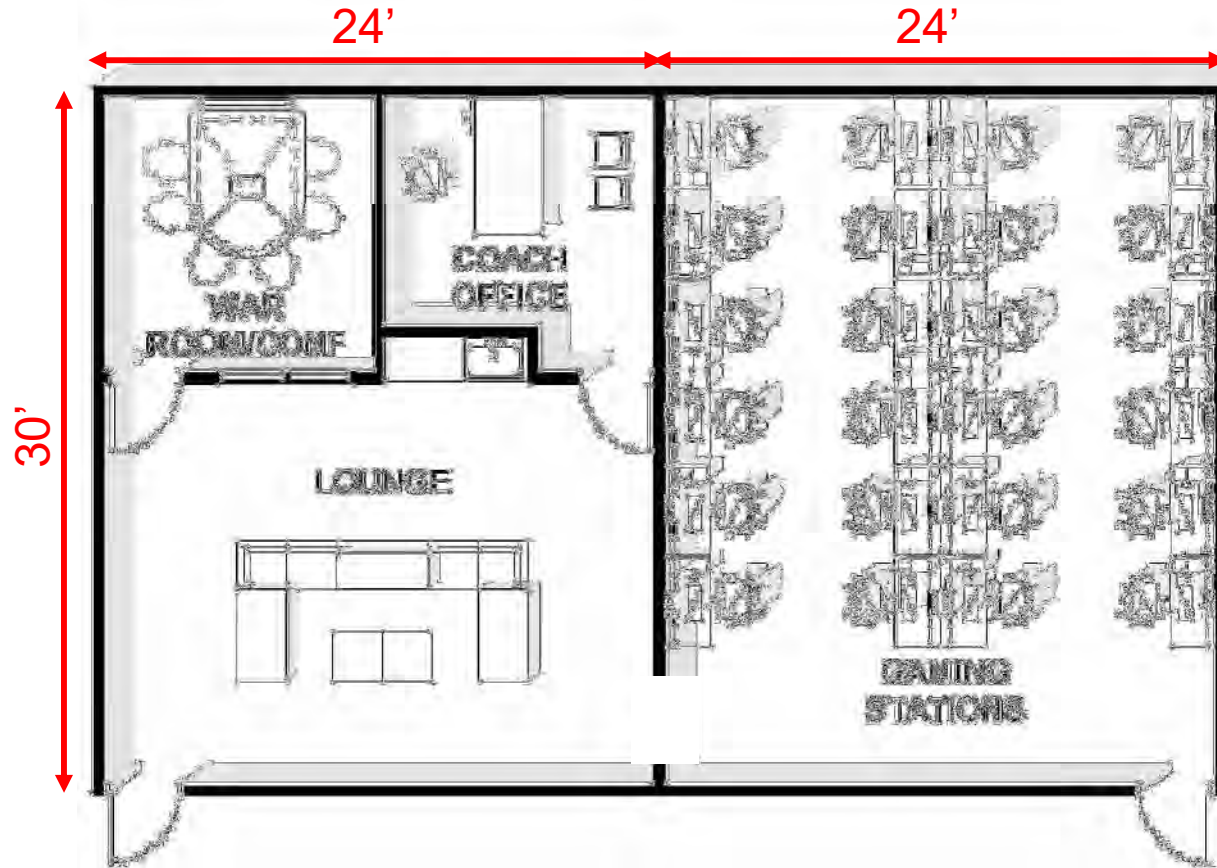
- 30 SF/Gaming Station
  - 24 Station Arena x 30SF = 720 SF
- 120 SF/Coaches Office
- 60 SF Secure Storage Closet
- 300-400 SF Lounge
  - Large enough for couches, common viewing area, kitchenette
- 120-200 SF War Room/Conference
- 240 SF Analyst/Broadcast Studio
- 200 SF Production Room
- 6 SF/Per Audience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



30 SF/Gaming Station  
24 Station Arena = 720 SF



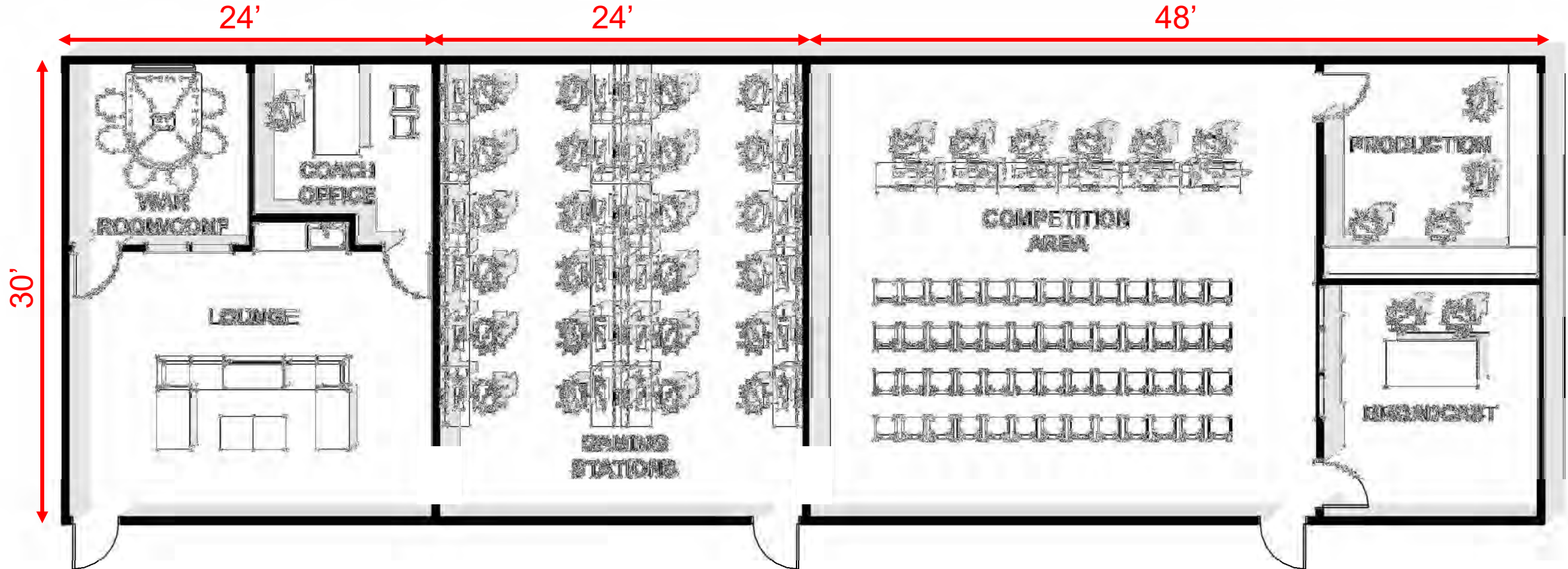




120 SF Coach Office  
 150 SF War Room  
 200-400 SF Lounge

30 SF/Gaming Station  
 24 Station Arena = 720 SF





120 SF Coach Office  
 150 SF War Room  
 200-400 SF Lounge

30 SF/Gaming Station  
 24 Station Arena = 720 SF

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

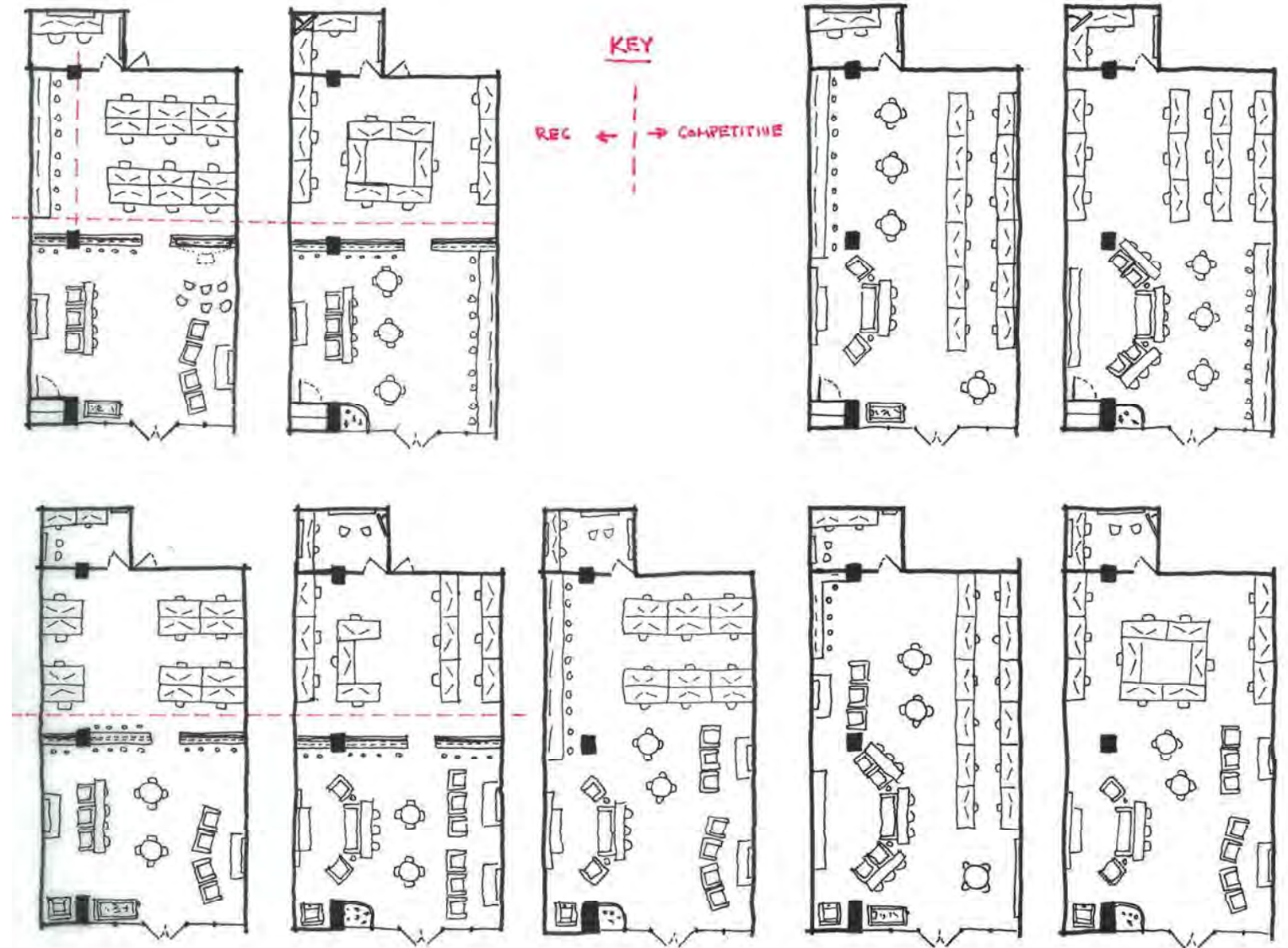


# Design & Branding





# Design & Branding





# Design & Branding





# Design & Branding



Esports





# The Tradeline Three



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

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