The future of electronic sports

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Introduction

In this paper I will try to define eSports, what it really is and what makes it so special. I will discuss the history of electronic sports (eSports) and look objectively at the process it has gone through to in order get to the stage that it is at today. I will discuss the rise of eSports in South-Korea and look at how and why the game Starcraft became so immensely popular over there and why it took such along time to reach the western hemisphere and gain any real popularity over here. The current state of eSports is another thing that will be researched and looked at since this sport is dependant on much more then just the players and spectators e.g. technology, game design perspectives, player-base, game genres and business models, these are all influences that I will look at and dig in to so I can shine a better light on this growing new age phenomena.

What are eSports?

Electronic sports (eSports) are a new breed of competitive sports that started in the 90‘s with arcade games, just when video games were being born (adjacent possible). This type of sport revolves around the same thing as the typical sport, which is individuals competing against each other, either as a part of a team or playing solo. The main difference is the obvious fact that eSports take place within in a digital world where the sports are made out of different video games. The word eSports does not depict a single type of sport but it is more of a title that covers a large sub-genre of sports, these sub-genres are basically every video game that has the ability to have competitive play.

Most game genres have received some type of competitive playing, 2D platformers had Donkey Kong, first-person shooters had Quake and Half-life (Counter-strike) and Real-time strategy games had Starcraft. These games are are all huge names in the gaming industry and are often house hold names and recognized by any real gamer out there. The reason for this, despite being great games, is the fact that they all have had a very long lifespan. This means that more and more people even from different generations got to play them, read about them or just hear news about them.

What makes game titles live for so long all comes down to the community and the player base that prospers within the game. The eSports scene of these games is one of the main reasons that these games have lived for so long and became the legendary titles that they

are today. These are the games that really stand out when it comes to eSports and later in this essay their effect on both the gaming industry and the future of eSports will be described further.

One thing which is so interesting and worthy to speculate is the fact that these games are all very different. Donkey Kong is a single player game where the means of measuring ones talent is the high score list. Quake is an extremely fast paced FPS where the players would either compete in a duel, which was the most popular scene, or team-deathmatch which is a 4vs4 gameplay. Counter-strike was an extremely slow team-based game and it has been one of the most played games for the past 12 years. Still today it is one of the most played game on Steam almost every day (Steam & Game stats). And last but notleast we have Starcraft which is a usually a slow playing strategy game which can mostly be done justice when compared to chess as a strategy type of mind-game but with more hand-eye coordination.

What this variance shows is that people are different, they are looking for new ways to compete in and slowly but steadily the community is defining the genre and selecting the game that will be the digital version of basketball or football. Maybe one day a game will come along that will reach the perfect balance between player enjoyment, spectator friendlyness, skill and fun so it can move on to become a gigantic worldwide sport, practiced and viewed regularly by hundreds of millions of people all over the world? But is this even a realistic thought? That is something that we will investigate further in this paper.

The history of eSports and influential factors

Some might say that eSports were born with the arcade games (twin galaxies ..) but it would be the most appropriate to say that it really began in the year 1997 when Microsoft sponsored a Quake tournament called Red Annihilation (Annihilation, 2010). The first prize for this competition was a red Ferrari owned by the lead programmer and co-founder of the video game company ID software, John Carmack. The generous prize really made the news and was a great ad stunt both for the game and for eSports in general. After this event things really started to progress and many entrepreneurs saw value in this up and coming new thing. Several businesses with eSports as their main business model were born around this time and the first and most

notable company was the Cyberathlete Professional League or the CPL.

The CPL started out, like most businesses, small, for the first three years it focused on competing in just one game, Quake, and as the success of these competitions grew, they started adding more and more games to the series and ditched the ones that they thought weren't working for them (Ostroff, 2010). The first new game to be added after Quake was Counter-strike, in the year 2000, this game was immensely popular even before the CPL decided to add it to their schedule but it really gained some momentum up after that happened. This really got things going for the CPL and the number of people who followed it grew with each event. This led to the fact that they were able to gain more sponsors which meant they were able to add more games and increase the prize pool. In 2004 they had five games in their event, Counter-strike, Halo, Unreal Tournament, Call of Duty and Painkiller; this along with a total prize pool of 250.000 dollars was definitely a force to be reckoned with.

But just before they reached their peak they had made several crucial mistakes which later on would lead to the downfall of this promising company. The first mistake was that they decided to ditch Quake 3 and put more money into Counter-strike (Ostroff, 2010), this led to the community being split up and since a lot of players watched both Quake 3 and Counter-strike even though they only played one of them, they lost a lot of viewers. Even though more people were interested in Counter-strike, having these two games in an event always made sense and really worked as they were quite similar. The second mistake they made was that they decided to add games to their events that had just been recently released, this meant that the games had almost no real player-base and had never experienced being played at a competitive level, the first game that this controversial decision was made regard was Painkiller, it came out April 12th , 2004 was right away placed on the tournament schedule and started the official downfall of the CPL. After this the CPL started to lose sponsors e.g. Intel, and the prize pool got lower by each event. In 2006 the CPL decided to call it quits (Ward, 2006) and this was definately a huge blow to the whole eSports scene which looked so promising.

When one fails there are always someone waiting to capitalize on the failure. That is exactly what other companies did and around that time (2006) the so called golden era of eSports started (D.Devil, 2011). After the CPL went down there were plenty of firms trying to take over as the leading event holder for eSports and many did indeed succeed. After Intel moved away from CPL they started sponsoring another series, the lucky recipients for this generous eSports sponsor was the World Series Of Video Games (WSVG). They mainly focused on the most popular games, the games that had had the most luck in the past, namely

Quake and Counter-strike. This series took place all over the world and were extremely successful, one great thing that spawned from this entity is the Dreamhack series which is an event held in Sweden several times per year which prides itself in being the largest digital festival in the world (Dreamhack, 2011) .

Even though the WSVG were successful they still got overwhelmed by another industry entity. This entity was the most notable series that went popular after the CPL went down and it is called the Major League Gaming (MLG). MLG were along with the CPL one of the first companies to start off with the idea of professional video gaming but were always in the shadow of the CPL and did not really do anything worthy of mentioning until 2006 when they received a 10 million dollar investment from Ritchie Capital ventures (Pinckard, 2006) and later that year a 25 million dollar investment from Oak Investment Partners (Magee, 2006). This plus the fact that the CPL was going down the drain meant the opportunity of a lifetime for the MLG. They started broadcasting their events on TV but once they realised that the the sponsors cared as much about having their advertisements shown through internet streaming as through TV they changed completely to only showing their events through live streams over the internet. As they would later find out this was a great move and they really helped eSports getting to where it is today as they kept on pushing for better and better online streams and a better framework for the the players to show off their skill and the spectators to watch other players compete.

To begin with the MLG were a bit unorthodox when it came to choosing the game for their events as they did not really choose the most popular eSports games at the time but chose games like Halo, Rainbow Six and Shadowrun. They were usually pretty successful but it was not until Starcraft II came out in 2010 and got adopted by the MLG when they started going from a medium sized company successful company to a large corporate entity which would start to attract tens of thousands of people to their live events and millions of unique online viewers to watch the best of the best play computer games on a high level.

Starcraft and South-Korea

The Starcraft phenomenon in Korea is truly something we should look at and analyze with interest and it definitely deserves a chapter of its own in this paper. This is a computer game that captured the attention of an entire nation and became one of the most popular sports in a matter of only a few years. The best players went on to become superstars and even millionaires and the country adopted this new electronic sport as something that was not just a temporary thing but a future sport. Some might say that South-Korea is a nation that was decades ahead of its time when it came to eSports and looking at the current state of eSports and seeing how immensely it has grown here in the western hemisphere over the past 10 years, we can see that it is hard to ignore this statement.

The game Starcraft is a real-time strategy (RTS) game created by Blizzard Entertainment and was initially released in 1998, it sold over 9.5 million copies across the globe with 4.5 million of these being sold in South-Korea (Sayed, 2010). It grew quickly and many players immigrated from Warcraft 2 which was an earlier RTS game released by Blizzard as well. Starcraft was a perfect candidate for players to compete against each other on a fairly level basis as it had a great framework which was the Battle.net system. This is an online system where players created users, logged on and played under a fixed name where they could create a reputation from themselves. This framework allowed players to play on ladders and keep scores which meant that it was quite easy to see which players were exceeding in skill and from there they were invited on tournaments to play for cash prizes.

This was also the birth of “clans” or teams where a group of players would join a team and include the name of the team in their game-name, for example if a player named “Destroyer” would join a team called “Natural” he would have to change his name to “[Natural]Destroyer” or something around that area. Even though Starcraft was really popular and had a great player base along with a growing eSports scene it did not really become a game for the future until Blizzard released an expansion later in 1998 called: Brood War (chopopeon, 2012).

When Brood War came out in 1998 it really changed pro-gaming forever. The amount of changes, new maps and characters really made the game even better then it had been and people were loving it. The picture below (Finals, 2012) depicts a major Korean final tournament. This picture really is worth a thousand words and shows the popularity really well.

Later on people inevitably saw business opportunities in this and in 2003 Korea had two major professional Starcraft leagues, the MBCgame Starcraft League which later on went to become known as the MSL (MSL, 2012) and the OnGameNet Starleague or better known as the OSL (OSL, 2012) which is by many considered the most prestigious Starcraft league in the world. These were leagues that were formed by Korean cable companies which in turn revolved heavily around showing Starcraft on television and having live tournaments with a great price pool. The repercussions of this was that players started to gain publicity through television, this meant they were able to live purely on the money they made from playing the game, both with tournament winnings and advertisements e.g. on their clothes and hats, they were professional gamers.

Soon the best players started to look more and more like typical sports stars, they began to have managers and the teams that included the best players became companies with giant sponsors. One player became an international superstar and is arguably the most famous eSports player of all time, this is a player who called himself Boxer.

Lim Yo-Hwan or Boxer as he was known in the eSports world received the nickname „The Emperor“ (O'Neill, 2011) as his dominance in the game was unmatched. Boxer founded and played for team SlayerS. Currently Boxer has a fanclub of over 1.000.000 members, annual earnings of over $400.000 plus $90.000 per year through endorsement contracts (Yo-Hwan, 2012). Boxer is a notable figure in the world of eSports and one of the first legends in the eSports world, he is still playing today along with managing his team, SlayerS, and even though he is currently not the best player in the world he is still among the top and always manages to have a unique and fun style of play which really makes him a fan favorite.

Current state of eSports and technology related to this field

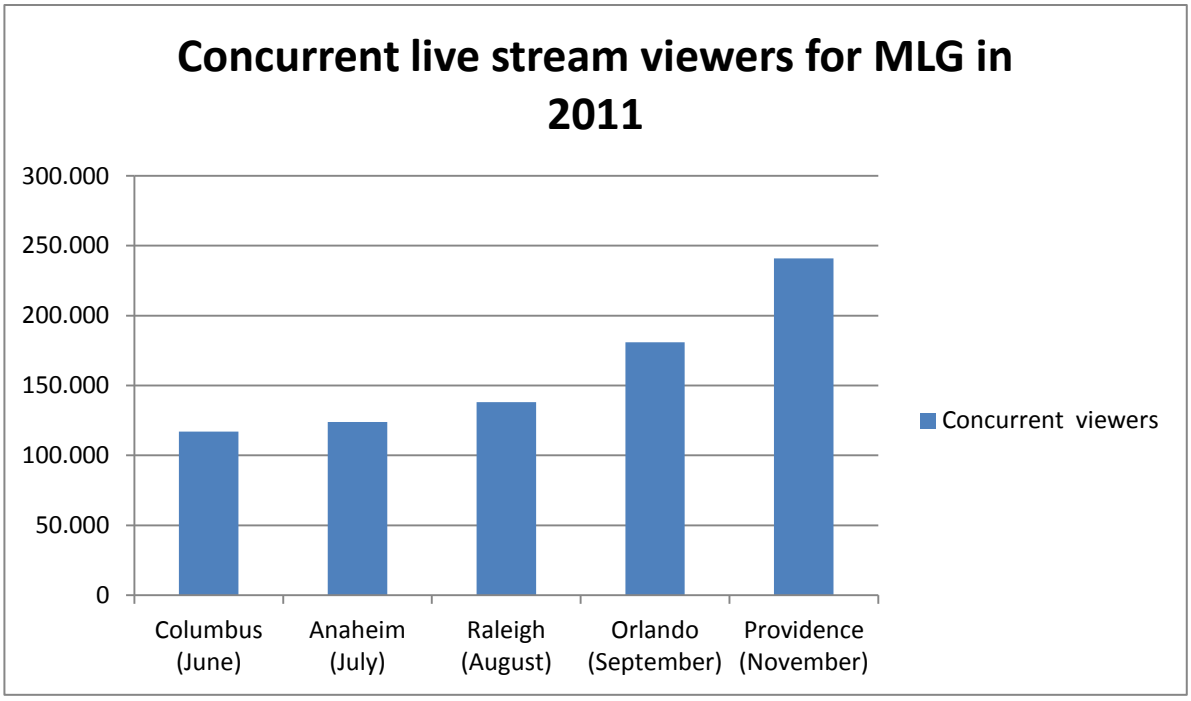
Right now the eSports business is booming, gaming series around the world are getting record number of viewers every event, which is something we will look into better later, more players are able to play professionally as there are more games and more cash flow around the business. This type of sport have never been more popular then right now and the reasons for this are cannot be summed up in one giant conclusion, there are multiple reasons for this and we need be looking at them from different angles.

The first and most notable reason is that the technology is finally ready for this sort of expansion (adjacent possible), bandwidth is cheap and fast, the tools that allow people to stream their games are free of charge, user friendly and gadgets / platforms that allow people to watch this are everywhere e.g. tablets and smart phones. Companies like Twitch.tv (www.twitch.tv) are supplying streaming frameworks for gamers to stream their games for free through their website and the most recognized and best players are able to show their skill while practicing for big tournaments on the website and gain fame and funding through advertising. Many of these players have had over 20 thousand concurrent viewers on a normal weekday. In the “old” days individuals that wanted to watch professionals play their games had to rely on recorded games or demos that were uploaded to a website and the spectators would then download the demo and play it back in their own game client. This then advanced to a form of live streaming where players could use their own game client to connect to another game server where they were able to watch the game live. This of course is a very limiting factor as the only ones able to watch have to own the game and then go through all the trouble in order to watch the competition.

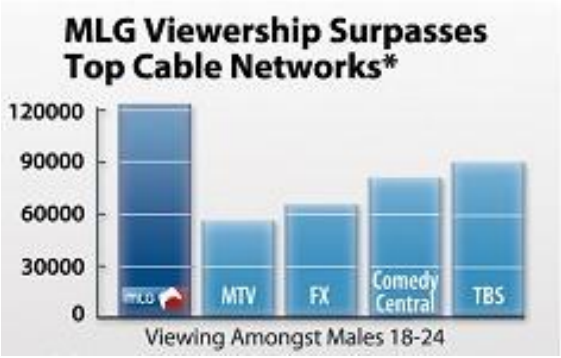
The second reason is that the games that are being played now are extremely spectator friendly and have been designed from the ground up as eSports games, meaning that the design relies on the game being spectator friendly. These games are Starcraft II, League of Legends which is a game based on the old Warcraft game mod DOTA (Defense of The Ancients) and still, believe it or not, Counter-strike. Counter-strike was not necessarily designed as an eSport game but it had some sort of magic within it that made it fun to play and watch. It was the same thing with Quake3 which has been picked to play a few times in the recent past but has not been able to gain any real ground again. The first two games mentioned, Starcraft II and League of Legends are the games that are paving the way into the next stage of eSports and they are broadening the audience every tournament. Now the people at home with no technical background are able to watch live streams of tournaments without having played the game a single time and this is a fantastic progression and it is doing wonders for the community. The reason novice people can watch the streams is because there are expert casters that cast the games and describe what is happening as the games are being played and by doing that a lot of people have started to enjoy watching professional gamers play more than actually playing by themselves.

The third reason for why eSports are so popular right now is that playing computer games is now a mainstream thing and more people than not do indeed play games, whether it is Facebook games like Farmville or more serious games like League of Legends. So many people are playing and buying games that some game companies are generating billions of dollars (Emery, 2011) in revenues for every title released. This means that the games that are released are more polished, more funded and hence more prone to being played on a competitive level. These are probably the top three reasons for the success of this sport but do not cover absolutely everything; there are many smaller reasons that have some factor in this but they would need further researching.

Of all the technological parts that are important to eSports, live streaming is by far the most important, besides of course the computers the players actually use to play the games on. The ability to show people around the world live events with maximum convenience is something you really cannot put a price on. This gives you the access to so many potential customers that it is hard not to gain increased popularity with each event. The Major League Gaming (MLG) pro series have an amazing framework and a fantastic atmosphere around all their events, in return they have seen some amazing growth in their series during their 2011 season and some incredible numbers for their live streams.



The above table (Tassi, 2011) shows the incredible growth that the MLG experienced in the year 2011. It went from the lowest point of 117.000 concurrent viewers up to 241.000 which is more than twice the number of viewers from the first event to the last. This breakthrough has made eSports a viable rival candidate versus television cable networks like Comedy Central, MTV and FX. The table on the right shows how MLG is doing among males in the age category of 18-24 years old (Lish, 2011). MLG has hinted that it is indeed looking at televising their future series and that they have been in talks with ESPN2 regarding this matter (Steiner, 2011).



But we must ask ourselves would this work on tv? Perhaps but that isnt necessarily the case as there might be a lot of magic lost since the internet streams give the people a lot more freedom to switch between games and watch what they like, the viewing format of the TV is quite outdated and HD connections are not available for everyone but this is changing slowly. There are a lot of positive sides to the TV and a simple example would be the screensize, maybe we could have live streams through internet connected televisions (SmartTVs) and the technology is here so maybe it is a good way to go but the only real way to find out is to give it a shot.

Possible future development and technology

So, what type of technology are we likely to see in the both near and far future when it comes to eSports? What will the adjacent possible give us? If we build on the amazing progress that has led to the existing format of eSports and look at what has happened in the last 10 years we can see that the technological parts that directly affect eSports aren't that many but these are things that still need to be worked on quite a lot in order to enhance the experience, both for players and the spectators.

The first thing we might get to see more of is game developers looking at their games from an audience point of view and designing them from the ground up with the audience and the player in mind rather than just the player. They have already done this with Starcraft II and it has worked amazingly well but many game studios might frown upon this because when developing an eSport game you have to focus on the audience which means you have to sacrifice a lot of the things that might be better for the player immersion.

Dustin Browder a game designer for Blizzard Entertainment narrowed down, what they at Blizzard think the requirements are for a successful eSports game (Scimeca, 2011). The four core things that games need to have in order to be a successful eSport game are;

1. *An eSport game needs to be watchable*
    a. The game needs to be crystal clear to the spectator so he knows at all times what is happening
    b. Has to have as few hidden factors from the audience as possible

2. *eSports games need to be simple*
    a. Few number of things to keep track of
    b. Objectives should be clear e.g. annihilate the other team or capture the enemy flag

3. *eSports need to have a very high skill factor*
    a. For example aiming in FPS games or micromanagement in Starcraft and League of Legends

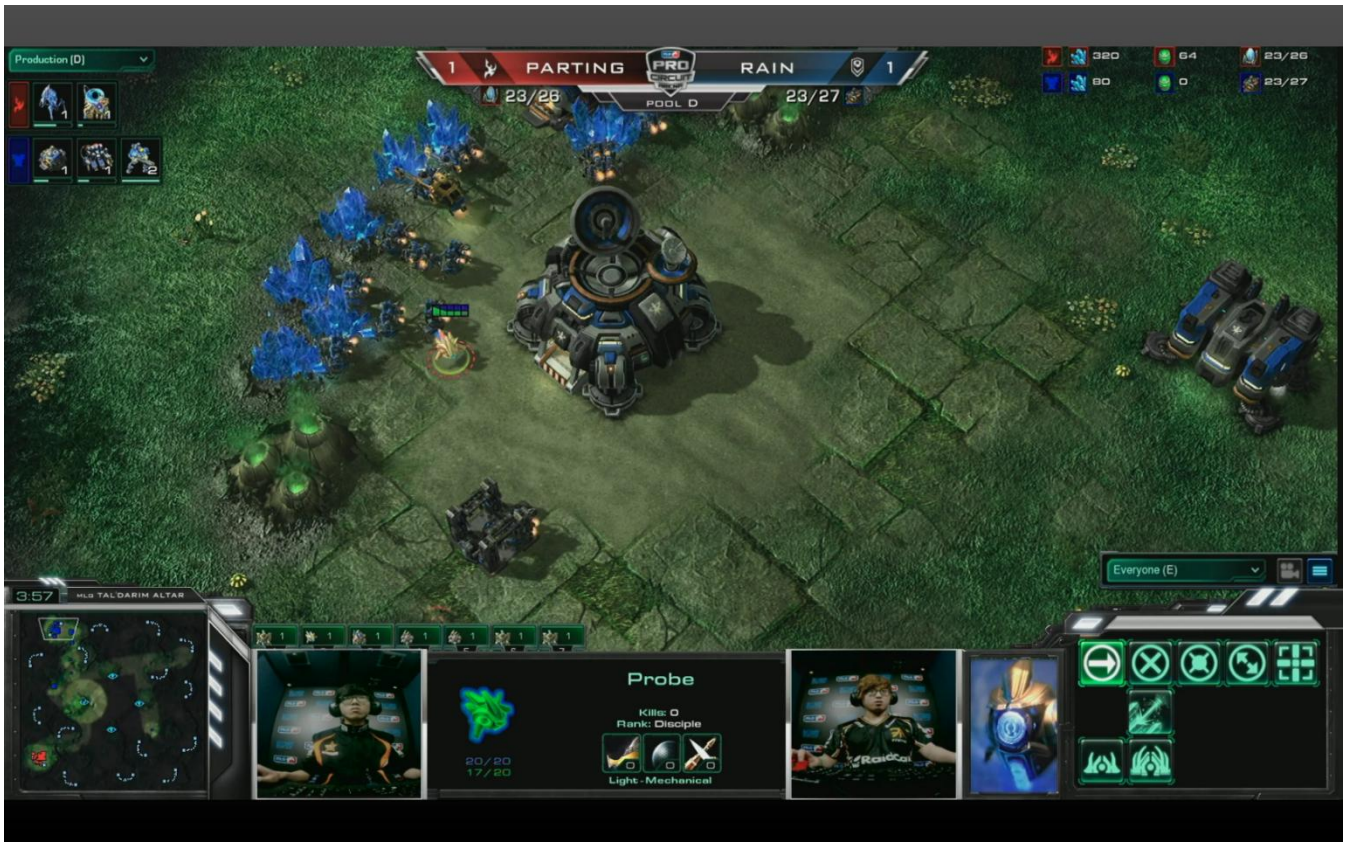
4. *Last but not least eSports need to have a high amount of uncertainty*
    a. The game should be able end really quickly and things can change with a simple miss click
    b. Small mistakes can cost players the game
    c. Keeps the audience excited and motivated to watch as anything could happen

That is all good and well but by trying to fulfill these objectives means that a lot of sacrifices must be made in different areas of the game, for example in Starcraft II they had to make giant epic units look relatively small in-game because otherwise the smallest units would be hidden behind them and the spectator would not see them. So as you can see developing a game that focuses on eSports does come with a price but sometimes it can be worth it as the game will live a lot longer due to communities that form with the competitive scene.

The next technological thing that we might get to see developers focus on is the Human Interface Devices (HIDs). The most efficient HID we have today when it comes to competitive gaming is the mouse and keyboard combination, sure we have some successful examples for the console controllers but the mouse gives more and faster accuracy both in RTS and FPS games and the keyboard gives more instant access to further functions, basically more buttons. Maybe we could specialize the HIDs for each game genre? For FPS games we could maybe expand on the Igloo simulator room (Igloo, 2011) which is a 360° gaming room which maximizes immersion and have us wielding a "real" gun walking around a dark room and shooting at enemies. This might be a lot more fun for the player as he is using his entire body to participate in the game and game designers could even capitalize on this, inserting game features which are directly linked to different body parts such as the kick or punch. But would this be more fun for the audience? I don't necessarily think so because the things you gain from this are not significant enough in regard to them, for example the aiming skill would not necessarily improve. On the other hand we might get to see players do some unorthodox moves that were impossible to do with a mouse like holding the gun to the side, doing summersaults and dodging incoming fire in an interesting way, this could be very an fun and potentially a breakthrough endeavor. They already tried this with Battlefield (Humphries, 2011) and it created quite an interest within the community.

The software is as well an interesting thing to look at. Right now it is quite primitive, but maybe that is okay. We might not need anything more complex, the picture below shows the current version of the MLG streaming window which spectators get to watch the game in.

The screenshot was taken from an MLG Winter tournament happening over the weekend of 23-25th of March 2012.



What is so good about the stream, besides the amazing HD quality, is the UI which shows all the important factors of the game which are important to the audience, it keeps it very clean and simple. Then along with all of this we have old world class Starcraft players in the role of the casters, this means they know the inside and out of the game which helps the non-familiar viewers a lot. In the top left corner we see the upgrades that the players are getting for their characters, number of units in production as well as number and types of units they currently have. The casters then can easily switch between these three things. In the middle there is a mini-live stream of the faces of the players as they are playing the game so that we get to see their facial expressions and reactions when unexpected things happen in the game or when the outcome of the match has been decided. In the top middle side of the screen we have the name of the players, in our case it is Parting vs. Rain and we also have the current score, they usually play best of three matches so we see that these two players have won one game each and are tie 1-1. Finally in the top right corner we see the number of currency each player has along with the number of units currently in play for each player.

The reason they are able to squeeze all of this information in to the game for the audience is not related to luck, it has to do with the fact that Blizzard had planned this all

along, they knew what the audience were interested in and designed the game around that. This is the reason for it is difficult for other games to take the step into eSports. They might to change the entire UI or even some game factors which might not be very popular with already dedicated players.

Barcrafting is a term unknown to most people but it is something that is growing incredibly fast. It is a term that describes an event when people decide to meet at bars and watch Starcraft tournaments such as the MLG together, they drink alcohol, chat about the players, strategies and everything in between. Mostly they are there to have fun and enjoy what they are interested in. This thing started around the spring of 2011 and now we have bars that regularly offer this service (Event listing for Barcraft & meetups, 2012). This is happening all around the world, even here in Iceland. What is notable about this is the fact that this is exactly what we see with people do with regular sports like football and basketball.

Prediction for the next 10 years

Like was talked about earlier in this paper we saw that the amount of viewers has roughly doubled over the year 2011 with the MLG. It is probably a good guess to say that they will pave the way further and become by far the biggest entity in the world possibly within 3-5 years. They are already pulling in millions of unique viewers per event and they are on a good way of becoming the “NFL” or “Premier league” of eSports since all the best players keep coming back to play for them and the viewers know where to find good content.

In around 5 years there will be one game that will rule them all and what game that will be is harder to predict then people might think because Starcraft II is the obvious winner in this, it is very likely that Starcraft II is about to hit second place regarding popularity because the game that is slowly becoming the most popular is League of Legends (LoL).

LoL is a force to be reckoned with as they have over 15 million registered accounts, every day over 1.4 million people log on to play the game and almost 1.7 million people watched the season one finals of the League of Legends championship with concurrent viewers peaking at 210.000 (Sullivan, 2011). It is clear that they will give Starcraft II a run for the money and even surpass them, maybe even this year.

More companies with existent games are looking at this market with serious thoughts; I attended an eSports roundtable meeting at this year’s EvE fanfest where the Chief Marketing Officer at CCP (the creators of EvE online) was seriously talking about things they could

change so they could expand the Player vs. Player part of their game into an eSports direction. They wanted feedback from players to see how they could make changes to the game so their tournaments could be more spectator friendly both to the core EvE players and to a larger target group. So this is all pointing in the direction that more and more game developing companies will start to form eSports divisions within the companies since this is both a great way to advertise their games and gain more costumers.

In 10-15 years things will start to become clearer, countries in the western hemisphere will have played catch up with Korea and reach a status where eSports are as popular and even more popular than many of the biggest sports in the world today. It is important to note that the core people that are watching eSports today, 18-24 year olds, will be 28-34 years old in 10 years and they will take all their knowledge with them to that level and the children that are 8-14 years old today, in 10 years from now they will be in the target group so the target audience will have expanded from 18-34 years old.

These predictions might be a bit optimistic but the way the technology is evolving today and how children are growing up today with one hand on the Playstation3 and other hand on the PC it might even be so that these predictions are pessimistic.

Betting on eSports games and tournaments will also be very popular since most the games have all the necessary features for it e.g. unexpected results, multiple betting options but still consistency for with the best players.

Personal speculations and conclusion

I find it fascinating that a new breed of sports is being born, I feel privileged about living through times like now, all the adjacent possibilities that are being born around us every day, it is really something amazing to think about and eSports are just one of those things that is growing and with the right type of nurturing it will grow up and mature into something spectacular. It is still extremely young but still it evolved so much.

It is natural that players want to compete between themselves, most often it is what drives games forward, it is the machine within the games that propels the game and it is what the players appreciate the most and seek to, sometimes without even realizing it. But there is an issue that needs to be addressed and that is the fact that a framework of a game often inhibits the viewer side of the game to be good. So I think there will always be huge gaps between games that are specially designed from the ground up as eSports games and those

that just decide afterwards that they want to extend their game into the eSports field, many games are trying this today e.g. EvE but it is likely that they will never reach a target group outside their own player base, which is all fine and dandy but it will not get them anywhere near to the numbers that Starcraft II and League of Legends are pulling in today.

I still love the fact that game companies have stopped ignoring eSports and have really started to see the potential in them; hopefully it is not just for the advertising opportunities that they bring to the game but as well to give it a long and prosper live and more depth and quality. What I would really like to see now are more entrepreneurs in this field, it does not really matter if they are in the game making field, software or hardware field or in the league making business, every little thing counts.

It is also great to see the Koreans actually starting to come here to the west and play on our home fields, usually they have not had much respect for how we look at eSports over here and did not think it was worth flying all the way over here to enter tournaments when the framework around the tournaments in Korea is so much better. But now all of this has changed and the best Korean players they are flying over here almost every month to participate in different Starcraft tournaments. The reason for this is that yes, the framework is a lot better but we have a few other reasons besides the price money. Here the eSports players have started to become celebrities which equals more sponsors and therefore more money and the players are sponsored better which means that tournament holders are actually paying for the best players to arrive at the tournaments in the USA in order to get more spectators since people want to see the best play the best.

It will be really exciting to see what technology will bring the world of eSports for the next years, all these multiple platforms coupled with the live stream features really allow people to watch and follow eSports from all over the world regardless of place and time.

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