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# MetiSentry - Esports

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eSports: Market Analysis

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**Abstract**

In the following secondary research, the goal is to achieve an understanding of the eSports world on the collegiate level. The analysis of the market is key in order to develop a product that will serve the purpose of being a recruitment tool for colleges to use when creating and or adding players to a team. The key to gaining knowledge in the eSports realm is to first find out who the important players in the eSports communities are and any current rules in the industry. By establishing a baseline of what the current market looks like from a sales and growth perspective, understanding it will allow for the development of a tool that best serves these players. After understanding the key players in the market including the coaches, current players, National Collegiate Athletic Association (NCAA) and High School eSports, a better understanding of what this tool can accomplish in the state of collegiate recruitment.

**Introduction**

Collegiate eSports is beginning to take shape as a major, lucrative player in the entertainment industry. With revenues projected to reach "$1.5 billion by 2020," and the "steady growth that is mainly driven by cloud gaming and mobile gaming" according to Newzoo, as found on uakron.edu, and M2PressWIRE; eSports as a total industry shows a promise for profit. (University of Akron, M2PressWIRE, 2019). However, when looking at the subject through the lens of Colleges, Universities, and the governing bodies that rule these entities, we are given an entirely different image. While explosive growth is synonymous between the two major sectors, professional and collegiate, there are some stark differences. When dealing with collegiate eSports, many audiences question whether or not this emerging league is truly a sport and thus qualifies for the benefits of such title. Fortunately, it meets the expected criteria. In *Biediger v. Quinnipiac University*, the court concluded that "it is possible that eSports would satisfy the factors identified by the government for components present in recognized sports under Title IX," (Dr. Dittmore, 2019) However, unlike traditional collegiate sports, eSports adhere to a separate governing bodies, one being the National Association of Collegiate Esports (also known as NACE). This governing body works to "lay the groundwork in areas such as Eligibility, Path to Graduation, and Competition & Scholarships," (National Association of Collegiate Esports, 2019). According to their website, questions such as using player likeness for profitability, on-campus benefits, and recruitment tactics are all sure to arise and expected to be dealt with in unique ways that are harmonious with the unique challenges of eSports. What we are witnessing is a development of an industry that will continue to expand on all levels- collegiate, professional, and recreational; however, this very rapid growth produces its own unique set of glitches.

**Project Scope/Statement**

Even with the overwhelming monetary promise of eSports, there is still a need for procedural improvement. As with any industry, company, or sector that experiences rapid development, there are necessary growing pains that are a part of the process. Specifically, we uncovered the need for a unified and agreed upon platform for collegiate eSports recruiting. Currently, the most advanced method of recruitment among universities is a "sign up and try out" process. However, we simply don't find this process to be feasible with the expected growth of the industry. Our solution is a platform where college eSport programs and potential eSport athletes can recruit or be recruited. In deciding what kind of platform to utilize, website or website-application, we recognize the importance of the changing economics surrounding eSports. As stated in Business Wire's Global eGaming & eSports Market Report, "The gaming industry is transforming from a product-oriented model to a gaming-as-a-service model. 5G, cloud gaming and AR/VR are leading the new innovation cycles, while free-to-play pricing strategies and in-app monetization are transforming the economics of gaming," (Research and Markets, 2019). Subject to change, but our initial design is a website-application structure. Our vision is a video-based layout where each account can upload highlight clips of their gameplay, becoming discoverable to the collegiate programs on the site. A search feature utilizing criteria of either game, state, university, class, or other criteria, programs will be able to find the exact potential eSports athletes they want. Ideally, the account on the platform will be linked to the actual gaming account of the individual, thus ensuring authenticity of gameplay. Looking to partner with the University of Akron's well-established eSports program, we hope to become *the* name in collegiate eSports recruiting.

**Background on Firm/Industry**

Despite only gaining mainstream popularity over the past ten years, "eSports" has existed

as an organized activity since as early as 2000 with the founding of the 'Korean e-Sports

Association' (KeSPA) in 2000 (Larch, par. 20). Also in 2000, the first World Cyber Games

(WCG) were held in Seoul and in 2003 the first "Electronic Sports World Cup" (ESWC) was

played in Poitiers, France. Fast forward to 2012, and the League of Legends World

Championship "draws more than 8,000 attendants and over 8 million TV and online viewers".

The next year, the League of Legends Championship finals took place in the Staples Center in

Los Angeles and draw over thirty-two million viewers worldwide (Hollist, pg. 824). One year

later, on October 19, 2014, "a professional gaming tournament in Seoul, South Korea, attracted

40,000 fans to the sold-out World Cup Stadium to watch the final match of a world

championship series. The series was broadcast internationally and about twenty-seven million

viewers tuned in to watch it live (Hollist, pg. 824). For reference, approximately 100 million

people tune in to watch the Super Bowl every year. In addition to the widespread broadcasting,

the League World Championship promoted the legitimacy of eSports by offering a large cash

prize to the Championship winner. In 2014 the prize pool totaled over $2 million with the

champion taking over $1 million, and prize money being awarded through 8th place. Other game

developers quickly began to follow suit, and "Valve, the developer of popular eSports title Dota

2, drew national media attention when it offered a $10.5 million tournament prize pool (Hollist,

pg. 829).

Prize money, while bountiful, was not a realistic source of income for most professional

gamers and they soon began to find revenue from other streams, very similarly to "mainstream"

professional athletes. Players began to gain sponsorships from major technology, automotive,

and sports drinks companies. In addition to this, many professional players began making money by "live streaming" on sites such as Twitch.com which allows users to stream their matches in real-time to an audience of viewers who can comment through a chat box, subscribe to gamers they like, and donate to gamers if they find the content worth it. To attest to the popularity of streaming sites such as Twitch.com, "in 2014 two massive technology companies bid for ownership of the site, Amazon and YouTube. Twitch was eventually acquired by Amazon in 2014 for 970 million dollars," (Burroughs, pg. 2).

In addition to the magnitudes of money, the average age of a professional gamer is shocking when compared to traditional sports. For example, to compete in League of Legends, players can begin playing professionally at 17, whereas in other eSports professional play can begin as early as age 14. This career path is very different from the traditional sports career with one source mentioning,"Some players retire from the professional circuit at 19 or 20. Most of the industry's players are either teenagers or in their early to mid-twenties," (Hollist, pg. 831).

2014 was a huge year for the eSports industry because it was also the year in which the first college scholarship for varsity eSports was awarded. This scholarship was given by Robert Morris University and in the same year, New York University began offering courses in competitive video-gaming (Hollist, pg. 840-841). Other universities quickly began to follow suit and in the next year five colleges offered eSports scholarships for the 2015–2016 academic year," (Schaeperkoetter, pg. 2).

 eSports had emerged at the high school level two years before that, when the High School Esports League was founded in 2013 to serve as a central hub for schools in Orange County California. Widespread popularity was not immediately found, but growth was exponential as the industry and interest around eSports kept increasing.  The CEO of the High

School Esports League said in 2019, "Our first-ever tournament had around 20 teams sign up. Today, we serve over 1,500 partnered schools and over 35,000 registered students, and we work with schools in all 50 states and every Canadian province," (Competition, pg. 1).

PlayVS (pronounced "Play Versus") has also become a major player in the eSports league management space. "PlayVS is the official partner of the National Federation of State High School Associations and is the only esports league as of press time that is recognized as a varsity sport, with state-sanctioned championships," (Competition, pg. 1). PlayVS serves students in all 50 states and charges a $64 annual fee for each player, but provides complete IT support, data and statistics tracking, match organization and allows students to 'start [their] gaming career,' as stated on their website.  The company also provides a software so that coaches can monitor real-time statistics, manage team rosters, and communicate with other coaches. On top of all of this, PlayVS is the only company with explicit rights to use each of these games on its platform, something that other leagues that charge participants to join may be doing illegally (McGrath, par. 49). PlayVS organizes two competitive seasons each year for League of Legends, Rocket League, and Smite. Their website currently states that they have had over eighty thousand individuals sign up and that they work with over thirteen thousand schools.

As of March of 2019, there are approximately 200 colleges and universities that offer scholarships to eSports athletes, for a combined total of almost $10 million in scholarship money (Gaming Skills, pg. 11). The opportunity to cash in on this new sport has many universities, including the University of Akron, developing state-of-the-art practice and competition spaces on campus to complement and encourage the eSports program. According to Newzoo, the self-proclaimed 'Global Leader in Games and Esports Analytics,' it is estimated that the global esports market will be worth around $1.1 billion in 2019 if expectations are met, an increase of

nearly $230 million from 2018, and projected to be about $1.5 billion in 2020. Growth is

expected to come from an increase in sponsorships and merchandise and ticket sales. They

expect the global esports audience to grow to about 443 million in 2019 and 495 in 2020

(Newzoo, 2019). Even the world's largest accounting firm, Deloitte, estimated in the April 2019

publication of *The eSports Observer* that in 2018 four and a half billion dollars was invested into

eSports in some capacity, with a majority of the money coming from private equity investors and

venture capitalists who are looking to see their share of the massive money-making potential of

competitive gaming (Colaco & Christoefl, pg. 3).

Here at the University of Akron, in late 2018, an estimated "$750,000 was spent on three

esports facilities and another $400,000 into program operating costs, plus $70,000 for game

licenses and other costs." The University has dedicated a space of over 5,200 square footage to

eSports, which is the largest and most state-of-the-art facility in the world. The dedication of

time and money may be reaping results, as evident from a recent event on November 9th, 2019,

when the University of Akron's Rocket League team won the Collegiate Rocket League 2019

National Championship. Each of the teams three members won $15,000 and a first place medal,

now getting to defend their new position as national champions.

**eSport Statistics And Impacts**

College recruitment has become an up and coming issue in eSports. Currently, with almost all universities across the nation just now starting their eSports teams or have started within the last few years and currently growing their teams; recruitment is now seen to be a growing issue. Many universities currently hold tryouts in order to form teams or fill open positions on existing teams. The eSports industry has just surpassed the $1.1 billion mark of revenue in 2019 and a projected roughly $1.8 billion in 2022 (Pannekeet, 2019). With the eSports industry growing at such a fast pace from $696 million in 2017 to $1.1 billion in 2019, college recruitment is going to be soon impacted (Warman, 2017). There will soon need to be a system that universities around the world, coaches, players, etc... can utilize in recruitment, match creation, statistic sharing, and many more.

The concept of E-recruitment systems have been utilized for years. For example it is currently being used by firms looking to "target a wide audience at a small cost" when performing their recruitment process for potential job candidates (Faliagka, 2012). The general concept they use follows as such: candidates fill out their resumes/applications on various places such as online forms, Linkedin, or blogs and a virtual computer will calculate their personality traits and match/rank these candidates according to position requirements and various other elements. Candidate rankings in this scenario is run using an algorithm that assigns scores to criteria like extraversion, education, work experience, calculated loyalty, etc (Faliagka, 2012).

This concept may work well with eSports in the future where on one single platform there will be thousands if not hundreds of thousands of players all looking to get recruited into a college while also potentially receiving scholarships from it. Coaches or managers of teams just do not have the time to sift through hours upon hours of game videos or statistics. A platform can

be created to where recruiters can post requirements such as specific games, scores, or anything

school related like grades, major, state of choice, and the algorithm can be run to compile

rankings of all potential recruits that meet the recruiters requirements.

　　　　There are hundreds of games that people play online everyday. A few of the top games

that the University of Akron's varsity eSports teams currently participate in include, League of

Legends, Overwatch, CS:GO, Hearthstone, and Rocket League. For the first half of 2019,

Fortnite has taken the crown of having the largest total prize pool of $14.7 million and followed

by CS:GO with $8.6 million (Hayward, 2019).

　　　　eSports is a very unique form of entertainment as it is a sport that can be taken up from

the comfort of your home, school, or even in a library. Not many sports nowadays are able to

give you the time flexibility or freedom of dedication. Sports such as football and baseball

require hours at a field with good weather while eSports only requires internet and power which

for most of the participants is not an issue. Another aspect that makes eSports unique is that

eSports in the college realm has been seen to be made up of a majority of STEM students.

"Although we don't think there is one type of student that makes up top League of Legends

talent, 62% of our participants are from STEM majors," (Reames, 2018). This does not mean

that this is the correlation with every game however comparing this number to the national

average of 36% of undergraduates being STEM majors makes a statement (Reames, 2018).

　　　　Success in the eSports world can sometimes be compared to solving a numbers problem.

One example of such a student is Ian Alexander, he is among the best League of Legends players

in North America and competes for Columbia College (Reames, 2018). Ian was originally a

computer science major who was utilizing eSports as a way to help pay for his education at the

university however as his skills improved he is looking into holding off with finishing school and going full time in eSports.

       With eSports continually growing every year with more and more money becoming available to players in the industry, a universal platform for recruitment is very much needed. Setting up a platform that includes highschoolers from as early as freshman year can help build and refine skills and give students a goal to reach in order to attend the university of their choice. This goal can be anywhere from helping to fund college with scholarships or even a further goal of potential job income post college in eSports. A platform would work best for highschoolers and up however middle school students will be welcomed to create a profile if desired. One issue with middle school students is that they may not be able to play some games such as League of Legends because the game has an ESRB rating of "teen" (Hayward, 2018). But their integration into the system at a younger age would allow them to hone skills in order to become better players.

**Future Outlook of eSports in College**

eSports are expected to generate more than 1 billion in revenue in 2019, gathering more traction and expanding into new markets everyday (IBISWorld, 2018). With this global rise, we also see a pattern of eSports rapidly increasing in colleges and universities throughout the United States. Not only are eSport games and teams benefitting from this growth, but also streaming websites such as Twitch, where millions of viewers watch their favorite gamers play online. Twenty five percent of adults in the United States report that they have watched a video of someone else playing a game before, whether it's been during an eSports tournament or just someone livestreaming their game (Mintel, 2019).

The popularity of people gaming and watching gamers is clearly increasing, but what games are they playing? Dota (Defense of the Ancients) 2, Counter-Strike: Global Offensive, Fortnite, League of Legends, and Starcraft II are the five top games that award prize money, each awarding at least $30 million total up to $217 million. While not every college has a team that plays every one of these high-earning games, most colleges with esports teams have gamers skilled in several of the top games. There are games that are growing in popularity, but the amount of gamers, the tournaments, and the prize money are all vastly different in each game. Warcraft III has only 556 competitive gamers, yet they have 1313 tournaments every year while Fortnite has 6 times as many players and only 520 tournaments a year (Top Games, 2019).

With the growing number of tournaments, there's a growth spurt in the number of colleges and universities with eSports teams. There are currently 175 members of NACE and 314 active Tespa chapters across the United States (eSports Colleges, 2019). These schools are constantly recruiting new players and offering more and more scholarships and benefits to those who choose to join their eSports team. And while not everyone who plays eSports is in college or

looking to start higher education, there are hundreds of thousands of high schoolers playing competitive eSports games, creating a large target market for a recruiting tool.

The Ohio State University is now offering a major designed around eSports management where students can focus on team management, game design, programming, business, game art, or health and rehabilitation (FAQ, 2019). Curriculum like this, specifically designed to attract gamers, is new and becoming a more popular course of study as well as a viable future career. With added support from the academic side of colleges and universities, there is a lot of room for more growth with an expected future for eSports programs.

**NCAA and eSports**

The constantly growing world of collegiate eSports has presented a unique opportunity for colleges around the United States with rapidly growing programs and professional eSports it is becoming a more prevalent topic for colleges and the NCAA. The NCAA has in the past few years become a more discussed topic on what role it will play in the collegiate eSports realm. The biggest questions on if the NCAA will regulate the sport like it does for all other collegiate teams such as football and basketball or if it will have a hands-off approach and allow them to create their own entity. At the start of eSports programs, the NCAA did not pay much attention to these teams as they were more clubs than teams but as the popularity of eSports grew and so did the enrollment of the students in these programs the roll the NCAA will play is becoming a big question. So far the NCAA has shown more of a hands-off approach and let eSports team regulate themselves. A recent vote in May of 2019 has shown this approach "The organization's board of governors voted unanimously late last month to table the possibility of overseeing and holding championships for esports…" (Schad, 2019). The NCAA has done some investigation what it would be like to sponsor eSports, and they came to a conclusion that eSports has to many unknowns that prohibit it from fully committing to the idea of regulating the sport.

The NCAA and eSports programs across the country have struggled in the past few years on where to take their relationship. While eSports started off as just clubs its continuous and rapid growth has made it apparent that there may need to be some type of governing body to help guide it. This is evident by how much cheaper it is for colleges to get involved in eSports compared to other major sports on the collegiate level:

eSports are too big, and a large percentage of gamers and esports fans are college age. In

contrast to many stick-and-ball sports, fielding an esports team does not require a school

to build expensive stadiums or sacrifice academic standards (Blum, 2017).

While eSports may require semi-expensive computer set-ups and higher quality internet than a

university would typically provide, it is much cheaper while being compared to other collegiate

sports that require large practice facilities and elaborate stadiums to house their spectators. This

also allows universities to offer better scholarships to athletes as they are less encumbered by the

up keep of these facilities and can offer more money an area where the NCAA regulates in other

sports.

A major advantage to the independent collegiate teams as they stand is that they are not

bound by the rules and limitations of the NCAA. This allows schools to set up their own

competitions generating the necessary income required to keep these programs up and running:

...because eSports aren't currently sanctioned by the NCAA, they aren't subject to the

financial limitations and archaic rules that govern most collegiate sports. One benefit of

that freedom is that it allows teams to generate their own revenue and players to compete

for thousands of dollars in scholarships and prizes, all while wearing jerseys with

sponsorship logos, a strict no-no for NCAA sponsored sports. As an NCAA sponsored

sport, prize winnings would be relegated…(Korbitz, 2015).

eSports teams across the country have struggled at times to get out of the initial start up phases

of the programs. But without the regulation of the NCAA they can turn to more monetization

opportunities than a normal college sport would allow in order to keep their programs running.

The NCAA also has hindered itself in what it requires for a sport to fall under their rule of

governance:

In order to be recognized as a sport and earn "championship status," the NCAA requires that a minimum of 40 schools (28 in Division III) field a varsity team sponsored by the university. Sponsorship generally means the team's expenses -- coaching, training, travel, uniforms, academic support services, etc. -- are paid for by the institution (Korbitz, 2015).

The NCAA has set clear defined ground rules for what it would take for them to become the governing body of the sport. But at the same time it has also caused them to fall victim to their own regulations as many teams do not have the full support of their university to pay for their expenses as universities are struggling to see the monetization factor in the sport and the uncertainty of the sport future leads school and the NCAA to be hesitant when approaching these programs.

Taking a look at the state of recruitment in eSports in relation to the NCAA so far it has been a free for all for the first few years with the recruitment being done by each school. Many schools had no real way in order to recruit players and most just put up players wanted signs in order to attract potential candidates. Those who wanted to join would just answer a few short questions need proof of their enrollment in college and then submit their application. But as the sport has grown and teams have become more elite and players are now choosing schools with more prestigious and longer running programs the need to formalize the recruitment process is becoming a larger issue to tackle. The question is becoming more evident on how this will become formalized and who will do it and if the NCAA steps in will these programs have to follow their strict player eligibility guidelines. Looking at Division 1 schools in order to be eligible to participate in NCAA sanctioned sport a player must maintain a 2.3 GPA, successfully complete 10 of the 16 courses required by the end of their seventh semester of high school and

meet SAT or ACT standards based upon a sliding scale. Then after all that they must apply for an NCAA eligibility certificate in order to be allowed to play (Academic Standards, 2019). This would most likely be applied to the college eSports program if it were to be absorbed into the NCAA.

One issue that could arise from this adoption in the recruitment standpoint would be college eSport programs having the funding in order to make sure these standards are met. By falling under the regulations of the NCAA standards for recruitment and conduct these teams would lose revenue sources and player recruitment would be even more of a hassle than it already is.  But that is not to say there would be a compromise for a system that would be put into place if this were to happen. Take Next College Student Athlete(NCSA) for example the top college athlete recruiting firm who have realized this ever growing need for recruitment help "Next College Student Athlete (NCSA), which bills itself as the world's largest and most successful college athletic recruiting network, announced this fall the addition of **esports** to its roster of collegiate sports," (Next College Student Athlete, 2018). A partner like this backing the recruitment process not only helps eSports as it currently stands with their growing base but as well as if there were to be an integration between eSports and the NCAA. NCSA already has a system put in place that helps colleges find talent needed to fill their spots and make sure that their growing programs have what it needs to succeed. This integrated system that they provide which also encompuses other collegiate sports would help bridge that gap between the NCAA eligibility recruitments and the current system that is being used by eSports teams across the country now.

Looking at an example of what all this would culminate in a division 2 conference the Peach Belt has actually fully adopted eSports as a recognized sport. Just like the rest of their

sports teams they play conference matches set up by the schools and regulated by the conference

on all matters:

> The Peach Belt has added Esports to its lineup of athletic offerings. The 12 conference
>
> schools, including Augusta University and USC Aiken, will feature five-player teams
>
> (one alternate) that will face off in League of Legends, a popular online game. The
>
> schools will play an 11-game schedule in the fall and spring semesters (Gay, 2017).

This is a great example of what it would be like if the NCAA where to take over the regulation of

the industry. While the adoption of eSports is new to the Peach Belt and will more than likely go

under many reforms as the sport continues to grow eSports programs and the NCAA can use

them as a model for any future possibility that could come. Looking at how the Peach Belt has

set up their championship matches can be a great example of this "At the end of the regular

season, the top eight teams will advance to the Peach Belt Esports Championship. The Peach

Belt is the first conference in the NCAA or NAIA to sponsor an Esports championship," (Gay,

2017). A major challenge in integrating eSports into Division 1 colleges would probably be how

to set up the championships. A system like college Football the more comparable of the NCAA

sports would not probably work but a ranking system would be needed in order to determine who

the top teams in the country are. But a system like NCAA basketball's march madness bracket

system would probably be the safest. The Peach Belts smaller scale of this would be a great

experiment to see if a true integration between the NCAA and large college eSports programs are

even possible. As time progresses and College eSports programs being to grow The Peach Belt

will come to set the standard on not only if such an integration would be possible but how it

would work as well.

**High School eSports**

Examining those involved in the world of college eSports recruitment, two distinct groups arise when thinking of recruitment those doing the recruiting and those being recruited. The recruiters are the easier group to define as they are the managers of the collegiate teams that run the programs. Recruiters are those who look and seek out the talent in order to build these programs from the ground up. A lot of research has already been done on their style of recruitment as shown earlier in the background of the programs above. These are the individuals that set up the state of the current college recruitment landscape and have went through the painstaking process of getting these programs off the ground and holding tryouts to get these teams started. As discussed earlier though there is another side to this, and they include the players that are getting recruited and the focus of this research and their impact that they have had on the eSports recruitment industry specifically, high schoolers. They have had a tremendous impact on the growth in the need for a standardized recruitment platform at the collegiate level. High School programs are growing at such a rapid pace just as at the collegiate levels take the state of Virginia as an example of a state who has jumped on the eSports bandwagon "The Virginia High School League joins leagues in 16 other states affiliated with the National Federation of State High School Associations participating in esports this year," (Andrejev, 2019). As states become more accustomed to the notion of joining eSports ever growing popularity, the need for a standardized platform for these up and coming teens to become noticed becomes more relevant.

High schools across the country seem to be on more of a unifying track than colleges though. As their programs are growing just as rapidly as collegiate teams but the sheer volume of the players joining are astonishing "School district rules said Miller needed 10 kids to start a

club. In just a week, he got 20 — 14 boys and six girls," (McGrath, 2019). One of the great

aspects of eSports in general is how easy it is for anyone to join. There are not really any barriers

like training that is needed before hand or years of conditioning, and the rapid growth of these

high school teams are evidence of that. Even on a small scale the ability to double the program

size in just a week proves that high schoolers want to make this work. This is a great sign for

colleges as their potential recruit pool grows they have more options to choose elite players for

their teams. This is even more evident by the scholarships that university teams are providing

these players that are spurring the rapid growth "Eventually, the university offered the students

$100,000 in scholarships,"(McGrath, 2019). Scholarships like this give a great reason for teens

everywhere to take up eSports with the potential of covering your entire college career and the

ability to even go pro with enough work. Scholarships are a major factor spurring this rapid

growth in eSports at the high school level.

High School eSports does have one advantage over collegiate eSports so far and that is

that they are becoming more organized in their matches and tournaments. Though that was not

the case at first many high school teams just like collegiate teams struggled to get organized in

their infancy:

> Mark Koski, the chief executive of the NFHS(National Federation of State High School
>
> Associations) Network, which livestreams high school events, said that over the past 18
>
> months, more and more member states have been looking for guidance in running esports
>
> leagues." (McGrath, 2019).

Guidance at any level of eSports can be a struggle in the start by Mark Koski and found a

solution that helped "The Federation decided it would bring its 19,500 high schools under a

single esports provider." (McGrath, 2019). The organization of college eSports was a huge

undertaking organizing something of that scale would not be easy but also allowing for the fact that this is a new industry with a lot of unknowns provides even more challenges. eSports though has advantages over other mainstream sports it does not involve large travel expenses which would help save high schools largest amounts of cash and make these programs even more feasible. Kioski eventually did find that company that was willing to help generate an eSports high school league in PlayVS(Player Versus) for anyone that wanted to join and at an affordable price to the students:

> Under an exclusive five-year contract signed in January 2018, PlayVS has license to operate leagues in any state that wants to sign on. This past school year, it ran its first two seasons in eight states. The cost for schools was $64 per student, per season. The company hopes to build itself into a 100-million-user subscription business. (McGrath, 2019).

The advantages to this are numerous and provide great opportunities for high schools around the country. Its affordable to them and the students and provides a gateway to enter the growing world of eSports. It also provides a great gateway to getting to the collegiate level and obtaining scholarships another advantage to the organization of the sport. It provides a centralized place for colleges to look in order to obtain key players needed for their teams. It also brings the emphasis for collegiate eSports to have a centralized system in order to maintain all these players stats and data for recruitment which at its current state is lacking and what this research hopes to solve.

**Primary Research Transition**

The next progression in our case study is primary research. We plan on using the fortunate circumstance that the University of Akron presents us: our well-established eSports program. We plan to reach out to gain knowledge on their current recruitment process, if they look for a certain individual when recruiting, the strong correlation between S.T.E.M. majors and eSports, and whether or not they would benefit from a refined recruitment process. From there, we will branch out to the local high school eSports teams looking to gain data on the support, both in terms of monetary and student interest, of the programs, the current processes and systems they use, and their general opinion on the direction and growth of eSports at their respective level.

In terms of our methods of collection, we primarily plan on using surveys, focus groups, and interviews. Specifically, we look forward to setting up an interview with the University's own Buzz Krager, a high-schooler who is enrolled in our "College Credit Plus" program, thus making him an eligible eSports athlete. We expect that Buzz will provide us with a unique perspective on the transition between high school and collegiate eSports. Also, in terms of surveys, we plan to construct and distribute surveys to the student bodies at a few colleges in the area, as well as a few high schools in the area that have eSports programs/interest. Ideally, we could obtain information from colleges across the country, but we aren't optimistic in their participation. Lastly, a focus group with the eSports managers and team members will help us craft an image of the current atmosphere in our program. Questions will be pointed towards, but not limited to, their current recruitment processes and systems.

Overall, we are fortunate enough to live in an area that embraces the growth of eSports. We look forward to collaborating with local programs and learning in greater detail the process behind collegiate eSports recruitment.

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eSports: Primary Market Analysis

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**Project Introduction**

The Esports industry is still relatively new and upcoming with no complete industry governing body. There are also growing pains where there is no unified platform for Esports recruitment. Our solution after conducting secondary research is creating an atmosphere where college Esports programs / potential Esport athletes can recruit or be recruited into such programs with ease. Our vision is of a video-based layout on a website/application structure due to Esports being used in the majority on a desktop. A phone application can become in the works once the base of the website/application structure is being utilized; this phone app can potentially give quick-add capabilities, application status, quick profile editing, and other things of that more mobile nature.

Looking forwards towards planning for our primary research, we decided to direct our research towards the college recruitment market. According to a graph from newzoo, the increase in popularity and peak of Esports can be found from roughly age 15 through your late 20s. The sweet spot of this curve is the transition from highschool to college market and with an increasing number of colleges adding Esports to their school activities, this seemed to be a no brainer for a great area of research.

For primary research, our group decided that we would like to conduct various interviews ranging from Esports administrators down to the players or upcoming players. We wanted to interview an administrator from the highschool and college level and also interview students from the highschool and college level. We chose this methodology to aid us in getting a first hand view to the Esports industry at the college level. One issue/question that we ran into during our secondary research was a specific governing body for Esports.This seemed like the perfect question for us to ask an administrator such as Nate Meeker, Director of Esports at the University

of Akron. Another question we ran into was uncertainty in the highschool Esports market, we already knew from secondary research that the college market was greatly expanding however not a lot of research could be found regarding the highschool scene and what it all entailed. Interviewing Jeffrey Caranna, Akron Public Schools High School Esports Coach & Coordinator, allowed us to get a great insight into the highschool Esport ecosystem. In order for us to fulfill our goals of getting interviews with the players, we planned to host a focus group after one of the University of Akron's Esports weekly meets. Due to the recent health pandemic, we decided it was best to do this in the form of a survey and ask open ended questions to leave the direction of answers open. This data was vital in aiding us to create recommendations on how MetiSentry can further pursue the college Esports market.

**Survey: The University of Akron eSports Team**

While we had originally planned to host a focus group with 8-10 athletes from the Zips eSports team, our plan changed and we sent a survey out to all members of the program asking them for their feedback. With 29 respondents, we had a fairly well-represented demographic. A broad range of players took the online survey who were at



*Figure 1, a wordcloud from the survey*

different points in their education levels and who played different games. There was also a fair amount of diversity in the majors of players of the eSports team, as shown in Figure 1.

With this survey's data, we could see that eSports is a developing sport for all people that is still emerging in a formal team setting and in high schools. Only one of the respondents had a high school with an eSports team, which tells us that there is a need for more structure and support in these developing leagues. Even though almost every player did not have a high school eSports team, many remarked that they have experience playing in some sort of organized setting for several years. We can clearly see that players want to play with organization, but that there is not an option for that during the formative high school years.

As far as recruitment, the Zips eSports team conveyed that this was a casual, more informal process for many. The university sent out emails about forming the team and posted about it on social media platforms; the tryouts were open to anyone who was interested and showed up. It seemed similar to a high school sports recruitment almost. From the survey, players told us that eSports recruitment is very different from traditional sports. For starters, most players do not meet

face-to-face with anyone until they are near the end of the process, which poses some problems to be shared in Nate Meeker's interview. High school eSports players aren't watched like most sports, where a recruiter might go to a local tournament or travel to a state competition to watch the best players. This can cause friction in the recruiting process for colleges looking for high school students. They often do not know where to recruit and as a result, many players go to colleges based on other factors and then consider the eSports team.

Players also communicated that the marketing for the eSports team was focused on the actual facilities and the environment of the program as opposed to the scores of the team or the strength of the college's name. This indicates that in a potential software, colleges need features that can showcase their marketing points. An interesting fact from the survey is that most players on the University of Akron's eSports team come from within 100 miles of the city of Akron, Ohio, as seen in Figure 2. This shows the evident problem that colleges and universities do not have a reach with their programs and need assistance in advertising their eSports programs to those in a broader radius.
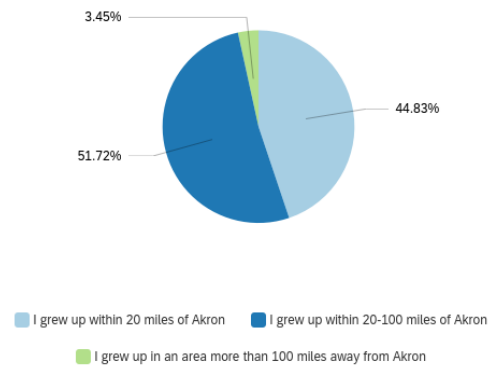


*Figure 2, responses to the survey question,*

Finally, the Zips gamers had advice for what they wanted in a recruiting software program. Many players responded that integration with other softwares and applications would be a major factor in their usage of a program. Twitter and Discord were named as the key pieces that needed to come together in a software. Just about every eSports player uses Discord and most players indicated that they used Twitter to follow local or grassroot eSports leagues and tournaments;

however, with Twitter's algorithm information can often get overlooked leading to frustrations with gamers trying to follow these organizations.

Profiles should offer customization; players take pride in their work and want to showcase their positions, their roles, their statistics, the heroes they play, and even explain their gaming style on their profile. Features that seem minor, such as displaying highlights/clips of their gaming can mean a lot to potential users. So far, most applications and softwares limit the ability of a player to customize their profile, effectively reducing the connection a gamer feels with their profile. In addition to profile customization, players take pride in which game they compete in and want some differentiation between the vastly unique games on this software. Colleges should also be able to share a lot about their programs and market themselves to potential high schoolers interested in collegiate gaming.

Of course, other factors such as user-friendliness and exclusive leagues/events are important to potential users. This survey really helped to find what players desire in their gaming software so that MetiSentry can effectively create some platform that will be attractive to their desired target. While eSports continues to grow, creating a software specifically for players and athletes is a unique opportunity to get involved in this expanding category. Almost 80% of survey participants believe that eSports will reach the level of support received by traditional sports, and the other participants indicated that they weren't sure; not a single player responded that they do not believe eSports will reach that level.

**Interview: Director of eSports at the University of Akron, Nate Meeker**

In meeting with the Director of eSports at the University of Akron, Nate Meeker, we walked away with an overall greater picture of what collegiate programs are looking for in terms of a recruitment tool. Their current recruitment process has a familiar "sign up and try out" look and feel to it, a procedure that could definitely use a makeover. In fact, when asked the question, "Do you think that there could be some use for a centralized tool in [eSports] recruitment?" Meeker simply replied, "Yes." The demand is there, but supply isn't.

As mentioned above, their current process lacks efficiency and cohesion. Per year, their efforts boast about six to seven hundred applicants. Information provided includes school information (SAT/ACT score, Name of High School, etc.), gaming profiles, and any video highlights. While we would focus on some of the same data in our recruitment tool, the ability to centralize the recruitment market would prove to be a valuable asset for any program. Other recruitment efforts include active recruitment from current eSport athletes, mailing lists, and Discord servers that mainly entail a high school population. Again, the current process is sufficient for an underdeveloped eSports program, but it is not built for sustainable growth.

In fact, the major pain point that Meeker shared with us was accurately determining a player's age. In the current process, all it takes is a simple white lie to fake eligibility: an incorrect birth date entered into the form. ESport programs have no true way of legitimizing potential recruits, and their problem is mostly highlighted in age. What the University of Akron mostly runs into is a problem of younger teenagers applying for the team and lying about their age. The program then wastes time and money investing and recruiting said player, all to have it be for nothing because of a falsified age. Our centralized recruitment tool will be sure to have the proper barriers in place to combat this dishonesty.

In terms of competition, Meeker admitted there were a few players in the eSports recruitment space, but none have taken hold of significant market share. This is reassuring to our cause. It doesn't matter who is first, it matters who is best. With players already in the space, it legitimizes the market while also allowing some first-mover mistakes to be made by other companies. One notable competitor listed by Meeker was *eFuse,* a "LinkedIn for eSports." As put by Meeker. This was an interesting discovery, as this website seemed to provide the look and feel of something professional and useful. In developing a recruitment tool, there could be some useful takeaways from this competitor, such as interface, but there is also a weakness to be exploited: eFuse is looking to be a social network for connecting potential gaming *professionals,* not collegiate athletes. Using the LinkedIn comparison, when was the last time a college used the social media platform to recruit a student athlete? The answer is never, which is where the niche is carved out. If Metisentry could corner the market and completely hone in on the high school to college progression, we believe that they can be successful.

**Interview: High School eSports Coach, Jeffrey Caranna**

In conducting secondary research, the team came across an article from the Akron Beacon Journal that reported on developments within the Akron Public Schools (APS) eSports program. At the same time secondary research was being conducted, APS was investing $39,000 in gaming equipment for its students. This equipment is housed at STEM high school, located on the University of Akron's campus, however, the program is open to students from all APS high schools. APS eSports head coach Jeffrey Caranna stated that the purchase symbolized the district's dedication to building an eSports program. Prior to this, APS students had been utilizing the University of Akron's recently created eSports facility located within the UAkron Honors College which is located directly across the street from STEM high school.

Given his position as APS eSports coach, Mr. Caranna was an ideal person to provide insights on what is currently working in eSports administration and what is needed or could be improved. Mr. Caranna has personal prior experience with professional eSports, as he had competed in Counter-Strike during the early to mid-2000s. Caranna then received a degree in Information Technology and is currently the Technology Support Specialist for the Akron Public Schools STEM high school. In addition to his involvement with the APS eSports team, Mr. Caranna is also on the board of directors for Esports Ohio, a grassroots, educator-led high school eSports organization.

In conducting primary research, the team focused on not only seeking out individuals who are involved with eSports, but active players and coaches in high school and college-level eSports who could provide insight into current platforms and what they would look for in their "ideal" system. Mr. Caranna was able to speak on various aspects of the high school's eSports program, including involvement with the University of Akron and administrative obstacles he

has faced. The questions asked focused on student participation, technical and organizational struggles, and the active platform providers in the high school eSports world.

Mr. Caranna had attempted to organize an eSports team within the Akron Public Schools as early as the Fall of 2017, but found that the lack of space caused most matches to occur at home. In early 2018, however, the University of Akron unveiled a new gaming facility for the newly launched eSports program. Caranna worked with then UA eSports Director Michael Fay to allow the APS team to practice at the University's facilities during the week. At this time, approximately forty students were actively involved with the APS organization and would practice two to four times per week after school. Caranna said that he was the one who brought the idea to his students at first because he had seen developments in other high schools, however most students did not realize competitive gaming had reached the student level. He immediately received a response from students and began orchestrating rosters, practices, and matches with other schools. APS students showed so much interest, in fact, that Caranna quickly found himself spending additional hours on managing the growing number of teams. Due to competitive gaming being relatively new at the high school level, no framework existed for how to structure an eSports team and compete with a wide range of other schools.

We then discussed the Akron Public School's involvement with Esports Ohio and his involvement with Esports Ohio outside of school. Esports Ohio promotes themselves as "Grass-Roots Esports For Ohio High Schools" and uses "Developed By Educators For Students" as their slogan. They strive to provide a free league for high school eSports teams throughout the state of Ohio to compete in. From their origin in early 2019, Esports Ohio provided instructional guides for educators and administrators who wanted to start a program at their school but did not have a background in eSports or competitive team management. In their first season, Esports Ohio had

approximately 50 teams compete on their league platform. In their spring 2020 season, there were approximately 2,600 teams from over 100 schools within the state of Ohio scheduled to compete in the league. This exponential increase in league members caused growing pains within the organization, however, as schedules, rosters, and statistics tracking became unmanageable and cumbersome. This is largely because the organization is coordinated through Google and Microsoft documents passed between educators. Due to the desire to keep the league free for schools to join, coaches had to use software that was already available and universally accessible.

That conversation led to the most pertinent insights for our research as they relate to the current need for a cost-efficient platform. There are multiple companies and organizations that focus on providing platforms, league structure, and additional tools for coaches and administrators that Akron Public Schools and Esports Ohio engaged. This included PlayVS and the High School Esports League (HSEL), however both of these organizations charge a per-student fee for access to their platform. This is $64 and $37 per season for PlayVs and HSEL respectively. Mr. Caranna highlighted extensively that he had struggled to find a provider who would charge a "reasonable" per-student fee. "For a large, urban school system like Akron Public Schools, the district isn't going to pay that for each student, and we can't expect students and families to pay $128 a year per student either." Mr. Caranna stated. The cost factor could keep students from joining school-related eSports teams as a family with three students who want to compete in eSports year-round would spend approximately $400, on games that would otherwise have a one-time cost of $60 or less.

Mr. Caranna noted that conversations with these companies were not always cordial. In fact, he said that PlayVS essentially tried to "take over" Esports Ohio in an attempt to add the

teams already on that platform to their own. In working with companies that offered "reduced" pricing packages for schools, he said they would typically walk through the benefits of the platform only to end the presentation with a $20 per student fee, which is still outside of the range APS would be willing to pay. From this we can conclude that high schools still need an affordable option, which MetiSentry may be able to offer.

The final takeaways from our interview with Mr. Caranna includes the need for a cost-efficient platform, the desire of eSports athletes to be able to create a more individualized platform, and the need for the software to be equally appealing to administrators and athletes alike. As he outlined in discussions about the various providers engaged by APS and Esports Ohio, organizations are still struggling to find a cost-efficient system to organize their eSports teams and players. School districts like Akron Public Schools could potentially have a large number of students interested in joining school-related eSports teams that would be deprived of the opportunity due to limitations of manual administration. Secondly, our findings from the survey with University of Akron eSports athletes were echoed in our interview with Mr. Caranna in that students show a strong desire to be able to customize their profiles outside of game statistics. Caranna stated that he wanted to be able to provide a "full, holistic" profile for students because that is what he saw college eSports coaches looking for even more so than gaming ability. Lastly, there is a strong need for the platform to be easily utilized by both students and administrators. Students will be looking for a system that can promote their playing ability as well as their team and leadership skills, and administrators without a background in eSports or athletics will need a system to organize their rosters, schedules, statistics, etc. that is intuitive and able to integrate other applications.

**Limitations of Research**

When conducting our primary research for the development of this online tool there were limitations that prevented us from coming to some conclusions. One of these limitations being that the eSports space is so new that very limited information is present on the future and needs of the sport. There are many instances when doing research when conflicting reports would come up on what exactly was the next step in the sports future. While it is clear that eSports will continue to grow and evolve rapidly over the next decade and beyond, the unclear direction of the sport can pose issues when developing tools to aid in this expansion. This lack of organization and direction in the future of the sport can pose a particular issue in funding and developing a pricing model for a recruitment tool or any tool of the sort. Programs across the country from high school to College have all sorts of different funds at their disposal. Some programs have full funding and are able to offer full rides which is as of this moment a rarity while others rely on donations to keep their program running which at this moment seems to be the majority. This issue posed some serious questions for us on what if any pricing model we could develop as the space is so large and unorganized the time given to develop this was out of our time frame.

Another major issue to this was, of course, the COVID-19 pandemic that forced us to change the way that we went about collecting our data from the University of Akron eSports team focus group. There was a focus group planned in order to get data from the players at the collegiate level on their thoughts for a recruitment tool for colleges. We did end up collecting data from them though in the form of an emailed survey but the information that was present there was much less than what we had wanted to obtain in the start as our goal was a more opinion based data than numerical. As stated earlier the issues with the space is that due to the

lack of data just all around gathering hard numbers at times became an issue with the goal of

interviews and focus groups being more to obtain what they would have liked to see when they

entered the collegiate space.

        When attempting to research competitors for this market we had some issues when trying

to pinpoint what we were looking for. While there are many companies out there when it comes

to development for tools for eSports programs we had an issue trying to find one that was meant

for recruiting from highschool to college. When interviewing with Nate Meeker he did discuss

that there were many tools in development right now in the space for recruiting but that they

were either still in development or in their beta stages of testing and had not gained widespread

use so the outcome of these tools is unknown at this time. This again presents a lack of

information that we ran into when attempting to come up with a pricing model for this tool. But

Nate did discuss how many of these tools were privately funded at the time and how much of an

investment was put into them is unknown as well. The all around lack of knowledge and

information available in this space presented a large issue when attempting to research for our

project but it also presents a large opening in the future for further developments of this tool with

more resources available.

**Recommendations**

Going forward for recommendations for future research more data would be collected from universities that participate in eSports outside of the Akron area. The data that was collected was all from the Akron area which significantly reduces the amount of variations present in the eSports community. Akron is one of the older eSports programs and has a lot more infrastructure than many of the newer programs that are still trying to get off the ground. So in order to get a more complete picture of what the collegiate and high school level eSports are looking for in a recruitment tool more data from a wide variety of programs needs to be collected.

Another area of future research for recommendation would be to look more at how wide the market is when it comes to eSports tools. The market at the moment is so vast that in the time that was presented to put this project together there was not sufficient time and manpower to properly look at all the possible tools being used or in development. With the data that was able to be gathered within this time it is very possible to create a recruitment tool and have success on the market with the data and opinions that were collected. Due to the market's nature at this time it is a free for all for who can create the best tool that fulfills the needs of the clients. It is just a matter of can the tool be made in the most cost efficient way as of right now many eSports programs do not have the funding to pay for an expensive tool and will need one that has minimal costs but also fulfills the needs that they are looking for.

**Solutions**

Moving forward from here there are many possible routes with the information that was presented. Like previously stated in the recommendations section it is very possible to go forward with the information that was presented and create this recruitment tool. There was in all cases of the data collected a need for a tool like this in order to help move the sport forward to a more professional setting. While the needs varied based on the group talked to they agreed that there is a lack of resources when it comes to data collections and recruitment in the eSports space. It is just a matter of more research and narrowing down what exactly the majority are looking for and what they all are willing to pay in order to gain access to such a tool.

Another solution is to continue research going forward from what was gathered and determine even further what this sport is looking for. While this tool is a good starting point when talking to players in the eSports area it was clear that they needed a tool that did more than just recruitment. They seemed to need a tool that would while also doing recruitment be a place where eSports teams could go even after recruitment. A tool that could not only help with recruitment but also be a space for interacting with other eSports programs across the country. The recruitment part could be just one aspect of the tool that's available for use but the tool could also be a place to schedule matches, check on other teams players, what school are active in what games the options are endless and just need to be researched more to determine what schools are needing beyond what the researched gathered stated.

**Future Research**

For future research more information needs to be gathered on what other eSports programs outside the Akron area are looking for. The scope of this research to various constraints was limited to the Akron eSports program and the surrounding resources available. In order to get a more clear picture of what everyone is looking for, the scope of research would need to be expanded beyond what was presented. The immediate region of north east Ohio would be more than sufficient to get a better idea of what the potential for such a tool would need. Though as time goes on that area of research would expand further even beyond Ohio to other states as the tool grew. As was seen from talking to Akron students and staff in the eSports program they recruit from surrounding states and even in rare cases from around the country and internationally. Thus changing the needs for the use of the tool as it were to expand.

Another area that needs to be further researched is what exactly programs and users of this tool would be willing to pay. It was found that depending on the level of program the willingness to pay for such a tool varies dramatically. At the high school level they have near no budget and do not have the resources to pay for an extremely expensive tool that they said would be a great help for them when organizing their teams and helping their students move to the next level. Moving on to the college level where programs have a better budget depending on various factors such as age of program as well as the size they are willing to pay a bit more depending on the features. Further research would need to be done in order to get this pricing model down to exactly what customers would be willing to pay for such a tool.

**Going Forward: Next Steps for MetiSentry**

There are two paths to take and depending on the one chosen the steps are different. If choosing to go forward with development of the tool all that would be necessary would be to develop the tool to be a recruitment based app and test it on the open market to see what happens. The main revenue from this would most likely come from advertisements or collegiate programs needing access to such a tool. Changes would most likely need to be made as the more use it got to better suit the needs of what the users want.

If choosing to do further research from here before going into development of the tool the way in which to do so was highlighted above on what exactly would need to be done. This course of action would be the recommended one due to various constraints that were put on this project by outside forces and other various factors. The steps needed to go forward with this are subjective depending on what is seen as necessary before developing such a tool. As stated above the narrowing down of the pricing model and further features of this product would be ideal just beyond a recruitment tool which was the main focus of this research. After the research is completed to a degree that was seen as sufficient the next steps would be the same as above and to develop and test the product. Again more than likely refinements would need to be made to the tool as use expands but the background knowledge of what users want would be much more plentiful if choosing to do further research.