

UNIVERSITY OF KWAZULU-NATAL

Esports: The consumers' awareness levels of esports in South Africa.

By: Caleb Womack

Student number: 217078723

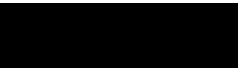
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Name: Caleb Womack	Student No: 217078723	
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Abstract

Esports is a growing industry that has many misconceptions that create a lack of awareness and a negative perception of esports in South Africa. The study aims to examine the consumers' awareness, knowledge, attitudes and perceptions of esports activities in South Africa and how these factors affect the esports businesses ability to attract the esports consumer. The target sample size of the population was 384 consumers. This study used a quantitative approach to gather data through a self-administered online questionnaire that was developed using google forms, this enabled the responses to be recorded anonymously. Two hundred and one respondents responded to the questionnaire. The misconception of consumers not knowing about esports, was proven wrong due to consumers gaining knowledge mainly through online gaming communities. The awareness of esports amongst consumers were high, however the associations and organisations were not as well known. It was evident that 99.5% were aware of esports and 93.5% would classify esports as a sport. It is important for consumers to be aware of other associations as these associations help to ensure the level of esports is at a professional level and will enable them to identify which organizations are credible. The respondents' attitudes attitude towards esports was positive and that they were not affected by external social factors towards the sport. The study revealed that advertising in the esports market is not as effective as it should be as consumers felt they were not as impactful as mainstream techniques. The study recommends the creation of awareness about esports to the greater populace via more traditional media to penetrate and correct the various social norms.

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Chapter 1: Overview of the Study

1.1. Introduction

This study explores the field of esports (electronic sports) and how esports influences awareness, attitude, and commitment towards promoting esports as an industry. Various articles indicate that there is a lack of awareness of esports in South Africa, as well as, a negative perception. Naik (2017) explains that there are stigmas about gaming, such as being anti-social or a nerdy kid in a basement. Although esports is recognised at a high level overseas and the players have a public image similar to traditional sports. Awareness of esports in South Africa tends to be low due to an issue in esports where there is a split focus from the SASCO affiliated Mind Sport South Africa (MSSA) and local esports organizations. An organisation called Highschool Esports League (HSEL) was facing is the issue of esports not being perceived as a real sport, while esports added various benefits like having an extracurricular activity to allow young esports players to create connections with other esports players (Goodluckhavefun 2018).

Due to the consumers' level of awareness and opinions this study will focus on identifying how consumers are made aware of esports and what may affect their attitudes and perceptions. According to Xiao (2019) the theory of reasoned action (TRA) helps to determine the attitude of the consumer allowing for a reliable prediction of the attitude towards esports, as well as, user and gratification theory analyses the consumers expectations of using a medium to satisfy their needs and motivate them to use it. These various factors contribute to understanding the consumers current awareness, as well as, if they have opinions of esports in South Africa that could influence their views on esports. This study seeks to gain an understanding of the awareness of esports amongst consumers in South Africa and determine whether the proper use of AIDA and the Theory of reasoned action are taken into consideration to effectively reach the consumers' awareness. The study will try to engage the consumers so that it can establish what changes should be made to esports to improve the awareness.

Sports form part of South African culture, the country has strong rugby teams, cricket teams as well as, soccer teams that are known as the primary national sports. To

maintain the high levels of certain sports such as; rugby, South Africa has projects like the 'BokSmart' program to ensure safety at younger levels of competition in rugby, as well as various academies' to help ensure that the sport is being played correctly and that the rules are being upheld. Esports have been growing rapidly as a sport in America, China, Japan, and other EU West countries. In other countries they have the sport listed as an extra-mural whereas some universities have specific teams to represent them in varsity cups. In South Africa there is a lack of infrastructure and there are a few well-known leagues or organisations namely: Telkom VS Gaming, ACGL, Mettlestate, ATK, Bravado Gaming, Goliath Gaming, White Rabbit Gaming, Rush Esports, Energy Esports (Minnie 2020).

This study will conclude with recommendations on how the awareness of esports can be improved in South Africa. This chapter presents the various areas that make up and/or influence the consumers awareness to the problem; the study motivation; study focus; the research problem; study aim; objectives and questions of this research; the study significance and the research methodology used in this research.

1.2. Problem statement and motivation for the study

Problem statement:

Various articles indicate that there is a lack of awareness of esports in South Africa, as well as, a negative perception. According to Naik (2017), many psychologists will advise you that video games can cause loneliness, social awkwardness and laziness. It further explains that there are stigmas about gaming, such as being anti-social or a nerdy kid in a basement. Esports is recognised at a high level in some countries overseas and the players have a public image similar to traditional sports where players can earn millions similar to traditional sports. Although, esports is not recognised widely across most countries, thus leading to it being an 'underground sport' (Naik 2017). Mortyson (2018) explained that spectators were not as engaged in the viewership of esports as the "experience was diluted pretty thin". He explained the lack of broadcast talent led the game (FIFA18) being casted as a traditional sport soccer match, leading to a lack of focus on the "humans" actually controlling the players within the game (Mortyson 2018). Another issue in esports is the awareness of organisations in the esports market, there is a split focus from the SASCOC affiliated Mind Sport South Africa (MSSA) and local esports organizations. MSSA

has focused on the grassroots growth of esports by integrating with schools and a senior level by being an MSSA affiliated club (Mortyson 2018). This created a gap where Highschool Esports League (HSEL) chose to create a platform to ensure it created fixtures that MSSA did not have (Goodluckhavefun 2018). HSEL further explained that MSSA's platform was "too restricting" as not all schools would be MSSA affiliated, this led to HSEL running parallel to help create awareness and engagement across as many schools as possible. The issues that HSEL was facing is that esports would not be perceived as a real sport, and esports could allow students to have an extracurricular activity to allow young esports players to create connections with other esports players (Goodluckhavefun 2018). Goodluckhavefun (2018) explained that esports should be widely acknowledged and embraced by schools and educate the youth of a path to follow to be scouted and recruited by the top esports organisations in South Africa.

There are studies that indicate the lack of awareness in esports, which would appear to be caused by the failure to recognise esports as a sport. Esports was first defined as "a competitive way of playing computer games within a professional setting" (Jenny *et al.* 2016: 4), however it was later expanded to be defined as "An area of sports activities in which individuals develop and train mental or physical abilities in the use of information and communication technologies." (Jenny *et al.* 2016: 4). Although this helped to encompass aspects it led to the gap between mental and physical to grow and hence for the purpose of this study the definition will be modified to physical and mental abilities. Esports was not declared a sport by the English Sports Council during the United Kingdom Professional computer gaming Championships (Jenny *et al.* 2016). To gain a perspective of the term sport we must first explain the six characteristics of sport (Jenny *et al.* 2016):

- It must include play (voluntary, intrinsically motivated activity)
- Be organized (Governed by rules)
- Include competition (outcome a winner and a loser)
- Be comprised of skill (not chance)
- Include physical skills (skilful use of one's body)
- Have a broad following (beyond local fad)
- Have achieved institutional stability where social institutions have rules which regulate it, stabilizing an important social practice.

Motivation for the study

This study was motivated because of the negative opinions about esports and whether it should be classified as a sport, this view is shared by JCKP (2019) that explains a common stereotype of being anti-social or people do not interact with others due to 'gaming'. They further explain that it is a myth and it is one of the more interactive ways to communicate across the world. Esports was once negligible and perceived as a hobby/past time however due to recent growth that is led by greater access to technology and elite competition through organized tournaments it has become more apparent to the average consumer (Jenny *et al.* 2016). This shows that although the public is learning of esports, the level in which it is understood can vary drastically. This is due to lack of understanding, perception of esports and the knowledge of the industry.

According to Jenny *et al.* (2016), it is explained that esports replicate core features of sport namely: interpersonal competition, skill training and development, adherence to rules, goal attainment, some involvement of coordination and agility.

Focus of the study

This study will focus on how esports influences awareness, attitude and commitment towards promoting esports as an industry. It will follow the AIDA framework, this theory is used in market communication to help establish how a consumer would engage with the advertising of a product/service (Rawal 2013). The AIDA model is expanded into four steps: attention (awareness), interest, desire, and action (Rawal 2013: 39). This model helps to establish the marketing influences on the market of Cape Town, KwaZulu-Natal and Johannesburg. It will also take into consideration the knowledge gap between various demographical segments (Generation Z). This study will concentrate on identifying various changes that should be made to esports to improve the awareness in South Africa.

1.3. Aims, objectives and research questions

The aim of the study is to examine awareness, consumer knowledge, attitudes and perceptions of esports activities in South Africa and how it affects the businesses ability to attract the esports consumer. The research questions are as follows:

- I. What does the consumer (gamers) market know about esports?

- II. What is the level of awareness of esports in South Africa?
- III. What is the consumers attitude and perception to esports?
- IV. What are the factors that contribute to the opinions of esports?
- V. What measures can be taken to improve the awareness of esports?

Accordingly, these questions can be written into research objectives

- I. To establish the extent to which South Africans know about esports.
- II. To assess the level of awareness of esports in South Africa.
- III. To determine how awareness of esports is affected by consumers attitudes and perceptions.
- IV. To determine the factors that may contribute to the opinions of esports in South Africa.
- V. To establish what changes should be made to esports to improve the awareness.

1.4. Methodology

The research design of the study is quantitative as the objective was to measure variables, find frequencies and correlations, as well as, test hypotheses. The quantitative study used a self-completed questionnaire that was completed online, via Google Forms, using a hyperlink (Saunders et al, 2016). The population of my study was the South African esports community, which consisted of individuals that can be any race, age, status or level of eSports involvement (leisure, professional athlete, manager and owner of a team). The sampling technique that was used was cluster sampling, as the gaming community is diverse. Although there are many gaming communities simple random sampling allowed for the selection of the clusters at random and gave each participant an equal chance to be chosen. Five clusters were chosen, namely: VSG, Mettlestate, ATK Arena, ACGL, MSSA; however due to the use of an electronic link to gain access to the questionnaire participants shared the link amongst other esport consumers outside of the selected clusters. The size of the population in South Africa was eleven million according to (Tarentaal 2019) and the reach of the above clusters based on twitter is 30 263 participants. This made the sample size of 378, however due to a lack of respondents only 201 surveys were recorded which is an acceptable response rate

due to over 50% of the sample size responded. This ensures that the study accurately captures an unbiased and generalization of the results.

The University of KwaZulu-Natal research policy was upheld and ensured that there was no ethical cons that occurred, thus it ensured that: the highest standards of honesty and integrity was used; the environment that the study was carried out took into consideration section 24 of the bill of rights, prevented the results from causing harm to health or well-being; ensured that there was no pollution or ecological degradation (University of Kwazulu-Natal 2014). Ethical clearance for the study was granted by the UKZN Research Office (Appendix 3) that ensured the research was ethical and that there were no issues in the study.

Electronic questionnaires ensured the respondents anonymity, privacy and confidentiality was maintained throughout the data collection process. The con of the study is that respondents cannot be identified or followed up with. Clarity was provided where needed to elaborate topics that participants found difficult to understand. Participation in this study was voluntary, and participants were given the option to withdraw from the study at any time they wished to do so. Before the study was conducted, Gatekeepers letters were obtained to reduce the ethical issues and the use of their name in the study (Saunders et al. 2016), namely: VSG, Mettlestate, ATK Arena, ACGL, MSSA. The data collection maintained the anonymity and confidentiality of participants throughout the study as the electronic form did not allow a participant to have access to other participants data and therefor preserved the rights of protection to personal data (Saunders et al. 2016). The results and analysis in the study are objective to ensure a lack of subjectivity that could distort the conclusions (Saunders et al. 2016).

1.5. Significance of the Study

The reason for this study is that esports is underdeveloped and the awareness of esports seems to differ amongst consumers. The importance of this study is to understand how aware the consumer is, is the consumers' attitudes positive towards esports, and are they correctly engaged to promote a growing industry. Hence, there is a need to explore, determine and investigate the reasons on how to develop the awareness of esports and understand the consumers behavioural intentions to

successfully target consumers in the industry. This justifies that the current perception of esports in South Africa is still at a developing phase and thus needs to be researched further. The recognition of esports has been recognised as being at the same level of recognition as Rugby. News24 (2013: 1) stated further that; “MSSA was categorized as a Tier 1 Sport, which means it is mentioned in the same level as Rugby, Cricket and Tennis”, although the common perception of esports has stigmas about gaming, such as being anti-social or a nerdy kid in a basement (Naik, 2017).

1.6. Limitations

The data collected via quantitative questionnaires is unlikely to be as wide ranging as data collected by using other research strategies (Saunders *et al.* 2016). The limitation to this study did not include Highschool Esports League (HSEL) as it will be dealing with minors, which requires parental consent and gatekeeper permissions from the schools. Therefore, the target population is aimed at gamers from the age of 18 and above. The study used an electronic form of social media to reach the consumers from the various clusters, due to public having access it may include consumers not specifically chosen in the cluster. This was done due to the lack of access to the consumers direct contact method due to the POPI Act. Further consideration from the research should be taken and ask the clusters to email the consumers on the researchers behalf thus ensuring the POPI act is adhered to.

1.7. Ethical Considerations

An ethical con can be caused by misconduct in research ethics, research ethics can be defined as a conduct that is guided by set standards of behaviour within the relation to the rights of those who are involved in the study (Saunders *et al.* 2016). To ensure that there is limited to no ethical cons the University of KwaZulu-Natal research policy will be upheld, thus ensuring that: the highest standards of honesty and integrity will be used; the environment that the study will be carried out shall take into consideration of section 24 of the bill of rights, preventing the results from causing harm to health or well-being; there will be no pollution or ecological degradation (University of Kwazulu-Natal 2014).

Electronic questionnaires will ensure the respondents anonymity, privacy and confidentiality is maintained throughout the data collection process. The con is that the study will be unable to follow up with the respondents or identify who has

participated or not in the completion of the questionnaire. The researcher will ensure that the questions posed will not be harmful to the respondents. Clarity will be provided where needed to elaborate on topics that the participant may find difficult to understand. Participation will be voluntary, and the participants will be free to withdraw from the study at any time should they wish to do so.

During the design of this study, a key stage to reduce the ethical issues is to seek access to gatekeepers and the use of their name in the study (Saunders *et al.* 2016: 249 & 259), namely: VSG, Mettlestate, ATK Arena, ACGL, MSSA. The organisations will be approached in a manner to ensure that they weren't pressurized, as they were explained that it was a research to help investigate the environment in which they conduct business and the results could be beneficial to the various organisations. The research topic would not impose on the privacy of the organisations business model, and it would only require disclosure to individuals participating in their organizations that would be at the participants choice and not forced. The organizations will be informed about the research in which they can ask questions and can provide a free given decision (Saunders *et al.* 2016). An information sheet will be sent to the organizations when requesting for the gatekeeper letters, this will ensure the consent is informed (Saunders *et al.* 2016). The participants involved in the electronic survey will be asked for their consent at the beginning of the electronic form.

The data collection needs to maintain the anonymity and confidentiality of participants throughout the study, this will be ensured as the electronic form will not allow a participant to have access to other participants data and therefor preserving the rights of protection to personal data (Saunders *et al.* 2016). The study will also use all the data collected and not distort or invent the results gained from the study (Saunders *et al.* 2016).

The results and analysis in the study must ensure that the remain objective as a lack of objectivity can distort the conclusions (Saunders *et al.* 2016). This will be ensured through the help of a supervisor from UKZN and a mentor from DUT to help ensure absolute objectiveness is ensured.

1.8. Outline of the dissertation

The study contains six chapters, detailed underneath.

Chapter one: This chapter will showcase the study where it outlines the aim, focus, objectives, significance and research questions of the study. The research methodology is introduced which is further utilised to carry out the study.

Chapter two: This chapter showcases a literature review which will explain the esports environment, as well as, explain theories used to determine the awareness of consumers. It will consist of the esports background from an international standpoint and a South African standpoint. Furthermore, this chapter also highlights the awareness and opinions of esports consumers. This will be done in order to create a framework to gain an understanding in the 'norm' of an esports consumer and what the awareness can range from.

Chapter three: Presents the research methodology by covering the research paradigm, study approach and methods chosen to conduct the study. Furthermore, it will present the kind of data required and decision on how to obtain the data.

Chapter four: Provides the results of collected data and findings interpretation.

Chapter five: This chapter will showcase the discussion, conclusions, and recommendations, where research findings will be interpreted and explained in conjunction with existing academic literature. It also presents conclusions and recommendations drawn from the study findings and analysis of the results.

1.9. Conclusion

This chapter has presented a brief background to the problem; the study motivation; study focus; the research problem; the aim of the study; objectives and questions of this research; the study significance and the research methodology used in this research. The overall purpose of this study is to examine awareness, consumer knowledge, attitudes and perceptions of esports activities in South Africa and how it affects the businesses ability to attract the esports consumer. The following chapter will present the literature review with a focus on the theoretical framework, growth of the industry, and factors influencing consumers attitudes and perception towards esports.

2. Chapter 2: Literature Review

2.1. Introduction

Esports awareness is explained as the knowledge or perception of an area of sports activities that individuals develop and train mental and physical abilities to compete using information and communication technologies (Seo 2013; Cambridge 2020). The awareness of consumers in the esports industry is hindered by the negative perceptions of esports. The first chapter outlined the introductory part of this study while this chapter presents the literature review surrounding the study. This chapter will identify and measure the consumers awareness of esports in South Africa through the use of AIDA and the theory of reasoned action model, as well as, to determine the consumers behavioural intentions to predict and understand the consumers awareness. Focusing on the purpose of this study, the current esports industry will be explained and the knowledge of what entails esports as an industry to see if the current consumers are aware. The challenges in esports are the negative opinions of esports compared to traditional sports creating a negative perception in partaking in the sport. This chapter will cover the various opinions and attitudes towards esports to see if they exist in the South African esports industry.

2.2. Theoretical Framework

The Framework used in this study consists of four theories to help determine the awareness of the consumers (AIDA model), the consumers knowledge and attitude towards esports (KAP model), the impact of a consumers behavioural intention towards participating in esports (TRA theory), and lastly a esports consumer that uses a specific medium expecting to fulfil their needs will create motivation for them to use the medium again (Uses and Gratification theory)

2.2.1. The AIDA Model

This theory is used in market communication to help establish how a consumer would engage with the advertising of a product/service (Rawal 2013). The AIDA model is expanded into four steps of attracting a consumer's attention (awareness), create a need for the consumer to have an interest in the product/service, the advertisement or business must ensure the consumer desires the product enough to take action and purchase or partake in it (Rawal 2013).

The first step, Attention, is the fundamental step as it is imperative to gain the consumers attention immediately otherwise, they will lose interest (Rawal 2013). To ensure that the consumers attention is actively captured the business's advertisement should offer a clear benefit while the consumer partakes in the advertisement, this could be in the form of knowledge, celebrity appearance, and/or reward. A consumer's awareness is developed once their attention is captured; the awareness of a consumer should be developed so that they can affiliate a strong brand to the product. Since esports is relatively new consumers need to be informed on the brand and able to perceive a level of quality and benefit esports yield (Chi, Yeh & Yang 2009). Chi *et al* (2009) explain that brand awareness that has a positive image can ensure that its consumers will have a stronger affinity of brand loyalty, this links to a higher brand trust and more of the service the consumer will engage in. In esports if a consumer has had a positive experience with an esports organization they will enter more of their tournaments with a great level of awareness and spread that awareness to other potential consumers.

The second step is to proactively build the interest of the consumer by emphasizing that the advertisement is a 'sound decision' or a 'good bargain', this can be done through reinforcing the appearance of the advertisement with positive emotions such as: enjoyment of the product/service (Rawal 2013). The third step is to turn the interest into a desire for the product as a customer could be interested but not find the purpose to wanting it, therefor the advertisement must create a fervent – not strong – motivation in the consumer to create the need to obtain the product/service and is only achieved when using the correct appeal for the advertisement (Rawal 2013). The fourth step is creating the action of using or finding out more about the product and this is done by ensuring the consumer is impacted strongly by the advertisement, while explaining the benefits of the product/service (Rawal 2013). AIDA is mainly used as a reference model to promote products/services, although the theoretical background of creating awareness and interest will be beneficial to this study to help determine a measurable quantitative study on the level of awareness of esports in South Africa. Figure 2.1 demonstrates the AIDA framework as a funnel starting at awareness being the fundamental step and filtering through to the action being the final step:



Figure 2.1: AIDA Framework

Source: Fritz (2018: 13)

2.2.2. Knowledge, Attitude, and Practices model

This model is used on a specific population to measure the knowledge, attitude and practices of a topic, in this case esports (Kaliyaperumal 2004). This model is important as it is vital to establish the current awareness in the esports community and industry, before being able to increase its awareness. This model will be able to identify and measure the consumers knowledge about certain areas, how they react emotionally to it, as well as, how they behave. It links with the theory of reasoned action as it helps to analyse and create a basis of attitudes and behaviour, and then tailor the awareness creation correctly to the consumer (Kaliyaperumal 2004).

2.2.3. Theory of Reasoned Action (TRA) and the impact on awareness

The theory of reasoned action (Figure 2.2.) explains when a person intends to perform an action it is influenced by behavioural intention, the attitude toward certain behaviours and their perceived social pressure (Xiao 2019). In the context of awareness about esports, it is likely that a consumer who believes that esports may positively impact them will have a positive attitude towards it. This would indicate a higher chance of participation or viewership in esports. Therefore, understanding if a consumer's behavioural intentions of esports are positive (i.e relaxation, escapism, recreation and/or reward) would predict and/or indicate if they would want to become more aware of esports as it would become a desirable outcome (Xiao 2019). There

are negative stereotypes that are associated to esports, this creates a social norm that has many negative connotations created by the social pressures that seem to obscure esports and gaming. Below is an illustration of the model:

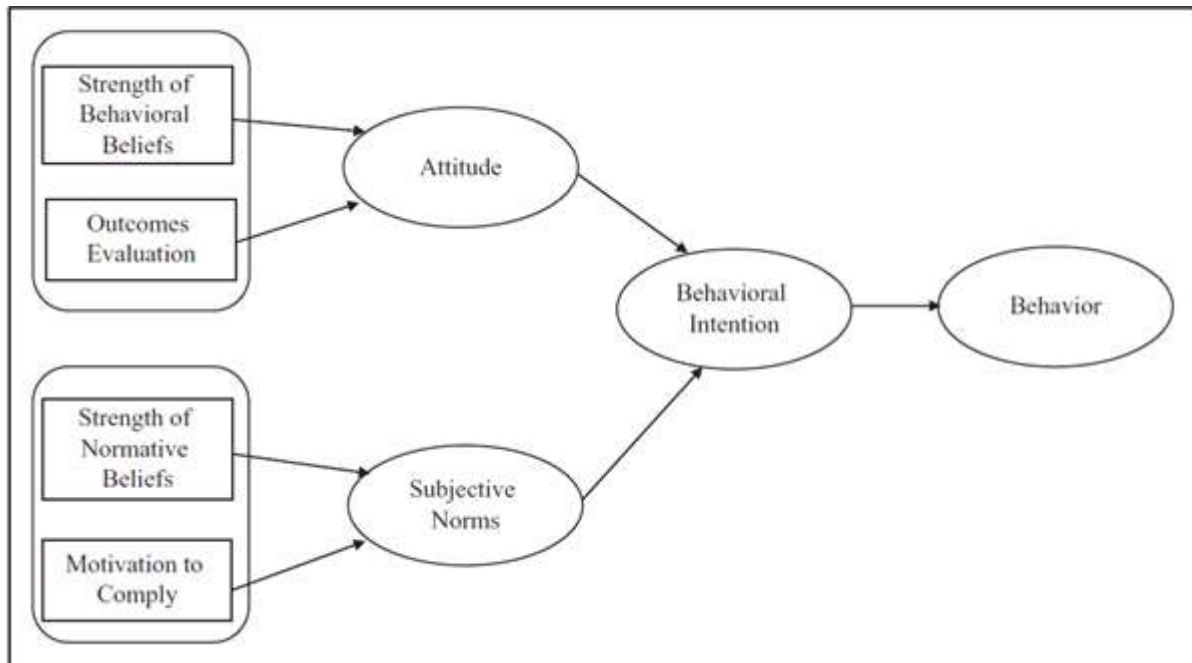


Figure 2.2: Theory of Reasoned Action Model

Source; Xiao 2019: 3

Xiao (2019) explains the psychology of the theory of reasoned action and breaks down the above model into ten hypotheses (mentioned in section 2.5.) that were tested in Xiao’s structural equation model. Brown *et.al.* (2017) highlights that the behaviour of watching traditional sports is common to the behaviour of watching esports as there are common traits that overlap. These traits can be that both sports are incredibly competitive and suspenseful (Brown et al., 2017; Hamari & Sjöblom,2017). The attitude of the esports consumers is determined by behavioural beliefs which is a person’s outcome expectancy of behaviour (Fishbein & Ajzen, 1975). It is important to note that if an individual feels that watching or partaking in esports can bring a desirable outcome they will be more inclined to watch or partake in esports, thus developing a positive attitude and behaviour towards esports.

2.2.4. Uses & Gratification theory

Uses and gratification theory explains that a consumer group that uses a specific medium (i.e gaming) expecting to fulfil their needs will create motivation for them to

use the medium again (Xiao 2019). This theory would help to show if a consumer of esports met their desired outcome after using the medium, and in-turn would help to draw the conclusion whether they had a positive or negative experience (Xiao 2019). By obtaining this information it would allow the study to gain an understanding of the consumer and whether they would spread the news of esports due to a positive experience or add to a negative connotation.

2.3. Esports' Defined

2.3.1. Definition of esport

To put this research into the correct paradigm and ease of understanding what esports is, a clear definition needs to be formulated to help understand the context of this study. According to Cambridge dictionary (2019: 1), esports is defined as:

“An activity of playing computer games against other people on the internet that are commonly: for money, to be watched by others or at specialized events.”

Although this definition is accurate in a broad sense it does not list the qualities of an esport and how they are applied to the upcoming esport industry. This is a common misconception due to poor awareness of esports and the lack of governance in the industry. According to Seo (2013), esport was expanded in this definition:

“An area of sports activities in which individuals develop and train mental [and] physical abilities in the use of information and communication technologies.” (Seo 2013: 1544)

It highlights that esport requires both mental and physical abilities that compete against an opponent, as well as, defining the ‘sporting ground’ in which it is played on.

Another common misconception of esport is the difference between Sedentary sport video games (SSVG) and esport. SSVG’s are defined as games that allow participants to rival real-life sport within a game that simulates a professional league and does not require physical activity (Seo 2013). These can be listed as NBA 20XX, FIFA 20XX, NFL 20XX, Rugby 20XX, UFC X (XX representing the year and/or issue of the game as they are updated, on average, yearly). The attribute that most commonly is debated is that sport must contain physical attributes and esport is

perceived to not have them, however this is the explanation of the term esports carried out through the study.

2.3.2. Definition of sport

According to Holden ZA (2013), a sport can be defined as, “a physical recreational activity, that is done simultaneously against an opponent, that includes animated movement and positional movement that involves physical exertion.”. This shows what the general attributes of a sport require such as: physical activity against an opponent that includes movement that contains physical exertion. In esports, there are multiple categories of esports that mirror similarly to how Sport includes soccer, rugby, cricket, etc.

2.3.3. Comparison with normal sport

According to the US Federal Government, players that participated in esports are considered professional athletes (Ligman 2013). In 2013, a Canadian League of Legends player was the initial pro gamer to receive a United States P-1A visa, this category was designated for ‘Internationally Recognised Athletes’ that allowed the candidate to stay up to 5 years within the country (Ligman 2013). In 2016, the French Government commenced a project to recognise and regulate esports. Recently, they passed legislation which helps to regulate professional esports player contracts within France.

Although many debate the popularity of esports should validate competitive gaming as a sport, Shabir (2017) explains that careful planning, precise timing, and skilful execution is what should support the activity’s classification as a sport. In the esports industry there is a thinner barrier between the player and the viewer, this is demonstrated when an esports player streams content they interact with their fan base live, where as in traditional sports this is less common and more distant (Shabir 2017). There is concern of instability compared to traditional sports, this is caused by various game titles that may tend to have a sequel like nature. This impacts the longevity of esports and could create uncertainty in players of that specific game, however most games keep the core rules the same (Shabir 2017).

2.3.4. Growth of the esports industry

Esports was started establishing in the 1980's by Atari who hosted the earliest large-scale video game competition, 'Space Invaders Championship' (PWC 2016). This attracted, at the early time of technology, over 10 000 participants from around the United States that started to show that the industry had a following. The growth of esports has always had a slow start due to the negative perception of playing games, such as: lack of maturity, lack of motivation, lack of sociability (PWC 2016). Even though this was the founding perception of the industry it is slowly changing according to PWC (2016), and a stable change has been occurring over the years. Esports was hard to access in the past due to a variety of factors (Shabir 2017):

- Internet connectivity
- Geographical location
- Technology
- Awareness - Online streaming services
- Popularity of gaming
- Availability of platforms and devices
- Video game publishers not embracing the esports

As technology developed over the years the industry changed different connective methods making the IoT more available via different connectivity services. In the past there was dial-up, however in today's society we have progressed chronologically: ADSL, 3G, LTE, Fibre. With the use of a variety connection methods and the increased in speeds it has allowed online gameplay to grow (Shabir 2017). This has allowed tournaments to be played from any location and thus ensured gamers an ease of access overcoming the geographical barriers. Due to the primitive internet services when online gaming was first released it led to lag time and unstable internet connection creating a barrier to play over the internet and limiting esports growth (McBain 2020). Now with these changes gaming is becoming a core aspect of culture in the youth.

The recent innovation in technology has allowed for the growth of esports to 4000 tournaments a year for core titles (Shabir 2017). This has allowed esports' to create a wide range of content that can be accessed by the consumer. This use of technology and consumption has created an exponential growth in the building of the gaming community and the development of the industry. This has led to the creation

of e-communities, such as, clans, guilds and/or groups that allow gamers to connect (Shabir 2017). These communities allow consumers to share content at a rapid rate and thus allowing the knowledge of strategies or potential strategies, statistics and best players per a game to become the fundamental knowledge. This is creating the core of gaming culture and the birth of esports into our society (Yue 2018).

Streaming services of esports has contributed largely to the fundamental growth of the industry, and thus is the entry point of creating awareness of esport tournaments. Twitch is one of the popular streaming services used to watch esport tournaments and has over 241 billion minutes of gaming content streamed with 10 million daily active users and 100+ million unique monthly users world-wide (Shabir 2017).

The popularity of gaming in society has started to increase due to the influence of the youth. Due to the core aspect of the gaming society that is highly competitive it has attracted the youth, as the new generation is attracted to having 'bragging rights'. Due to gamers always trying to improve they will try and learn from watching other "Pro Gamers" play in the respective game, this leads to a demand in viewership and hence creates an increase in viewers (Yue 2018).

Esports has steadily grown due to the increased availability of platforms and devices to play games, this development in technology has led to a gradual increase in the number of devices that can be used to play games (Shabir 2017). An average costing of the consoles used in esports can vary from R3500 to R7000 rand for the older generation PlayStation 4 and Xbox one consoles. The newer generation consoles range from R9999-R11999 for the PlayStation 5 and R6999-R11999 for the Xbox series S and X respectively (Game4U 2021). A computer for an average budget gamer ranges from R10 499 (Evetech 2021) to R11 499 (McKane 2019), while a peak performance gaming setup could be as high as R55 299 (Evetech 2021). This brings concern to the affordability of esports accessories and the feasibility, in comparison to traditional sports, the price a consumer would pay for entry level equipment and training would be relatively similar. It is important to note the average salary of an individual in South Africa is recorded at R22 500 a month (BusinessTech 2020), this indicates that esports would be able to grow steadily although it would require careful budgeting to ensure the consumers could afford the accessories and internet usage to participate.

“According to the United Nations Agency that oversees international communication, there are more than 3.7 billion people now using the internet. According to Business Insider, Sony have sold over 60 million PS4 consoles and Microsoft have sold approximately 26 million Xbox One consoles.” (Shabir 2017).

It can be seen that the creators of games, game publishers, have started to identify the likelihood of esports within the products they create. This has led to (Shabir 2017): Nintendo for example, hosting the Wii Games Summer 2010. Halo creation of the Halo Championship Series in 2014, Blizzard and Riot Games have created collegiate outreach programmes with their North America Collegiate Championship. This change in publishing of games has led to the companies taking into consideration of the target audience and providing communication channels and esports events to fulfil the need.

Esports has grown to the point where companies see opportunity in investing in esports through advertising, and sponsorships. This allows the companies to gain awareness amongst consumers, as well as, use the hype of esports to promote their product line to fans and participants (Shabir 2017). With these abundant and large sponsorships, it is creating and fuelling an exponential growth in the esports industry, as well as, esports breaks the geographical boundaries that traditional sports battled with (Shabir 2017).

Esports further grew recently in South Africa due to the international pandemic known as Covid-19, this pandemic forced a nationwide lockdown that closed most recreational activities and put limitations on what the population could do (Van Niekerk 2020). Van Niekerk (2020) explains that the lockdown has created an upward trend towards various competitive gaming tournaments and leagues, thus showing the further growth of esports in South Africa, and further explains that esports may become a substitute for sports fanatics to fill the gap created by the pandemic. According to Minnie (2020), esports organizations stepped in during the pandemic to ensure the population could partake in esports, as well as, ensure they were safely following the countries rules for Covid-19. Minnie (2020) listed a variety of tournaments that took place during lockdown to engage with consumers during the lockdown and further grow the awareness of esports, as follows:

- Mettlestate hosted a PUBG tournament called the ROG Lockdown Cup (prize pool of R15 000) and an Assetto Corsa endurance race (prize pool of R3000)
- ATK Arena hosted a weekly and monthly competition for a variety of games: Warzone Wednesday (prize pool of R1000 a tournament), Apex Legends Squad Mondays (prize pool of R2250), Fortnite Frenzy (prize pool of R8000) and Friday Fortnite duos.
- Inkkosi Super Cup tournaments hosted a variety of games, namely: CS:GO, FIFA 20, Tekken 7 and PUBG Mobile that was broadcasted to the Ginx DSTV channel 127.
- ACGL Midday Cups was hosted as a way for consumer to causally compete in a variety of titles and be eligible to win random prizes to ensure the consumers of esports were occupied during the lockdown period.
- Raving Mad Gamerz hosted a lockdown series that covered 6 titles hosted on a specific day of the week, namely: Monday: COD: Modern Warfare, Tuesday: Rainbow Six: Siege, Wednesday: Apex Legends, Thursday: Overwatch, Friday: Rainbow Six: Siege, Saturday: Apex Legends
- DNLE Tekken 7 tournament was hosted on the Smash.gg website that allowed for consumers to participate (prize pool of R3000)
- FIFA 20 Ajax Cape Town eCup was hosted which gave back to a relief fund for Covid-19.

The esports industry took an economic expansion during lockdown instead of contracting during the hard times. This was possible due to the innovative standpoint of esports and increasing its consumers knowledge that the industry could target more freely while consumers were progressing through the lockdown.

2.4. Types of Esport Codes

There is a base of 6 esports codes (genres) in esports, they are listed below (esportsbettingelite 2019 & Yue 2018):

i. Multiplayer Online Battle Arena (MOBA)

Multiplayer Online Battle Arena is a type of esports that is commonly team-based and consist of characters that have various abilities and benefits that progress as the game is played. Its core fundamental aspects consist of action, role-playing and real time strategy. This esports code has a large participation and viewership and is

being known as the staple of the emerging esports scene. This code functions around social and mental skills, such as: Intelligence, as each player would have to have a strong memory and a profound understanding of tactics and strategy of the *MOBA*; communication is needed to ensure that players can carry out the strategy needed in order to win. Some examples of these games are League of Legends (Riot 2020) and Dota-2 (Valve 2017).

ii. First-Person Shooters (FPS)

First-Person Shooters (FPS) is an esportsing code that is made up of games that are centred in a first-person perspective, which would normally include weapons of some sort (firearms or a variety of weapon-based combat). This esports is classified as an action-based sport and is fast paced that involves hand and eye co-ordination. Some examples of these games are Counter Strike (Valve 2020), Call of Duty (Activision 2020) and Overwatch (Blizzard 2020).

iii. Fighting Games

Fighting games esports code was highly popular in the 1990s, however they have declined in popularity post 1990. This esports consists of a character, that is controlled by the player, engaging in close combat with an opponent. It mainly consists of hand to hand combat but may include weapons or abilities. Some examples of these games are Street Fighter (Capcom 2020), Tekken (Bandai Namco 2020) and Mortal Kombat (Warner Bros 2020).

iv. Real-Time Strategy (RTS)

Real-Time Strategy is an esportsing code that often requires a gamer to select multiple units in a selection game, each of these units can be chosen to do different tasks. This differs from a *MOBA* or other games as they can only select one unit to do a task. This type of esports has a 'real time' characteristic that has been developed from the turn-based ones previously found in games. Some examples of these games are StarCraft (Blizzard 2020) and Warcraft (Blizzard 2020).

v. Sports Games

Sports games is an esportsing code that allows gamers to partake in a simulation of traditional sports with replicas of real players and teams, thus allowing the code to

remain popular. Some examples of these games are FIFA (Fifa 2020), Madden (Electronic Arts 2020) and NBA 2k (Take-Two Interactive Software 2020).

vi. Racing Games

Racing games is an esporting code that is made up of gamers that will race against time or an opponent via a method of transportation. Some examples of these games are: Trackmania (Ubisoft 2020), iRacing (iRacing.com Motorsport Simulations 2020) and Forza (Microsoft Corporation 2020).

2.5. Esport associations

A large amount of associations regarding esports has been created since the beginning of esports, that ensure the esports industry grows symbiotically (Shabir 2017). These associations are:

2.5.1.1. International esports federation (IeSF)

The International esports federation (IeSF) was founded to standardise the industry and promote esports and the players that participate (Shabir 2017). This federation started in 2008 with a group of 9 affiliates and has grown to 46 nations (International e-Sports Federation 2019). The federation states that (International e-Sports Federation 2019: 1):

“As an international federation for esports our obligations include hosting international esports tournaments, expanding our range of member nations and establishing standards for referees, players, certifications, titles and competitions. With this we strive to become the worlds first international Sports Organisation of esports.”

International esports federation has three main titles, according to International e-Sports Federation (2019), they are: Dota 2, Tekken 7 and efootball PES 2020. South Africa is a member with international esports federation through the link of Mind sports South Africa (MSSA) as the governing body of South Africa, which in comparison to the United States esports federation (USeF) is a lot more inactive. The United States esports federation (USeF) president recently got appointed as the new international esports federation’s president.

2.5.1.2. World Esport association (WESA)

This association was founded by ESL in 2016 (Shabir 2017), and contain some of the major team names listed below (WESA 2019: 1):

“FNATIC, TEAM ENVYUS, NINJAS IN PYJAMAS, G2 ESPORTS, VIRTUS.PRO, NATUS VINCERE (NAVI), MOUSESPORTS, RENEGADES, SK GAMING, OPTIC GAMING, FACE CLAN, SPLYCE and THE NORTH.”

World esport association (WESA) consists of industry leading professional esports teams and ESL (WESA 2019). World esport association (WESA) sets out to further professionalize esports by creating structure such as: proposing elements of player representation, standardized regulations, and revenue shares for esports teams (WESA 2019). World esport association (WESA) will seek to produce schedules for fans, players, organizers, and broadcasters. This organization helps to create a norm to ensure consistency and regulation to various esports competitions. The organisation currently regulates the Counterstrike ESL Pro League, while ESL has an extension into Rainbow 6 Siege and more esports titles (Tsukayama 2016).

2.5.1.3. British Esport Association (BEA)

The British Esports Association (BEA) is a non-profit body that was created in 2016 to promote esports in the United Kingdom (British esports association 2019). The association is the national body for esports and its goal is to provide support and promote grass roots esports in Britain. It is important to note that they are not a governing body, as their primary focus is to make esports a credible activity which can provide benefits such as positive cognitive influences, teamwork skills, communication skills, and provide jobs (British esports association 2019).

2.5.1.4. Esports Integrity Commission (ESIC)

Esports Integrity Commission formerly known as the Esports Integrity Coalition, formed in 2016. This association aims to take responsibility for “disruption prevention investigation and prosecution of all forms of cheating in esports, including, but not limited to, match manipulation and doping.” (Esports Integrity Commission 2019: 1). Esports Integrity Commission aims to be acknowledged as the guardian of integrity within esports and to take responsibility for the above mentioned. This association aims to bring together the industry and ensure that there is a unified set of values and visions to combat corruption in any form to protect the integrity of the sport

(Esports Integrity Commission 2019). The associations core principles are: “integrity and respect; fair process; implementation, education and enforcement in standardised codes; recognition of sanctions; sharing of information; and confidentiality” (Esports Integrity Commission 2019).

2.5.1.5. Korea e-sports association (KESPA)

Korea e-sports association was founded in 1999 and aims to be a global esports leader due to their long history with endless changes to keep up with the changing industry (Korea e-sports association 2019). The association has been striving to establish a standardize system for domestic professionals and amateurs that help create a stable environment for the esports industry and esport fans. The associations goal is to try and normalize esports so that the sports culture can become a global culture to represent the Republic of Korea (Korea e-sports association 2019)

2.5.1.6. Mind Sport South Africa (MSSA)

Mind Sports South Africa (MSSA) is a government organisation that is an affiliate of the South African federation of Sport and Olympic Committee (SASCOC), as well as, it is recognised by the department of sport and recreation (SRSA) to be the national controlling body and authority for disciplines as a sport or recreation (Mind Sports South Africa 2019). Mind Sports South Africa (MSSA) was formed in 1985, however only becoming a member of NOCSA in 1990 and became an affiliate of the Confederation of South African Sports Confederation (COSAS) in 1991 (Mind Sports South Africa 2019). Mind Sports South Africa (MSSA) ensures that all the games that are promoted by MSSA are accredited as national sports, as the organisation is a member of SASCOC. The organisation ensures there is transparency between clubs and Mind Sports South Africa (MSSA) due to the clubs being directly affiliated to Mind Sports South Africa (MSSA), as this helps to ensure inclusion in the organisation (Mind Sports South Africa 2019). Mind Sports South Africa (MSSA) is part of the Korea e-sports association (KESPA), thus ensuring national champions can participate in oversea leagues on behalf of South Africa, to allow greater exposure and development to esports.

2.6. Esport Media Broadcasters

According to Shabir (2017), the main media broadcasters are Twitch, Youtube, Facebook, and lastly traditional media outlets (ESPN and Ginx). It can be seen that Twitch TV and Youtube are at the top of the market share as large esport media broadcasters use both frequently (Sachs 2018).

It is apparent that Twitch is currently at the forefront for esports media content, however Youtube has created fierce competition (Sachs 2018). Both these platforms do support each other due to supporting cross application notifications and interacting with highlight clips. Twitch is known for providing statistics for the viewers and to enable switching to multiple feeds of various players, while Youtube has an expansive social community that creates ease to share content. Both online platforms generate the interest of avid and casual gaming consumers on a global scale, thus it is vital for an esports content creator or organisation to use both platforms to grow their brand and audience (Shabir 2017).

Another popular streaming service that has been on the rise is Facebook due to the partnerships with Activision Blizzard Media, it is said to have over 800 million people use Facebook gaming every month (Influencer Marketing 2020). This streaming service also links live content from the MLG.tv (major league gaming) that allows the consumer/viewers to have access to match statistics, live leader boards and insights on the content they are watching.

There are smaller streaming services that are used to showcase video content such as: Azubu, Hitbox, uStream and StreamMe. Conventional TV has taken a slow but calculated approach into showcasing esports on the sporting channels such as ESPN started streaming it via their webpage and later on channels like ESPN2, while Sky released Ginx.TV that is even showcased on DSTV. These are used to showcase various games and competitions that are taking place. Some avenues of showcasing and broadcasting esports is done through vertically investing in esports, thus for the Counterstrike esports the Eleague was created and distributed via the TBS TV channel and twitch (Shabir 2017). For effective broadcasting it is important to note that analysis of the esport and side stories allows for more engaging content for the viewers, this allows the audience to gain emotional engagement with the players, teams and the esport.

2.7. eSports in South Africa

2.7.1. Awareness level and current state of esports in South Africa

According to Minnie (2020), the ranking of South Africa in 2019 for esports has decreased to 64th from 47th in 2018. The player earnings seem to have also decreased from 2018, this could also be due to teams not reaching the top placements that inherently have a higher prize money allocation.

From previous years esports tournaments have increased by a large amount as dedicated tournament organizers have been pushing the scene into the correct direction to foster the development of the industry, especially by covering a diverse number of titles (Minnie 2020). One of the major esports organizers Telkom VS Gaming, started the year by minimizing the amount of esports titles they hosted and more specifically focusing on one title for their 'Masters' title to ensure a high quality of service. The rest of the titles were given a lower focus in the form of short cups, although this would probably lower their budget allocations (Minnie 2020). The African Cyber Gaming League (ACGL) has specialized in managing, broadcasting, and administering a diverse range of esports titles that have tournaments throughout the year in various locations, with expert management and organization (Minnie 2020). The African Cyber Gaming League (ACGL) hosted a tournament called the Mythic Royale Fortnite tournament series that had a total prize pool of R30 000 in cash.

The Mettlestate organization is a powerhouse of the South African esports scene, according to Minnie (2020). The organization hosts multiple esports titles with professional production. They have various types of events that range from leagues, cups, and big tournaments. ATK Arena was a recent esports organization that opened in Cape Town, with a completely new venue and signing of esports teams across multiple esports titles. Bravado Gaming is an esports organization that hosts smaller scale tournaments, although they had a FIFA 20 tournament with R15,000 prize pool (Minnie 2020). This shows that the current scene although new is trying to economically stimulate the esports industry.

It is important to note that the players in the industry are valuable assets and much to the average consumers knowledge it is perceived as a activity with low reward. In 2020, South Africa has had two international breakthroughs for players competing at

a semi-pro to professional level. A Counterstrike Global Offensive team was signed by Cloud 9 (a professional esports organization based in Los Angeles) and an Apex team was competing in a Major for the esports title Apex Legends (Minnie 2020).

An obstacle that has been identified in South Africa is low player participation in local tournaments, this has led to low tournament turnouts becoming the norm in South Africa (Minnie 2020). A concern from the owner of Mettlestate was that no sponsors would willingly invest in esports titles that are unsupported in the scene as they bring a minimal amount of consumer numbers. Player participation needs to be stimulated in South Africa to ensure the future growth of the esports industry (Minnie 2020)

South African esports consumers face multiple issues that range from technology to a current affair such as 'loadshedding'. This makes it difficult for esports competitors to compete who were already facing issues of latency due to the distance from international servers.

2.7.2. Esports organizations' current state in South Africa

The current South African gaming industry consists of many organizations, namely: Bravado, ATK arena, White rabbit gaming, ACGL, Mettlestate, Orena, Rush, Rage, VS gaming, MSSA. The below five organisations were chosen for the study.

Telkom VS Gaming

Telkom VS Gaming is an organisation that is affiliated with Telkom and has been around since 2008. It was previously named Telkom DGL, which was created as an independent gaming brand that has one of the largest platforms in South Africa (VS Gaming 2017). Telkom VS Gaming have hosted multiple tournaments and ladders across many major esports titles and skill levels. The organisation focuses on trying to expand the esports footprint in Africa by developing improved spectator access, increased awareness, education, social environment and a fun industry for casual gamers and professional esports players (VS Gaming 2017).

Mettlestate

Mettlestate is an organisation that strives to be the leader in esports content creation, they are a premium esports authority in South Africa (Mettlestate 2020) that have partnered with the South African Racing Community Online (SARCO). They

create leagues and tournaments to promote and host esports events across a variety of titles. This allows the organization to generate a greater interest in the competitive gaming industry and casual gaming industry (Mettlestate 2020). The leagues that are created are monthly and range from single player to multiplayer titles, such as solo or team leagues. The organisation ensures that broadcasting of the competitions are of a professional and high quality tier, thus ensuring the organization penetrates the awareness in the esports market (Mettlestate 2020).

African Cyber Gaming League (ACGL)

ACGL is an esports company that specialised in broadcasting, management and tournament administration (online and physical – LAN). ACGL was established in 2015 by Nick Holden and Clint O’Shea, and originally created a company to manage tournaments for other companies, namely, Mweb GameZone Mater Series and the ASTRO Gaming Cup at Rage 2016 (ACGL 2020). The company continued to develop various new and improved concepts, such as, an easy user interface with ACGL’s tournament website and a match finder allowing players to automatically find games with minimal administration errors. ACGL also has a variety of innovative tournament ideas that incorporate the average business, namely Rocomamas ‘Smashball’ / Debonairs ‘Pizza Series’ / BMW ‘Asphalt Series’, into esports by offering a service to host the tournament on the company’s behalf to allow the company to strategically connect consumers with the company that sponsored the league (ACGL 2020). This helps to increase awareness and advertising through esports and vice versa as the marketing through esports is interactive. ACGL has ensured that esports news is a focal point of the core business function to ensure that the competitive gamers will use ACGL’s site to keep up to date on esports news, creating another factor to raising awareness in esports.

ACGL promotes the awareness of esports by allowing business to sell directly to the gaming community via discounts or promotions through leagues. This increases the market penetration, especially to millennials, as it allows a company to interact at a level comfortable to the consumer (ACGL 2020). Businesses can fully create awareness of their products through icons and brand affiliated features that can be created through ACGL business service, allowing the company to market effectively

to the esport community. ACGL has currently over 10 000 users that are part of the community (ACGL 2020).

ATK

ATK is a professional esports organisation that represents esports talent across multiple titles (ATK 2020). ATK was established in 2017, and has a physical arena based in Cape Town, that has some of the latest premium gaming equipment and games. The organization strives to offer a professional gaming experience that is dedicated to celebrating gaming and esports (ATK 2020).

2.8. Factors influencing consumers attitudes (behaviour) and perception towards esports.

2.8.1. Factors that affect consumers attitudes towards esports

According to Foster (2016), brand communities are developed based on a stream as it allows the consumer to share common identities with the streamer and other viewers. This shows that an electronic stream can influence attitudes/behaviour of consumers' attitudes to esports. A stream can affect a consumers' behaviour through (Foster 2016):

- User-Generated Content (UGC) – Credibility, Professionals, Popularity
- Streaming
- Motives for Viewing Streams
- Gamer Identities

User-generated content (UGC) can be interpreted as credible and reliable information between consumers (Flannigan *et al.* 2013), this content was found to have the ability to influence consumers perceptions of the message and product. There are three main areas the effect behaviour and attitudes, namely: credibility, professional media, popularity. UGC is deemed credible due to previous research that used the group identification theory, this proved that information shared by others similar in nature more credible and have a higher possibility to act on it (Foster 2016). The various authors (Foster 2016) explained that consumers perceived UGC to be reliable method in obtaining product information, experiences and new surveillance of products in the market. Zhu & Zhang (2009) found that online reviews of a popular gaming site were more influential with a consumer

experienced with the internet, however a user that is less experienced may not be able to distinguish whether the information is reliable or not.

A consumer's behaviour was found to be more susceptible to UGC (up to 22 percent more) as they used informative and persuasive techniques, whereas brand generated content was primarily persuasive techniques. Cox & Kaimann (2014) study revealed that a professional critic had a greater effect on the consumers' behaviour and consumer reviews, although this may be due to the critics having access before UGC. By disclosing who created the content it makes the consumers more critical of the advertisement than if it did not mention the creator (Foster 2016).

According to Lert-Asavapatra (2019), the study conducted revealed that in Bangkok the attitudes of citizens have a directly proportional relationship with the impact of esports. It suggests that local businesses should increase the level of involvement for the residents to help encourage consumers to watch esports through media and mass communication. The research study used three criteria to understand the impact on the attitudes, namely: identification (Do you agree that esports is broadly recognized and accepted, how do you feel when media negatively portraits esports, how do you feel being able to participate in an esports competition); involvement (How often do you think of esport competition, how often do you watch esport competition, would you classify yourself as a true esports fan); and attitude toward esports (how do you feel about esport being classified as a sport, how does esport make you feel while participating in it, do you get a sense of accomplishment through esports).

2.8.2. Theory of reasoned action impact on the behaviour towards esports

The theory of reasoned action model that Xiao (2019) applied to their study has ten hypotheses that help to determine the behaviour and attitudes of consumers who watch/partake in esports to determine if it positively effects their perception of esport. The results showed that hypotheses one to six had a positive correlation with attitude toward watching esports (Xiao 2019). Hypothesis seven postulated that the intention to watch esports has a significant positive correlation with the attitude to watch esports. Hypothesis eight was proved incorrect as the result did not support subjective norms correlating with the intention to watch esports. Hypothesis nine proved that normative beliefs positively correlated with subjective norms. Lastly,

hypothesis ten postulated a positive correlation between the attitude and the subjective norms. Below is the list of hypotheses (Xiao 2019, 7-13):

- 1) "Achievement is positively correlated with attitude toward watching esports" (Xiao 2019: 7). This was based on the sense of achievement that is accompanied through BIRGing and the consumer gaining a sense of achievement vicariously.
- 2) "Aesthetics is positively correlated with attitude toward watching esports" (Xiao 2019: 8). This was based on the understanding that consumers perceive a sense of beauty and gracefulness which attracts their viewership as it provides them with an aesthetically appealing experience.
- 3) "Acquisition of knowledge is positively correlated with attitude toward watching esports" (Xiao 2019: 8). Knowledge acquisition has been shown to be an important driver of a fan that has a psychological connection to the team as the consumer believes that watching esports will help them to learn useful knowledge about the game, player, and player's style.
- 4) "Drama is positively correlated with attitude toward watching esports" (Xiao 2019: 9). Drama can be explained as the suspense or thrill of watching an esports game. This is created due to the variability of the outcome of the match which can only be concluded at the end of the match.
- 5) "Escapism is positively correlated with attitude toward watching esports" (Xiao 2019: 10). Escapism is interpreted as a form of escape from stress and other bothersome daily activities in life. The consumers behaviour of watching esports could help divert their attention from problems in their life and gain a sense of escapism.
- 6) "Social interaction is positively correlated with attitude toward watching esports" (Xiao 2019: 10). Sport fans interact with others when consuming sport content, this form of social interaction allow individuals to engage in social activity because watching sports provides conversational topics and helps them bond with others.
- 7) "Attitudes toward watching eSports positively correlate with behavioural intention to watch esports" (Xiao 2019: 11). It was important to note that a fan's attitude toward sports teams could have an impact on their decision to watch the sport. A consumer will have a positive attitude if they reach the

attachment and allegiance level, this means that the fan might be attitudinally loyal to the sports. This would positively influence the consumers intention to keep watching the sport.

- 8) "Subjective norms positively correlate with behavioural intention to watch esports" (Xiao 2019: 12). An individual may be impacted by social pressures that are created from the subjective norms of the social group they belong to. This could influence the individual's decision on which genre of esports they need to watch to avoid being left out the group.
- 9) "Normative beliefs of watching eSports positively correlate with subjective norms of watching esports" (Xiao 2019: 12).
- 10) "Subjective norms positively correlate with attitude toward watching eSports" (Xiao 2019: 13).

The results mentioned above show that the consumers had a positive attitude towards watching esports, this suggests that consumers would continue to partake in esports as their attitudes would internally motivate them as they perceived a sense of gratification when engaging with esports.

2.8.3. Perceptions towards esports

Jiow *et al.* (2018) explains that parents had limited knowledge and understanding of video gaming careers and they had limited perceptions of those careers due to the lack of knowledge. Mulgrew (2021) stated that while talking to a colleague at work their opinion was "esports, that's not a real thing." This confirms that due to the portray that main stream media has depicted esports in the past has led to the mass believing esports is not real. Parents tend to know very little of the esport realm and are generally concerned due to the technical skills needed to achieve that career path are high, as well as, parents did not view pro-gaming and YouTube careers as genuine career options for their children (Jiow *et al.* 2018). The major concerns of parents were raised over job stability, profitability, and sustainability of these careers. These concerns of parents would be justified however due to the creation of professional leagues and investment from famous athletes / celebrities, namely: Shaquille O'Neal; Alex Rodriguez and Jennifer Lopez, are trying to create awareness that esports is a viable career path (Mulgrew 2021). Wong (2019) confirmed that the

public perception of the top national esports players in Singapore are problematic and explains that the elder generation do not understand the digital trend.

A perception from some parents were more focused on esports running parallel to their normal career path, such as professional gamer at night but a proper day job (Jiow *et al.* 2018). Parents perceived that being a game designer was a more viable option than esports as they felt that game designing was an acceptable job. Parents are generally supportive of their children's aspirations, however they still had reservations over the legitimacy of certain video gaming careers (Jiow *et al.* 2018). It can be seen that esports in the past in 2017 would of sold out the Beijing national stadium in China showing the growing fan base is similar to traditional sport and it is on the rise (Mulgrew 2021).

The perception of esports form a child's perspective showed that children generally knew about pro-gamer and YouTuber careers (Jiow *et al.* 2018). The pro gamer perception was understood that a certain level of effort was required that ranged from: exceptionally good in playing the game, possess passion, and must be entertaining (Jiow *et al.* 2018). The child's perception of another career in the esports industry such a being a game designer showed that they new the requirements needed to pursue that career path, such as: creativity, imagination, and extensive computer programming skills (Jiow *et al.* 2018). Wong (2019) confirms that the audience of esports will be new, and that the SEA games is attempting to become the medium in which to spread esports past the core audience, to ensure that the education of esports reaches the mass public.

Jiow *et al.* (2018) explained that children seemed to have a related negative perception towards following a occupation in pro-gaming and YouTubing. The children did explain that they believed their parents would disapprove should they choose these career paths as they understood the social norm would be: a miss use of their time or an justification to play video games all day and not study (Jiow *et al.* 2018). The study further explained that esports was perceived to be inappropriate occupation because of how video gaming was seen as a non-value-added activity (Jiow *et al.* 2018). This led to the further development of negative perceptions of esports as it could be detrimental to health, unstable, unsustainable, and ultimately non-value-adding use of their time (Jiow *et al.* 2018).

Table 1: Summary of perceptions of pro-gamers, YouTubers and game designers by parents and children.

	Conceptualization			Attitude		
	Pro-gamer	YouTuber	Designer	Pro-gamer	YouTuber	Designer
Parent	<ul style="list-style-type: none"> • Have not heard of such profession • Only a few knew because their child told them about it 	<ul style="list-style-type: none"> • Only a handful knew • Understanding based on child’s YouTube consumption 	<ul style="list-style-type: none"> • Profession is fairly popular • Have a general understanding 	<ul style="list-style-type: none"> • Not a legitimate career • Not stable • Market is not profitable • Too much time spent playing video games • Neglect of studies 	<ul style="list-style-type: none"> • Not a legitimate career • Not stable • Success is unlikely • Too much time spent playing video games • Neglect of studies 	<ul style="list-style-type: none"> • Legitimate career • Stable and profitable • Transferrable skills • The need for education • Success rate might not be high
Child	<ul style="list-style-type: none"> • Most able to briefly describe the profession • Knowledge through Youtube or e-sports channels 	<ul style="list-style-type: none"> • Generally all understood the profession • Use of YouTube led to this knowledge 	<ul style="list-style-type: none"> • Children generally knew what a game designer does • A topic discussed in schools and amongst peers 	<ul style="list-style-type: none"> • Not a legitimate career • Not stable • Market is not profitable • Too much time spent playing video games • Neglect of studies 	<ul style="list-style-type: none"> • Not a legitimate career • Difficult to obtain subscribers and viewers • Too much time spent playing video games 	<ul style="list-style-type: none"> • Legitimate career • Stable and profitable • Very difficult career • Requires not only skills but passion

Table 2.1: Summary of perceptions of pro gamers, youtubers and game designers by parents and children.

Source; Jiow *et al.* 2018: 1

2.9. Conclusion

The literature review undertaken seeks to provide an in-depth understanding of the consumers' awareness, knowledge, attitudes, and perceptions of esports activities in South Africa and how it affects the businesses ability to attract the esports consumer. The use of theories and were used to gain an understanding of whether the consumer was aware of esports. The growth of esports has started in 1980 by Atari, however multiple factors have negatively impacted it, namely: internet connectivity, geographical location, technology, awareness - online streaming services, popularity of gaming, availability of platforms and devices, video game publishers not embracing esports. It was apparent that there were multiple definitions of esports that consumers were defining the industry by, however only one covered all the correct aspects of esports. According to Seo (2013: 1544) the most appropriate definition was *"An area of sports activities in which individuals develop and train mental [and] physical abilities in the use of information and communication technologies."* The awareness level and participation of esports in South Africa was low according to Minnie (2020), as well as the industry had multiple challenges to overcome such as: 'loadshedding', technological issues and participation. Esport organizations were recognized for hosting an increased number of tournaments in comparison to the past year, however the participation in these tournaments seemed to be lower. Foster (2016) explained that a consumer of esports can be affected by various factors namely, User-Generated Content (UGC), Professionals, Popularity, Streaming, Motives for Viewing Streams, and Gamer Identities. Xiao (2019) explained that the theory of reasoned action and the uses gratification theory could help predict the consumers attitude towards esports allowing business to be able to determine if the consumers would proactively engage in the industry. Jiow *et.al.* (2018) shows the gap between the understanding of the adolescent youth group and the middle aged demographic, this lack of understanding can create negative perceptions of the industry and lead to the greater populace being less open to esports if this perception is not addressed. The aim of the study is to examine awareness, consumer knowledge, attitudes and perceptions of esports activities in South Africa and how it affects the businesses ability to attract the esports consumer and from the literature review undertaken it is clear that issues such as awareness, knowledge, attitudes and perceptions play a huge role in the consumers awareness

of esports. The research methodology used for this investigation is discussed in chapter three.

3. Chapter 3: Research methodology

3.1. Introduction

The aim of the study is to establish consumer knowledge, attitudes and perceptions of esports activities in South Africa and how it impacts their awareness.

The methodology chosen is a cross-sectional research study that will adopt a post positivist deductive approach using a questionnaire in this quantitative study (Saunders *et al*, 2016: 200). This study will be carried out using a survey strategy to collect, analyse and interpret the quantitative data using descriptive and inferential statistics.

This study will be a descriptive explanatory study (study a situation or problem to understand the relationship of the problem (Saunders *et al*. 2016: 176). The study will be cross sectional as the time horizon is aimed at esports in the current time within South Africa (Saunders *et al*. 2016: 200). This is due to the research being time constrained.

3.2. Research Paradigm

3.2.1. Ontology of the study

The current environment of esports is developing and hence the awareness in esports is on the rise, this is shown due to previous studies that were conducted by various individuals and organisations. The result creates the reality or assumption due to these observations that there is a lack of awareness in esports (Saunders *et al*, 2016: 127).

3.2.2. Epistemology of the study

The current industry has various studies that broadly cover the awareness (PWC), attitudes (Xiao 2019), perceptions and knowledge (Shabir 2017) that were used by researchers in adapting these theories to make hypotheses. The Attention Interest Desire Action (AIDA) model, Knowledge Attitudes Perception (KAP) study, U&G theory and the theory of reasoned action have been used in the literature review to create a conceptual framework to understand the consumers level of awareness in relation to their attitudes and opinions of esports (Saunders *et al*, 2016: 127).

3.2.3. Objectivist and positivist paradigm of the study

This study uses a positivist approach as it uses imperial hypotheses testing which is controlled by objectivity, measurability, predictability, probability, controllability and control laws that can be used to forecast human behaviour (Saunders *et al*, 2016: 135). This study uses the findings from Xiao (2019), which can be generalised and adapted for the South African environment using the positivist approach.

The research study uses an objectivist approach as knowledge is objective and quantifiable. The study that is being conducted consists of a stable and unchanging reality, that believes a person's perceptions and statements are either correct or incorrect based on knowledge being hard, real and acquirable (Saunders *et al*, 2016: 128).

3.2.4. Functionalist paradigm

This research study is concerned with logical, reasonable and realistic explanations, as well as, developing sets of recommendations within the current esports industry whilst developing answers to the rational problems of awareness of esports (Saunders *et al*, 2016: 132-134).

3.3. Research design and methods

The research design of the study is quantitative as the objective is to measure variables, find frequencies and correlations, as well as, to test hypotheses. The quantitative study will be using a self-completed questionnaire that will be completed online, via Google Forms, using a hyperlink (Saunders *et al*, 2016: 440). The design of the questionnaire will be based on a previous study (Xiao 2019) that has been tailored to the South African target population. Thus, the study will have questions that are carefully designed, clear and pleasing visual representation, lucid explanation of the purpose, pilot tested and executed delivery that is planned (Saunders *et al*, 2016: 439).

3.3.1. The research questions of the study

- I. What does the consumer (gamers) market know about esports?
- II. What is the level of awareness of esports in South Africa?
- III. What is the consumers attitude and perception to esports? Theme?
- IV. What are the factors that contribute to the opinions of esports? Result?

- V. What measures can be taken to improve the awareness of esports?

3.3.2. The objectives of the study

- I. To establish the extent to which South Africans know about esports.
- II. To assess the level of awareness of esports in South Africa.
- III. To determine how awareness of esports is affected by consumers attitudes and perceptions.
- IV. To determine the factors that may contribute to the opinions of esports in South Africa.
- V. To establish what changes should be made to esports to improve the awareness.

3.4. Study Setting

The research has chosen MSSA, ACGL, Mettlestate, VSG, ATK Arena as each organisation creates an esports environment in South Africa. These organisations create a focal point where gamers and/or esports competitors converge to participate, watch, or interact amongst each other, thus creating a reliable means for collecting data from the gaming community in South Africa.

3.5. Population and sample of the study

Population can be defined as, a specific group of individuals, organizations, human products and events or the conditions they are exposed to (Welman and Krugar, 2005).

The population of my study would be the South African esports community, which would consist of individuals that can be any race, age, status or level of eSports involvement (leisure, professional athlete, manager and owner of a team).

The size of the population is eleven million according to (Tarentaal 2019). This would make the sample size 384 (Saunders *et al*, 2016) to ensure the study accurately captures an unbiased and generalization of the results.

An online questionnaire was drawn up using Google forms and distributed amongst the organisations' participants via url links. This allowed the organisations to distribute it to their participants via communication media and allowed for fast and accurate feedback. The surveys were distributed throughout the duration of a week due to time constraints, with 384 questionnaires or more being accepted.

A structured pilot study was used to collect information. The questionnaire was formulated and made available online to five participants. This allowed me to confirm the data being gathered was appropriate to the study and make changes to clarify questions that were misunderstood. It confirmed the appropriateness of the questionnaire. The clusters were proportionally split to give every candidate a fair and equal chance to participate.

3.6. Sampling method

The sampling technique that was used in the study is cluster sampling (Saunders *et al.* 2016: 290), as the gaming community is diverse. The organisation in each cluster were chosen by the simple random sampling to select five organisations that represent the gaming community in South Africa as all organisations had an equal chance. These organisations' communities overlap in leagues or tournaments thus creating a focal point of the cluster sampling to select the common points of interaction. The cluster samples that were selected are VSG, ACGL, Mettlestate, MSSA, ATK Arena. These organisations are common environments that esports and gamers will commonly interact, thus allowing an accurate data selection tool. The sampling method that was chosen did have a few shortcomings due to the participants extending the research by personal means. This included some participants that were not reached by the designated clusters, although when using an electronic medium to distribute the questionnaire it is expected to have some variance and lack of control. A suggestion for a better sampling choice would be to ask the cluster to send an email on the researcher's behalf to their email list, therefore it allows the researcher to have a reach specifically to the organization's consumers with minimal variance. Whereas twitter allows for multiple interactions by unselected clusters that could create variance.

<u>Organisation</u>	Expected Sample Weekly	Expected number completed	Actual number of completed surveys
ATK Arena (week 1) 13-20	25	25	22
ATK Arena (week 2) 21-28	25	15	1
ATK Arena (week 3) 29-05	25	10	0
MSSA (week 1) 13-20	25	20	15
MSSA (week 2) 21-28	25	10	2
MSSA (week 3) 29-05	25	5	0
ACGL (week 1) 13-20	25	25	30
ACGL (week 2) 21-28	25	15	4
ACGL (week 3) 29-05	25	10	0
Mettlestate (week 1) 13-20	25	25	26
Mettlestate (week 2) 21-28	25	15	1
Mettlestate (week 3) 29-05	25	10	0
VSG (week 1) 13-20	25	30	59
VSG (week 2) 21-28	25	20	9
VSG (week 3) 29-05	25	10	1

130 responses were from social media and other participants that were unplanned.

3.7. Construction of the instrument

The questionnaire was made using a previous study (Xiao 2019) and a survey conducted by PWC (2019), these studies were adapted to fit the South African context of esports and effectively measure the consumer awareness through the awareness, knowledge, attitude and perception of esports characteristics. The online questionnaire was created using google forms, to ensure efficient distribution for an

online questionnaire (see Appendix 1). It was distributed to five organisations that had various gaming populace, to generate a diverse and generalizable sample of data. The Data was then captured into SPSS 26.0 to generate descriptive statistics and various analyses to determine the consumers awareness of esports in South Africa. The questionnaire comprised of 54 questions the majority of which used the Likert scale. There were also nominal, ordinal and open-ended questions. This study was piloted amongst five individuals from the gaming community and their comments were reviewed to aid in refining and revising the questionnaire to remove any obvious errors or ambiguity. The questionnaire was divided into parts, which measured various themes reflected below in chapter four.

3.8. Data collection

This study used a quantitative approach to gather data in the form of online questionnaires through google forms. Multiple gamers within South Africa participated in the study representing the various segments of the gaming community in South Africa. The collection of the data occurred over the period of three weeks commencing on 13/11/2019 to 05/12/2019.

A self-administered online questionnaire was developed using google forms, this enabled the responses to be recorded anonymously. This ensured the data was automatically coded and immediately available in excel. This method was the most appropriate due to obtaining information and awareness from the respondents of this study. It has all the benefits of self-administered postal questionnaires (Saunders *et al*, 2016), as well as, the distribution across many devices to ensure a greater response rate. However, the questionnaire data collection environment cannot be controlled due to the responses being completely anonymous. of the research. The online questionnaires have a lower cost than many of the alternative thus allowing it to be more advantageous over other data collection methods. According to (Saunders lewis and Thornhill 2007: 356), questionnaires are an economical way of gathering large amounts of data, standardizing data, making easy comparisons and being perceived as authoritative. The inferential and descriptive data can be easily analysed with the use of software programs such as SPSS 26.0.

3.9. Data analysis

The data collected from the survey responses were analysed using SPSS 26.0. The quantitative results display the descriptive statistics, including univariate and bivariate statistics, in the form of graphs and cross tabulation for the quantitative data collected. The univariate analysis focuses on the measures of central tendency by the use of the mean and measures of dispersion by the use of standard deviation. Inferential techniques included the use of correlations and the chi square test of significance (De Vaus 2014), which are explained using the p-values. The information that was derived from the online questionnaire data was used in the data analysis. Concurrent and convergent validity was recognised through factor analyses (Cron Bach Alpha). Reliability of the factors was established through coefficient alpha.

3.9.1. Frequency tables

The use of frequency tables was used to present the data from the study, as it allows a summative overview of the results. This type of data analysis ensures a good basis to inspect the data in depth (McCaig and Dahlberg, 2010). The use of descriptive statistics, specifically univariate and bivariate, allows the study to arrange and summarize the quantitative data (de Vaus, 2014).

3.10. Reliability and validity of the study

To ensure this study will be valid the measuring tools used should measure what it is designed to measure (de Vaus, 2014). In this study the online survey questionnaire measured the hypotheses and ensured that the awareness of esports was measured. The perceptual and attitudinal variables that are defined will include important dimensions and elements as the elements were not overlooked or irrelevant (Sekaran and Bougie, 2016). In this study several types of validity tests are used. Validity can be evaluated in three ways, namely: content validity, criterion-related validity and construct validity (Correlational analysis and principal components analysis statistical techniques).

The test of validity helps to ensure whether the measurement tools calculate what they were supposed to (Bell and Waters, 2014).

“The test for validity establishes whether the instrument actually calculates what it was intended to determine and computes this correctly (Goddard and Melville, 2001), as well as what the results actually mean.”

Validity in quantitative research will also occur through the strategies used to solve the possible issues in the data collection, data analysis, and interpretation stages (Creswell and Plano Clark, 2011).

In this study the effective use of reliability is employed, this can be explained as a test or procedure that yields alike results under stable conditions consistently (Bell and Walters, 2014). Reliability is reinforced by Goddard and Melville (2001) who explain that the measurements made must be consistent. It is important to understand that an instrument is reliable when noticeable measures represent a theoretical idea that is accurate and consistent when used for other hypotheses (Bless, Higson-Smith and Kagee, 2006). In this study the triangulation of data was used as a strategy that strengthened the reliability and internal validity (Sekaran and Bougie, 2016), as well as, crystallisation and legitimation (Plano Clark and Creswell, 2008), as it further improves the validity and reliability of the research study and the evaluation of the findings.

3.10.1. Factor analysis validity test

In this quantitative study, the validity is determined by the quality of the results that were obtained from the instrument used and the value of the deductions that can be acquired from the outcomes of the quantitative analysis (Creswell and Plano Clark, 2011). The degree of the cause and effect that can be concluded between variables shows internal validity (Sekaran and Bougie, 2016). The outcomes of this research should allow the researcher to apply it to the broader population, thus granting external validity (Creswell and Plano Clark, 2011). The survey instruments were tested for validity with principal component analysis using SPSS version 26.0. KMO and Bartels Factor analysis aim is to aid in data reduction (de Vaus, 2014), it is a multi-variate technique that identifies patterns in between differences in the variables.

3.10.2. Cronbach Alpha test of reliability

In this study the questionnaire's instruments were tested for reliability with the Cronbach Alpha test of reliability, through the use of SPSS version 26.0. The Cronbach Alpha coefficient was used to test the study for internal consistency (Sekaran and Bougie, 2016) through the use of SPSS for the quantitative analysis. The reliability of the quantitative study is concerned with the fact that the results that are obtained from the participants need to be consistent and stable over time (Creswell and Plano Clark, 2011). The measurement of scores, as well as, the instrument needs to be reliable and they must be internally consistent.

3.11. Bias encountered and minimized

Bias can influence a researcher's ability and undermine the validity and reliability of the study, there are three types of bias that were encountered, namely: sampling bias, selection bias, response bias. Sampling bias can be created when a sample is not selected correctly, this can be influenced by the language used, personal views that distort the data, incorrect sampling frame and or preference in selection (Brink 2006). This was minimized as the sampling frame was accurately chosen according to the population size, as well as, the study was piloted tested to avoid incorrect language, and elimination of personal views. Selection bias can be created when using a lab type experiment as it may pose a threat to external validity. However, in this research the group were chosen from 5 major organizations client base. This helps to ensure that the study has external validity. The participants were not offered an incentive and were allowed a chance to decline or participate ensuring the internal validity is strong and not threatened (Sekaran and Bougie, 2016).

Response bias is the effect caused by non-responses on survey estimates, if bias is present it means that those who did not respond had to respond it would change the overall results (Creswell & Creswell 2018). The wave analysis was used to determine if there is response bias, the responses were checked weekly to see if the average responses change. This helped to ensure that response bias is minimized.

3.12. Ethical considerations

The ethical considerations that will be used in the study are as follows: informed consent, right to privacy, protection from harm, and the involvement of the researcher (Welman, Kruger and Mitchell, 2005). Every participant has a fair and equal right to participate in the study, as well as, they will have to agree to the participation via a check box which they could decline if they wanted to. In this consent page it is explained the reason for the study and the intention of the use of information, thus fully informing each participant the purpose of this survey and therefore it will be classified as informed consent. Every participant will be kept anonymous to ensure their right to privacy is upheld, as well as, no physical or emotional harm will become any participant. The researcher will be using methods that are ethical and not manipulate the data or respondents during the survey process.

Another ethical consideration was the participation of organisations that were enabled through gate keeper letters sent to each organisation. This allows the research to have access to data that may only be accessible to that organization for the purpose of this study. These can be found in appendix 2 (gatekeeper letters and informed consent).

3.13. Summary

This chapter showcased the research methodology that was followed in this research paper. It further addressed the sampling technique which was used and how esports consumers were selected fairly and ethically to participate in the study. The research design was covered in this chapter which provided an overview of the research was conducted. The next chapter is chapter four and it will present the findings of the study.

4. Results and Discussion

4.1. Introduction

The purpose of the fourth chapter is to present and analyse the data that was collected from the questionnaires. The questionnaires were distributed to the respondents in order to examine the awareness, knowledge, attitudes and perceptions of esports consumers' activities in South Africa and how it affects the consumers behavioural patterns.

The study approached the consumers from seven aspects in order to identify their awareness, namely: awareness, knowledge of esports, attitudes, perceptions, behavioural intentions, suggested changes to be made in esports, personal particulars. The first aspect awareness dealt with the consumers awareness of esports and how they came to know about esports or become involved in esports, as well as what titles constitute an esports title. The second aspect was identifying the participants knowledge of esports by asking how much they agreed with the definition of esports, on a five-point Likert scale, as well as the knowledge of various categories of esports. The third aspect asked six behavioural strength questions and six behavioural outcome questions to identify the attitude a consumer has towards esports, as one may have a strong belief and a poor outcome. The fourth aspect dealt with the perceptions of the consumer by analysing their normative belief while comparing it to the motivation of complying with that belief, this shows the consumers perception. The fifth aspect dealt with the behavioural intentions of the consumer to identify how aware or involved they are with esports. The sixth aspect allowed the participants to give suggested changes on how to improve awareness in the esports industry. The last aspect dealt with the general particulars, capturing the participants demographical and geographical information. Both inferential and descriptive statistics have been used to present the data. The descriptive or frequency statistics are presented as tables, narrative text, figures that use a combination of figures, bars, lines and pie graphs. The inferential statistics are explained through the use of correlations, regressions, and analysis of variance that are presented in tables.

The results captured from the surveys are presented in this chapter that have been collected after conducting chapter three's research methodology. Although the cluster groups were chosen due to social media the survey attracted participants that

were not from the cluster groups specifically but involved in esports. The sample size was not met, and the total participants were 201, although this is still quantifiable as the validity and reliability is positive.

4.2. Presentation of results: Demographic and general profile of the respondents
 Questions forty-four to fifty-four of part seven (General particulars) captured the general particulars of the survey population studied. The questions addressed population in terms of age, gender, working status, where they currently reside, race, home language, highest level of qualification, which platform of gaming do they participate in, what esports leagues do they participate in and which organization did they gain access to this questionnaire.

Table 4.1 Age Distribution of Respondents

Age		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	18 - 22	94	46.8	46.8	46.8
	23 - 27	52	25.9	25.9	72.6
	28 - 32	31	15.4	15.4	88.1
	33 - 37	12	6.0	6.0	94.0
	38 - 42	5	2.5	2.5	96.5
	43 - 47	4	2.0	2.0	98.5
	48 - 52	1	0.5	0.5	99.0
	53+	2	1.0	1.0	100.0
	Total	201	100.0	100.0	

Table 4.1 explains the age of the participants that answered the questionnaire. The information in the table show that 46.8% were between the ages of 18 and 22, and the second significant age being between 23 and 27. This age gap shows that the awareness of esports is among the younger generation, this is also verified by esports being a new technological trend in the sporting field and that it attracts age groups that can invest time into a sport. Sachs (2018) confirms that 79% of their esports audience was under the age of 35, this comparison shows the validity in results remaining constant as 88.1% were under the age of 35.

The gender in the US esports industry showed that 72% of US gamers that watched esports were male (Sinclair 2020). Frazer (2019) explains that esports is a male dominated industry and that there are negative stereotypes such as, female gamers not understanding the game. This shows that female gamers are subjected to sexist

comments and abuse by male gamers due to the harsh stigma that is in the industry. Some tournament organizers are trying to host female exclusive tournaments to integrate female gamers into the scene in a more comfortable setting (Frazer 2019).

Table 4.2 Gender Dispersion of Respondents

Gender		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Female	33	16.4	16.5	16.5
	Male	167	83.1	83.5	100.0
	Total	200	99.5	100.0	
Missing	System	1	0.5		
Total		201	100.0		

Most of the respondents, namely 83%, were male consumers and only 16% percent were female consumers as shown in table 4.2. This reflects the poll conducted by Sinclair (2020) and Frazer (2019) that esports is a male dominated industry in South Africa.

The common stereotype of gamers being lazy and socially isolated is proven wrong due to the majority of respondents being active with regards to their working status. This is shown in figure 4.1 as 45.8% of consumers that answered the questionnaire are employed, 36.8% are students, while 11% are self-employed. Only 5% are unemployed. It is important to have a sense of financial security as being a consumer or participant of esports is engaging in a volatile and uncertain industry. This can be seen due to the employed and student status, as both sections are financially funded.

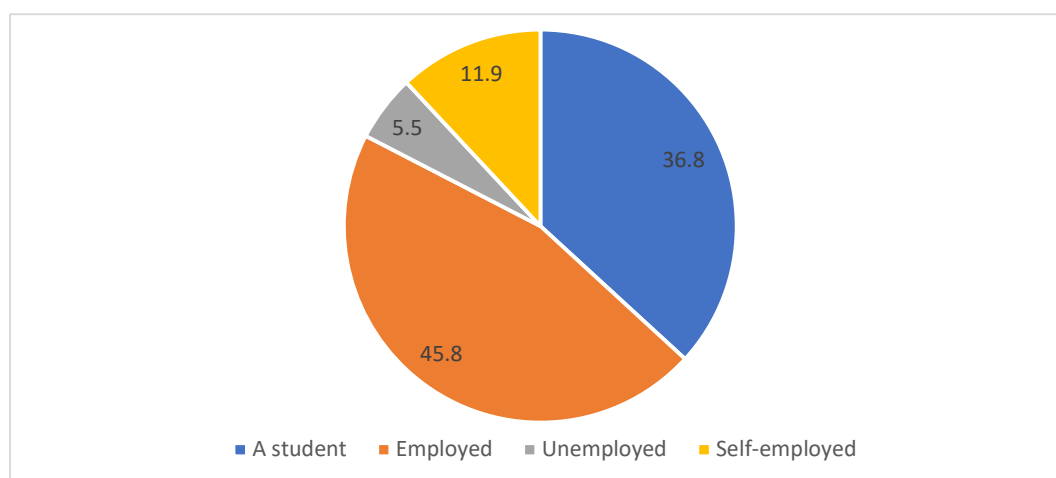


Figure 4.1 Working Status of Respondents

Table 4.3 shows that ninety-eight percent of the respondents reside in South Africa although two percent of the respondents don't. This shows the authenticity to reflecting the opinions of the South African esports consumer, as well as, showing the consumers extension in the South African esports industry.

Table 4.3 Geographic distribution of respondents

Please indicate whether or not you currently reside in South Africa

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	South Africa	198	98.5	98.5	98.5
	Nigeria	1	0.5	0.5	99.0
	Zambia	1	0.5	0.5	99.5
	Zimbabwe	1	0.5	0.5	100.0
	Total	201	100.0	100.0	

Out of the 98% of consumers, the table 4.4 shows that the majority of esports consumers are situated in Gauteng being 42%. The data shows that Western Cape is the second largest geographical area for esports consumers being 23% and the third largest group being Kwa-Zulu Natal at 15%. This is significant as it shows that the developed cities are central hubs for esports to prosper. It is important to note that 17.5% of the respondents make up the smaller geographic locations and shows that there is interest in esports but the current consumer could be at a disadvantage due to the lack of infrastructure in their regions.

Table 4.4 Geographic distribution inside of South Africa

Please indicate where you currently reside in South Africa

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Eastern Cape	12	6.0	6.0	6.0
	Free State	4	2.0	2.0	8.0
	Gauteng	86	42.8	42.8	50.7
	Harare	1	0.5	0.5	51.2
	KwaZulu-Natal	30	14.9	14.9	66.2
	Lagos	1	0.5	0.5	66.7
	Limpopo	7	3.5	3.5	70.1
	Mpumalanga	5	2.5	2.5	72.6
	North West	7	3.5	3.5	76.1
	Western Cape	47	23.4	23.4	99.5
	Zambia	1	0.5	0.5	100.0
	Total	201	100.0	100.0	

Figure 4.2 shows that the majority of the respondents were white (78.1%), with the second significant race group African being 11.9%. The other race groups had a low response rate, and this could be due to the involvement in esports being a European trend.

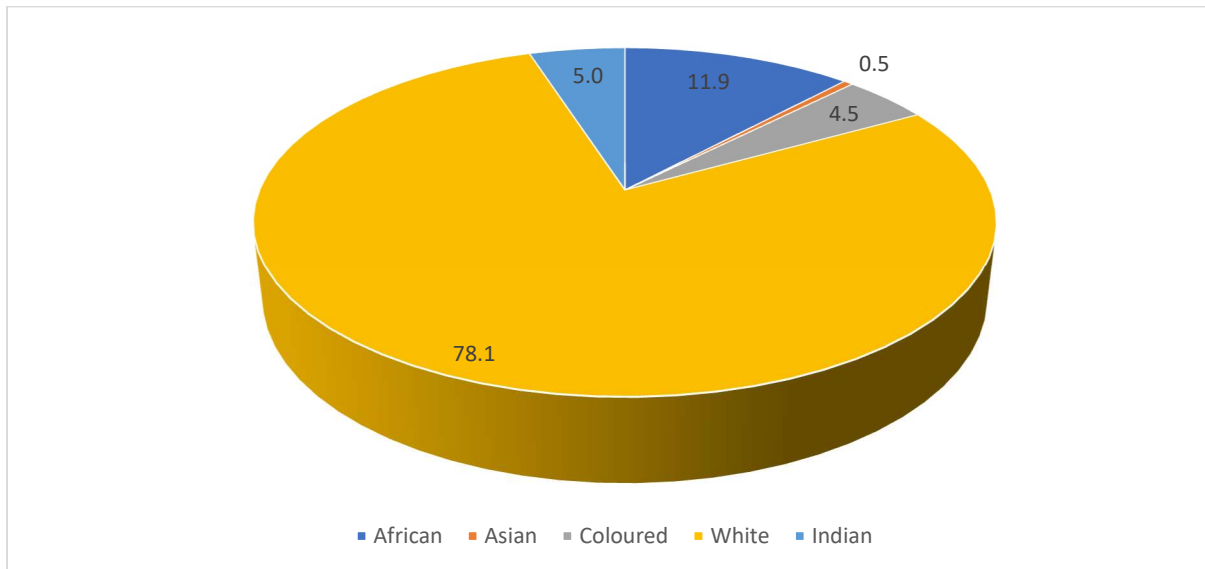


Figure 4.2 Race Representation of respondents

Table 4.5 shows that majority of the respondents' home language is English (69.2%), and the second biggest percentile is Afrikaans (22.4%). The other home languages had a low response rate, and this could be due to the involvement in esports being a European trend, as well as, the accessibility to technology to play or the awareness of esports is not popular amongst other cultural groups.

Table 4.5 Home language of respondents

Home language		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Afrikaans	45	22.4	22.4	22.4
	English	139	69.2	69.2	91.5
	Northern Sotho	4	2.0	2.0	93.5
	Sesotho	1	0.5	0.5	94.0
	Shona	1	0.5	0.5	94.5
	Swati	1	0.5	0.5	95.0
	Tsonga	1	0.5	0.5	95.5
	Tswana	3	1.5	1.5	97.0
	Xhosa	3	1.5	1.5	98.5
	Zulu	3	1.5	1.5	100.0
	Total	201	100.0	100.0	

Figure 4.3 shows that the majority of respondents had a matric/grade 12 (41%), and it can be related to the youth that are participating in the sport. This is evident as the age shows that nearly half (47%) are between 18 – 22 years of age. It is important to note that 40% of the respondents have a formal education such as a diploma (19%) and a degree (21%), this shows that the future of esports will have an educated or working class following that will be able to be a viable consumer with an above average buying power.

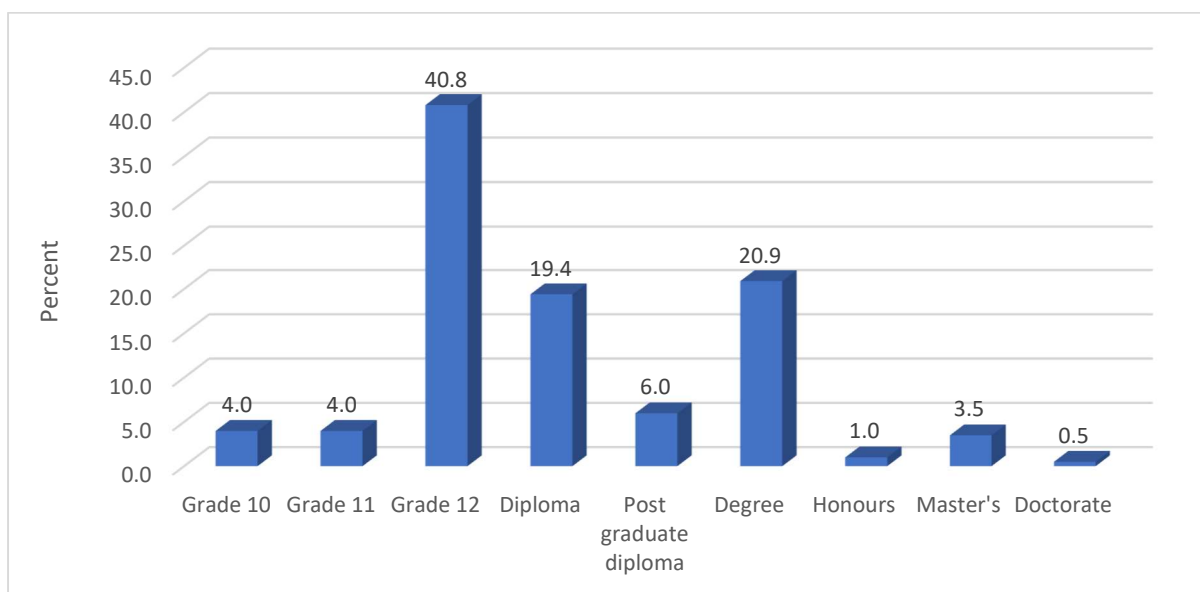


Figure 4.3 Highest level of academic qualification

Figure 4.4 shows that the vast majority are computer / PC gamers (89%) although it is important to note that respondents can be involved on multiple platforms. The second highest percentile was mobile devices (45%) that incorporate an important developing sector in esports. The console scene of esports seems to be at a lower percentile with a combined percentile of 53%, this shows that the console leagues in esports are divided currently as only a few games allow cross platform engagement (gaming across different console brands, which was previously not available to consumers). The PS4 percentile (34%) is the higher of the console category, while Xbox (18%) is nearly half of that. This is significant to note as esports leagues would need to focus on the majority of available participants and expand their services to proactively gain a wider client base.

Which of the following do you use to participate in gaming:

201 responses

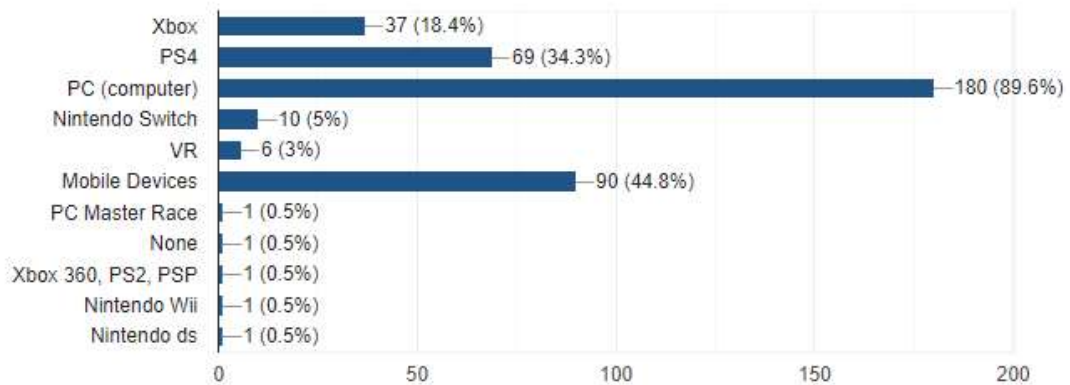


Figure 4.4 Consumers methods to participate in gaming

Figure 4.5 shows that the vast majority of consumers are aware of VSG (91%), this can be attributed to its being led by Telkom and has been around for a long time in the South African competitive scene. It is important to note that out of the total consumers, they are aware of three new upcoming tournament / league organizers, namely: ACGL (61%); Mettlestate (60%) ATK Arena (56%). The MSSA has been around since the beginning of esports however has one of the lowest participation out of the total respondents at 56%. It is important to note of two less mentioned organizations that were not captured in the primary set of questions but was added by respondents were: Raving Mad Gamers and Evetech Champions league. There were also negative remarks made about the reasons for not participating in MSSA organization in this section.

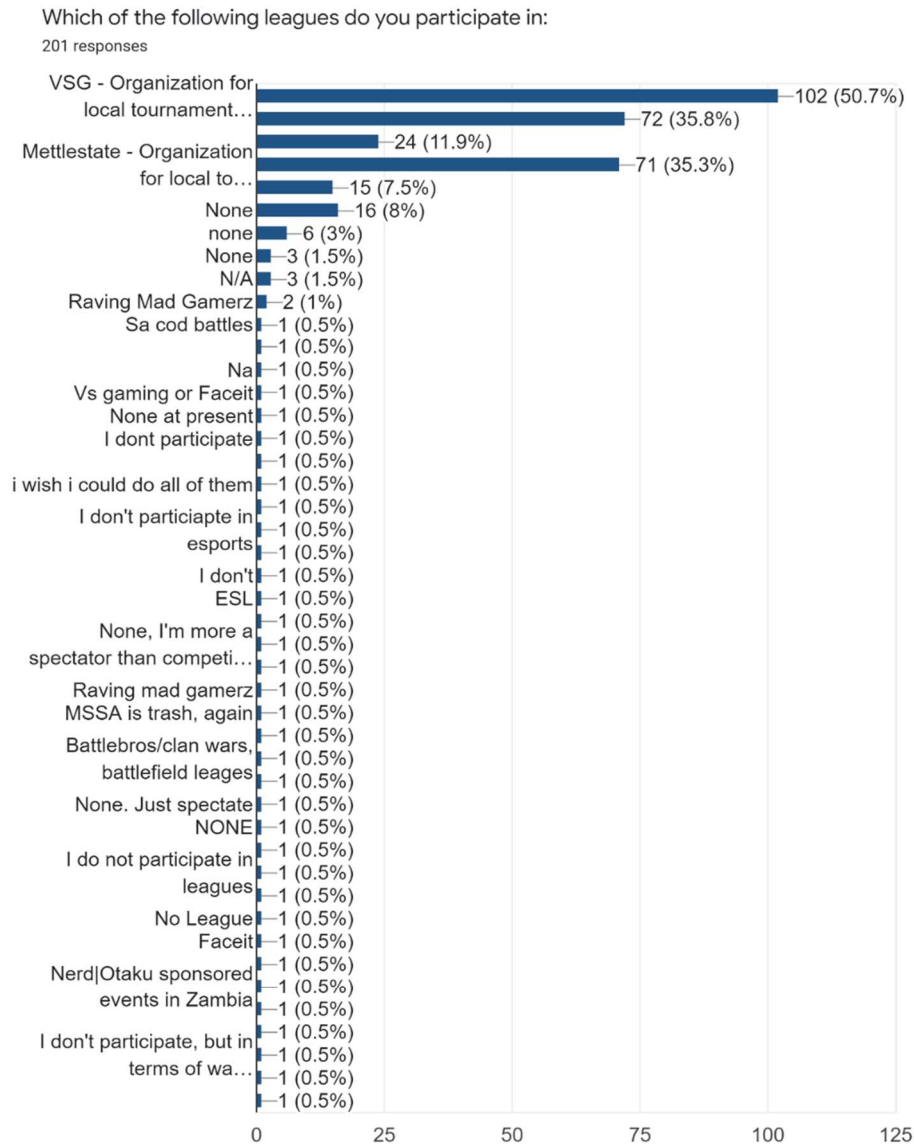


Figure 4.5 Leagues that are participated in South Africa

Figure 4.6 shows that the respondents were mainly from the VSG cluster (35%) that was selected, the second highest respondents were ACGL (17%), third highest was Mettlestate (13%), the fourth highest was ATK Arena (11%) and the lowest from the cluster was MSSA (9%). It is important to note the esports community is electronically inclined and that even though the survey was targeted at these clusters it extended beyond the reach via social media (13%) and other gaming organizations (1.5%).

From which organization did you gain access to this questionnaire
201 responses

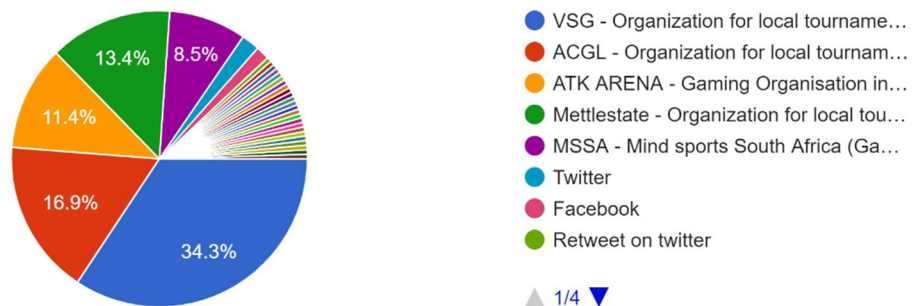


Figure 4.6 Clusters of respondents that gain accessed to the questionnaire

4.3. Presentation of results: Awareness of Consumers'

Figure 4.7 shows that an overwhelming number of respondents (99%) have heard about the term esports.

Please indicate whether you have heard of the term esports?
201 responses

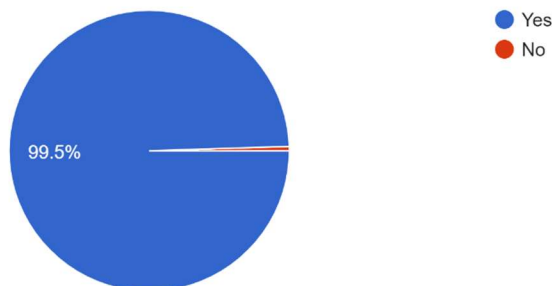


Figure 4.7 Respondents that had heard of esports

Table 4.6 shows that a vast majority of respondents learnt of esports through online gaming communities (70%). It is important to note that the second highest percentile is word of mouth (9%) and the third is esport organizations (9%) while social media (8%) is fourth. This shows that esports has a limited way to gain a greater audience and raise awareness amongst the greater population.

Table 4.6 How the consumers learned about esports

How did you first learn about esports?		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	By word of mouth	18	9.0	9.0	9.0
	Through esport organizations	17	8.5	8.5	17.4
	Through online gaming communities	141	70.1	70.1	87.6
	Through social media	16	8.0	8.0	95.5
	Through user generated content	5	2.5	2.5	98.0
	Other	4	2.0	2.0	100.0
	Total	201	100.0	100.0	

Table 4.7 shows that the majority of respondents are invested into gaming and are either esport competitors (34%) or hardcore gamers (34%). It is important to note that the minority of the respondents are spectators (2%).

Table 4.7 Type of esports consumer / gamer

What would you classify yourself as with regards to gaming?		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Administrator	1	0.5	0.5	0.5
	Casual gamer	54	26.9	26.9	27.4
	Esports commentator	1	0.5	0.5	27.9
	Esports competitor	69	34.3	34.3	62.2
	Former competitor	1	0.5	0.5	62.7
	Gaming and esports enthusiast	1	0.5	0.5	63.2
	Hard core gamer	68	33.8	33.8	97.0
	Manager for an esports team	1	0.5	0.5	97.5
	Spectator / just a viewer	4	2.0	2.0	99.5
	Other	1	0.5	0.5	100.0
	Total	201	100.0	100.0	

Table 4.8 shows that the consumers are involved fairly evenly in esports as 32% of the respondents are currently participating in the esports scene, 30% currently watch and participate in the esports scene, and lastly 27% watch esports and support it in forms of viewership.

Table 4.8 Involvement of consumers in esports

To what extent are you involved in esports?		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No involvement	7	3.5	3.5	3.5
	Commentator	2	1.0	1.0	4.5
	Content Creator	1	0.5	0.5	5.0
	Game room host	3	1.5	1.5	6.5
	Owner of gaming company	1	0.5	0.5	7.0
	Administrator	1	0.5	0.5	7.5
	Participate / player	65	32.3	32.3	39.8
	Player and Team Manager	2	1.0	1.0	40.8
	Spectator / watch only	55	27.4	27.4	68.2
	Tournament organizer	2	1.0	1.0	69.2
	Watch and participate	61	30.3	30.3	99.5
	Employment	1	0.5	0.5	100.0
	Total	201	100.0	100.0	

Figure 4.8 shows that the highest segment of consumers watch esports daily (38%), however on the other side of the scale the second highest segment only watches esports once a week (21%). The third segment consumes esports content two times a week (13%) and the fourth segment three times a week (12.9%), this shows that on average an esports consumer consumes esports media more than three times a week.

How regularly do you watch esports?
201 responses

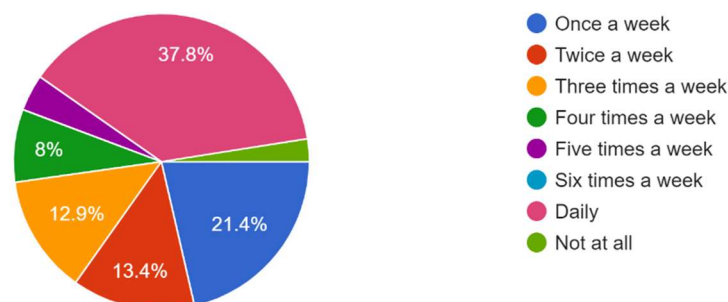


Figure 4.8 The frequency that shows how often consumers watch esports

Figure 4.9 shows that 83% of the respondents watch major championships and 73% of the respondents watch major leagues. These two titles seem to have the highest demand of consumers that are interested in watching and this shows a keen interest into the international esports market. The local esports scene showed that 53% of respondents watch local championships and 50% of the respondents watch local tournaments. This shows that there is content missing in the local scene that is not captivating the viewers or another issue.

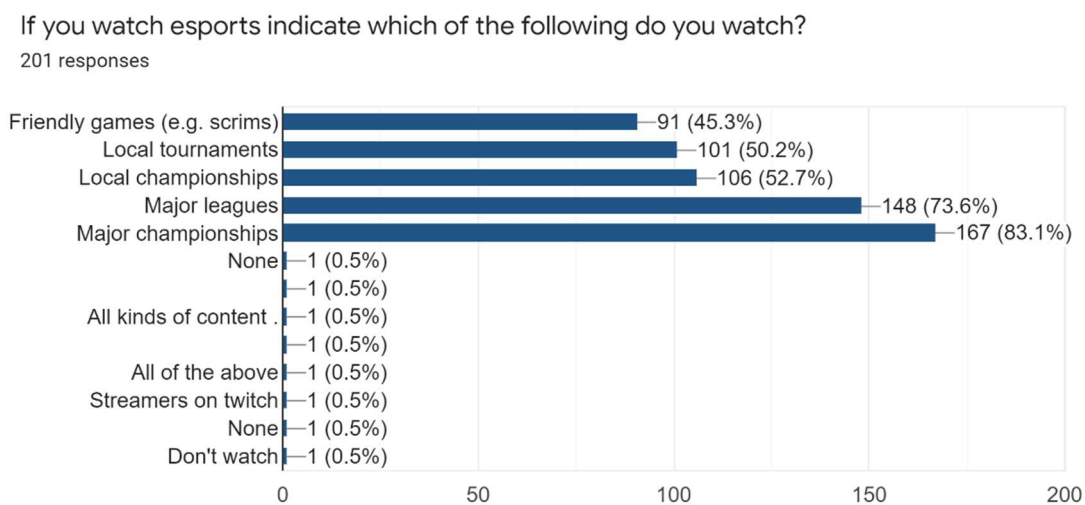


Figure 4.9 Content that esports consumers watch

Table 4.9 shows that 31.8% do not participate in esports at all, which implies that they are spectators and esports consumers. It is important to note that 30.9% participate in esports for the majority of the week, while 37.2% participate three or less days in a week. This shows that the majority of consumers in this study partake in esports while 31.8% are more casual gamers or spectators

Table 4.9 The frequency of how often consumers participate in esports

If you participate, indicate how regularly you participate in esports?		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Daily	39	19.4	19.4	19.4
	Once a week	33	16.4	16.4	35.8
	Twice a week	21	10.4	10.4	46.3
	Three times a week	21	10.4	10.4	56.7
	Four times a week	9	4.5	4.5	61.2
	Five times a week	13	6.5	6.5	67.7
	Six times a week	1	0.5	0.5	68.2
	Not at all	64	31.8	31.8	100.0
	Total	201	100.0	100.0	

Figure 4.10 shows that the vast majority of respondents spend under ZAR 1000 (73%), whilst the next highest segment between ZAR1000 to ZAR 2000 (18%). This shows a concern of buying signals being low in the consumer market and should be investigated further to understand why consumers spend low amounts in the esports industry.

How much do you spend of your income on esports / gaming in a month?
201 responses

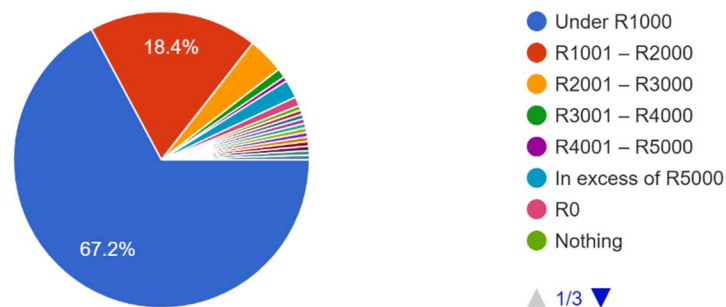


Figure 4.10 The amount esports consumers spend in a month

Figure 4.11 shows the awareness for each of the broadcasting services. The overwhelming majority of South African consumers were aware of Youtube's (99%) broadcasting service, with Twitch (97%), Facebook (90%) and Ginx Tv (70%) following close behind. It is important to note that Azubu (9%), Hitbox (14%), uStream (11%) and streamMe (9%) are more popular overseas (Shabir 2017) than in the local market.

Please indicate which of the following broadcasting services you are aware of:

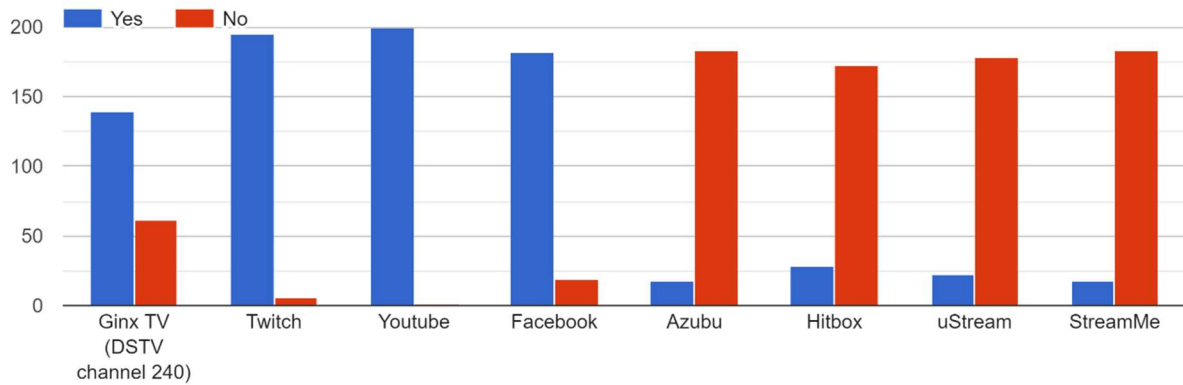


Figure 4.11 Consumers awareness of broadcasting services

Table 4.10 Other broadcasting sites that consumers are aware of

Other broadcasting sites that consumers are aware of				
	Frequency	Percent	Valid Percent	Cumulative Percent
Valid				
Caffeine	2	1.4	1.4	1.4
Mixer	100	71.4	71.4	72.9
Discord	3	2.1	2.1	75.0
DLive	9	6.4	6.4	81.4
Douyu	2	1.4	1.4	82.9
Huya	1	0.7	0.7	83.6
Eu.Lolesports.com	2	1.4	1.4	85.0
Kwezu, In Game Client (Dota 2)	1	0.7	0.7	85.7
Gamely	1	0.7	0.7	86.4
Omlet Arcade	5	3.6	3.6	90.0
MobCrush	1	0.7	0.7	90.7
YouNow	1	0.7	0.7	91.4
MLG.tv	1	0.7	0.7	92.1
MSSA - Tuluntulu	2	1.4	1.4	93.6
None	7	5.0	5.0	98.6
Steam	1	0.7	0.7	99.3
Youtube	1	0.7	0.7	100.0
	140	100.0	100.0	100.0

Table 4.10 shows that out of the 201 respondents only 133 were aware of other streaming sites, this shows that 66.17% of the respondents are aware of more sites than the normal consumer market (Shabir 2020). The majority of this segment is aware of Mixer (71.4%), while there are some smaller streaming services such as dlive (6.4%) and Omlet Arcade (3.6%).

Figure 4.12 displays the consumers usage for each of the broadcasting services and that Youtube (93%) was the most used broadcasting service by the esports consumer, with Twitch (91%), Ginx tv (26%) and Facebook (25%) following behind. Although Azubu (1%) and streamMe (2%) Hitbox (14%), uStream (11%).

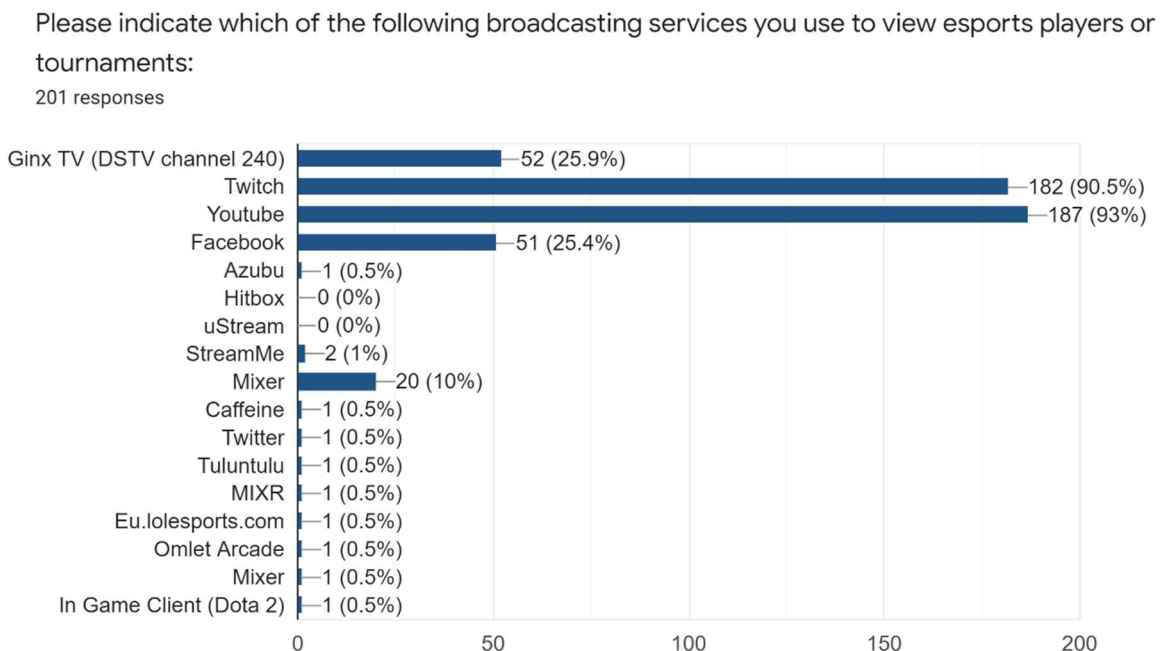


Figure 4.12 Broadcasting Services that consumers use

Table 4.11 shows that 61 of the 201 respondents (30.34%) use other forms of streaming services than those mentioned in the study. The largest segment of consumers 65.57% of those consumers use Mixer making it a significant broadcasting service to be further researched in the South Africa.

Table 4.11 Other broadcasting sites that consumers use

Other Streaming Services consumers use				
	Frequency	Percent	Valid Percent	Cumulative Percent
Caffeine	1	1.64	1.64	1.6
DLive	2	3.28	3.28	4.9
Hltv	1	1.64	1.64	6.6
lolesports	1	1.64	1.64	8.2
Mixer	40	65.57	65.57	73.8
MLG.TV	2	3.28	3.28	77.0
N/A	13	21.31	21.31	98.4
Omlet arcade	1	1.64	1.64	100.0
Total	61	100.0	100.0	100.0

Figure 4.13 shows that only 23% of respondents would watch esports on Ginx Tv, while the majority (53%) are unlikely to use Ginx tv as a broadcasting service. It can be seen that the majority of respondents would prefer to use Twitch (86%) and Youtube (90%), as there was an overwhelming response towards very likely to view on these platforms. Facebook has recently started to stream various games it still seems to not be popular with only 28% of respondents would view esports on it, and the majority (45%) would not use facebook. There was a negative response towards Azubu (77%), Hitbox (78%), uStream (78%) and Stream me (78%) showing that the majority would not prefer watching esports on these platforms.

Please indicate to what extent you are likely to watch esports content on the following broadcasters:

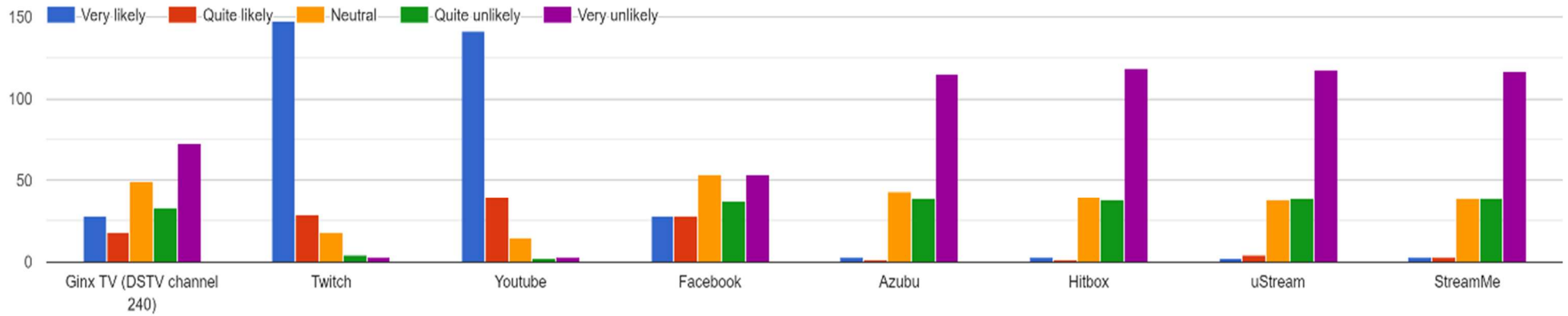


Figure 4.13 Likeliness to watch esports content on various broadcasters

Please indicate which of the following esports codes/genres you prefer watching:

201 responses

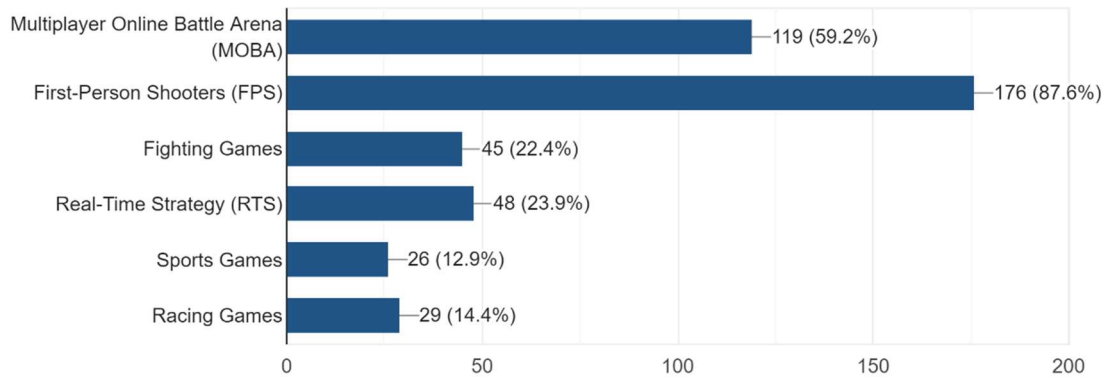


Figure 4.14 Esports codes / genres that consumers prefer watching

Figure 4.14 shows that an overwhelming majority (88%) would prefer to watch First person shooters, and just over half of the respondents (59%) would want to watch Multiplayer Online Battle Arena style games. It can be seen that there is a low spectatorship for fighting games (22%), real time strategy (24%), Sports Games (13%) and racing games (14%).

Figure 4.15 shows that an overwhelming number of total respondents (91%) are aware of the Telkom VS Gaming league. This could be due to the tournament organization being hosted by one of the biggest data providers in South Africa. The majority of total respondents were aware of other leagues/tournament organizations in South Africa namely; ACGL (61%), Mettlestate (60%), MSSA (56%) and ATK Arena (56%). It is important to note that there are minor leagues that have little to no awareness amongst the local scene although being represented by larger organizations/sponsors such as: Evetech champions league, Raving mad gamers etc.

Please indicate which of the following local leagues / tournaments you are aware of:

201 responses

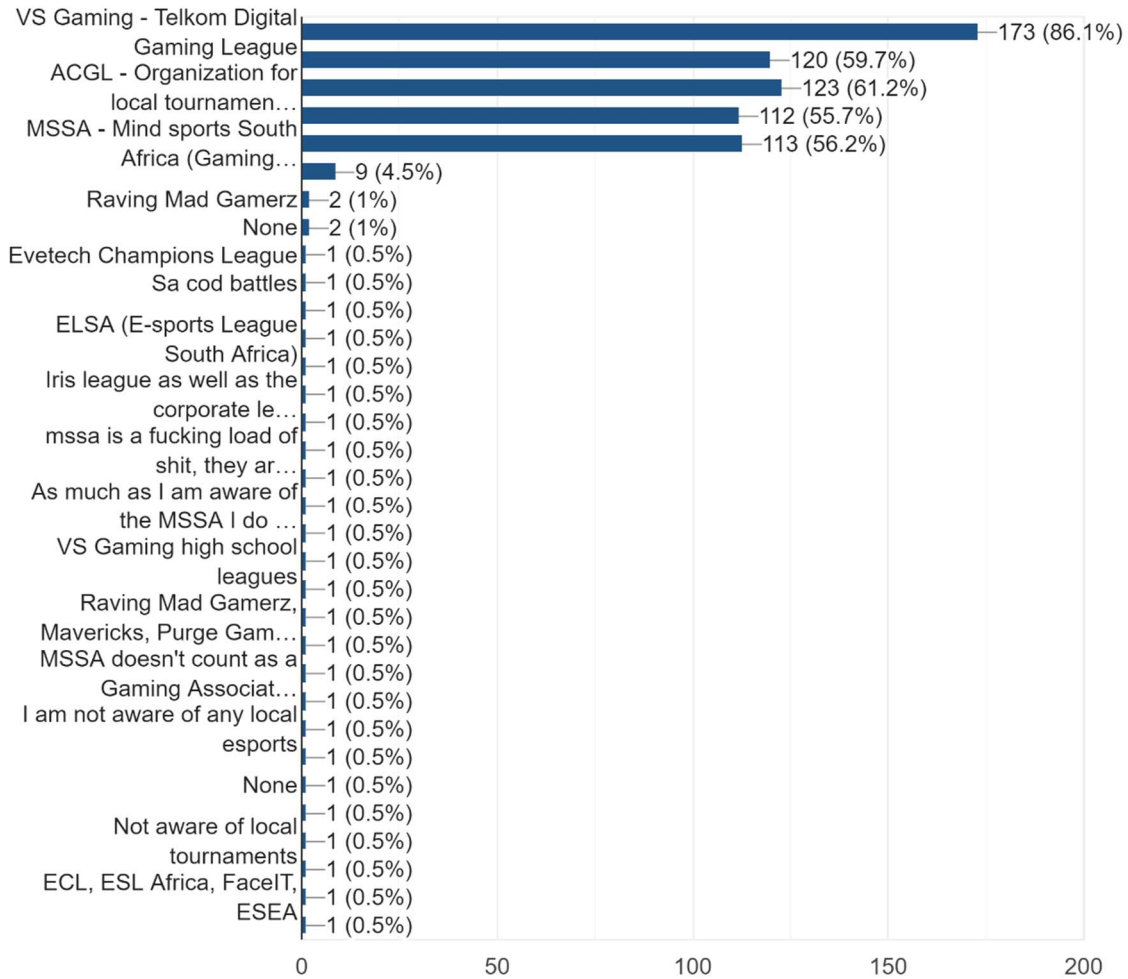


Figure 4.15 Local leagues / tournaments that esports consumers are aware of

Figure 4.16 shows that although there are a few consumers (33%) that would pay to watch a tournament live, the majority (48%) would prefer not to. It can be seen that an overwhelming majority of respondents (92%) would prefer to watch esports on social media for free, this is evident due to the spectatorship being of the lower age bracket (18-27).

Please indicate to what extent you are likely to:

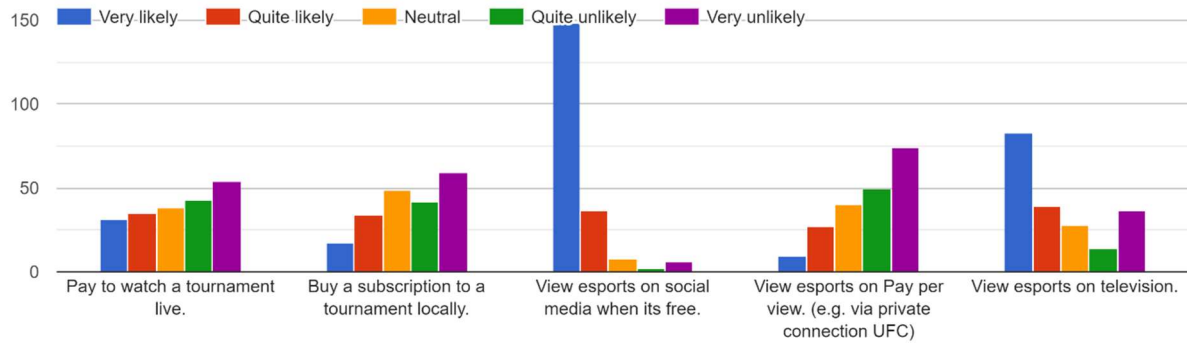


Figure 4.16 How likely consumers are to pay or view esports

Please indicate which of the following registered esports associations are you aware of:

201 responses

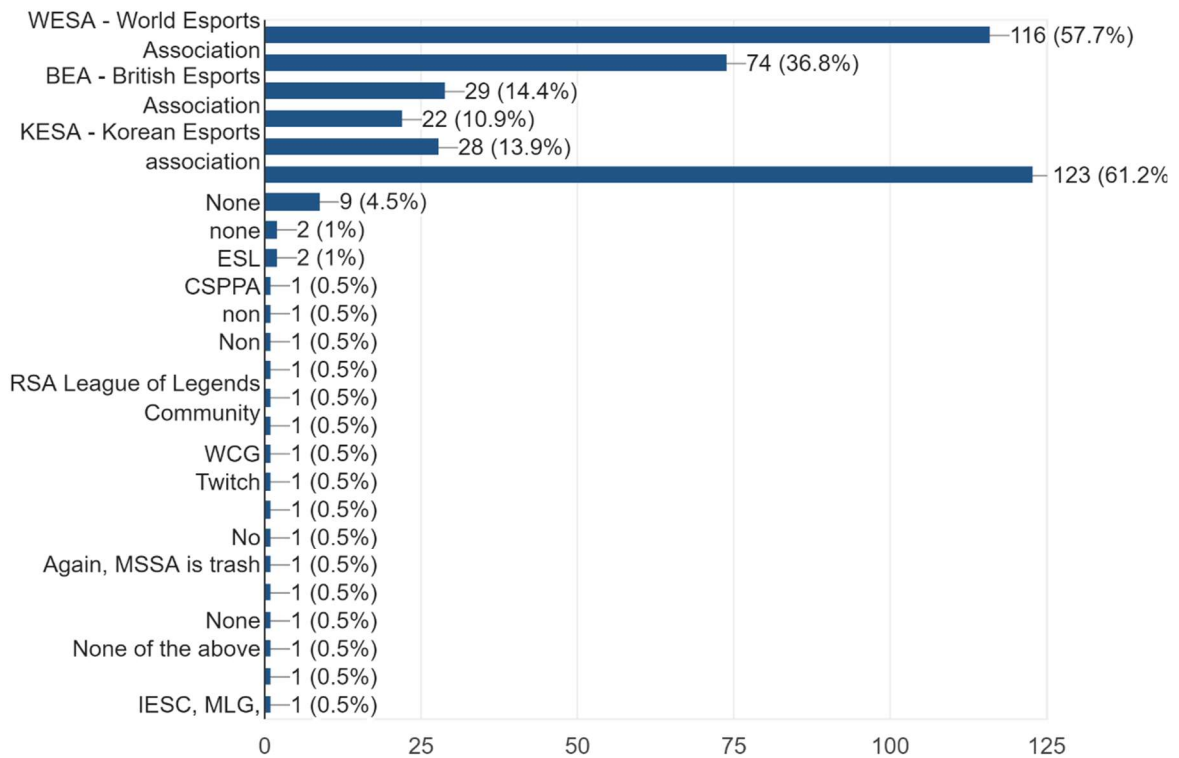


Figure 4.17 Esport associations that consumers are aware of

Figure 4.17 shows that MSSA has a 123 respondents that are aware of the organisation (61%) and WESA has the second highest awareness of 116 (58%) of the respondents. IESF has 74 (37%), followed by BEA 29 (14%), KESA 28 (13%), ESIC 22 (11%). It is important to note that 8% are not aware of any associations that are registered and credential to esports.

4.4. Presentation of results: Knowledge of Consumers'

Table 4.12 The consumers' knowledge of the definition of esports

An area of sports activities in which individuals develop and train mental [and] physical abilities in the use of information and communication technologies (internet).					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Strongly agree	91	45.3	45.3	45.3
	Agree	61	30.3	30.3	75.6
	Neutral	33	16.4	16.4	92.0
	Disagree	13	6.5	6.5	98.5
	Strongly disagree	3	1.5	1.5	100.0
	Total	201	100.0	100.0	
An activity of playing computer games against other people on the internet that are commonly: for money, to be watched by others or at specialized events.					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Strongly agree	97	48.3	48.3	48.3
	Agree	65	32.3	32.3	80.6
	Neutral	30	14.9	14.9	95.5
	Disagree	8	4.0	4.0	99.5
	Strongly disagree	1	0.5	0.5	100.0
	Total	201	100.0	100.0	
Games that allow participants to rival real-life sport within a game that simulates a professional league and does not require physical activity					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Strongly agree	63	31.3	31.3	31.3
	Agree	42	20.9	20.9	52.2
	Neutral	49	24.4	24.4	76.6
	Disagree	31	15.4	15.4	92.0
	Strongly disagree	16	8.0	8.0	100.0
	Total	201	100.0	100.0	

The participants were presented with three definitions of esports that are commonly used to explain esports, however not all of them entail the full explanation of esports. Table 4.12 shows that the respondents felt each definition had a positive way of explaining esports, however it is important to note that the second definition "An

activity of playing computer games against other people on the internet that are commonly: for money, to be watched by others or at specialized events.” had the most positive response of 81% agreeing. The first definition had 76% of the participants agreeing and lastly the third definition had an agreement of 56%. The correct definitions is the first one, this shows a lack of understanding on the characteristics that properly define esports.

Figure 4.18 represents that 94% of the respondents perceive esports as a sport, this is significant as it shows that the emerging market perceive esports correctly compared to the common stereotypes. Fitch (2020) explains that the president of the Commonwealth Games Federation has been trying to explore various paths to integrate esports into the Commonwealth Movement to help support the sustainable development of digital infrastructure, connectivity and commerce across the Commonwealth due to esports not being viewed as a sport.

Would you classify esports as a sport?
201 responses

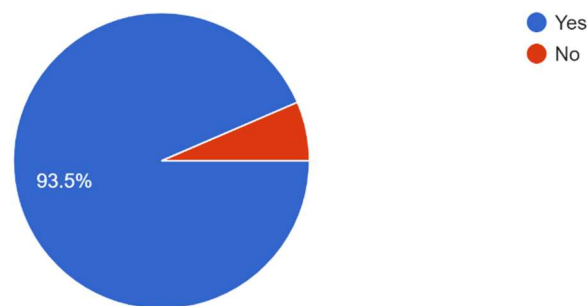


Figure 4.18 Esports consumers classify esports as a sport

Figure 4.19 shows that there is a strong agreement on MOBA (81%) and FPS (90%) genre being an esports code, whereas the other codes have a weaker agreement. This shows that the majority of gamers agree with these esports codes and would represent a similar style to sport having various codes like rugby, cricket, soccer etc.

Please indicate to what extent do you agree or disagree that the following are esportsing codes/genres:

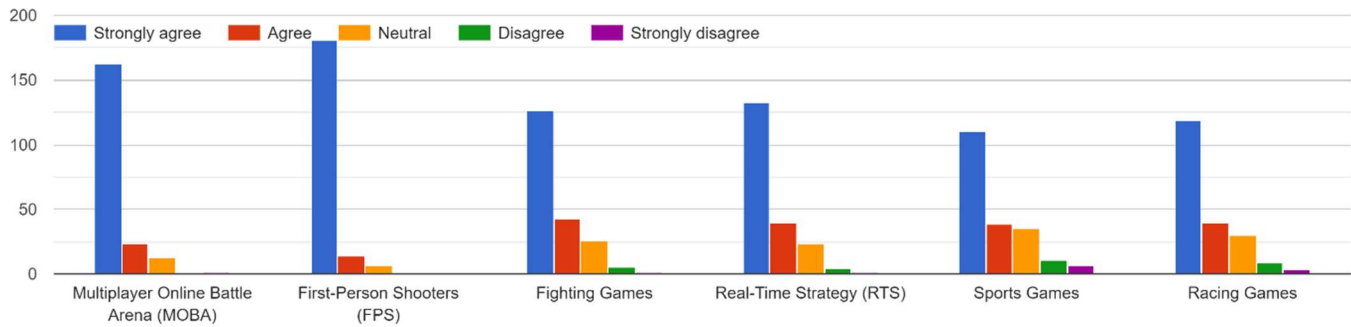


Figure 4.19 The consumers agreement on the classification of esports codes

4.5. Presentation of results: Attitudes of Consumers'

The figures below reflect the behavioural belief patterns of the esports consumers in South Africa that will be compared to their behavioural intentions to later determine their attitude towards esports.

4.5.1. Behavioural belief strengths

Please indicate to what extent do you agree or disagree with the following statements relating to achievement:

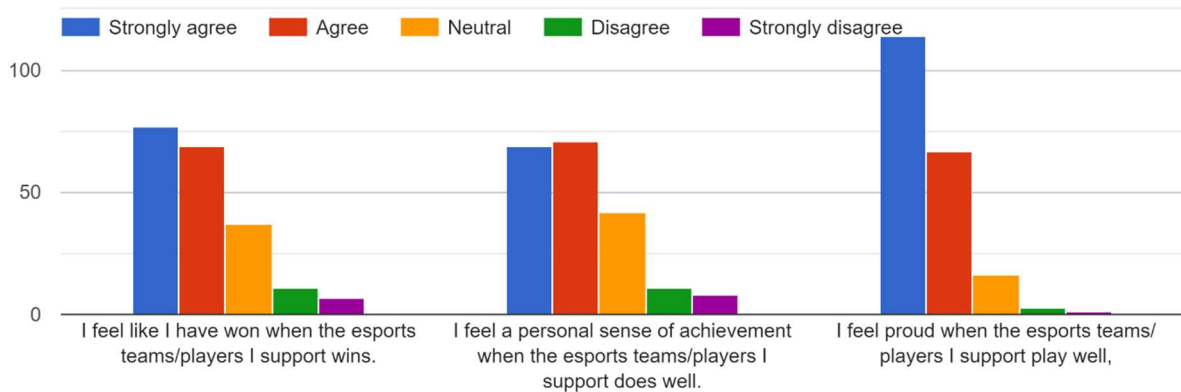


Figure 4.20 The consumers sense of achievement in esports

Figure 4.20 shows that the majority of respondents feel a sense of achievement when the esports team they support wins (73%), does well (70%) and play the game well (90%). This is a positive as it shows that one of the core factors in determining the consumers attitude towards esports is positive (Xiao 2019).

Figure 4.21 shows that the majority of respondents believe that it is important to gain knowledge in the esports scene. This was concluded due to respondents agreeing that they track the statistics of esports (61%), know the win loss records (47%) and read up about teams statistics regularly (46%). This is positive as it shows that one of the core factors in determining the consumers attitude towards esports is positive (Xiao 2019).

Please indicate to what extent do you agree or disagree with the following statements relating to knowledge acquisition:

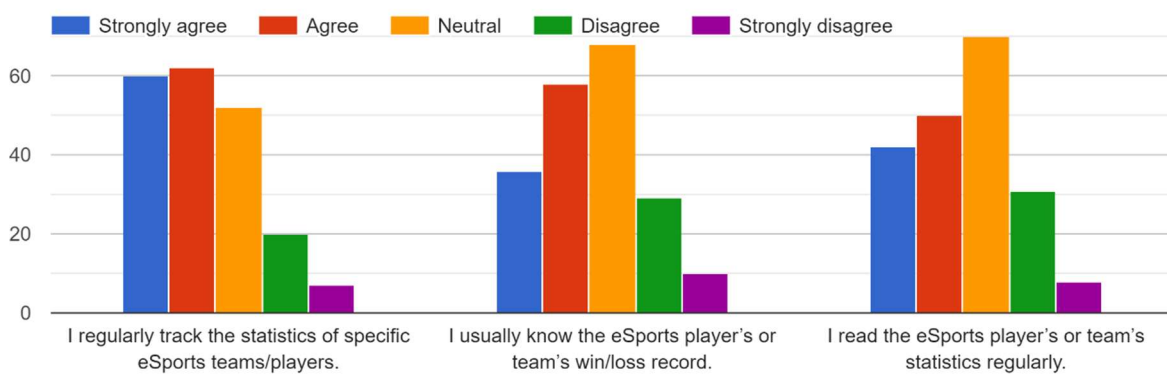


Figure 4.21 The consumers knowledge acquisition of esports

Figure 4.22 shows the consumers perception of esports aesthetics as it is important in the behavioural strengths of respondents due to majority of respondents agreeing with the inherent beauty (85%), natural beauty (78%) and gracefulness (70%). This is positive as it shows that one of the core factors in determining the consumers attitude towards esports is positive (Xiao 2019).

Please indicate to what extent do you agree or disagree with the following statements relating to aesthetics:

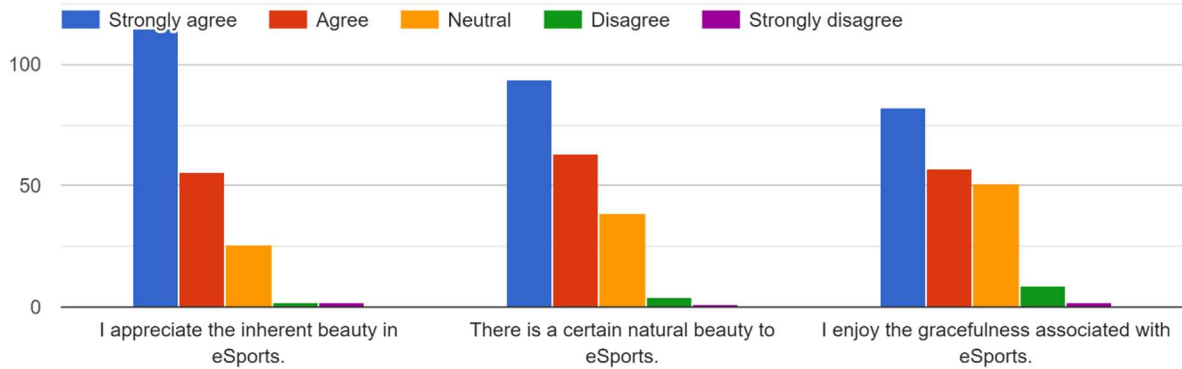


Figure 4.22 The consumers perception of aesthetics in esports

Figure 4.23 shows that the consumer enjoys the drama in esports and that a match in esports should be on a similar level enforcing the game to have a dramatic effect, this is shown by an overwhelming number of respondents (85-90%) strongly agreeing with the figures statements. This is positive as it shows that one of the core factors in determining the consumers attitude towards esports is positive (Xiao 2019).

Please indicate to what extent do you agree or disagree with the following statements relating to drama:

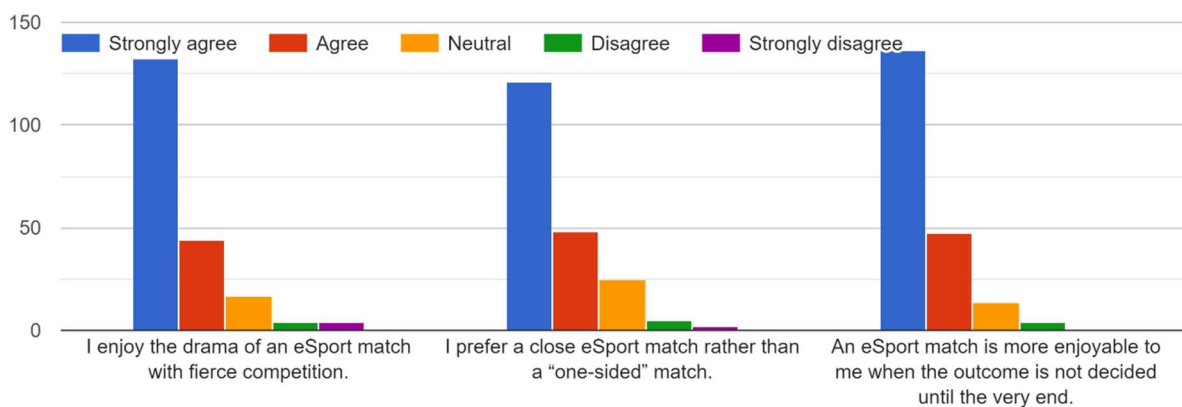


Figure 4.23 The consumers perception of drama in esports

Figure 4.24 shows that the majority of respondents (61-64%) perceive esports as a form of escapism and believe esports can and are being used as an escapism method. It also is important to note that a fifth of respondents (20-21%) feel neutral about it, this shows that there is not such a strong relation to escapism as the other areas of behavioural intentions. However, this is still positive as it shows that one of the core factors in determining the consumers attitude towards esports is positive (Xiao 2019).

Please indicate to what extent do you agree or disagree with the following statements relating to escapism:

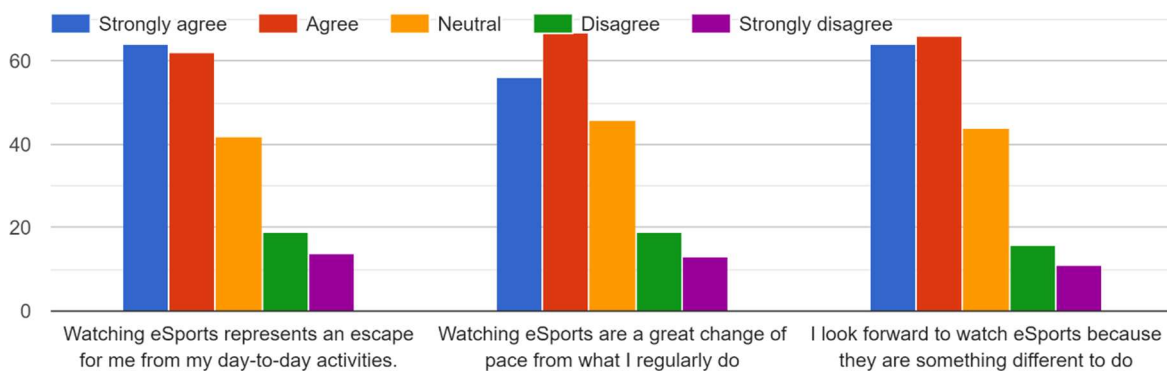


Figure 4.24 The consumers perception of escapism in esports

Figure 4.25 shows the level of perceived social interaction by the participants and that esports is a social based and intensive sport, as the majority of respondents agreed with the mentioned social interactions (71%, 60%, 81%). This is positive as it shows that one of the core factors in determining the consumers attitude towards esports is positive (Xiao 2019).

Please indicate to what extent do you agree or disagree with the following statements relating to social interaction:

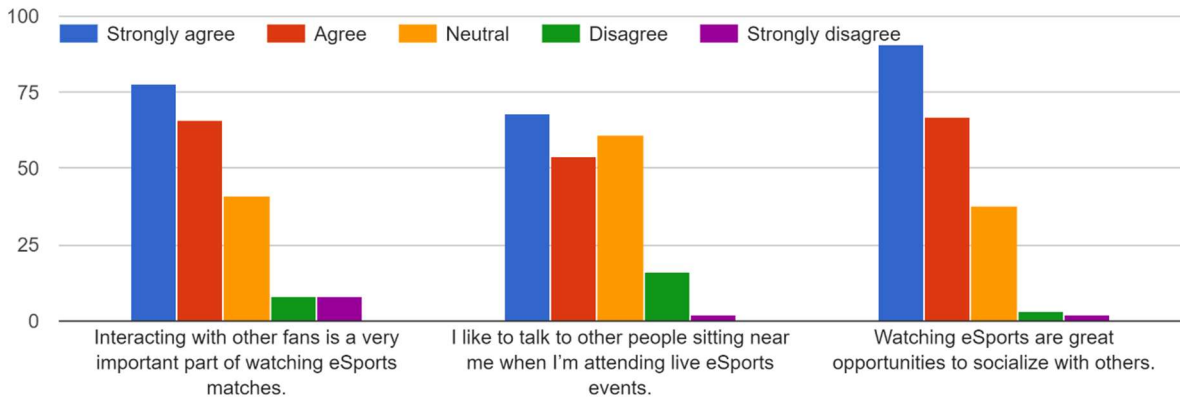


Figure 4.25 The consumers perception of social interaction in esports

4.5.2. Behavioural belief outcomes

The figures below reflect the behavioural intention patterns of the esports consumers in South Africa that will be compared to their behavioural beliefs to later determine their attitude towards esports.

Please indicate to what extent do you feel good or bad about the following statements relating to achievement:

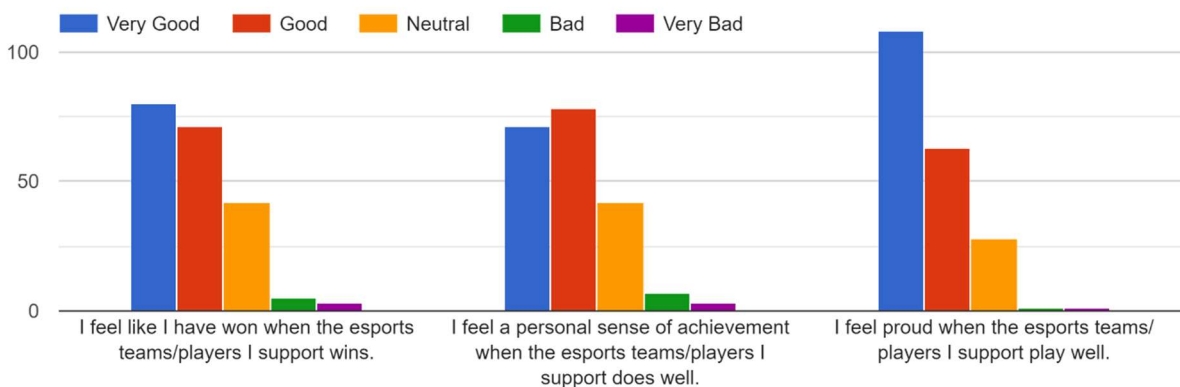


Figure 4.26 The consumers intention of achievement the feel in esports

Figure 4.26 shows how the participants felt about esports and the majority of respondents feel positive when the esports team they support wins (75%), does well

(74%) and play the game well (74%). This is positive as it shows that one of the core factors in determining the consumers attitude towards esports is positive (Xiao 2019).

Figure 4.27 shows that the consumer intends to gain knowledge of esports, and this is positive as it shows that one of the core factors in determining the consumers attitude towards esports is positive (Xiao 2019). It can be seen that the majority of respondents are positive about gaining knowledge in the esports scene. This was concluded due to respondents agreeing that they believe it is beneficial for consumers to track the statistics of esports (74%), know the win loss records (63%) and read up about teams stats regularly (65%).

Please indicate to what extent do you feel good or bad about the following statements relating to knowledge acquisition of esports:

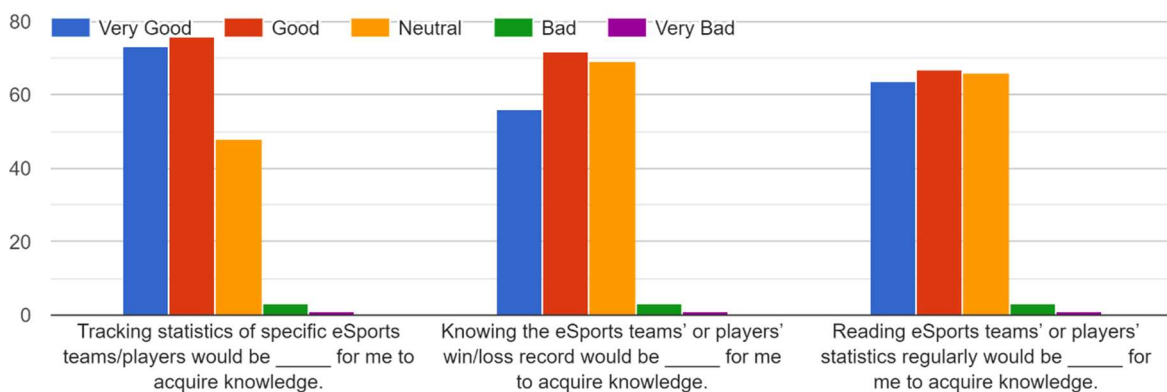


Figure 4.27 The consumers intention of gaining knowledge in esports

Figure 4.28 shows the participants intention that they view esports aesthetics positively by the majority respondents and they believe that it is a positive behavioural outcome for consumers due to: the inherent beauty (75%), natural beauty (73%) and gracefulness (70%). This is positive as it shows that one of the core factors in determining the consumers attitude towards esports is positive (Xiao 2019).

Please indicate to what extent do you feel good or bad about the following statements relating to aesthetics of esports:

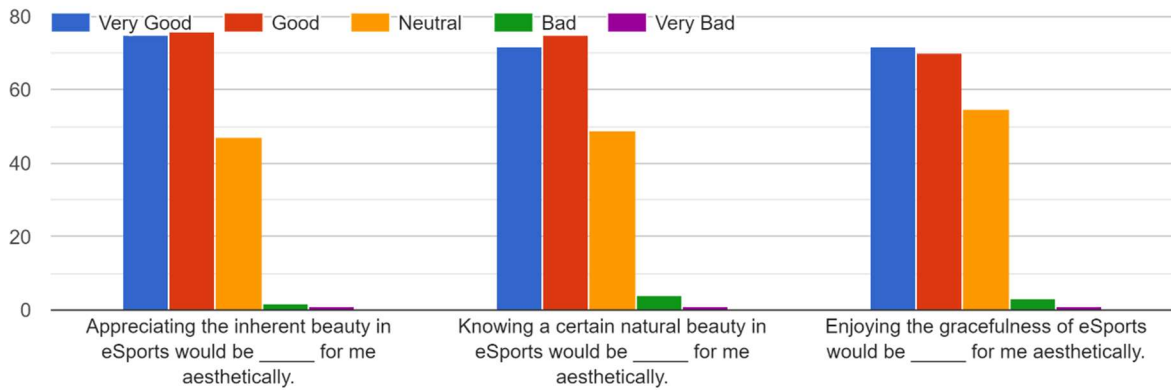


Figure 4.28 The consumers intention of acknowledging aesthetics in esports

Figure 4.29 shows that the participants enjoy the drama in esports, and it makes them feel good. This is important to note as it shows a positive trend in one of the core factors that help determine the consumers attitude towards esports is a positive one (Xiao 2019). Respondents felt positive that the drama would be a good form of entertainment, this is shown by an overwhelming number of respondents (85-90%) strongly agreeing with the above statements.

Please indicate to what extent do you feel good or bad about the following statements relating to the drama of esports:

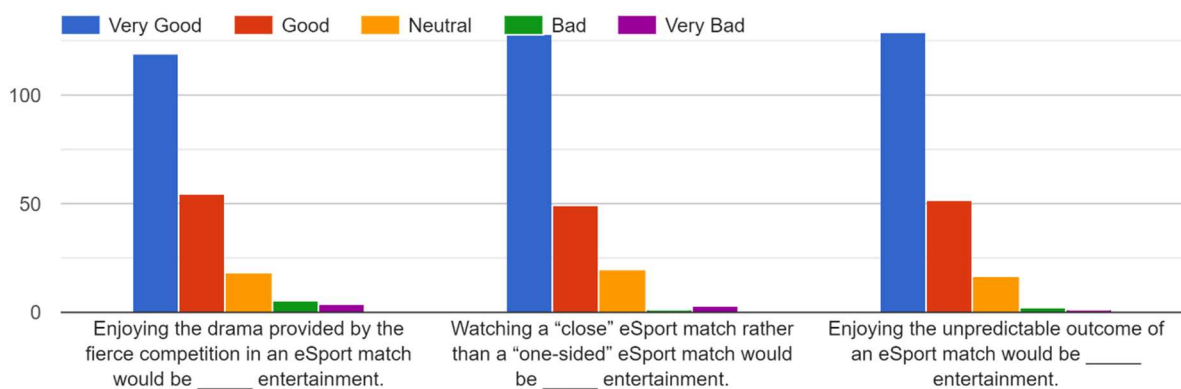


Figure 4.29 The consumers intention of appreciating the drama in esports

Figure 4.30 shows that the majority of respondents (64-72%) believe that esports is a positive method to use as an escape from their everyday routine. This means that they believe esports to be a beneficial escapism method. This is positive as it shows that one of the core factors in determining the consumers attitude towards esports is positive (Xiao 2019).

Please indicate to what extent do you feel good or bad about the following statements relating to escapism in esports:

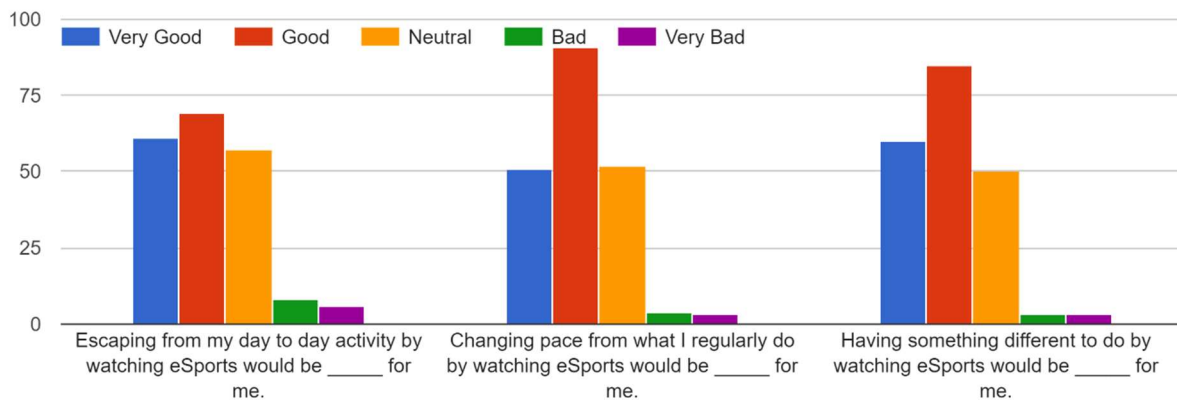


Figure 4.30 The consumers intention of using escapism in esports

Please indicate to what extent do you feel good or bad about the following statements relating to social interactions:

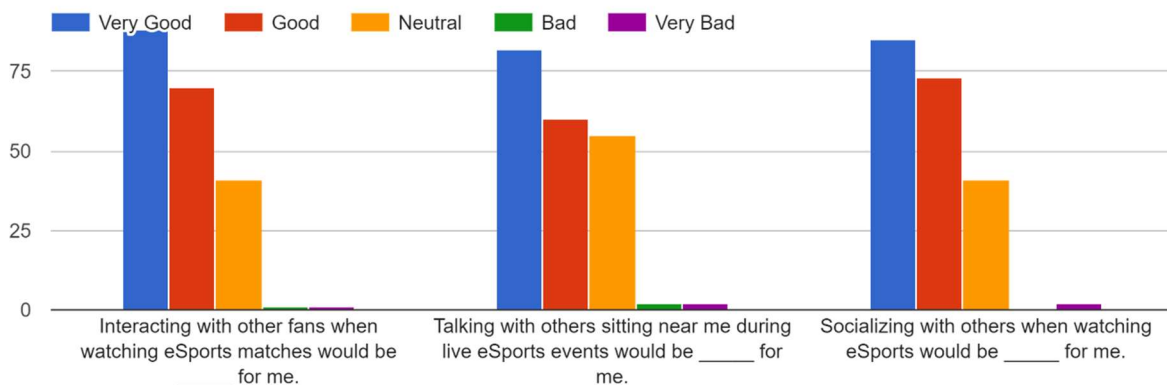


Figure 4.31 The consumers intention of interacting via social methods in esports

Figure 4.31 shows that the majority of respondents believe that esports will be a good form of social interaction (79% ,70%, 78%). This is positive as it shows that one of the core factors in determining the consumers attitude towards esports is positive (Xiao 2019).

4.5.3. Attitude about watching and taking part in esports

It can be seen by the figures 4.32 to 4.35 that the vast majority of respondents found esports to be good, valuable, pleasant and interesting. These graphs also show little to no negative responses which is important to note. This shows a positive attitude towards esports amongst consumers and is apart of the core factors in determining the consumers attitude towards esports is positive (Xiao 2019).

Please indicate to what extent do you feel good about watching esports:

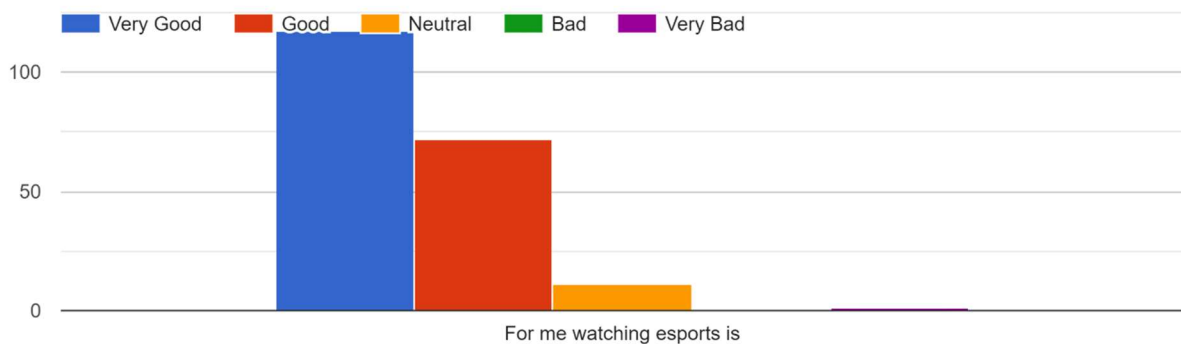


Figure 4.32 The consumers extent at which consumers feel good when watching esports

Please indicate to what extent do you feel valuable about watching esports:

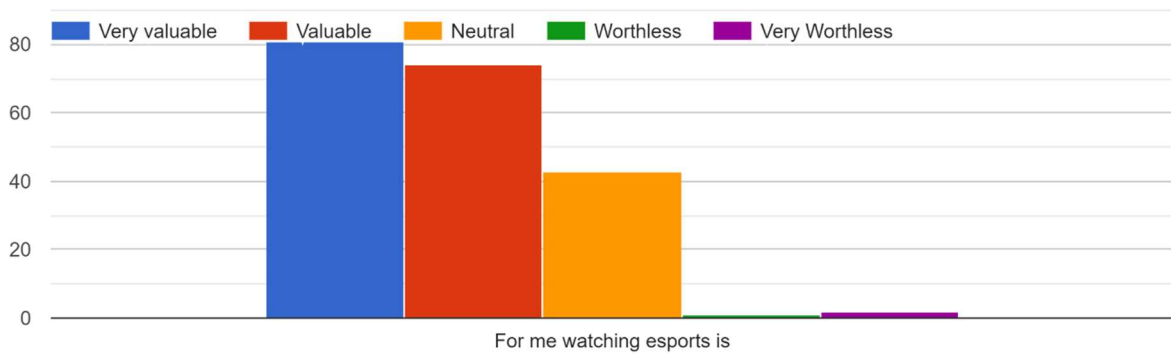


Figure 4.33 The consumers extent at which consumers feel esports is valuable, when watching esports

Please indicate to what extent do you feel pleasant about watching esports:

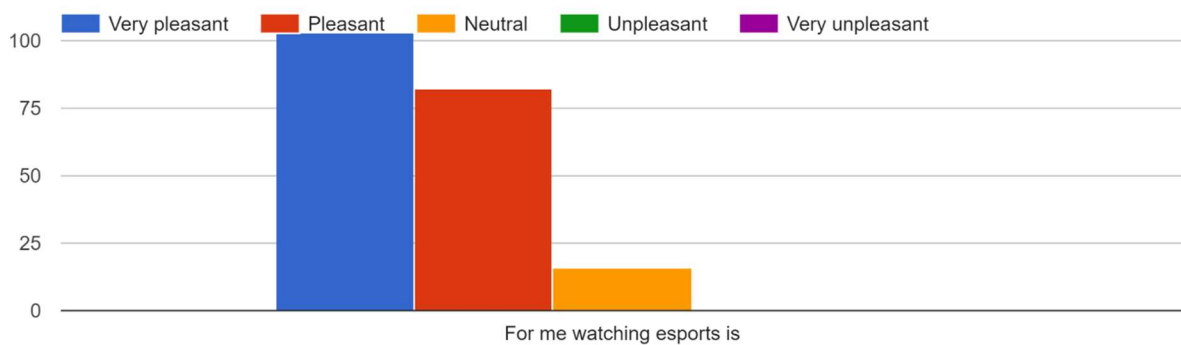


Figure 4.34 The consumers extent at which consumers feel pleasant when watching esports

Please indicate to what extent do you feel interested about watching esports:

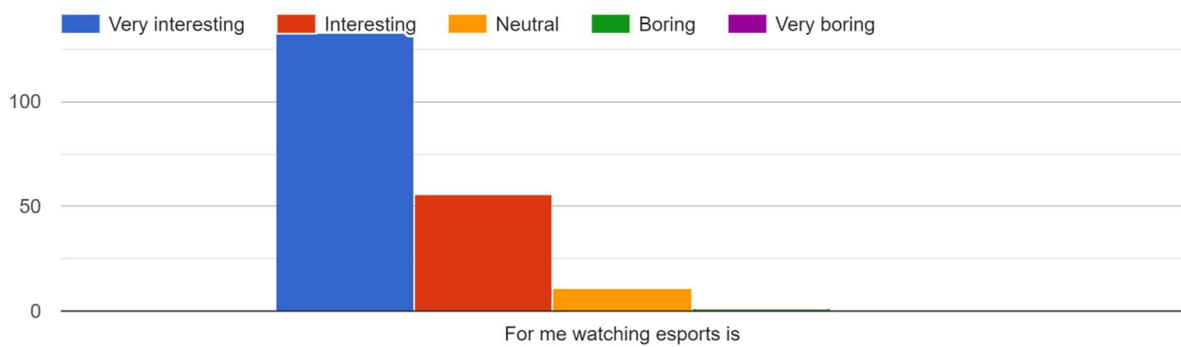


Figure 4.35 The consumers extent at which consumers feel interested when watching esports

4.6. Presentation of results: Perceptions of Consumers'

Figure 4.36 shows the normative beliefs of an esports consumers' social environment, this is important as it lays the foundations to following a social norm or not to follow it. It can be seen that 32% of the respondents have close friends that would support the spectatorship of esports while 28% have a non-supporting group. The second statement brings into account the respondents' personal environment, it can be seen that the majority of respondents' families have a negative perception towards watching esports (54%). This is important as having a conflicting social norm towards esports can negatively impact the attitude towards esports and thus prolong the growth of esports. The third statement shows that although there are some negative views from people they value the majority of respondents (39%) feel that their trusted social group support them in watching esports.

Please indicate to what extent do you agree or disagree with the following statements relating to normative beliefs:

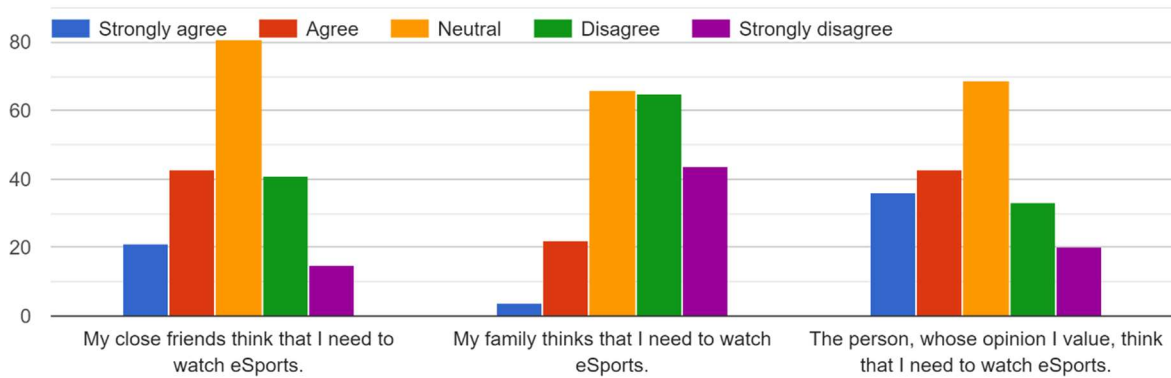


Figure 4.36 The consumers normative beliefs about watching esports

Figure 4.37 shows that the normative belief of following a social trend is low amongst the majority of esport consumers' as 47% of respondents disagreed with the first statement and 41% disagreed with the second statement. Although it is important to note that the esport consumers are motivated to comply with the value of people they deem important (41%). This shows a positive attitude towards esports as the participants do not follow the social norm and will continue to watch esports no matter the perception of esports (Xiao 2019).

Please indicate to what extent do you agree or disagree with the following statements relating to the motivation to comply with normative beliefs:

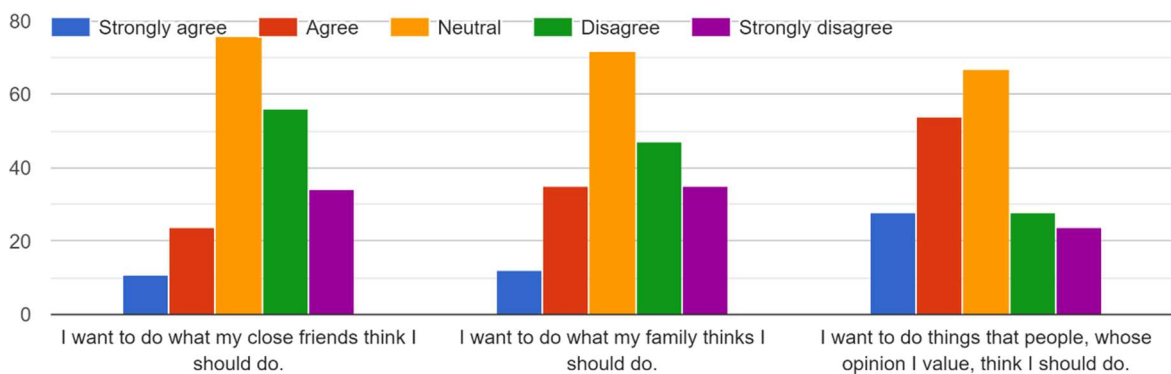


Figure 4.37 The consumers motivation to comply with the normative beliefs

Figure 4.38 shows that although the participants have a natural will to fit in and this may impact a decision, in esports the decision to watch esports is self-made. This can be seen as the majority of respondents (57%) disagree with watching esports to fit in, as well as the majority of respondents (53%) believe that esports reflects their personality to others. It is important to note 40% of respondents said that people close to them do not encourage the spectatorship of esports that could create a negative impact on the growth of esports.

Please indicate to what extent do you agree or disagree with the following statements relating to subjective norms:

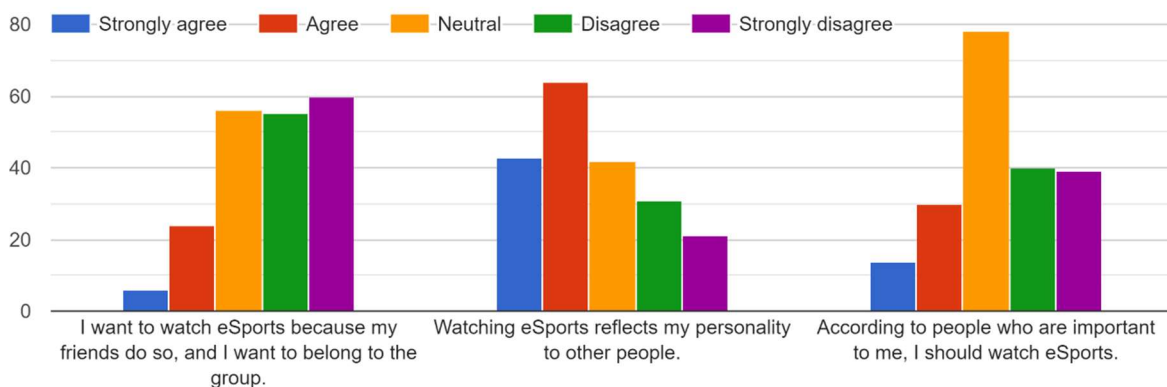


Figure 4.38 The consumers opinion of the subjective norms

Figure 4.39 depicts an overwhelming amount of respondents have a strong behavioural intention to watch esports (86%), continue to make an effort to watch esports (81%), and intend to watch esports (88%). This shows a positive attitude towards esports as the participants are internally motivated to engage in esports (Xiao 2019).

Please indicate to what extent do you agree or disagree with the following statements relating to your behavioural intentions:

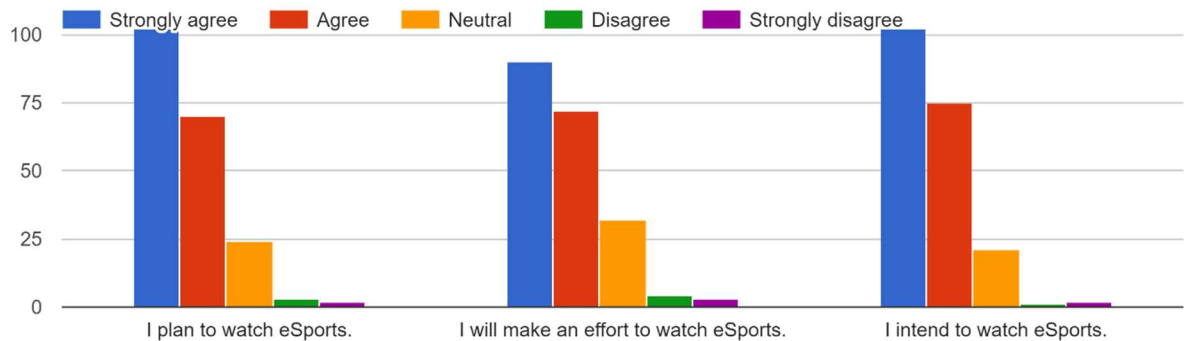


Figure 4.39 The consumers behavioural intentions

4.7. Suggested changes

Table 4.13 shows six common themes that can be established from the responses of the participants. The majority of respondents (52%) felt that advertising in the esports industry was not efficient and could be done better to help spread the awareness of esports, this varied from correct stigmatisms of the industry to advertisement on mainstream media. It is important to note that a fifth of the respondents (22%) felt that the development of esports could be done in a more proactive and methodical way starting from grass roots and establishing a governing body that is independent from Mind Sports South Africa. It can be seen that the change towards better prize pools and events are only 17%, this is evident that it may be a minor change for the industry in light of other themes. Although esports is a relatively new industry the respondents felt that esports was not advertised sufficiently, although the esports industry should look at seeking investors to help further the awareness (12%). The technological issues mentioned with in esports in South Africa was actually mentioned second least in the suggested changes with only 10% and increasing the knowledge of intricate details of esports was least with 6%.

Table 4.13 A summary of suggested changes that should be made to the esports industry in South Africa

Themes:	1 - Advertise		
	2-Better internet/computer engagement/infrastructure		
	3-Better Prize pool and events		
	4- Knowledge		
	5- Investment		
	6- Development		
		out of	Percentage
Total 1:	104	201	51.74
Total 6:	44	201	21.89
Total 3:	35	201	17.41
Total 5:	24	201	11.94
Total 2:	20	201	9.95
Total 4:	12	201	5.97

4.8. Reliability Statistics

The Cronbach Alpha technique was used to ensure that the statistics were precise, reliable and valid in this study. This technique measures the internal consistency of the Likert scale questions used in this study to see how closely related a list of items are as a group. This test is to establish a coefficient of reliability and/or consistency. The reliability is calculated by the use of several measurements that are conducted on the same subjects and a result is computed. A reliability coefficient of 0.60 or higher is considered as “acceptable”.

Table 4.14 below reflects the Cronbach’s alpha score for all the items that constituted the questionnaire.

Table 4.14 Cronbach Alpha results of the Likert questions used in the study

	Section	Number of Items	Cronbach's Alpha
A1.11	Please indicate to what extent you are likely to watch esports content on the following broadcasters: Ginx TV (DSTV channel 240), Twitch, Youtube, Facebook, Hitbox, uStream, StreamMe.	8	0.770
A1.14	Please indicate to what extent you are likely to: Pay to watch a tournament live, Buy a subscription to a tournament locally, View esports on social media when its free, View esports on Pay per view. (e.g. via private connection UFC), View esports on television.	5	0.696
B2.1	Please indicate to what extent you agree or disagree with the following definitions of esports:	2	0.571
B2.3	Please indicate to what extent do you agree or disagree that the following are esportsing codes/genres:	6	0.777
C3.1.1	Please indicate to what extent do you agree or disagree with the following statements relating to achievement:	3	0.829
C3.1.2	Please indicate to what extent do you agree or disagree with the following statements relating to knowledge acquisition:	3	0.892
C3.1.3	Please indicate to what extent do you agree or disagree with the following statements relating to aesthetics:	3	0.870
C3.1.4	Please indicate to what extent do you agree or disagree with the following statements relating to drama:	3	0.619
C3.1.5	Please indicate to what extent do you agree or disagree with the following statements relating to escapism:	3	0.870
C3.1.6	Please indicate to what extent do you agree or disagree with the following statements relating to social interaction:	3	0.810
C3.2.1	Please indicate to what extent do you feel good or bad about the following statements relating to achievement:	3	0.873
C3.2.2	Please indicate to what extent do you feel good or bad about the following statements relating to knowledge acquisition of esports:	3	0.908
C3.2.3	Please indicate to what extent do you feel good or bad about the following statements relating to aesthetics of esports:	3	0.941
C3.2.4	Please indicate to what extent do you feel good or bad about the following statements relating to the drama of esports:	3	0.778
C3.2.5	Please indicate to what extent do you feel good or bad about the following statements relating to escapism in esports:	3	0.907
C3.2.6	Please indicate to what extent do you feel good or bad about the following statements relating to social interactions:	3	0.926
D4.1	Please indicate to what extent do you agree or disagree with the following statements relating to normative beliefs:	3	0.762
D4.2	Please indicate to what extent do you agree or disagree with the following statements relating to the motivation to comply with normative beliefs:	3	0.842
D4.3	Please indicate to what extent do you agree or disagree with the following statements relating to subjective norms:	3	0.753
E5	Please indicate to what extent do you agree or disagree with the following statements relating to your behavioural intentions:	3	0.924

The reliability scores for all sections are below the minimum acceptable value of 0.70 and some may exceed but do not go over 0.90 which is the maximum value's for

internal consistency. These scores show that the internal consistency of the common range is low and that there is little to no redundancy or duplication. Questionnaires that contain twenty or more questions may give a false positive and in this study twenty questions were used ensuring that it upholds a degree of acceptable and consistent scoring for these sections of the research.

4.9. Factor Analysis

4.9.1. KMO and Bartlett's Test

	Section	Kaiser-Meyer-Olkin Measure of Sampling Adequacy.	Bartlett's Test of Sphericity		
			Approx. Chi-Square	df	Sig.
A1.11	Please indicate to what extent you are likely to watch esport content on the following broadcasters: Ginx TV (DSTV channel 240), Twitch, Youtube, Facebook, Hitbox, uStream, StreamMe.	0.834	1881.568	28	0.000
A1.14	Please indicate to what extent you are likely to: Pay to watch a tournament live, Buy a subscription to a tournament locally, View esports on social media when its free, View esports on Pay per view. (e.g. via private connection UFC), View esports on television.	0.736	231.506	10	0.000
B2	Please indicate to what extent you agree or disagree with the following definitions of esports:	0.514	41.958	3	0.000
B3	Please indicate to what extent do you agree or disagree that the following are esporting codes/genres:	0.747	356.576	15	0.000
C3.1	Behavioral Belief Strengths:	0.815	1889.543	153	0.000
C3.2	Behavioral Outcome Evaluations:	0.854	2816.897	153	0.000
D4	Perceptions	0.762	834.367	36	0.000
E5	Please indicate to what extent do you agree or disagree with the following statements relating to your behavioural intentions:	0.759	470.085	3	0.000

Table 4.15 KMO and Bartlett's Test results

The Kaiser-Meyer-Olkin Measure of Sampling Adequacy is a form of factor analysis and the value should be greater than 0.500. The Bartlett's Test of Sphericity sig. value should be fewer than 0.05. All of the circumstances are fulfilled for factor analysis.

4.10. Discussion of main insights

The AIDA principal (Rawal 2013) mentioned that a fundamental step was to gain the awareness of the consumer. In this study the consumers are aware of esports leagues as seen in figure 4.15. It can be seen that just over half of the respondents (61%) are aware of the local esports association, while other international associations were below 37% which shows that the respondents are less aware of various international organisations as seen in figure 4.17. The participants interest in esports was significant as they indicated that they watch major championships and local championships as indicated in figure 4.9. The participants desire for esports to be classified as a sport shown in figure 4.18 indicates that the consumers are actively seeking ways to take part or view esports and grow its perception amongst the population. and action of consumers in esports. The consumers actions with regards to esports indicate that consumers are reluctant to spend on esports but support the sport through means of public viewing on social media platforms such as twitch as seen in figure 4.16. The results confirm that the esports consumers need to have a greater desire, as this creates fervent motivation for consumers to engage in esports products/services and the desire will lead to a more impactful consumer action in the consumption of esports. The British Esports Association (2017) indicated that the esports audience is between the age of 16 to 30 and shows that the core audience is the younger generation. However, to increase the desire and action of esports can only be created by organisations that increasing the attention and awareness beyond the core audience as mentioned by Wong (2019).

The theory of reasoned action measured the behavioural beliefs with the outcome of those beliefs to form the consumers attitude as indicated by Xaio (2019). Section 4.5 shows that the results from this study on achievement, aesthetics, knowledge, escapism, drama, and social interaction are positively correlated with the attitude for esports in South Africa. Such positive correlations are similar to the results in Xiao's (2019) study. The consumers that participated in the study may not have a supportive normative norm to watch esports, as depicted in section 4.6, the majority of consumers would not be motivated to comply with those beliefs. This contradicts Xiao's (2019) conclusion that normative beliefs positively correlate with subjective beliefs as the consumers

were not motivated to comply with the normative belief. It is important to note that the consumers motivation to comply positively correlates with the subjective norms. The strength of the consumers normative beliefs and the motivation to comply with such beliefs formed a consumers' subjective norm. The behavioural intention of the consumer was impacted by the attitude and the subjective norm that led to the understanding of the consumers behaviour. It can be seen in figure 4.39 that consumers' behavioural intentions are to watch esports, this confirms Xiao's (2019) conclusion of subjective norms positively correlating with the attitude to watching esports.

The results showed that the audience that was obtained from the selected clusters were mainly between the age of 18-27 (46.8%) This is similar to the results of Wong (2019) and Jiow *et al* (2018) that the perception of esports is more commonly accepted by the younger generations. In Jiow's *et al* (2018) study the parents that were concerned with the misuse of time and a lack of understanding that esports had on their children, however it was proven that it could be positive for their children with the correct understanding. It can be seen that 45.8% of the respondents were employed while 36.8% were students. This shows that although parents are concerned, the audience that partakes in esports are aware of the volatility of esports by mainly participating while they are financially stable. Therefore it can be seen that the elder generation are unsure of esports and it creates a negative perception to expanding into a new 'field' that may not be fully explained to the general public. This knowledge of the esports industry should be taught in a freely accessible method with a singular explanation to avoid confusion and educate beyond the core audience.

It is important to note that although consumers can participate on multiple platforms (PC, Xbox and PS4/ PS5), the majority of consumers mainly use computers to engage with esports. As can be seen in section 2.3.4 the average price of a gaming pc ranges from R10 499 to R55 299 (Evetech 2021), this makes the entry level to the average consumer of esports barely accessible, even with careful budgeting. The higher end computers would be inaccessible to the average consumer in South Africa as the average recorded salary by BusinessTech (2020) was R22 500. This should be considered a growing concern to the entrance of esports for the average South African consumer.

Respondents (consumers) are aware of esports, but it is important to note that their understanding about the meaning of esports tends to differ. This can be seen in table 4.12 as the three definitions were agreed upon but all three have different meanings. These results in section 2.3 are similar to the results of Seo (2013) that clearly show that there are common misconceptions of esports. This shows that the information available about what esports is seems to not have a single basis to define esports, but rather multiple theories that can confuse consumers. This can be seen in table 4.6 as the majority of consumers learnt about esports through online gaming communities and not through traditional means.

4.11. Conclusion

The results that were obtained from the data analysis were presented in this chapter and were outlined in the form of tables, pie charts and bar charts. The majority of the respondents were white (78%), male (83%), primarily English speaking (69%), and below the age of 27 (72.6%). An overwhelming majority (98.5%) of the respondents were from South Africa, only 3 respondents were international. The respondents represented the following clusters: VSG (35%), ACGL (17%), Mettlestate (13%), ATK (11%), MSSA (9%), Social media (13%), and other gaming organisations (1.5%). The responses from the respondents were interpreted and discussed, with the aim of looking at how it compared to the literature review to either prove or disprove the literature. The next chapter presents the conclusions and recommendations of the study.

5. Conclusion and Recommendations

5.1. Introduction

This chapter seeks to discuss present the conclusions and recommendations. The discussion will be focused on understanding and determining the awareness, consumer knowledge, attitudes and perceptions of esport activities in South Africa. The discussion will address each of the five research questions and discuss what the outcome is and make conclusions for each objective and provide recommendations as well as areas for future research.

5.2. What do consumers know about esports?

The misconception of consumers not knowing about esports, was proven wrong due to consumers gaining knowledge mainly through online gaming communities. It is important to note that these consumers did not find out about esports via traditional methods known to the greater public and mainly through niche environments. The participants knowledge of esports showed an understanding of esports although the results clarified that the consumers had no clear idea on the definition that encompassed all the attributes of esports. This could be due to the lack of education around esports and knowledge in the community, as the results in section 4.3 showed a confusion between two definitions. The vast majority of respondents agreed on the five esporting codes that Yue (2018) and esportbetting elite (2019) had identified, thus proving that consumers have an adequate amount of knowledge about esports. It is important to create easily accessible channels of communication for the public to learn about esports so that the greater populace does not have to find small niche communities to explain esports. This would help to create a social norm and understanding of what esports is in South Africa.

5.3. Are consumers aware of South African esports?

The level of awareness about esports in South Africa is low, this research question was answered by the results showcasing that the participants were in fact aware of esports. It was evident that 99.5% were aware of esports and 93.5% would classify esports as a sport. The awareness of esports was established primarily through online gaming communities. It can be seen that major championships and leagues have the greater following, even though there are local tournaments. This could limit the consumer focus towards local esports as it is not as enjoyable as the majors. Xiao (2019) explained that the drama in esports creates a positive attitude to

esports, and the results from this dissertation showed that esports consumers gained a high level of dramatic effect from esports. However there is a lack of clarity if it was South African esports or international esports. This is a limitation in the study as consumers could be more aware of global esports. Consumers are aware of the three major streaming sites, namely: Youtube, Twitch and Facebook. The consumers prefer to view esports via Twitch and Youtube. This shows that although multiple streaming sites will try to engage with viewers, in the South African esports market utilizing these three services will attract a greater audience. It is important to note that 48.3% of the respondents would not pay to view esports making a pay per view option less viable in the South African esports industry. The majority of the respondents were aware of the esports organizations in South Africa, although it is important to note the vast majority were aware of Telkom VS Gaming. The consumers did have a misperception on the various associations due to multiple respondents listing incorrect associations and rather organizations. This shows that credible associations as listed by Shabir (2017) were less known. The majority were aware of Mind Sports South Africa and World Esport Association showing that there is awareness of the local association and one of the international associations. It is important for consumers to be aware of other associations as these associations help to ensure the level of esports is at a professional level and will enable them to identify which organizations are credible.

5.4. Are consumers awareness affected by the attitudes and perceptions of esports?

Xiao (2019) study showed that consumers attitudes were influenced by the theory of reasoned action, as well as the use and gratification theory. The results showed that Xiao (2019) was right as there is a positive relationship between the variables mentioned in the structural equation (see section 4.10). The behavioural strength and behavioural outcome for the consumers sense of achievement, knowledge acquisition, aesthetics, drama, escapism and social interaction were positive. These factors lead to a strong positively correlated attitude toward watching esports (Xiao 2019). The results in section 4.5 of the study showed that the majority of respondents had a positive attitude towards esports that positively correlated with their behavioural intention to watch esports (Xiao 2019). The normative beliefs of the participants were lower than the norm which showed a slightly lower relation to their

positive attitude of esports as shown in figure 4.36. However, the participants were not motivated to follow these beliefs that inherently meant that they would still intend to watch esports, this showed that they were internally motivated to watch esports. The subjective norms had a negative result as 57.3% disagreed with the statement that they watch esports because their friends did so and 39.3% disagreed with the statement that they watched esports because the people they deem important want them to watch esports. This shows that esports consumers are not as impacted by the social norms and are more resilient to being influenced. This contradicts Xiao (2019) hypothesis "Subjective norms positively correlate with behavioural intention to watch esports." (Xiao 2019: 12) as in South Africa the subjective norms do not influence the behavioural intention to watch esports. This shows that the consumers have a positive attitude towards esports and that they are not affected by external social factors towards the sport (see section 4.6).

5.5. What factors contribute to the consumers opinions of esports?

The consumers opinions of esports is influenced by niche communities that they belong to as the awareness of esports is not portrayed via other methods known to them. This could make the industry hard to grow as the consumers are spread across multiple platforms and groups. The esports industry should create an association that they can be a part of that runs parallel to Mind Sport South Africa, due to the negative mentions in the data, to ensure there is a central point in which the industry is represented in South Africa.

5.6. What changes should be made to improve the awareness of esports?

Half of the respondents (51.74%) mention that consumers want more advertising of esports in South Africa. This means that the current advertising plan should approach a more inclusive and adaptive form of advertising to gain the consumers' attention. The principles of the AIDA Model should be reviewed and tailored to target the correct consumer market, as the current advertising is not reaching the consumers. A segment of respondents believe that it is important to develop esports further in the form of grass root programs and integrations with the general populace of South Africa. This would help create awareness as it would be a professional approach to educate and include as many consumers in South Africa as possible. A minority of respondents explained that the prize pools create a lack of awareness as the amounts are insignificant and unsustainable. This is a common phenomenon as

the sporting scene had a lack of funding and monetary prizes when it was still emerging. However, tackling this issue in the development stages by creating a successfully esports ecosystem would allow a faster growth for esports in South Africa.

5.7. Recommendations

The following recommendations are made as a result of the study

- Create an association to unify all organizations so that consumers have a common point of interaction for knowledge, rules and regulations in the esports environment.
- Create awareness of esports to the greater populace through the forms of more traditional media to penetrate and correct the various social norms.
- Integrate more viewership rewards to stimulate paying or subscribing viewers.
- Create tournaments that are sustainable and frequent with consistent prize money to allow for esports to be a more stable career path.

5.8. Recommendations for future studies

There are four areas of interest that could be considered for future studies.

Firstly, the development model of esports and its nature should be further defined and a developmental model of the esports industry should be created from the perspective of the government management. This would allow clarification of a development model for esports and the esports industry. It is recommended that government divisions learn from developed countries esports industries to help articulate an esports policy, effectively differentiate different attributes of esports and online games, and act according to esports industry's own expansion.

Secondly, esports has a close relationship with technological innovation and impacts information consumption. Simultaneously, esports is also an athletics industry that is related to the healthy growth of minors and their education of sports habits. Therefore, the government can encourage policies to ensure healthy esports curriculums are implemented at an early stage to stimulate awareness and participation amongst adolescents. This could help guide the entire industry in the direction of healthier and more positive development within South Africa.

Thirdly, esports in South Africa boomed during lockdown as the impressions made in the local market for AAA titles grew exponentially. It can be seen that lockdown has created an upward trend in competitive gaming tournaments and leagues, which has been aided by an increase in digital literacy. It is important to note that during lockdown social distancing and gatherings are kept to minimal interaction, this has in turn focused many consumers to connect via digital means and challenge themselves to a virtual variation of the more traditional sport competition.

Fourthly, the creation of an esports Structural Equation Model (SEM) to effectively correlate the consumers attitudes with the intention to watch esports. This will help businesses understand the consumer market and identify what their needs could be based on their attitudes towards esports, allowing a more tailored marketing approach towards consumers. An example of a Structural Equation Model can be found in Appendix 5.

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Appendix 1: Questionnaire & Informed Consent

Esports: The consumers' awareness levels of esports in South Africa.

* Required



Request your permission to participate in an academic research project

Informed Consent Letter

UNIVERSITY OF KWAZULU-NATAL
GRADUATE SCHOOL OF BUSINESS AND LEADERSHIP

Master of Business Administration
Caleb Womack (082 491 4743)
Supervisor: Dr Emmanuel Mutambara (031 260 8129)
Research Office (HSSREC): Prem Mohun (031 260 4557)

Dear Respondent

I, Caleb Womack am a Master of Business Administration student, at the Graduate School of Business and Leadership, of the University of KwaZulu-Natal. Invite you to participate in a research project entitled: "Esports: The consumers' awareness levels of esports in South Africa". The aim of the study is to establish consumer knowledge, attitudes and perceptions of esports activities in South Africa and how it impacts their awareness.

Through your participation I hope

- To establish the extent to which South Africans knows about esports.
- To assess the level of awareness of esports in South Africa.
- To determine how the awareness of esports is affected by consumers (gamers) attitudes and perceptions.
- To determine the factors that may contribute to the opinions of esports in South Africa.
- To establish what changes should be made to esports to improve the awareness.

Your participation in this project is voluntary. You may refuse to participate or withdraw from the project at any time with no negative consequence. There will be no monetary gain from participating in this questionnaire. Confidentiality and anonymity of records identifying you as a participant will be maintained by the Graduate School of Business and Leadership, UKZN.

If you have any questions or concerns about participating in the questionnaire or about participating in this study, you may contact me or my supervisor at the numbers listed above.

The questionnaire should take about 15 – 20 minutes at the most. I hope you will find the above study topic and its intended objectives worthy or valuable to spend time on and make time to participate.

I hope you will agree to participate in this research and in the hope that you will agree; I am sending you my questionnaire to complete online.

If you have any questions or concerns about the research, you may contact me on my cell 082 491 4743 or by email womacale@hotmail.com

I humbly thank you for having taken the time to read this letter and I humbly look forward to receiving a favourable response from you.

Yours faithfully

CALEB WOMACK (MR)
Student No. 217078723
P.O.Box 30985
Mayville
4058

Statement of Agreement and Consent to Participate in the Research Study:

1. Consent *

I hereby confirm that I have been informed by the researcher, Caleb Womack, about the nature, conduct, benefits and risks of this study - Research Ethics Clearance Approval Number: HSSREC/00000770/2019, I have received, read and understood the Participant Letter of Information regarding the study. I am aware that the results of the study, including that of the business entity concerned and my personal details regarding my full names, age, sex and responses will be anonymously processed into a study report. In view of the requirements of research, I agree that the data collected during this study may be processed in a computerised system by the researcher. I may, at any stage, without prejudice, withdraw my consent and participation in the study, without giving my reasons therefore and with no consequences of any nature to me. I have had sufficient opportunity to ask questions and of my own free will declare myself prepared to participate in the study. I understand that any significant new findings developed during the course of this research may be as a result of my participation and will be made available to me, upon my request.

Mark only one oval.

- I consent to participate in this study.
- I do not consent to participate in this study.

Esports: The consumers' awareness levels of esports in South Africa.

Esports Survey Questionnaire

HOW TO COMPLETE THE QUESTIONNAIRE
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1. Please answer the questions as truthfully as you can. Please read and follow the directions for each part.
2. You may only answer the questions you feel comfortable about. If you are uncomfortable to answer a question, you may indicate that you do not want to answer it. Would you kindly give your reason. For those questions that you do answer, your responses will be kept confidential.
3. You can mark each response by the appropriate boxes via a computer, or by filling in the required words or numbers.

In this questionnaire, you are asked to indicate your opinion or perception, so there is no "right" or "wrong" answers to any question. If you wish to make a comment please write it directly on the questionnaire itself. Please try to answer all the questions. The questionnaire should only take 15-20 minutes to complete.

Thank you for participating.

THE FOLLOWING THEMES WILL BE COVERED IN THE QUESTIONNAIRE:

- Awareness of esports
- Knowledge of esports
- Attitudes towards esports
- Perceptions of esports
- Behavioral intentions towards esports.
- Suggested changes to esports to improve awareness

Please note that in the questionnaire abbreviations will be explained per question.

PART 1: Awareness

Please select only ONE response per row for each of the statements that follow below.

2. Please indicate whether you have heard of the term esports? *

Mark only one oval.

- Yes
- No

3. How did you first learn about esports? *

User generated content - Reddit, memes, etc.

Mark only one oval.

- By word of mouth
- Through online gaming communities
- Through user generated content
- Through social media
- Through esports organizations
- Other: _____

4. What would you classify yourself as with regards to gaming? *

Mark only one oval.

- Hard core gamer
 Esports competitor
 Casual gamer
 Spectator / just a viewer
 Other: _____

5. To what extent are you involved in esports? *

Mark only one oval.

- No involvement
 Spectator / watch only
 Watch and participate
 Participate / player
 Other: _____

6. How regularly do you watch esports? *

Mark only one oval.

- Once a week
 Twice a week
 Three times a week
 Four times a week
 Five times a week
 Six times a week
 Daily
 Not at all

7. If you watch esports indicate which of the following do you watch? *

You may select multiple options that are applicable.

Check all that apply.

- Friendly games (e.g. scrims)
 Local tournaments
 Local championships
 Major leagues
 Major championships

Other: _____

8. If you participate, indicate how regularly you participate in esports? *

Mark only one oval.

- Once a week
- Twice a week
- Three times a week
- Four times a week
- Five times a week
- Six times a week
- Daily
- Not at all

9. How much do you spend of your income on esports / gaming in a month? *

This could be subscriptions, battlepasses, worldcup packages, gaming titles in esports

Mark only one oval.

- Under R1000
- R1001 – R2000
- R2001 – R3000
- R3001 – R4000
- R4001 – R5000
- In excess of R5000
- Other: _____

10. Please indicate which of the following broadcasting services you are aware of: *

If there is another site please fill in the short answer on the next question if not you may skip it.

Mark only one oval per row.

	Yes	No
Ginx TV (DSTV channel 240)	<input type="radio"/>	<input type="radio"/>
Twitch	<input type="radio"/>	<input type="radio"/>
Youtube	<input type="radio"/>	<input type="radio"/>
Facebook	<input type="radio"/>	<input type="radio"/>
Azubu	<input type="radio"/>	<input type="radio"/>
Hitbox	<input type="radio"/>	<input type="radio"/>
uStream	<input type="radio"/>	<input type="radio"/>
StreamMe	<input type="radio"/>	<input type="radio"/>

11. Please state any other streaming sites you are aware of?

12. Please indicate which of the following broadcasting services you use to view esports players or tournaments: *
Please select at least one and select all that are applicable.

Check all that apply.

- Ginx TV (DSTV channel 240)
- Twitch
- Youtube
- Facebook
- Azubu
- Hitbox
- uStream
- StreamMe

Other: _____

13. Please state any other streaming sites you have used?

14. Please indicate to what extent you are likely to watch esports content on the following broadcasters: *

Mark only one oval per row.

	Very likely	Quite likely	Neutral	Quite unlikely	Very unlikely
Ginx TV (DSTV channel 240)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Twitch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Youtube	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Facebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Azubu	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hitbox	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
uStream	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
StreamMe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

15. Please indicate which of the following esportsing codes/genres you prefer watching: *
Please select all that apply to your preferences.

Check all that apply.

- Multiplayer Online Battle Arena (MOBA)
- First-Person Shooters (FPS)
- Fighting Games
- Real-Time Strategy (RTS)
- Sports Games
- Racing Games

16. Please indicate which of the following local leagues / tournaments you are aware of: *
Please select all that are applicable to you.

Check all that apply:

- VS Gaming - Telkom Digital Gaming League
 Mettlestate - Organization for local tournaments and leagues
 ACGL - Organization for local tournaments and leagues
 ATK ARENA - Gaming Organisation in Cape Town
 MSSA - Mind sports South Africa (Gaming association in South Africa)

Other: _____

17. Please indicate to what extent you are likely to: *
Social media - Streaming sites such as twitch, youtube etc. Pay per view - Similar to UFC pay per view sites (e.g. box office)

Mark only one oval per row.

	Very likely	Quite likely	Neutral	Quite unlikely	Very unlikely
Pay to watch a tournament live.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Buy a subscription to a tournament locally.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
View esports on social media when its free.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
View esports on Pay per view. (e.g. via private connection UFC)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
View esports on television.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

18. Please indicate which of the following registered esports associations are you aware of: *
These are registered legal entities that comply with esports regulations and are officially connected to the legal body regulating esports around the world

Check all that apply:

- WESA - World Esports Association
 IESF - International Esports Federation
 BEA - British Esports Association
 ESIC - Esports Integrity Coalition
 KESA - Korean Esports association
 MSSA - Mind Sports South Africa

Other: _____

19. Please state what would motivate you to watch more South African esports?
Anything that you deem as relevant motivating factors.

Knowledge of esports

Please mark with a cross only ONE response to each of the statements per row below.

20. Please indicate to what extent you agree or disagree with the following definitions of esports: *

Mark only one oval per row.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
An area of sports activities in which individuals develop and train mental [and] physical abilities in the use of information and communication technologies (internet).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An activity of playing computer games against other people on the internet that are commonly: for money, to be watched by others or at specialized events.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Games that allow participants to rival real-life sport within a game that simulates a professional league and does not require physical activity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

21. Would you classify esports as a sport? *

Mark only one oval.

- Yes
 No

22. Please indicate to what extent do you agree or disagree that the following are esportsing codes/genres: *

E.g. Titles in which an individual can compete in esports.

Mark only one oval per row.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Multiplayer Online Battle Arena (MOBA)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
First-Person Shooters (FPS)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fighting Games	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Real-Time Strategy (RTS)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sports Games	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Racing Games	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

PART 3: Attitudes

Please select only ONE option in the questions that follow below.

Behavioral Belief Strengths:

This means how much you agree or disagree with the below statements in the mentioned scenarios.

23. Please indicate to what extent do you agree or disagree with the following statements relating to achievement: *
- Achievement is when something is accomplished: especially by superior ability; special effort; or great courage; etc.

Mark only one oval per row.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
I feel like I have won when the esports teams/players I support wins.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel a personal sense of achievement when the esports teams/players I support does well.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel proud when the esports teams/players I support play well,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

24. Please indicate to what extent do you agree or disagree with the following statements relating to knowledge acquisition: *
- Knowledge acquisition is a method of learning.

Mark only one oval per row.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
I regularly track the statistics of specific eSports teams/players.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I usually know the eSports player's or team's win/loss record.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I read the eSports player's or team's statistics regularly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

25. Please indicate to what extent do you agree or disagree with the following statements relating to aesthetics: *
- Aesthetics is the nature and appreciation of beauty.

Mark only one oval per row.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
I appreciate the inherent beauty in eSports.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a certain natural beauty to eSports.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I enjoy the gracefulness associated with eSports.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

26. Please indicate to what extent do you agree or disagree with the following statements relating to drama: ⁴
Drama is an exciting, emotional, or unexpected event or circumstance.

Mark only one oval per row.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
I enjoy the drama of an eSport match with fierce competition.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I prefer a close eSport match rather than a "one-sided" match.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An eSport match is more enjoyable to me when the outcome is not decided until the very end.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

27. Please indicate to what extent do you agree or disagree with the following statements relating to escapism: *
- Escapism is to seek a distraction or relief from unpleasant realities such as using entertainment or engaging in fantasy.

Mark only one oval per row.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Watching eSports represents an escape for me from my day-to-day activities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching eSports are a great change of pace from what I regularly do	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I look forward to watch eSports because they are something different to do	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

28. Please indicate to what extent do you agree or disagree with the following statements relating to social interaction: *
- Social interaction is an exchange between two or more individuals.

Mark only one oval per row.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Interacting with other fans is a very important part of watching eSports matches.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I like to talk to other people sitting near me when I'm attending live eSports events.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching eSports are great opportunities to socialize with others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Behavioral Outcome Evaluations:

This means how good or bad you feel about the below statements in the mentioned scenarios.

29. Please indicate to what extent do you feel good or bad about the following statements relating to achievement: *
- Achievement is when something is accomplished: especially by superior ability; special effort; or great courage; etc.

Mark only one oval per row.

	Very Good	Good	Neutral	Bad	Very Bad
I feel like I have won when the esports teams/players I support wins.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel a personal sense of achievement when the esports teams/players I support does well.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel proud when the esports teams/players I support play well.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

30. Please indicate to what extent do you feel good or bad about the following statements relating to knowledge acquisition of esports: *
- Knowledge acquisition is a method of learning.

Mark only one oval per row.

	Very Good	Good	Neutral	Bad	Very Bad
Tracking statistics of specific eSports teams/players would be ____ for me to acquire knowledge.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Knowing the eSports teams' or players' win/loss record would be ____ for me to acquire knowledge.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reading eSports teams' or players' statistics regularly would be ____ for me to acquire knowledge.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

31. Please indicate to what extent do you feel good or bad about the following statements relating to aesthetics of esports: *
- Aesthetics is the nature and appreciation of beauty.

Mark only one oval per row.

	Very Good	Good	Neutral	Bad	Very Bad
Appreciating the inherent beauty in eSports would be ____ for me aesthetically.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Knowing a certain natural beauty in eSports would be ____ for me aesthetically.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enjoying the gracefulness of eSports would be ____ for me aesthetically.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

32. Please indicate to what extent do you feel good or bad about the following statements relating to the drama of esports: *
- Drama is an exciting, emotional, or unexpected event or circumstance.

Mark only one oval per row.

	Very Good	Good	Neutral	Bad	Very Bad
Enjoying the drama provided by the fierce competition in an eSport match would be ____ entertainment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching a "close" eSport match rather than a "one-sided" eSport match would be ____ entertainment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enjoying the unpredictable outcome of an eSport match would be ____ entertainment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

33. Please indicate to what extent do you feel good or bad about the following statements relating to escapism in esports: *
- Escapism is to seek a distraction or relief from unpleasant realities such as using entertainment or engaging in fantasy.

Mark only one oval per row.

	Very Good	Good	Neutral	Bad	Very Bad
Escaping from my day to day activity by watching eSports would be ____ for me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Changing pace from what I regularly do by watching eSports would be ____ for me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Having something different to do by watching eSports would be ____ for me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

https://docs.google.com/forms/d/19fwG_ghSGNI0BnBOg5MGZtjLq_k9FBrqFmCH-n-jlcc/edit

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34. Please indicate to what extent do you feel good or bad about the following statements relating to social interactions: *
- Social interaction is an exchange between two or more individuals.

Mark only one oval per row.

	Very Good	Good	Neutral	Bad	Very Bad
Interacting with other fans when watching eSports matches would be ____ for me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Talking with others sitting near me during live eSports events would be ____ for me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Socializing with others when watching eSports would be ____ for me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Attitude about watching and taking part in esports:
This means how you feel with regards to the following statement.

35. Please indicate to what extent do you feel good about watching esports: *

Mark only one oval per row.

	Very Good	Good	Neutral	Bad	Very Bad
For me watching esports is	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

36. Please indicate to what extent do you feel valuable about watching esports: *

Valuable - a thing that is of great worth

Mark only one oval per row.

	Very valuable	Valuable	Neutral	Worthless	Very Worthless
For me watching esports is	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

37. Please indicate to what extent do you feel pleasant about watching esports: *

Pleasant - giving a sense of happy satisfaction or enjoyment

Mark only one oval per row.

	Very pleasant	Pleasant	Neutral	Unpleasant	Very unpleasant
For me watching esports is	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

38. Please indicate to what extent do you feel interested about watching esports: *
- Interesting - arousing curiosity or interest; holding or catching the attention.

Mark only one oval per row.

	Very interesting	Interesting	Neutral	Boring	Very boring
For me watching esports is	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

PART 4: Perceptions

Please mark with a cross only ONE option in the questions that follow below.

Normative Belief Strengths:

Normative beliefs are individuals' beliefs about the extent to which other people who are important to them think they should or should not perform particular behaviors.

39. Please indicate to what extent do you agree or disagree with the following statements relating to normative beliefs: *

Mark only one oval per row.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
My close friends think that I need to watch eSports.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My family thinks that I need to watch eSports.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The person, whose opinion I value, think that I need to watch eSports.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Motivation to comply with normative belief:

Normative beliefs are individuals' beliefs about the extent to which other people who are important to them think they should or should not perform particular behaviors.

40. Please indicate to what extent do you agree or disagree with the following statements relating to the motivation to comply with normative beliefs: *
- Normative beliefs are individuals' beliefs about the extent to which other people who are important to them think they should or should not perform particular behaviors.

Mark only one oval per row.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
I want to do what my close friends think I should do.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I want to do what my family thinks I should do.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I want to do things that people, whose opinion I value, think I should do.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Subjective Norms:

Subjective norms refer to the belief that an important person or group of people will approve and support a particular behaviour.

41. Please indicate to what extent do you agree or disagree with the following statements relating to subjective norms: *
- Subjective norms refer to the belief that an important person or group of people will approve and support a particular behaviour.

Mark only one oval per row.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
I want to watch eSports because my friends do so, and I want to belong to the group.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watching eSports reflects my personality to other people.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
According to people who are important to me, I should watch eSports.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

PART 5: Behavioral Intentions

Please mark with a cross only ONE option in the questions that follow below.

42. Please indicate to what extent do you agree or disagree with the following statements relating to your behavioural intentions: *
- Behavioural intention is your perceived likelihood or subjective probability that you will engage in a given behaviour.

Mark only one oval per row.

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
I plan to watch eSports.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I will make an effort to watch eSports.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I intend to watch eSports.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

PART 6: Suggested changes to be made to esports to improve awareness

43. Briefly state what changes do you suggest should be made to improve awareness of esports within South Africa.

PART 7: GENERAL PARTICULARS

Please tell me a little about yourself
Please mark only ONE option per question below.

44. Please indicate your age: *

Mark only one oval.

- 18 - 22
- 23 - 27
- 28 - 32
- 33 - 37
- 38 - 42
- 43 - 47
- 48 - 52
- 53 +

45. Please indicate your gender: *

Mark only one oval.

- Male
- Female
- Other: _____

46. Please indicate your current working status: *

Mark only one oval.

- Student
- Employed
- Unemployed
- Self-employed
- Other: _____

47. Please indicate whether or not you currently reside in South Africa: *
If abroad please specify under other.

Mark only one oval.

- South Africa
- Other: _____

48. Please indicate where you currently reside in South Africa: *
If you reside in South Africa please indicate which province.

Mark only one oval.

- Eastern Cape
- Free State
- Gauteng
- KwaZulu-Natal
- Limpopo
- Mpumalanga
- Northern Cape
- North West
- Western Cape
- Other: _____

49. Please indicate your race group: *

Mark only one oval.

- African
- Asian
- Coloured
- Indian
- White
- Other: _____

50. Please indicate your home language: *

Mark only one oval.

- Afrikaans
- English
- Ndebele
- Northern Sotho
- SA Sign Language
- Sesotho
- Swati
- Tsonga
- Tswana
- Venda
- Xhosa
- Zulu
- Other: _____

51. Please indicate your highest level of academic qualification: *

Mark only one oval.

- Grade 10
- Grade 11
- Grade 12 - Matric
- Diploma
- Degree
- Post graduate diploma
- Masters
- Doctorate
- Other: _____

52. Which of the following do you use to participate in gaming: *

You can choose more than one option, if applicable.

Check all that apply.

- Xbox
- PS4
- PC (computer)
- Nintendo Switch
- VR
- Mobile Devices
- Other: _____

53. Which of the following leagues do you participate in: *

You can choose more than one option, if applicable.

Check all that apply.

- VSG - Organization for local tournaments and leagues, Telkom Do gaming League
 - ACGL - Organization for local tournaments and leagues
 - ATK ARENA - Gaming Organisation in Cape Town
 - Mettlestate - Organization for local tournaments and leagues
 - MSSA - Mind sports South Africa (Gaming association in South Africa)
- Other: _____

54. From which organization did you gain access to this questionnaire *

Please select one.

Mark only one oval.

- VSG - Organization for local tournaments and leagues, Telkom Do gaming League
- ACGL - Organization for local tournaments and leagues
- ATK ARENA - Gaming Organisation in Cape Town
- Mettlestate - Organization for local tournaments and leagues
- MSSA - Mind sports South Africa (Gaming association in South Africa)
- Other: _____

PART 6: ADDITIONAL COMMENTS

55. Please feel free to comment on or add anything which you feel is relevant and which may not have been covered or adequately covered in this questionnaire:

This content is neither created nor endorsed by Google.

Google Forms

Appendix 2: Example Structural Equation Model (SEM)

The model below is a multivariate statistical result that was obtained using structural relationships, applying a combination of factor analysis and multiple regression analysis techniques. It is used to analyse the structural relationship between the attitude of consumers and the behavioural intention to watch esports.

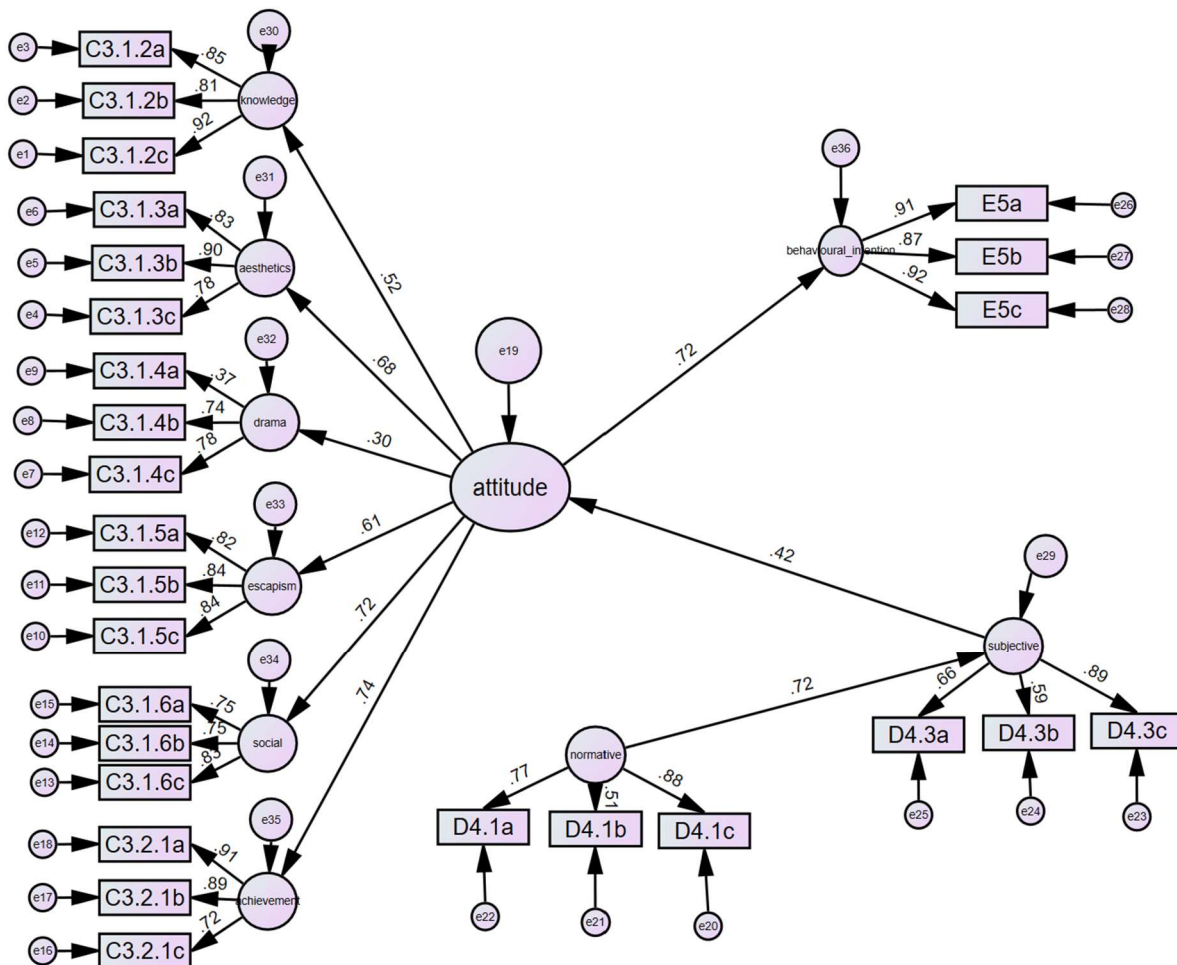


Figure 5.1 An example of the Structural Equational Model.

This path diagram shows that the various behavioural motivational factors have a strong influence on the attitude of consumers in the esports market. This attitude is impacted slightly by subjective norms of esports in South Africa, although the behavioural intention of the consumer will still partake in esports regardless. This shows that consumers will have a positive attitude towards engaging in esports related content, events, or services.

Key:

C3.2.1a	I feel like I have won when the esports teams/players I support wins	Sense of Achievement	Behavioural motivation
C3.2.1b	I feel a personal sense of achievement when the esports teams/players I support does well		
C3.2.1c	I feel proud when the esports teams/players I support play well		
C3.1.2a	I regularly track the statistics of specific eSports teams/players	Consumer Knowledge	
C3.1.2b	I usually know the eSports player's or team's win/loss record		
C3.1.2c	I read the eSports player's or team's statistics regularly		
C3.1.3a	I appreciate the inherent beauty in eSports	Aesthetics	
C3.1.3b	There is a certain natural beauty to eSports		
C3.1.3c	I enjoy the gracefulness associated with eSports		
C3.1.4a	I enjoy the drama of an eSport match with fierce competition	Drama	
C3.1.4b	I prefer a close eSport match rather than a "one-sided" match		
C3.1.4c	An eSport match is more enjoyable to me when the outcome is not decided until the very end		
C3.1.5a	Watching eSports represents an escape for me from my day-to-day activities	Escapism	
C3.1.5b	Watching eSports are a great change of pace from what I regularly do		
C3.1.5c	I look forward to watch eSports because they are something different to do		
C3.1.6a	Interacting with other fans is a very important part of watching eSports matches	Social interaction	
C3.1.6b	I like to talk to other people sitting near me when I'm attending live eSports events		
C3.1.6c	Watching eSports are great opportunities to socialize with others		
D4.1a	My close friends think that I need to watch eSports	Normative Norms	
D4.1b	My family thinks that I need to watch eSports		
D4.1c	The person whose opinion I value think that I need to watch eSports		
D4.3a	I want to watch eSports because my friends do so and I want to belong to the group	Subjective Norms	
D4.3b	Watching eSports reflects my personality to other people		
D4.3c	According to people who are important to me I should watch eSports		
E5a	I plan to watch eSports	Behavioural Intention	
E5b	I will make an effort to watch eSports		
E5c	I intend to watch eSports		

Appendix 3: Gatekeepers Letter

Gatekeeper's response ATK

ATK esport | www.atkarena.com

To whom it may concern
University of KwaZulu Natal
Ethical Clearance Committee

Dear Sirs

RE: CONFIRMATION OF RESEARCH

We refer to a letter dated 14/10/2019 in which Caleb Luis Womack expressed interest in conducting research titled "Esports: The consumers' awareness levels of esports in South Africa" in fulfilment of a mini dissertation for a master's degree in business administration with the University of KwaZulu Natal.

There are no objections to his study and if his proposal is approved, we ATK esport are willing to work with him.

In light of the aforesaid, this letter serves to confirm that student Caleb Luis Womack, student number 217078723 has sought and obtained permission to conduct research within our league, gaming community etc.

Yours faithfully



ATK esport Company
91 Main road, Claremont
0817268421
info@atkarena.com

Gatekeeper's response ACGL



To whom it may concern

University of KwaZulu Natal

Ethical Clearance Committee

Dear Sirs

RE: CONFIRMATION OF RESEARCH

We refer to a letter dated 14/10/2019 in which Caleb Luis Womack expressed interest in conducting research titled "Esports: The consumers' awareness levels of esports in South Africa" in fulfilment of a mini dissertation for a master's degree in business administration with the University of KwaZulu Natal.

There are no objections to his study and if his proposal is approved, we ACGL are willing to work with him.

In light of the aforesaid, this letter serves to confirm that student Caleb Luis Womack, student number 217078723 has sought and obtained permission to conduct research within our league, gaming community etc.

Yours faithfully



Clint O'Shea | Director

ACGL

19 Lower Collingwood Road, Observatory, 7925, WC

0837547683

dredd@acgl.co.za



To whom it may concern
University of KwaZulu Natal
Ethical Clearance Committee

Dear Sirs

RE: CONFIRMATION OF RESEARCH

We refer to a letter dated 14/10/2019 in which Caleb Luis Womack expressed interest in conducting research titled "Esports: The consumers' awareness levels of esports in South Africa" in fulfilment of a mini dissertation for a master's degree in business administration with the University of KwaZulu Natal.

There are no objections to his study and if his proposal is approved, we, Mettlestate, are willing to work with him.

In light of the aforesaid, this letter serves to confirm that student Caleb Luis Womack , student number 217078723 has sought and obtained permission to conduct research within our league, gaming community etc.

Yours faithfully,



Barry Louzada, Director

Mettlestate

082 387 9333

barry@mettlestate.com

UNIVERSITY OF KWAZULU-NATAL
GRADUATE SCHOOL OF BUSINESS

MBA Research Project

Researcher: C.L. Womack (Cell No. 0824914743)

Supervisor: Dr. Emmanuel Mutambara (Office No. 031 260 8129)

Dear Mr. Colin Webster of Mind Sports South Africa

Re : Permission to use gamers for academic research purposes.

My name is Caleb Womack, I am currently studying towards a Masters in Business Administration degree at the Graduate School of Business at the University of KwaZulu-Natal Durban, South Africa. As a prerequisite for the completion of my degree. I have to write a research dissertation on a topic of my choice.

I have chosen to conduct a quantitative research on "Esports: The consumers' awareness levels of esports in South Africa."

I would like to invite all the gamers/consumers/members in your organisation and/or it's subsidiaries to participate in a research project to study the level of awareness of esports in South Africa.

The results of this project will be for my mini dissertation. With all the gamers/consumers/members participation, I hope to understand the present level of awareness in esports in South Africa. I hope that the results of the survey will prove to be useful to all stakeholders, such as, Organizations in the esport industry and league holders (i.e tournament hosts) in South Africa. I also hope to share my results by publishing them, possibly in South African business journals.

I do not know of any risks to the gamers/consumers/members, if the gamers/consumers/members decide to participate in this survey, however I guarantee that their responses will not be identified with them personally. Their participation in this project is voluntary or optional. They can refuse to participate or withdraw from the project at any time with no negative consequence. I promise not to share any information that identifies the gamers/consumers/members with anyone outside my research group, which consists of my supervisor and myself. The gamers/consumers/members will not be required to put their names or any identifiers on the questionnaire. The Graduate School of Business,

University of KwaZulu Natal, will maintain confidentiality and anonymity of records identifying the gamers/consumers/members as participants for many years.

The survey should take the gamers/consumers/members about twenty minutes to complete.

Attached please find a draft questionnaire that I intend to administer to the participants online (i.e. Google Forms).

I hope you will grant me permission to invite the gamers/consumers/members to participate in this research and if they agree, send them my questionnaire to complete, that you will grant them permission to complete the questionnaire.

If you have any questions or concerns about the research, you may contact me on 082 491 4743 or by email womacale@hotmail.com.

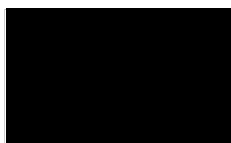
I humbly thank you for having taken the time to read this letter and I humbly look forward to receiving a favourable response from you.

Yours faithfully

CALEB WOMACK (MR)
Student No. 217078723
P.O.Box 30985
Mayville
4058

CONSENT

I have read and understand the above information. I have received a copy of this form. I agree to participate in this study.



Participant's signature: Colin Webster

Date 1 November 2019

Gatekeeper's response VSG



61 Oak Avenue, Highveld,
Techno Park, Centurion 0157,
Private Bag X148, Centurion 0046

T: +27 12 642 1690
F: +27 12 642 0000
C: +27 81 000 0000

To whom it may concern
University of KwaZulu Natal
Ethical Clearance Committee

Dear Sirs

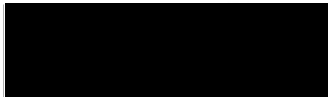
RE: CONFIRMATION OF RESEARCH

We refer to a letter dated 14/10/2019 in which Caleb Luis Womack expressed interest in conducting research titled "Esports: The consumers' awareness levels of esports in South Africa" in fulfilment of a mini dissertation for a master's degree in business administration with the University of KwaZulu Natal.

There are no objections to his study and if his proposal is approved, we Telkom VS Gaming are willing to work with him.

In light of the aforesaid, this letter serves to confirm that student Caleb Luis Womack, student number 217078723 has sought and obtained permission to conduct research within our league, gaming community etc.

Yours faithfully



Wanda Mkhize

Executive Content & VS Gaming
Consumer & Mobile Product House, The HUB Building, Telkom SA Ltd
61 Oak Avenue, Centurion, Pretoria, 0001, SOUTH AFRICA
Office: +27 12 311 1095
Email: mkhizepw@telkom.co.za

Telkom SA SOC Limited: Reg no 1991/005476/30. Directors: MS Moloko (Chairman), SN Maseko (Group Chief Executive Officer), TBL Molefe (Group Chief Financial Officer), SL Botha, GW Dempster, N Kapila*, K Kweyama, PCS Luthuli, DO Mokgatle, KW Maondeki, F Petersen-Cook, KA Rayner, SP Sibisi, RG Tomlinson, LI Von Zeuner.
Company Secretary: AF Fakhe, *Residi

Appendix 4: Ethical Clearance



13 November 2019

Mr Caleb Luis Womack (217078723)
Graduate School of Business & Leadership
Westville Campus

Dear Mr Womack,

Protocol reference number: HSSREC/00000770/2019
Project title: Esports: The consumers awareness levels of esports in South Africa

Approval Notification – Expedited Application

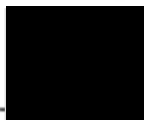
This letter serves to notify you that your application received on 06 November 2019 in connection with the above, was reviewed by the Humanities and Social Sciences Research Ethics Committee (HSSREC) and the protocol has been granted **FULL APPROVAL**

Any alteration/s to the approved research protocol i.e. Questionnaire/Interview Schedule, Informed Consent Form, Title of the Project, Location of the Study, Research Approach and Methods must be reviewed and approved through the amendment/modification prior to its implementation. In case you have further queries, please quote the above reference number. PLEASE NOTE: Research data should be securely stored in the discipline/department for a period of 5 years.

This approval is valid for one year from 13 November 2019.

To ensure uninterrupted approval of this study beyond the approval expiry date, a progress report must be submitted to the Research Office on the appropriate form 2 - 3 months before the expiry date. A close-out report to be submitted when study is finished.

Yours sincerely,



Professor Urmilla Bob
University Dean of Research

/ms

Humanities & Social Sciences Research Ethics Committee
Dr Rosemary Sibanda (Chair)
UKZN Research Ethics Office Westville Campus, Govan Mbeki Building
Postal Address: Private Bag X54001, Durban 4000
Website: <http://research.ukzn.ac.za/Research-Ethics/>

Founding Campuses:  Edgewood  Howard College  Medical School  Pietermaritzburg  Westville

INSPIRING GREATNESS

Dissertation 2021 corrections

by Caleb Womack

Submission date: 23-Jan-2021 02:51PM (UTC+0200)

Submission ID: 1492794508

File name: Research_Thesis_eSports_Final_corrections_217078723.docx (5.87M)

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