



North American e-Sports

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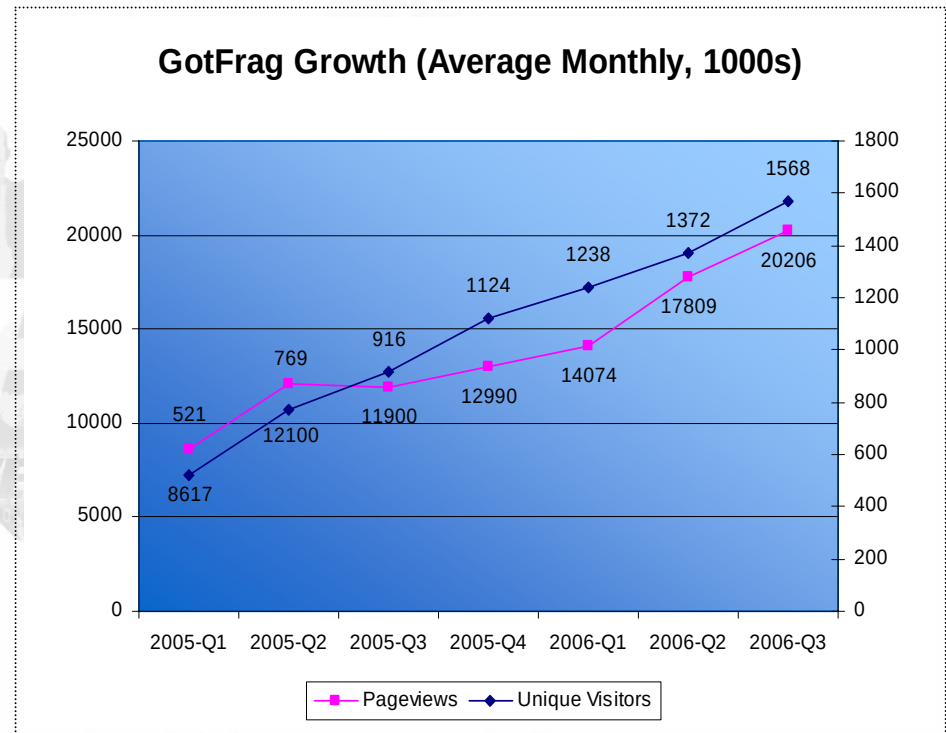
September, 2006

Outline

- **About GotFrag**
- **What is e-Sports?**
- **Who is e-Sports?**
- **e-Sports in the US**
- **What's next?**

About GotFrag

- GotFrag is a leading website destination for competitive computer gamers world-wide with coverage of 11 leading game titles including Counter-Strike 1.6, Counter-Strike:Source, Battlefield 2, Day of Defeat, Warcraft 3 and many others.





What is e-Sports?

Not just gaming...

What e-Sports is NOT.

- e-Sports is NOT just computer gaming
- e-Sports is NOT just competitive gameplay
- e-Sports is NOT just online or on LAN





What e-Sports is...

- Competitors (Teams, Players)
- Hosts (Leagues, Tournaments, Events)
- Media (TV, Streaming, Websites)
- Games (Publishers and the Games themselves)
- Sponsors, Advertisers
- Most importantly...
 - **COMPETITION**
 - **FANS**
 - **ENTERTAINMENT**



Elements of e-Sports

- Truly International
- Many “Sports” (Games) in one Sport
- Defining the next generation
 - “Show me the games your children play and I will show you the next 100 years...”
 - Anthropology Quote from SmartBomb
 - By Heather Chaplin and Aaron Ruby
- Online and OnLAN both
 - Online = USD\$ 11 BILLION by 2011 (BusinessWeek Nov 2005)
- Convergence
 - Gaming + Gamers + Media + Internet = Entertainment



Who is e-Sports?

Not just gamers...

Who e-Sports is...

- 99% 18-34y.o Young Males
 - 81% of GotFrag Readers are 17+y.o.
 - 40% of GotFrag Readers are 21+y.o.
 - 49% of GotFrag Readers are 18-24y.o.
- Competitors
- Fans
- Opinionated, Decision Makers and Decision Influencers

GotFrag Poll – 8/1/2006

How much time do you spend gaming per week?

Less than an hour	3.90%
1-2 Hours	1.95%
3-5 Hours	8.91%
6-10 Hours	13.57%
11-15 Hours	11.96%
16-20 Hours	15.01%
21-30 Hours	14.08%
31-40 Hours	8.23%
More than 40 Hours	22.39%

Gamers

- *"Everyone -- even luxury goods clients -- realizes that the twenty-something male is off playing video games, not watching TV."*
 - Arden Doss, managing director of Propaganda GEM
 - » Boston Globe, December 5th, 2005
- *The average gamer is 29 and spends more time playing games than engaging in traditional forms of entertainment such as watching TV or going to the movies.*
 - Entertainment Software Association Survey 2004.
- *Online gaming all night: Cool. Hour after hour downloading MP3s and porn: No problem. Thirty seconds so you can try to sell me something? Outta here. How the 18-34 male is reinventing advertising.*
 - Wired Magazine, August 2004

e-Sports speaks to the right people

- e-Sports fans and competitors are the audience that every sponsor and advertiser wants to talk to...
 - 18-34y.o. Young Males
 - Less TV, more gaming
- Shift in advertising strategies to reach this audience through e-Sports opportunities

GotFrag Poll

Top Uses of their Broadband

Gaming	60.60%
Downloading	15.00%
Everything	2.09%
Music	2.39%
Movies	1.72%
Gotfrag	0.75%
Browsing	10.97%
Chat	2.84%



e-Sports in the U.S.

Genres/Games
Leagues/Events
Teams/Players
Fans

GotFrag Nation's Ranking (CS)

- Countries ranked on National involvement (by team) in e-sports
- Includes
 - All major tournaments world-wide
 - All major teams world-wide
 - Counter-Strike only (No Warcraft or Starcraft ranking yet)

Rankings		Change	Last	Points
1	Sweden	0	1	2680.57
2	United States	0	2	1678.14
3	Germany	0	3	1169.03
4	Denmark	0	4	893.10
5	Norway	0	5	868.72
6	Spain	+4	10	709.60
7	France	-1	6	673.12
8	Brazil	0	8	667.24
9	Russia	-2	7	639.25
10	Finland	+3	13	509.00
11	Canada	-2	9	505.84
12	South Korea	0	12	500.82
13	United Kingdom	-2	11	448.00
14	China	+2	16	419.22
15	Romania	+3	18	353.13
16	Austria	-2	14	341.95
17	Poland	0	17	330.80
18	Kazakhstan	-3	15	300.36
19	Hungary	0	19	282.11
20	Australia	0	20	251.71

<http://www.gotfrag.com/cs/nationsranking/>



Genre's US Gamers Play

- First Person Shooters (FPS)
- Real-Time Strategy (RTS)
- Fighting Games
- Casual Games
- Sporting and Racing Games

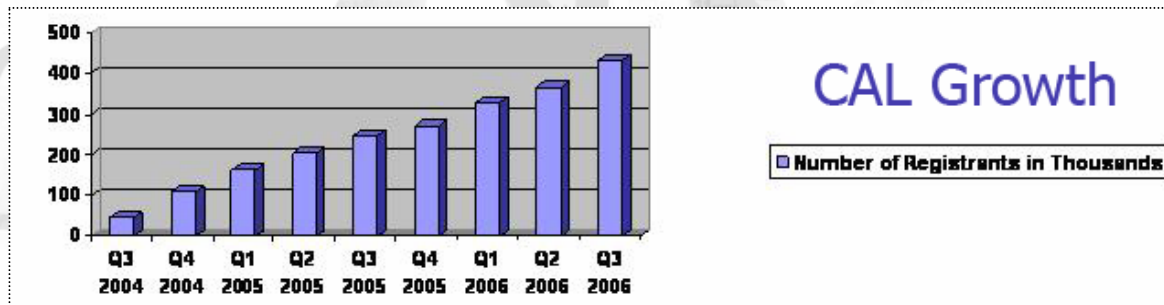


Games U.S. Gamers Play

- e-Sports Games
 - Counter-Strike 1.6
 - Counter-Strike: Source
 - Halo 2
 - Quake3 & Quake4
 - Battlefield 2
 - Call of Duty
 - Day of Defeat
 - Day of Defeat: Source
 - Warcraft III
 - Dead or Alive
 - Tekken
- “Casual” Games
 - Poker
 - World of Warcraft
 - Racing Games
 - Sports Games
 - Solitaire

Online Leagues (U.S.)

- Cyberathlete Amateur League (CAL) – www.caleague.com
 - Founded in 1997, over 450,000 registered competitors



- Cyber Evolution (CEVO) - www.cevolved.com
 - Founded 2004, Over 5,000 registered competitors.
- Global Gaming League (GGL) – www.ggleague.com
- Online Gaming League (OGL) – www.worldoggl.com



Online Leagues in the US

- Have an advantage
 - US is larger geographically (increased travel costs for teams and players)
 - Non-endemic sponsors are still figuring out e-sports
 - Broadband access is very available
 - Hi-powered computers at home
- Positive Growth
 - In 2000, there were 2 major online leagues
 - In 2005, there were 4 major online gaming leagues and dozens of smaller leagues, including publisher run leagues



OnLAN - Tournaments (U.S.)

- Cyberathlete Professional League (CPL)
 - Over past 9 years, 50 Tournaments, 250,000 competitors and USD\$3MM in prize money
- World Series of Video Games (WSVG)
 - Launched in 2005, Circuit of 8 events world-wide
- Global Gaming League (GGL)
- QuakeCon
- Championship Gaming Series (CGS)



Other OnLAN Events

- Others (holding qualifiers in the US):
 - E-Sports World Cup (ESWC)
 - World Cyber Games (WCG)
 - Kode5
 - World e-Sports Games (WEG)
- Positive Growth:
 - In 2000, there were 2 Major OnLAN events
 - In 2005, there were 5 Major OnLAN events and 40+ regional events

Teams (U.S.)

- Team Complexity (coL)
- Team3D (3D)
- Team EG (EG)
- Pandemic (pan)
- United5 (U5)
- Jax Money Crew (JMC)
- Aggression (AGN)

Teams (U.S.)

- Intel, NVIDIA and a few others are the only sponsors of teams
- Very little non-endemic sponsors involved
- Teams are multi-platform/genre
 - Counter-Strike 1.6, Quake, WC3, DOA



Fans (GotFrag stats)

- e-Sports fans in the US are a distinct population from gamers. They are the tip of the spear.
- 2.0+ MM unique visitors to GotFrag.com monthly, 50% from US
- 60% of GotFrag users play 15 or more hours per week
- 80% of GotFrag users read the site daily
- Over 4MM comments and posts
- Over 6MM downloads of game recordings, demos and replays



What's Next?

e-Sports 2.0

WWW.GOTFRAG.COM / AZTK

Challenges

- “Soft” ceiling today
 - Same Sponsors, largely endemic
 - Capital pool is largely fixed
- Mainstream media attention/coverage
- More fans
 - Awareness of gaming as a sport

Focus

- On Fans and Entertainment value
- Where e-sports in the US lags behind everyone else world-wide is on the emphasis on fans.
 - U.S. e-Sports scene is perhaps 2 years behind Korea and one year behind EU
- Paid Pros, “Real-world” League structure
- International

Standardization

- 
- Games
 - Which ones?
 - Integrating New Games
 - Platforms
 - PC and Consoles
 - Rules
 - Rulesets and tournament formats for each Game
 - Logistics (PC configurations, network, etc)
 - Media Integration



The Future is bright

- Continued growth
- Better communication between organizers
- More mainstream media attention
- More competitors
- More fans



Conclusion

Questions welcome

<http://www.gotfrag.com>



China eSports Status

15 September 2006

Head officer, LIU Yuan Fu
Administration Department,
China General Administration of Sport.

尊敬的各位来宾： Distinguished guests:

大家好！ Good morning！

首先请允许我代表中华人民共和国国家体育总局和中华全国体育总会对大韩民国文化观光部和韩国游戏产业开发院的邀请表示感谢，并预祝本次国际电子竞技论坛圆满成功！

First, on behalf of the General Administration of Sport of the People's Republic of China(GASP) and All-China Sports Federation, I would like to thank the Ministry of Culture and Tourism of the Republic of Korea and the Korean Game Development and Promotion Institute for their invitation and wish this International Forum on E-Sports Gaming a great success！

今天，我演讲的题目是“蓬勃发展的中国电子竞技事业”。

The topic of my speech today is *the Thriving Economy of E-Sports Gaming in China*.

2003年11月，国家体育总局宣布电子竞技成为中华人民共和国正式开展的第99个体育项目。几年来，电子竞技运动在政府、企业、媒体、电子竞技爱好者和社会各界人士的共同培育下，快速、稳定、蓬勃地发展起来。

In November 2003, the General Administration of Sport of the People's Republic of China declared E-Sports gaming to be the 99th sport officially recognized in the People's Republic of China. Over the past few years, E-Sports gaming has maintained a fast yet stable pace of development thanks to the support from the government, the enterprises, the media, the E-Sports gaming aficionados and people from other social sectors.

一、中国的电子竞技运动发展现状.

the status quo/present situation of E-Sports gaming in China

(一)电子竞技发展的条件和氛围

the conditions and environment for the development of E-Sports gaming

随着高科技产业的迅猛发展和互联网络的普及，为世界电子竞技运动的发展提供了充分的条件，中国也是如此。

The rapid development of the high-tech industry and the popularization of the internet have created a sound environment for the development of E-Sports gaming in the world. The situation is the same with China.

1999年，中国的电子竞技运动就已初步呈现出了萌芽状态，到2003年，中国的网民已经达到了5000万人，这为中国电子竞技运动的发展提供了强大的群众基础，使电子竞技作为国家批准正式开展的体育项目成为可能。

In 1999, E-Sports gaming in China saw its embryonic stage of development. Up till 2003, the number of net subscribers in China has reached 50 million, which constitutes a sound mass base for the development of E-Sports gaming in China and makes it possible for the E-Sports gaming to be enlisted as a sport officially recognized by the government.

随着网络技术的发展与应用，2003年以后，中国的网民急速增至现今的1.23亿人，参与和支持电子竞技的人数也不断增加，直接参加电子竞技运动和关注电子竞技运动的人已经超过2003年以前中国5000万网民的数字。这使中国成为拥有全世界最大的电子竞技市场的国家，为中国电子竞技运动的发展奠定了坚实的基础。

As a result of the development and application of the internet technologies, the number of net subscribers in China has surged to 123 million by the end of 2003, with more and more people supporting and joining in E-Sports gaming. The number of people directly involved in E-Sports gaming and those who have shown their interest in the sport has surpassed the total number of 50 million net subscribers in China for the year 2003, making China the world's biggest E-Sports gaming market and laying a solid foundation for the development of E-Sports gaming in China.

2003年11月，国家体育总局正式批准电子竞技为我国正式开展的第99个体育项目。为使电子竞技从网络游戏的负面影响中走出来，引导电子竞技运动健康发展，国家体育总局和中华全国体育总会作了大量卓有成效的工作。

In November 2003, the General Administration of Sport of the People's Republic of China (GASP) declared E-Sports gaming to be the 99th sport officially recognized in China. In order to lead E-Sports gaming out of the shadow cast by the negative influences associated with internet gaming and promote the healthy development of the new sport, the General Administration of Sport of the People's Republic of China (GASP) and the All-China Sports Federation has done a great deal of work that paid off well.

加强对电子竞技的理论研究，在肯定电子竞技与网络游戏共性的同时，着重强调了电子竞技与网络游戏之间本质的区别，树立起电子竞技健康、文明、阳光的旗帜，明确了电子竞技的发展方向。

They intensified theoretical research on E-Sports gaming. While recognizing the similarities between E-Sports gaming and internet gaming, they emphasized more on the fundamental difference between the two by classifying E-Sports gaming as a healthy, civilized and promising sport event.

加强了对电子竞技的领导，电子竞技比赛纳入了体育总局的竞赛计划，电子竞技正在走入一条规范化的发展道路。在争取政府对电子竞技支持的同时，我们还与媒体、企业、电子竞技爱好者和关注、支持者进行了广泛的互动。目前，电子竞技的概念已被社会广泛接受，电子竞技良好的社会形象开始确立，参与电子竞技运动的人数与日俱增，企业参与和支持的力度明显加强，一个促进电子竞技发展的良好局面开始形成。

Besides, they tightened up their management of E-Sports gaming by adding it to the Sport List of GASP. While trying to gain support from government, they have also interacted well with the media, the enterprises, the E-Sports gaming aficionados as well as people who have shown their interest in and support to the sport. By now the concept of E-Sports gaming has been widely accepted by the society and a good social image for E-Sports gaming has been built. There has been a rapid increase in the number of participants in E-Sports gaming. Corporate involvement is also growing. A amenable environment for the sport is taking shape.

(二)电子竞技竞赛和职业俱乐部的发展

the development of E-Sports gaming contests and professional clubs

2003至2006的3年间，众多的电子竞技赛事如雨后春笋般诞生，WCG、ESWC、CPL等国际大赛纷纷来到中国。

From 2003 to 2006, E-Sports gaming events mushroomed in China. Renowned international events such as WCG,ESWC and CPL have made their presence in China.

2004年3月，中国第一个正式的全国性电子竞技赛事——中国电子竞技运动会(CEG)的诞生，标志着中国电子竞技运动开始朝着职业化的方向发展。三年来CEG成功跨越两个台阶，从起步阶段进入快速发展阶段。2005年，CEG实现了对战类联赛转制，开创了电子竞技运动职业化运作的先河，共有10家职业俱乐部加盟CEG联赛。2006年，CEG在赛制方面进行了重大改革，把主客场制联赛改为分站式联赛，使每战比赛优秀选手更加集中，竞争更加激烈，广大群众关注度、参与度更为广泛。

In march 2004, China's first nation-wide E-Sports gaming contest-China E-Sports Gaming(CEG)-was born, marking the development of China's E-Sports gaming toward a more professional level. Over the past three years, CEG has successfully passed two stages of development and entered a new round of fast-paced development.

目前，中国已拥有职业电子竞技俱乐部200多家，职业电子竞技运动员1万余人，其中包括世界知名的WNV、WE、BET等俱乐部，来自韩国的田正熙、黄泰民等世界著名电子竞技运动员也加盟了中国的职业电子竞技俱乐部。

Currently, there are more than 200 professional E-Sports gaming clubs in China with more than 10 thousand professional E-Sports game players. World-famous clubs such as WNV, WE, BET and world-class players such as Chun Jung-Hee and ??? have also joined China's professional E-Sports gaming clubs.

(三)电子竞技运动水平不断提高，在国际大赛上初露锋芒。

Performance continues to rise with initial success in international contests achieved

几年来，中华全国体育总会一方面大力推进电子竞技职业化，培育电子竞技职业俱乐部，建立电子竞技高水平选手的孵化器；一方面组织开展丰富的竞赛活动，为选手搭建展示身手的舞台。

For the past few years, the All-China Sports Federation has, on the one hand, made great efforts to professionalize E-Sports gaming by fostering professional clubs and setting up incubators for professional players, and on the other hand, organized a series of competitions in the hope of building a stage for players.

通过选拔方式组建国家代表队，参加国际大赛。在今年法国的电子竞技世界杯比赛中，中华全国体育总会首次带队参赛，夺得魔兽争霸和女子CS两个项目的季军，展示了中国电子竞技的实力。

We have also set up a national team by way of selective trials to represent China in international events. In the E-Sports Gaming World Cup held in France this year, the All-China Sports Federation sent a team to the World Cup for the first time. The delegation won the third place in the Warcraft and the CS (Women) events, showing our strength in the sport.

二、中国对电子竞技运动的管理

II. Government management of E-Sports gaming in China

(一) 2003年电子竞技被国家体育总局列为中国正式开展的体育项目，并决定中华全国体育总会为电子竞技运动的主管部门，负责制定电子竞技运动的发展规划，指导全国电子竞技运动的业务发展，审批、管理和监督各级各类电子竞技赛事等工作。

In 2003, E-Sports gaming was announced an official sport in China by GASP. All-China Sports Federation was charged the responsibility of managing the new sport. The scope of the Federation's responsibility includes planning and policy making, guiding the development of the sport nationwide, and licensing, administering and monitoring the events at all levels.

(二) 中国电子竞技赛事频繁，但却处于不同程度的无序状态，出现了任何组织随意组队代表中国参加国际电子竞技比赛、任何级别的电子竞技赛事不经过体育主管部门的批准就擅自举办等不规范现象，违背了《中华人民共和国体育法》，对电子竞技的发展产生了消极影响。

There are many E-Sports gaming events in China but they are poorly managed. Teams are randomly set up to represent China in international events. Some events are held without the endorsement of the sport administrations at appropriate levels. These phenomenons are against the Sport Law of People's Republic of China and negatively affect the development of E-Sports gaming.

在电子竞技被列为我国正式开展的体育项目后，为加强对中国电子竞技运动竞赛市场的培育和管理，经过近两年的调研和准备，依据《中华人民共和国体育法》中“参加国内、国际重大体育竞赛的运动员和运动队，应当按照公平、择优的原则选拔和组建。具体办法由国务院体育行政部门规定。”以及“国家对体育竞赛实行分级分类管理”等规定，我们将尽快出台一系列规章制度，为广大电子竞技爱好者和从业人员创造一个健康、有序的电子竞技发展环境。

After two years of research and preparation since the announcement of E-Sports gaming as an official sport, the GASP and the All-China Sports Federation will introduce a series of regulations to foster and manage the E-Sports gaming market. The regulations will be based on such provisions in the Sport Law as “Athletes should be selected on the basis of fair play and performance to form teams in important national and international events. The sport administration under the State Council stipulates the implementation measures.” and “The State has the right to classify and categorize sport events.” The introduction of the regulations will create a healthy and orderly environment for E-Sports gaming enthusiasts and professionals.

(三)积极推动电子竞技产业发展。

Promoting the development of E-Sports gaming economy

今年7月26日，中国国家体育总局和中华人民共和国新闻出版总署在上海联合举办了电子竞技产业国际高峰论坛。论坛邀请国务院相关部委和国内外电子竞技赛事组织者、软硬件开发商及代理商等出席论坛并作演讲。

On July 26, the GASP and the General Administration of Press and Publication jointly sponsored the International Summit Forum on E-Sports Gaming Economy in Shanghai. The Forum invited representatives from relevant Ministries of China, Chinese and overseas event organizers, software programmers and hardware manufacturers as speakers and attendees

- 本次论坛是我国首次举办的国际性电子竞技产业论坛.论坛集中交流了国内外电子竞技产业发展的最新成果，探讨了推进电子竞技产业发展的基本对策，搭建起了中外电子竞技合作交流平台，对推动世界电子竞技发展具有十分重要的意义。
- It was the first time China sponsored an internal forum on the E-Sports gaming economy. The Forum updated people on the latest developments of E-Sports gaming, explored fundamental strategies for promoting the E-Sports gaming economy, and built a platform for cooperation and exchange. Given the preceding, the Forum significantly pushed forward the development of E-Sports gaming.

(四)加强电子竞技的国际合作与交流

Strengthening international cooperation and exchange

2006年7月，中华全国体育总会与韩国电子竞技协会经过会谈与研究，决定了全面的合作与交流，以后两个国家对于电子竞技比赛、运营和管理等方面会共同进行研究和作。

In July 2006, the All-China Sports Federation and the E-Sports Gaming Association of Korea decided on carrying out full-scale cooperation in event organization, operation and management.

我们愿意与世界各国电子竞技主管部门以及电子竞技同行建立友好合作与交流关系，欢迎世界专业的电子竞技组织与赛事来到中国发展。

We are willing to establish good cooperative relationships with E-Sports gaming authorities as well as the professionals of all countries.

同时也希望你们尊重中国法律法规和国际体育惯例，来中国举办国际电子竞技赛事首先要与中华全国体育总会取得联系，并征得国家体育总局的同意。我们愿意与大家携起手来，共同为中国乃至世界电子竞技运动的健康发展做出不懈努力。

Meantime we hope that the Chinese laws and regulations, as well as international sport norms, will be respected. Organizers wishing to hold events in China should contact the All-China Sports Federation first and obtain the approval from GASP. We would like to work with you to promote the healthy development of E-Sports gaming in China and in the world.

三、中国电子竞技运动的未来

III. The future of E-Sports gaming in China

未来，我们将积极推动电子竞技产业的发展作为主要目标。中国将围绕电子竞技赛事这一产业的主要支柱，进行电子竞技的产业化与职业化建设，进一步完善竞赛体制建设，依托竞赛培养和选拔高水平的运动员，加快职业电子竞技俱乐部的发展，扩大电子竞技相关产业市场的发展，完善电子竞技产业链条。

Our goal for the future is to seek rapid development of the E-Sports gaming economy. China will further industrialize and professionalize E-Sports gaming mainly through E-Sports events. We will enhance our event system, select and foster high performance athletes, promote the development of professional clubs, expand the growth of related industries, and strengthen the links on the industrial chain of E-Sports gaming.

我们坚信，随着信息时代的到来，随着我国各有关部门对电子竞技运动的更加关注和支持，随着各类媒体的积极传播和推广，随着我国电子竞技竞赛市场和产业开发的逐步规范，随着越来越多的电子竞技爱好者的参与，随着电子竞技产业链的不断完善，越来越多企业的投入，勤劳智慧的中国人与电子竞技运动结缘，必将更加显示出这项运动的无穷魅力。

It is our conviction that in light of the advent of the information age, the support from the government, the promotion by all types of media, the related industrial development and regulation, the growing involvement of gaming enthusiasts, the strengthening of the industrial chain, and the increasing corporate involvement, the Chinese's people's engagement with E-Sports gaming will add to the infinite charm of the sport.

最后，我代表中国国家体育总局和中华全国体育总会向国际上一直关注与支持中国电子竞技运动的有识之士表示衷心的感谢，中国政府愿与世界各国一同携手，共同促进世界电子竞技运动事业的发展与繁荣！

Lastly, on behalf of the GASP and the All-China Sports Federation, I would like to thank all the people will care about and support E-Sports gaming in China. The Chinese government would like to join hands with other countries in the world to work for the development and prosperity of E-Sports gaming in the world.

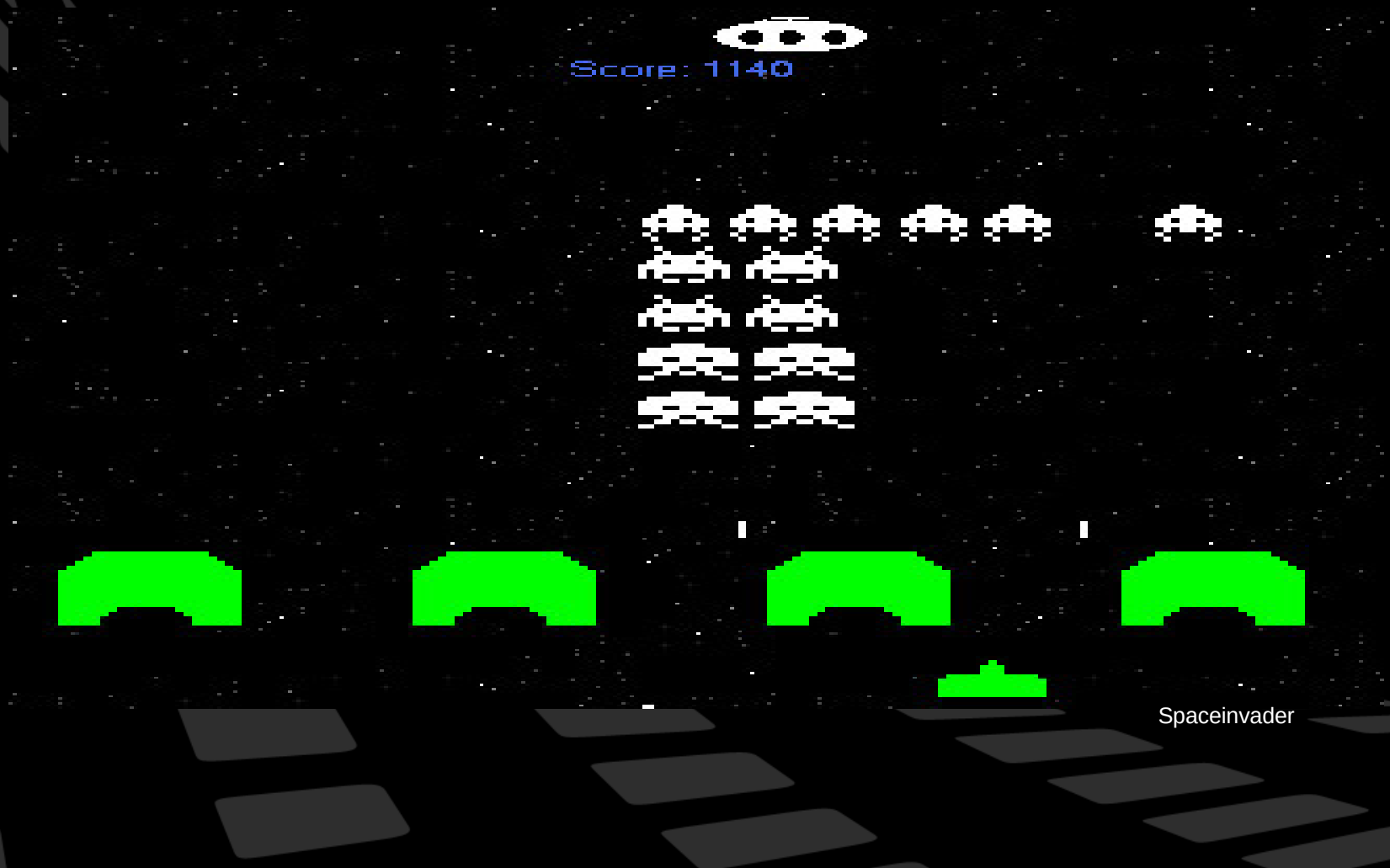
祝本次国际电子竞技论坛圆满成功！

I wish the International E-Sports Gaming Forum a success!

谢谢大家！

Thank you!

Gaming - 1978



Gaming - 2006

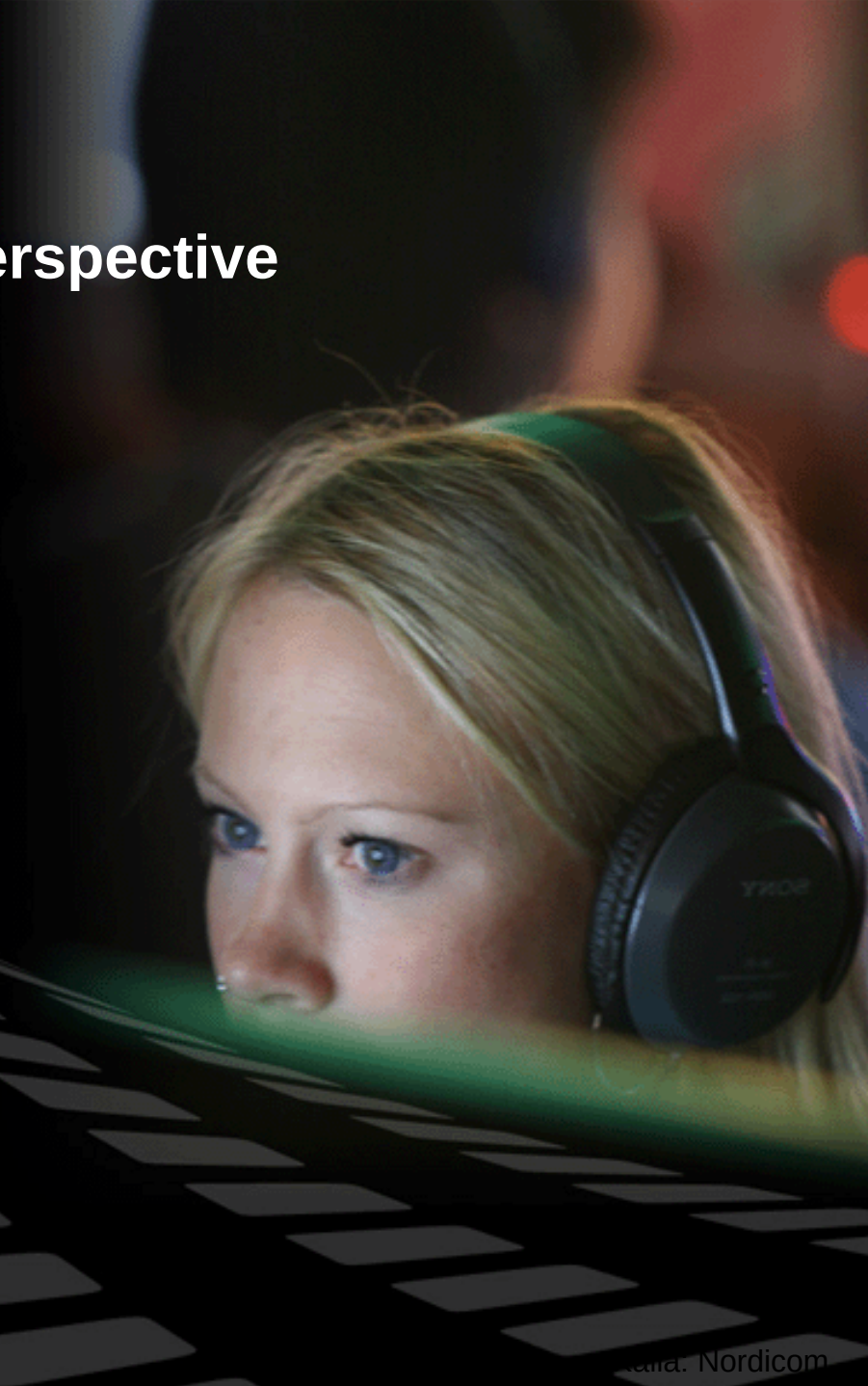


Facts Gaming Industry Sweden

- **3 000 000 000** SEK turn over gaming industry in Sweden 2005
- **600 000** Swedes buy a minimum of 1 game/year
- **200 000** people play Counter-Strike in Sweden
- **35 000** swedes compete i e-sport-tävlingar
- **3 000** SEK a "gamer" spends on film and music per year (average spending ca 1 300 SEK)
- **35,5 %** more books bought by "gamers" (Compared to the swedish average)
- **29** year old average age for a PlayStation2-buyer
- **36** years old vid computer games.
- **24** minuter per visit spend in Gaming website forums on average
- **8** of 10 Swedish teenagers use MSN-messenger, Skype etc
- First generation gamers 30-35 age

European Gaming Market - Perspective

- History
- 1996
- Quake
- Gaming centers “Inferno Online”, “Nine”
- Lan Parties
- Infrastructure, broadband
- Clubs NiP, Fnatic & SK



Youth Culture

According to research young men, 18-35 years old, spends more and more time on the internet. TV viewing has decreased sharply amongst this group. This has had huge impact on big advertisers that now try to find new ways to find their target groups!



22% TV



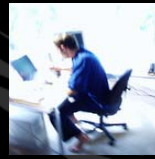
6% reads books & magazines



9% watches movies on PC



4% music



6% DVD/VHS movies



22% surf Internet



16% play computer games

General statistics (2005)

- 49 % E-mail
- 35% Seek information
- 16% Arrends
- 14 % News
- 7% Chat/discussion
- 5 % Magazines
- 4% Play games
- 1 % Radio
- 1% Movies



Internet – Youth (9-16 years old)

- 58% Play Games
- 54% Download music
- 43 % Surfing
- 34% Download software
- 24% Hobby websites



The logo features a stylized, glowing orange and yellow grid pattern that curves upwards and to the right, resembling a digital landscape or a network structure.

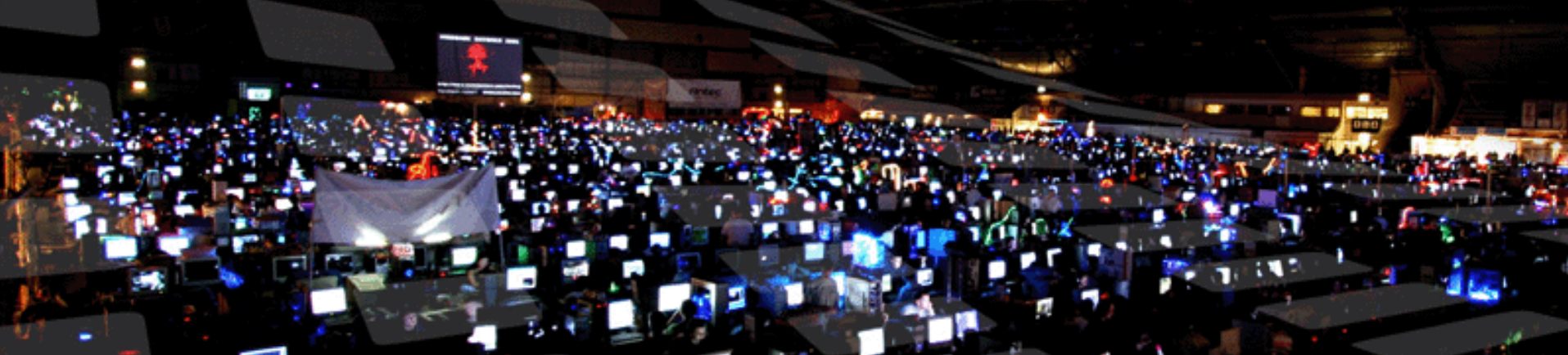
DREAMHACK

THE WORLD'S LARGEST COMPUTER FESTIVAL



Worlds Largest Lan party.

- 2 times per year DreamHack event at Elmia in Jönköping, Sweden
- DreamHack Summer, v 24, 16-19 Juni
- DreamHack Winter, v 47, 24-27 November
- Gender ca 94% male, 6% female
- DreamHack gathers almost 2% of all males in Sweden between 15-25
- DreamHack used 2005 over 25 000 squaremeters



A photograph of three people in a dimly lit room, likely at a computer festival. In the foreground, a young man with blonde hair and a blue t-shirt is wearing large headphones and looking intently at a screen. Behind him, a man with glasses and a dark shirt is resting his chin on his hand, also looking towards the screen. To the right, another man with short blonde hair is looking towards the same direction. The background is dark with some colorful light streaks, possibly from computer monitors or stage lighting.

DREAMHACK
THE WORLD'S LARGEST COMPUTER FESTIVAL







Högskola & universitet på DreamHack 2006

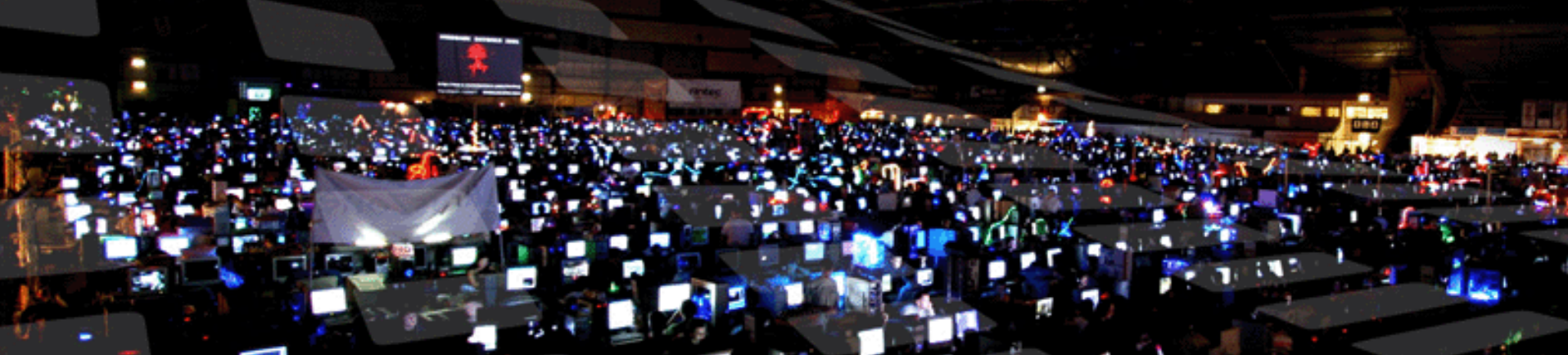


CHALMERS



Wonder of the Swedish e-Sport scene.

- The disposable income
- Small country, fast to adopt to cultural changes.
- Language
- Competitive mentality (Vikings)
- The winter
- Gaming center cultural
- Infrastructure; Broadband, DSL



Wonder of the Swedish e-Sport scene.

- 30% of Nordics
- Team Europe GGL All star Game at E3 2006. 60%
- Total of 15 players nominated
 - 6 .se [40%]
 - 3 .no [20%]
- Final Team 100% Nordic (60% .se)





**ELECTRONIC SPORTS
WORLD CUP**







ELECTRONIC SPORTS WORLD CUP



ELECTRONIC SPORTS
WORLD CUP

INTRODUCTION TO ESWC 2006

1 - THE GAMES



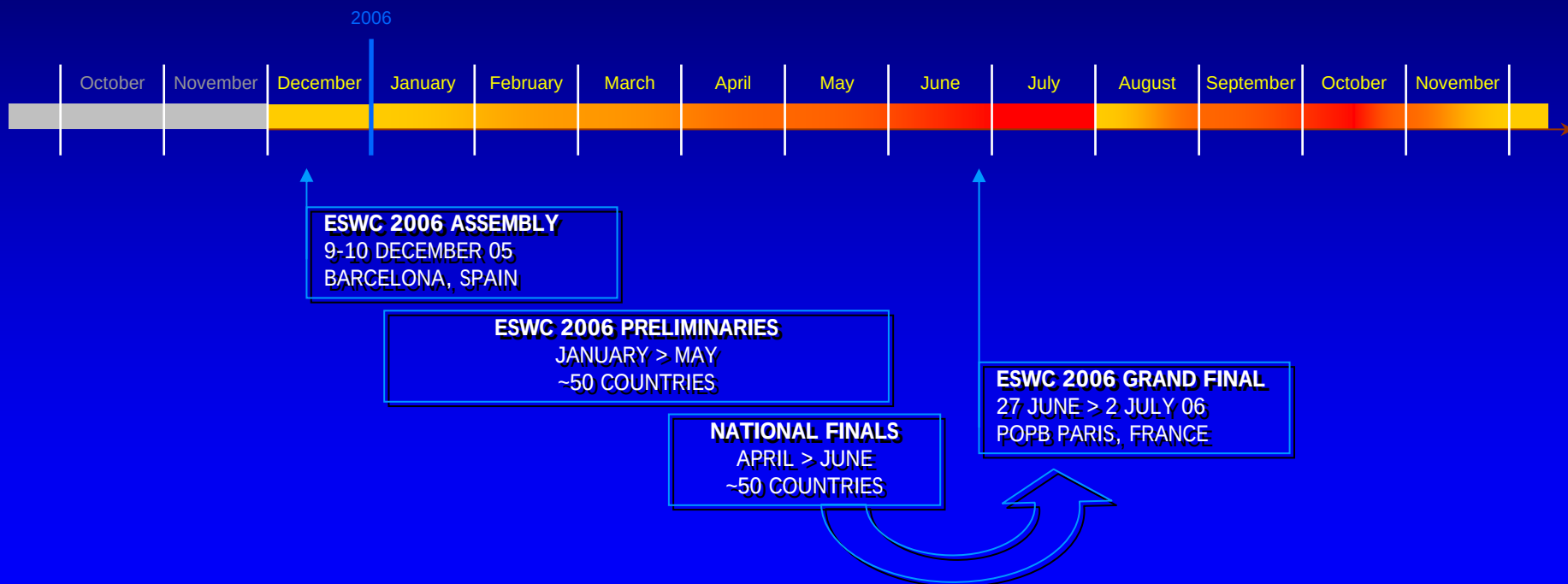
Counter-Strike - PC	\$ 160,000
Counter-Strike Women - PC	\$ 40,000
Pro Evolution Soccer 5	\$ 40,000
Quake 4 - PC	\$ 40,000
Warcraft III - PC	\$ 40,000
Trackmania Nations / ESWC - PC	\$ 40,000
Gran Turismo 4 - PS2	\$ 40,000

PRIZE MONEY FOR
CHAMPIONS

400 000 \$



3 - THE SCHEDULE





ELECTRONIC SPORTS
WORLD CUP

ESWC 2006 ASSEMBLY
BARCELONA

INTRODUCTION TO ESWC 2006

5 - THE GRAND FINALE LOCATION

PARIS BERCY
15 000 SEATS
5 000 M² OF SPACE
CENTER OF PARIS

ONE OF THE MAIN
INDOOR SPORTING
ARENA OF EUROPE





6 - REFERENCES OF BERCY

- ➊ MADONNA
- ➋ U2
- ➌ MARIA CAREY
- ➍ THE ROLLING STONE
- ➎ PINK FLOYD
- ➏ NBA ALL STAR SHOW
- ➐ TENNIS DAVIS CUP
- ➑ JUDO WORLD CUP
- ➒ SUPERCROSS WORLD CUP





ELECTRONIC SPORTS
WORLD CUP



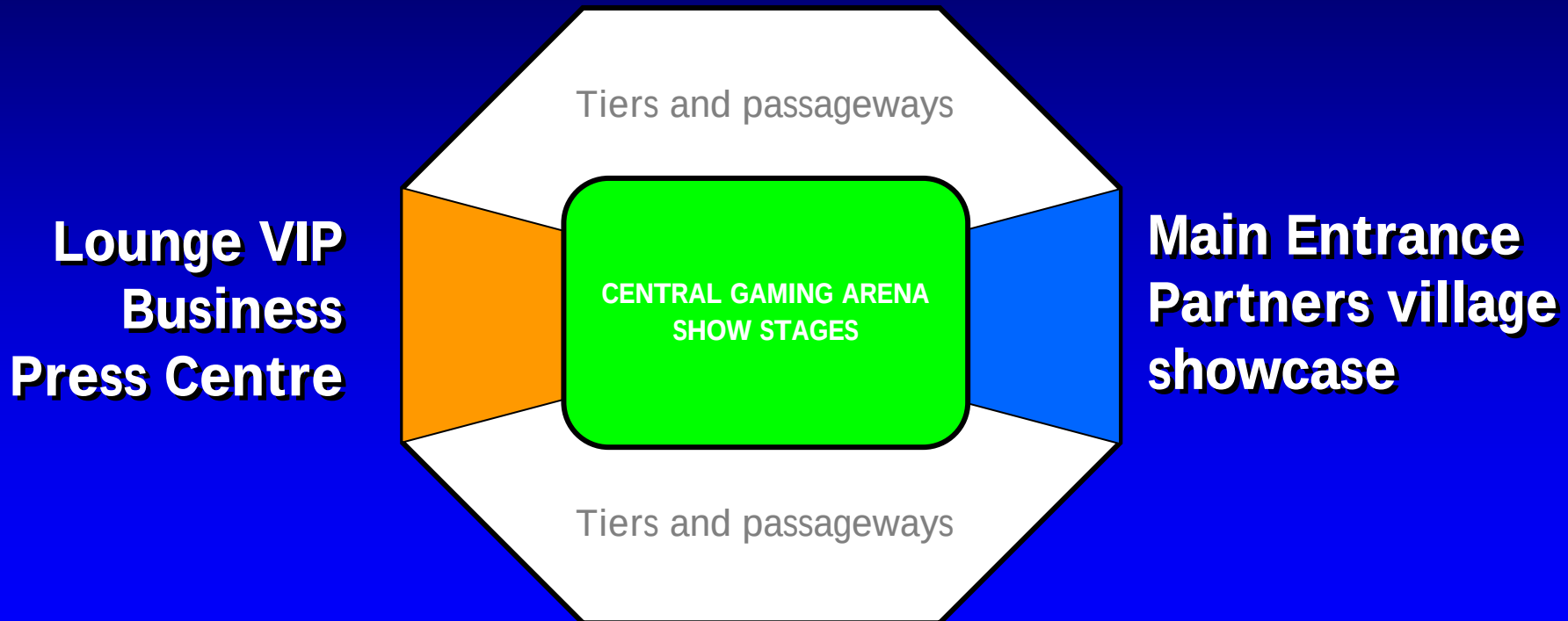


ELECTRONIC SPORTS
WORLD CUP

ESWC 2006 ASSEMBLY
BARCELONA

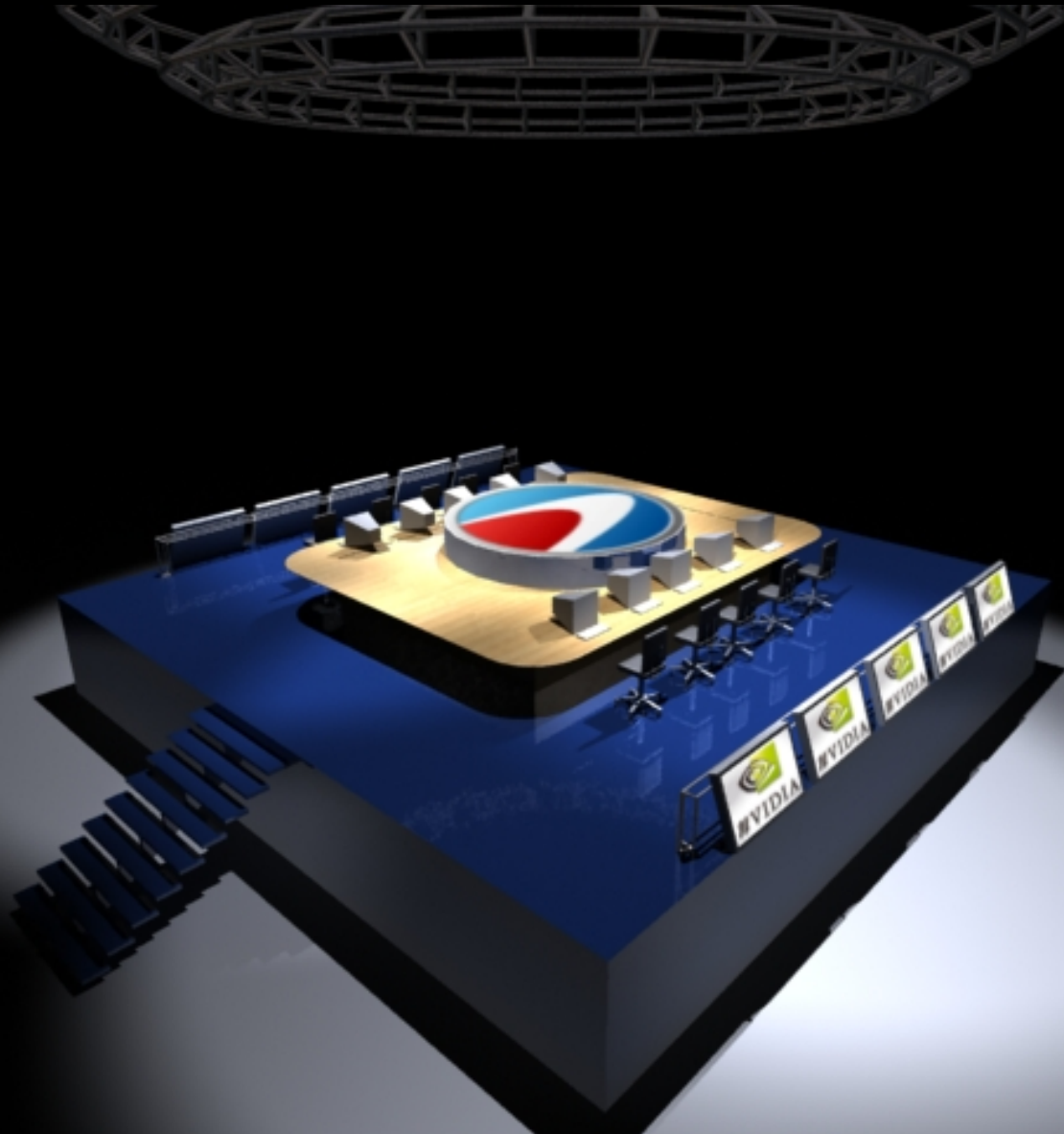
INTRODUCTION TO ESWC 2006

7 - SCHEMATIC SETTING UP



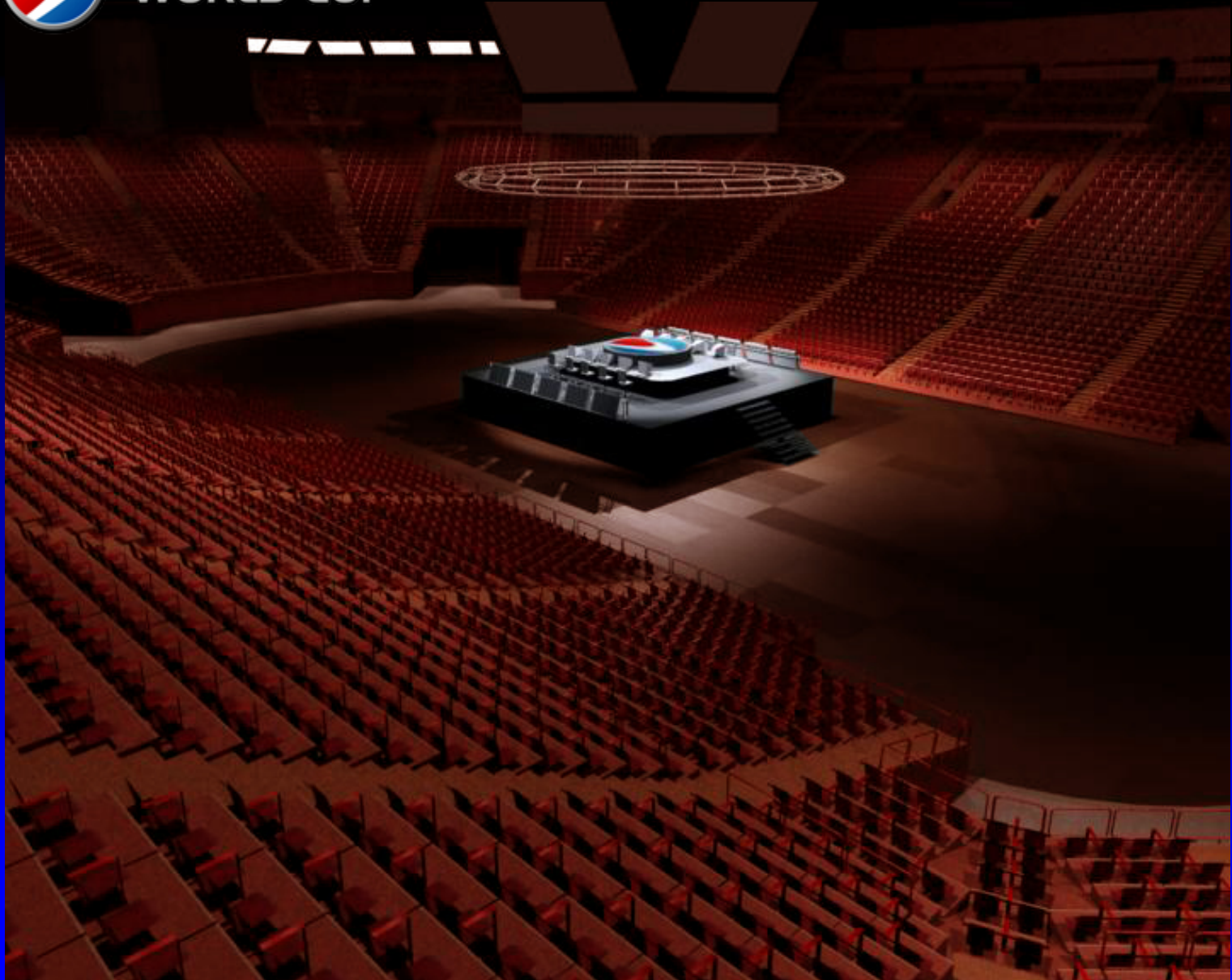


ELECTRONIC SPORTS
WORLD CUP





ELECTRONIC SPORTS
WORLD CUP





ELECTRONIC SPORTS
WORLD CUP







ESWC 2003

THE REVOLUTION

- ❑ 32 licensed countries for the 4 months qualifying world tour
- ❑ 150 000 gamers entering worldwide preliminaries
- ❑ 500 gamers gathered for the Grand Final
- ❑ 156,000\$ of prize money
- ❑ 150 journalists attending the event
- ❑ 10 000 spectators
- ❑ 18 hours of TV Broadcast
- ❑ 150 000 spectators live on the net streaming video
- ❑ 140 000 results on the subject on Google

▪ Host place : *Futuroscope Park, Poitou Charentes, Vienne*

▪ Official Partners : *Nvidia, Atari, Olidata, La Fnac*

▪ Operation Partners : *Cable & Wireless, PNY, Nortel Networks, Microsoft Xbox...*





ESWC 2004

THE WIDE AUDIENCE ATTRACTION

- ❑ 40 licensed countries for the 5 months qualifying world tour
- ❑ 250 000 gamers entering worldwide preliminaries
- ❑ 600 gamers gathered for the Grand Final
- ❑ 210,000\$ of prize money
- ❑ 220 journalists attending the event
- ❑ 35 000 spectators
- ❑ 30 hours of TV Broadcast
- ❑ 380 000 spectators live on the net streaming video
- ❑ 450 000 results on the subject on Google

▪ Host place : *Futuroscope Park, Poitou Charentes, Vienne*

▪ Main Partner : *Nvidia*

▪ Official Partners : *Intel, France Telecom, Olidata, La Fnac*

▪ Operation Partners : *Konami, Sennheiser, Dreamcatcher, Atari...*





ESWC 2005

THE LOUVRE WITH PANACHE

- ❑ 52 licensed countries for the 6 months qualifying world tour
- ❑ 250000 gamers entering worldwide preliminaries
- ❑ 700 gamers gathered for the Grand Final
- ❑ 266,000\$ of prize money
- ❑ 350 journalists attending the event
- ❑ 24 000 spectators
- ❑ 150 hours of TV Broadcast
- ❑ 520 000 spectators live on the net streaming video
- ❑ 1 350 000 results on the subject on Google (18/07/05)

▪ Host place : *Le Carrousel du Louvre, Paris, France*

▪ Main Partner : *Nvidia*

▪ Official Partners : *Intel, BNP Paribas, Medion, Région Ile-de-France, La Fnac*

▪ Operation Partners : *Konami, Xray Technology, Sony Playstation, Blizzard, Logitech...*





ESWC 2006

LIVE SHOW AT PARIS-BERCY

- ❑ 54 licensed countries for the 6 months qualifying world tour
- ❑ 450000 gamers entering worldwide preliminaries
- ❑ 753 gamers gathered for the Grand Final
- ❑ 400,000\$ of prize money
- ❑ 424 journalists attending the event
- ❑ 22 500 spectators
- ❑ 300 hours of TV Broadcast
- ❑ 6 060 000 results on the subject on Google (10/07/05)

▪ Host place : *Palais Omnisport de Paris Bercy (Bercy Arena)*

▪ Main Partner : *Nvidia*

▪ Official Partners : *Intel, Orange, Sony Playstation, Logitech, Région Ile-de- France, La Fnac*

▪ Operation Partners : *Konami, Nova, Asus, LG, Nokia, Nadeo, Sega, Goa...*





ELECTRONIC SPORTS - eSPORTS

- The understanding of video gaming as a **competitive, emotionally charged sport**
- The gaming industry's total revenue is higher than the total turnover of the Hollywood industry every year
(Source: Financial Times, Aug. 2005)
- Approx. **1.5 million online gamers in Germany**

(Quelle: Nielsen//Netratings, Jan. 2003)



ELECTRONIC SPORTS LEAGUE (ESL)

- The ESL is a **dating platform for computer-players**
- Players compete against one another in various disciplines
- The ESL offers every single player, **amateur or professional**, a relevant competition with likeminded people



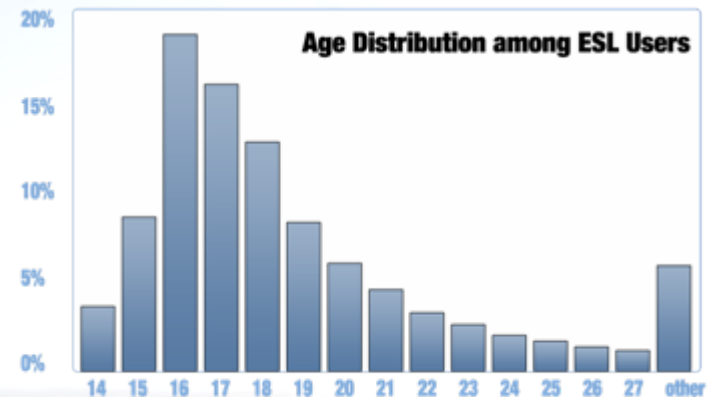
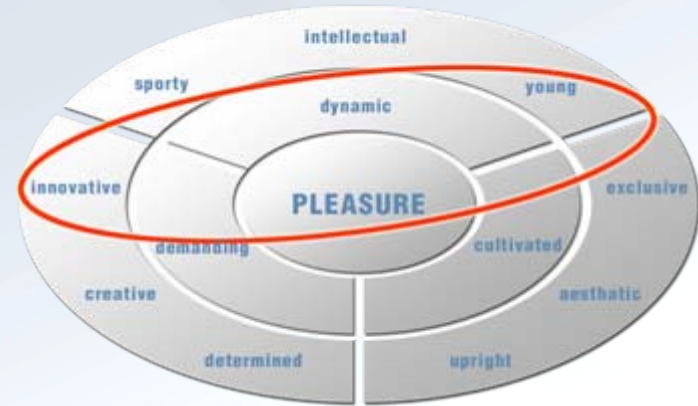
TURTLE ENTERTAINMENT

- Medium-sized company in Cologne, Germany
- Over **50 employees** and more than **600 administrators**
- eSport considered as a vision and passion
- Establishment of the Electronic Sports League (ESL) in the year 2000



THE TARGET GROUP

- Young, dynamic, innovative
- 50% of the users are **aged between 16 and 18 years** and are therefore very aware of the branded goods industry sector
- The average **purchasing power** of a user amounts up to **120 Euros** per month
- **Detailed user profiles** as a result of a survey in cooperation with the university of Essen, Germany (50,000 participants)



PRODUCT RANGE

National



International

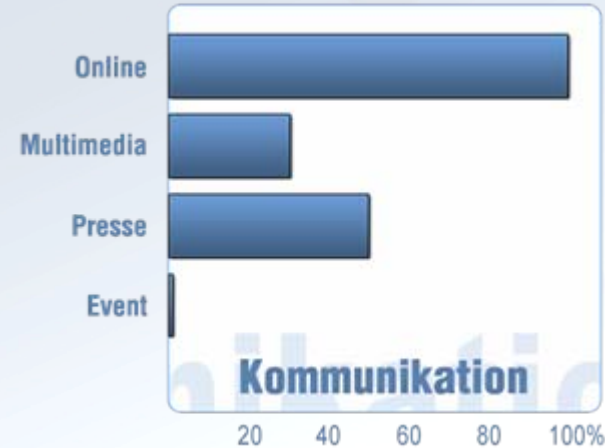


ESL: INFORMATION AND FACTS

- **1,000 leagues for 100 different games**
- **100,000 different users** visit the website every day
- **More than 100 million page impressions** and 680,000 unique users per month
- **560,000 active users** - one of the largest online communities in Germany



ESL: OVERVIEW



National



International



EPS: INFORMATION AND FACTS

- The „Premier League“ of eSports
- The 200 best German players compete against one another in different disciplines
- The most important matches are shown **live on TV and via IPTV**
- **11 Intel Friday Night Games** in front of 650 – 1,000 viewers each event
- **Spectacular final-event** at the end of each season
- **140,000 Euro prize money** per season



EPS: OVERVIEW



2006

Online

Multimedia

Presse

Event

Kommunikation

20 40 60 80 100%

2007



National



International



ENC: INFORMATION AND FACTS

- **European Championship of eSports**
- **27 national teams** compete against one another in different disciplines
- The tournament involves a **qualification- and group-phase and a final event**
- A lot of matches are broadcasted on **TV and via IPTV**
- **Spectacular final event** at the Games Convention
- **50,000 Euro prize money**



ENC: OVERVIEW



National



International



major events each Season

EUROPEAN INTEL FRIDAY NIGHT GAME

The roadshow of the Extreme Masters will take the art of designing an eSports event to a higher level:

- **Major events** in Paris, London, Hamburg, Stockholm
- Kick-off on **Games Convention 2006**
- eSports live in front of an large audience all over Europe with **up to 750 spectators per event**
- enhancing the Intel Friday Night Game reputation to an **international level**



ESL MASTERS: INFORMATION AND FACTS

- „Champions League“ of European eSports
- The winners of the EPS from **24 European countries** compete in 3 disciplines against one another
- Top matches are shown **live on TV and via IPTV**
- **5 international Intel Friday Night Games** per season in European metropolis in front of 7,500 viewers
- **Final-event** over several days' duration
- **150,000 Euro prize money**



ESL MASTERS: OVERVIEW



National



International



eSPORTS AWARD: INFORMATION AND FACTS

- „Oscar“ of eSports
- The **most remarkable achievements** in eSports are honoured by well-known personalities
- **Award ceremony** in line with the annual Games Convention and international guests
- **Live broadcast** of the award show
- **Large media response**



eSPORTS AWARD: OVERVIEW



EVENTS

Intel Friday Night Games

Intel® Friday Night Game

organized by **Electronic Sports League**

Finals



Games Convention



INTEL FRIDAY NIGHT GAME

- **eSports live!**
- Two top-games of the EPS are carried out offline in front of a large audience
- **Up to 1000 spectators**
- **11 events per season** in the major German cities
- **Professional commentators, interviews with players and comments from gaming experts**



Intel Friday Night Games

Intel® Friday Night Game

organized by **Electronic Sports League**

Finals

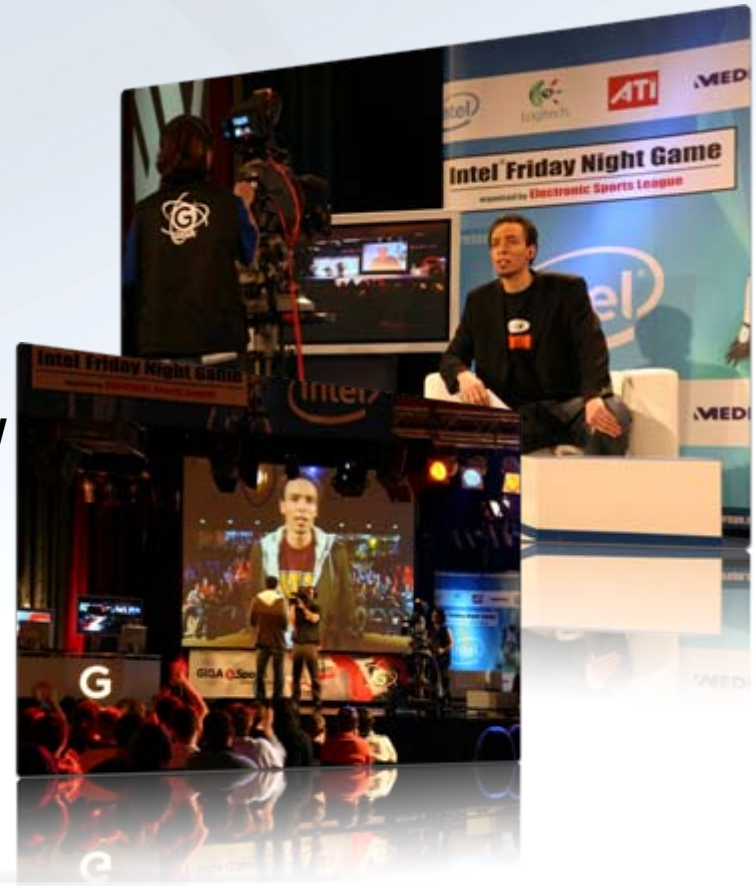


Games Convention



FINALS

- Every season's final matches take place in front of a **huge audience**
- They last for 3 days
- The event is carried out in a German metropolis
- **Professional commentators, interview with players and comments** from gaming experts
- **Free-gaming-areas, workshops and raffles** top off the show



Intel Friday Night Games

Intel® Friday Night Game

organized by **Electronic Sports League**

Finals



Games Convention



GAMES CONVENTION

- **Biggest exposition in Europe** dedicated to computer and video games
- **134,000 visitors** in 2005
- ESL presented itself on **more than 2,500 qm** in 2006
- **TV- and IPTV-coverage**
- **ENC finals**
- **eSports Award ceremony**
- **Extreme Masters Qualifier Sweden**



TIMELINE 2006



The 1st International eSports Symposium

- Korea eSports -

15 Sep. 2006

Korea eSports Association

Director, JE Hun-ho



1. History of Korea eSports

2. Korea eSports Status

A. Basic Infrastructure for eSports

B. Economic effects of eSports

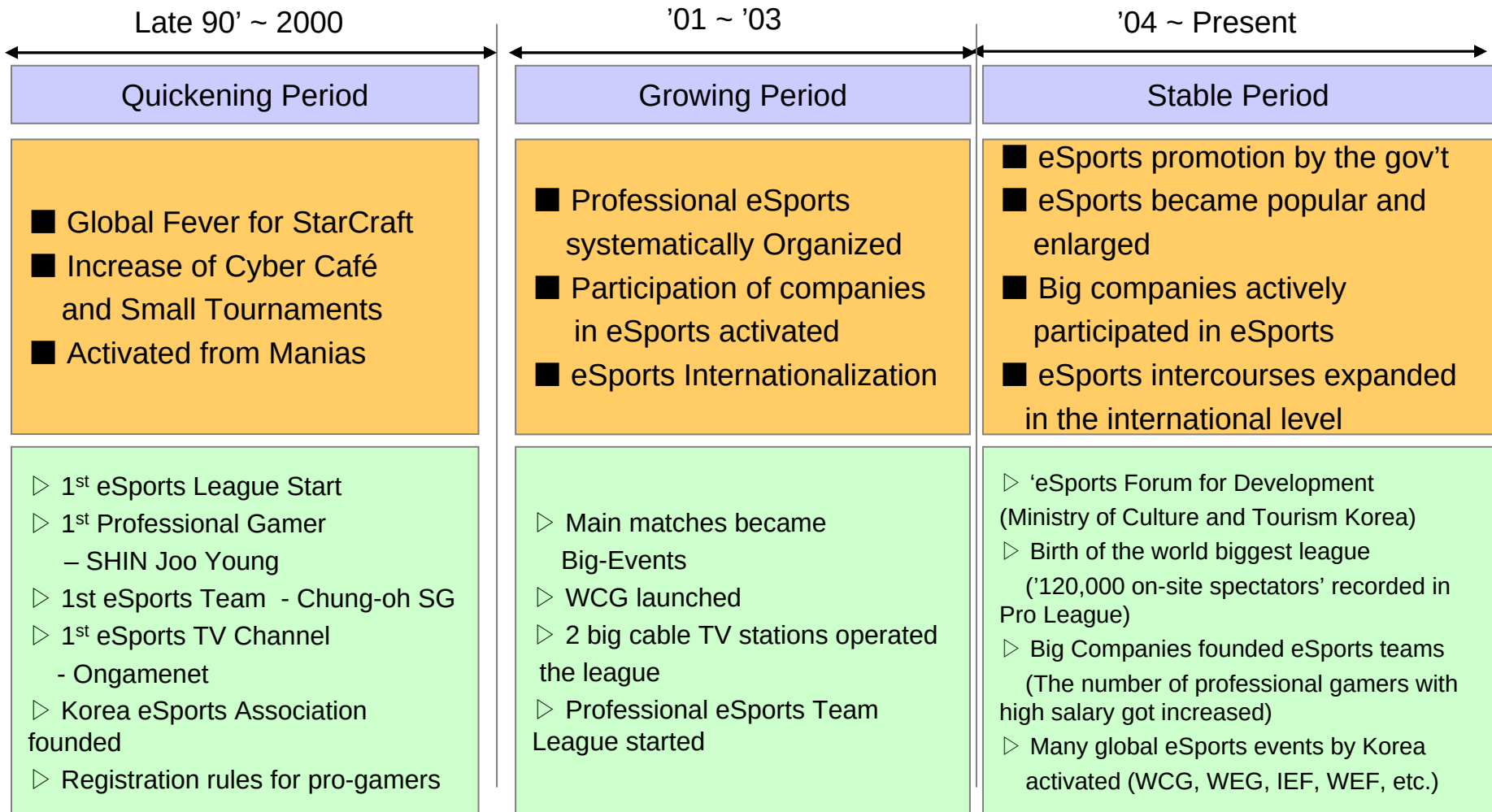
C. International eSports Events by Korea

D. Korea eSports Association

3. Future of Korea eSports

1. History of Korea eSports

- On the basis of the world most developed IT infrastructure, Korea eSports became a new leisure culture.
- eSports popularization led participation of many companies and Big league of eSports formed
- Increasing attention on eSports in the world, international intercourse increased



Game Population Status

- After 2001, eSports stepped into the growth period and the numbers of gamers dramatically increased
- 'Games' settled down as a representative youth cultural code, which enjoyed by half of Koreans

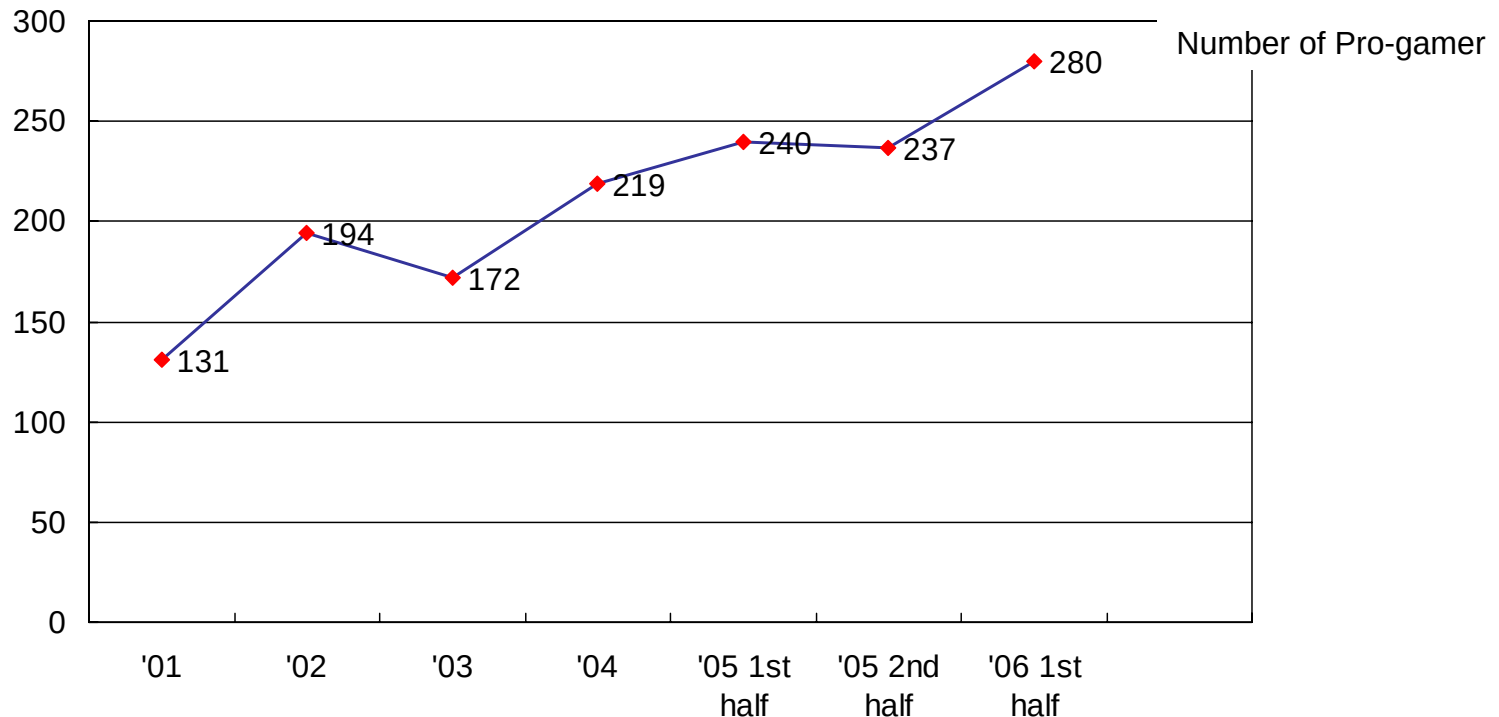
Year	Total number of internet user	Number of internet users for game	Portion
2005	33,010,000	18,350,000	55.60%
2004	31,580,000	16,930,000	53.60%
2003	29,220,000	17,230,000	59.00%
2002	27,260,000	11,990,000	44.00%
2001	24,380,000	5,800,000	23.80%
2000	19,040,000	4,070,000	21.40%
1999	9,430,000	1,830,000	19.50%

[Source: 'Survey on Information-oriented Status by Ministry of Information and Communications]

Professional Gamers

- After 'the pro-gamer registration rule' in 2000, the pro-gamers, registered in 24 official games, managed well systematically
- Pro-eSports popularization raised the pro-gamer's position
- 'Pro-gamer' became the most favored job among the youth and the number of pro-gamer got more than double

Change in number of registered pro-gamers



2. Korea eSports Status

Pro-game Team Status

- 11 Company Pro-game Teams are participating in the eSports League (SKY pro-league) now
- Due to the increased recognition of pro-gamer, direct participation of each company in eSports field increased through game team establishment
- Due to the growth of companies' participation, the operation of league became larger and focused more on team events

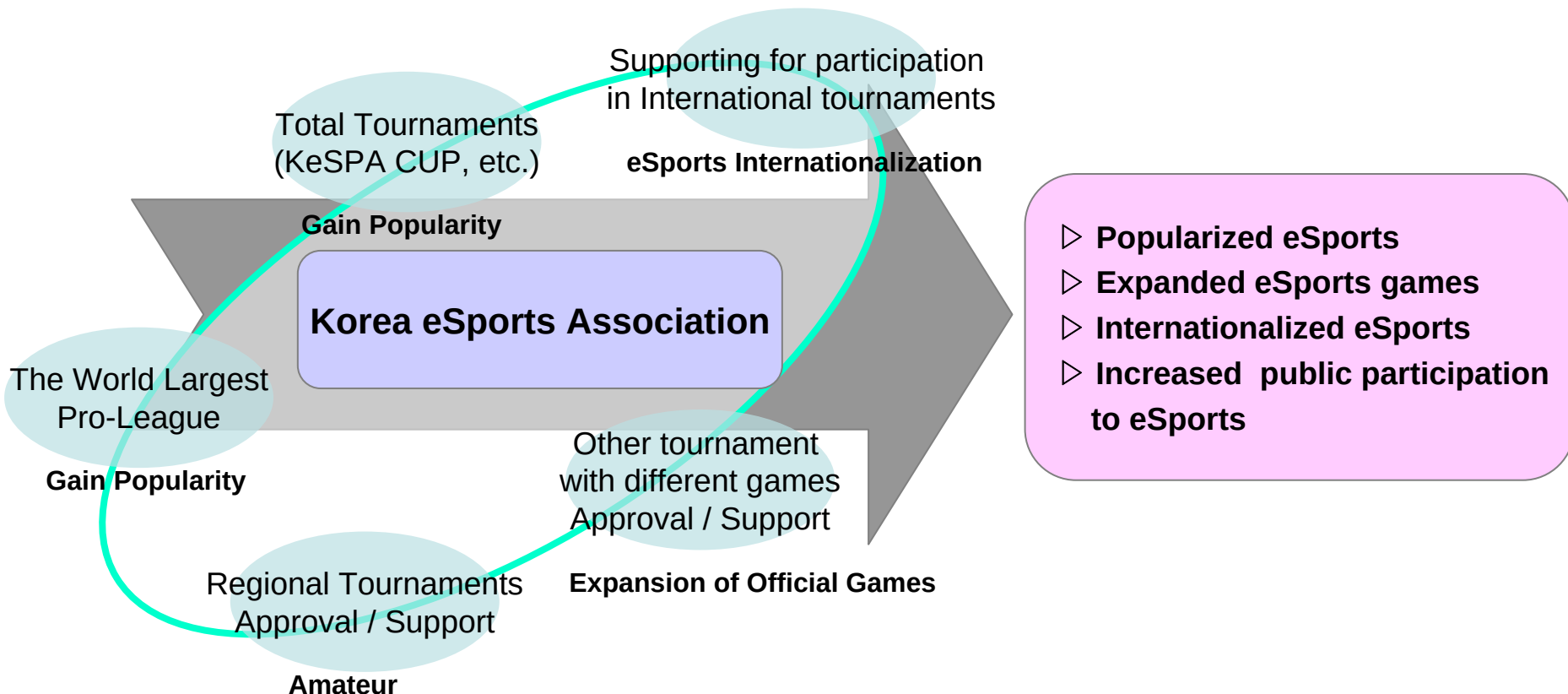
Game Team name and Company Category

	KTF Telecommunications		SAMSUNG Digital Media		Hanbit Stars Game Development
	SK Telecom Telecommunications		PANTECH Mobile phone terminal		LECAF Sports Fashion
	MBCgame eSports dedicated TV channel		CJ Group		Ongamenet eSports dedicated TV Channel
	STX Ship building		eNature Cyber Café Franchise		

2. Korea eSports Status

Current eSports Tournament

- With the StarCraft popularity, other games are tried to eSports
- Open & participative total tournaments as a family leisure culture



Ex) eSports League

Outline	
League Title	SKY Pro-league (launched in 2003)
Participating Teams	11 pro game teams registered in KeSPA
Major Results	July '04 SKY pro-league 2004, 1 st Round Grand Final with “100,000 Spectators” July '05 SKY pro-league 2005, 1 st half year Grand Finals with “120,000 Spectators”

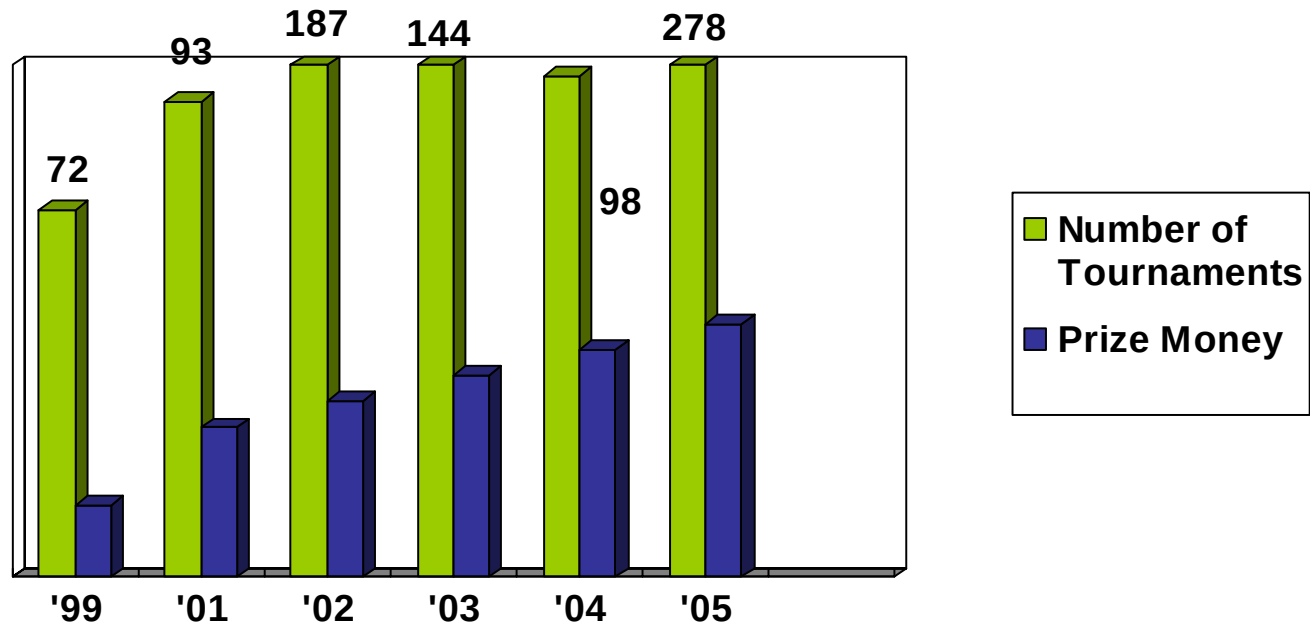
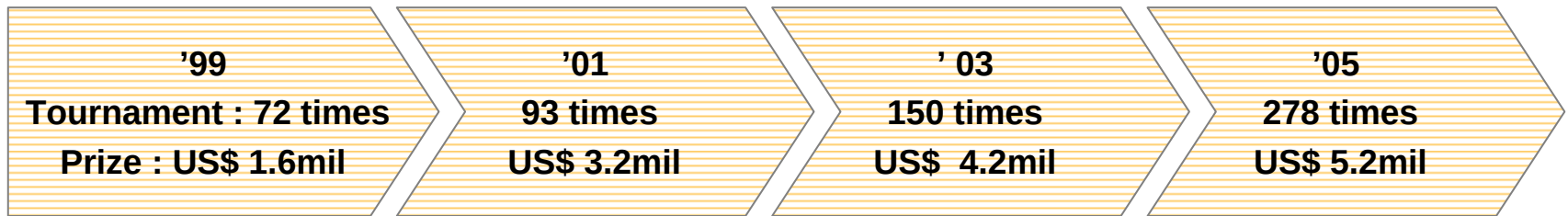


(SKY pro-league 2005 Grand Finals in Kwang-han-ri)

2. Korea eSports Status

Current eSports Tournament – Change in the Size

- Tournaments, held at a small size, became larger and settled down as a regular league
- Except StarCraft, another eSports leagues are building now('06)
 - Special Force, Sudden Attack, FIFA ONLINE, etc.
- In the stable period (after '04), many youths are enjoying participative and watchful digital leisure from mania sports



2. Korea eSports Status

eSports Stadium

- In Dec, '05, eSports Stadium opened at the first in the world
- eSports Stadium contributed to eSports expansion through standing regular league
- Will be open to amateur eSports, tournaments and events for youth to enjoy the game as a sound leisure culture

Outline

Name	I'PARK mall e-Sports Stadium
Size	2027 ft ² , 1117.4m ² , 1336.1 yd ² Main arena – about 500 seats, 2nd arena – 64 seats
Use	Korea Pro eSports Regular Match and Armature Match



Ex) SKY pro-league 2006

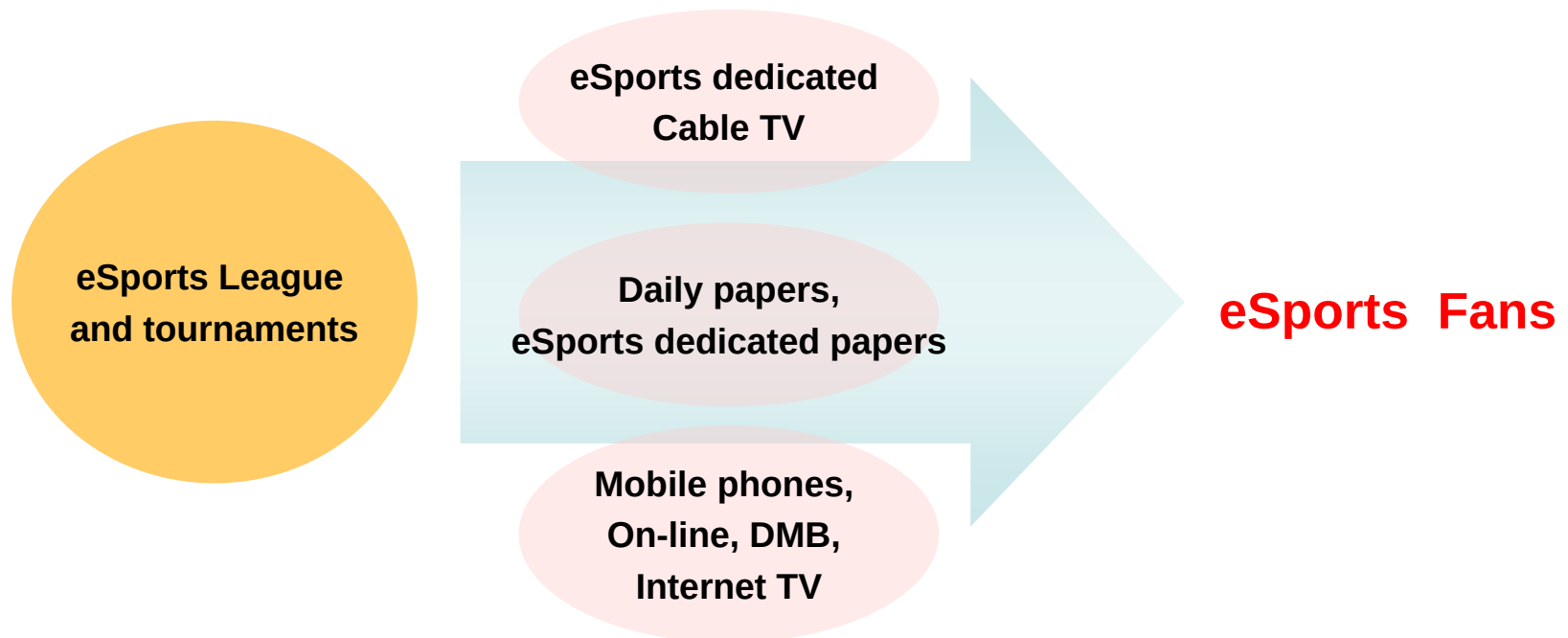


2nd Arena

2. Korea eSports Status

Media

- Activation of Cable Channels for eSports only
- Papers and reports for eSports increased annually
- Diversified channels to mobile Phones, on-line, DMB, IPTV, etc.



Change in eSports Industry

- Expected market size of 2007 is US\$ 81 million. 96% of increase from 2005
- High increase of 28.6%, till 2010

'04	'05	'10 (est.)
Dedicated TV Channel US\$ 16.5 mil	Dedicated TV Channel US\$ 20.0 mil	US\$ 126.2 mil 4.5 times larger from 2005
Tournament US\$ 3.8 mil	Tournament US\$ 11.1 mil	
Game Team Sponsorship US\$ 7.0 mil	Game Team Sponsorship US\$ 8.6 mil	
Government support US\$ 155,000	Government support US\$ 1 mil	
Others US\$ 310,000	Others US\$ 310,000	
Total US\$ 27.765 mil	Total US\$ 41.01 mil	

(Source: Samsung Economic Research Institute, eSports Industry Status and Development Plans)

eSports Marketing

- eSports gives much benefits to the marketing for company

ROI from Game Team

Division	Marketing & Ads Results	Investment	Exposure in Media and Press → ROI: (about) x10
Company A with Game Team A	US\$ 51.1 mil for 5 years (approx. US\$ 10 mil for 1 year)	US\$ 5.2 mil for 5 years	
Company B with Game Team B	US\$ 16.7 mil for 1 year	US\$ 2.1 mil for 1 year	

eSports Fan as a potential customer

Pro Gamer	Number of subscribed fans	Celebrities	Number of subscribed fans
LIM Yo-han	587,235	BAE Yong-joon (Actor)	168,215
HONG Jin-ho	177,787	SEO Tae-ji (Singer)	109,486
LEE Yoon Yeol	171,241	WON Bin (Actor)	88,482
PARK Jung Seok	174,665	PARK Joo-young (Soccer Player)	32,094
KANG Min	98,865	PARK Chan-ho (MLB-SD)	5,350

2. Korea eSports Status

Current International Tournaments by Korean Organizers

- From 2005, as eSport highly amplified, international tournaments & interchange activated
- Korea eSports shows reasonable models and event styles of eSports to many countries by organizing many international tournaments

International Tournaments by Korean Organizers (2005)

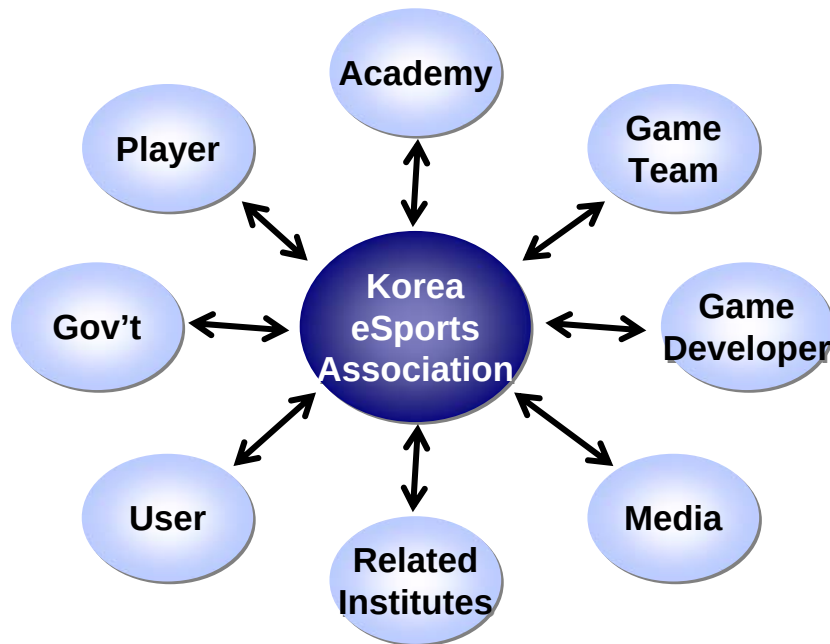
Name	Host City	Organizer	Official Games	Number of Countries	Number of Players	Total Prize Amount	Number of Spectators
WCG	Singapore	Samsung	StarCraft and 7 other games	67	679	US\$ 430,000	55,000
WEG	Beijing, China	CJ	WarCraftIII Counter-Strike	35	240	US\$ 450,000	5,000 (with Entrance Limit)
WEF	Tsingtao, China	Committee	StarCraft WarCraftIII Counter-Strike	2	36	US\$ 18,000	10,000
IEF	Beijing, China	Committee	StarCraft WarCraftIII Counter-Strike	2	68	US\$ 85,000	10,000

- ▷ Increased attention to Korean eSports through VOD and on-line media
(Accumulated number of audience of WEG: more than 100K in 2005)
- ▷ Foreign gamers in Korea are playing now (China, Poland, etc.)
→ eSports is the fastest growing parts in the media leisure culture industry of 21st Century

2. Korea eSports Status

Korea eSports Association

- Established in 2000 with the approval of Ministry of Culture and Tourism Korea
- Contributed to the settlement of Korean eSports as a sound leisure culture for youth life
- Coordinating among various eSports actors, KeSPA carried out as a representative eSports organization

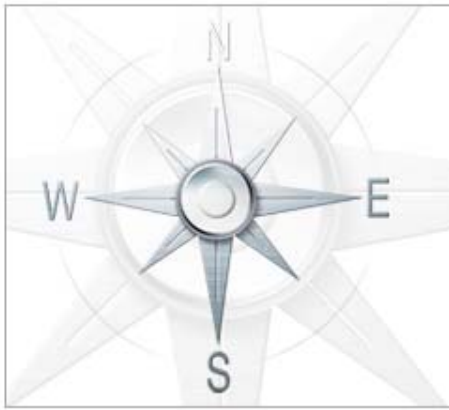


- Hosting the world largest eSports Pro-League.
- Hosting, approving, supporting many Amateur tournaments
- Coordinating among various e-Sports actors
- Performing International Roles as a Korean Rep.
- Supporting eSports research studies

3. Future of Korea eSports

Tasks for future of Korea eSports





Comparative Study (Sports & e-Sports)

Concept

Value

H.R.

Program

Industry

Institution

Organization



2006. 9. 15.

Seoul National Univ.
Na, Young-II



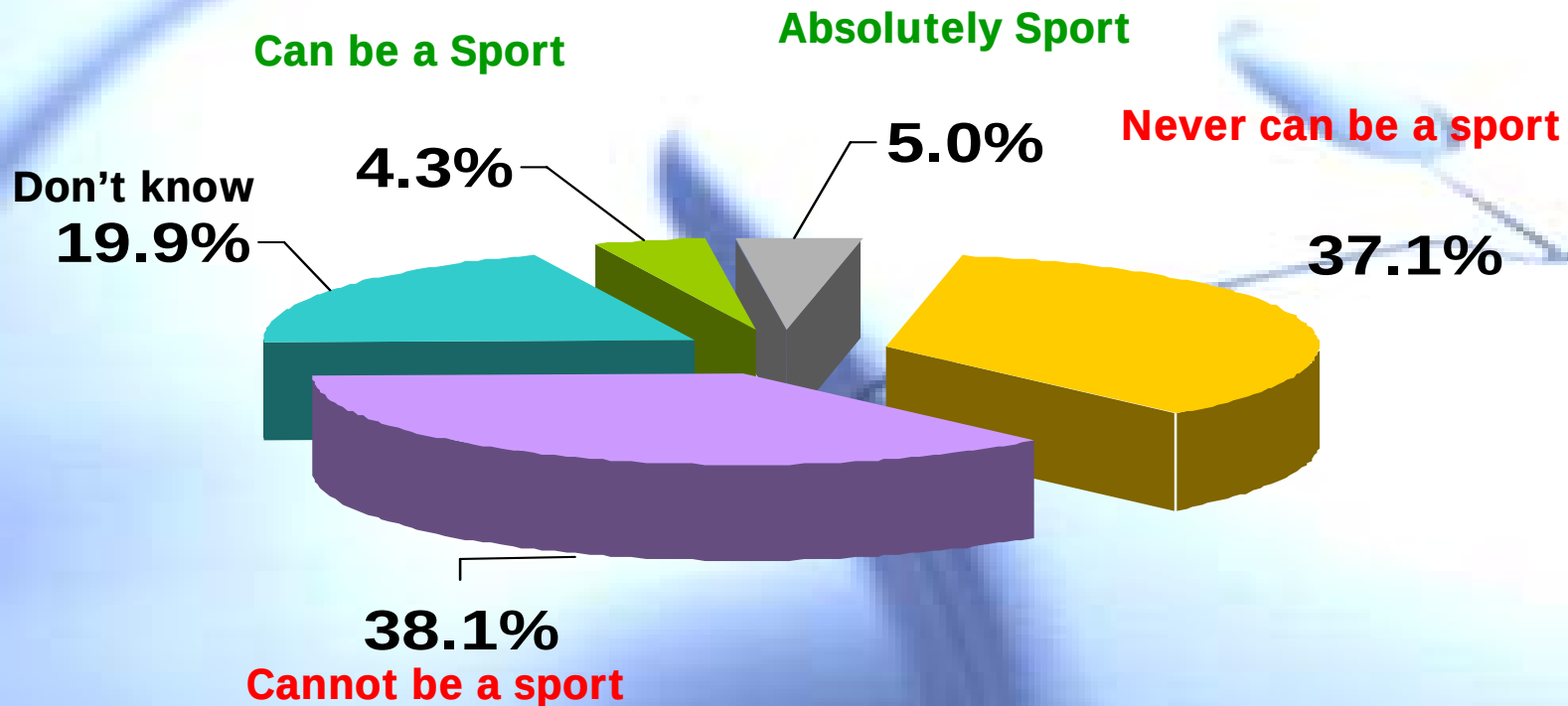


Introduction





Suspicion Against e-Sports



Can internet games be considered as a sport?



Introduction

Interface



Sports

Play

Game

Competition

Amusement

Strategy

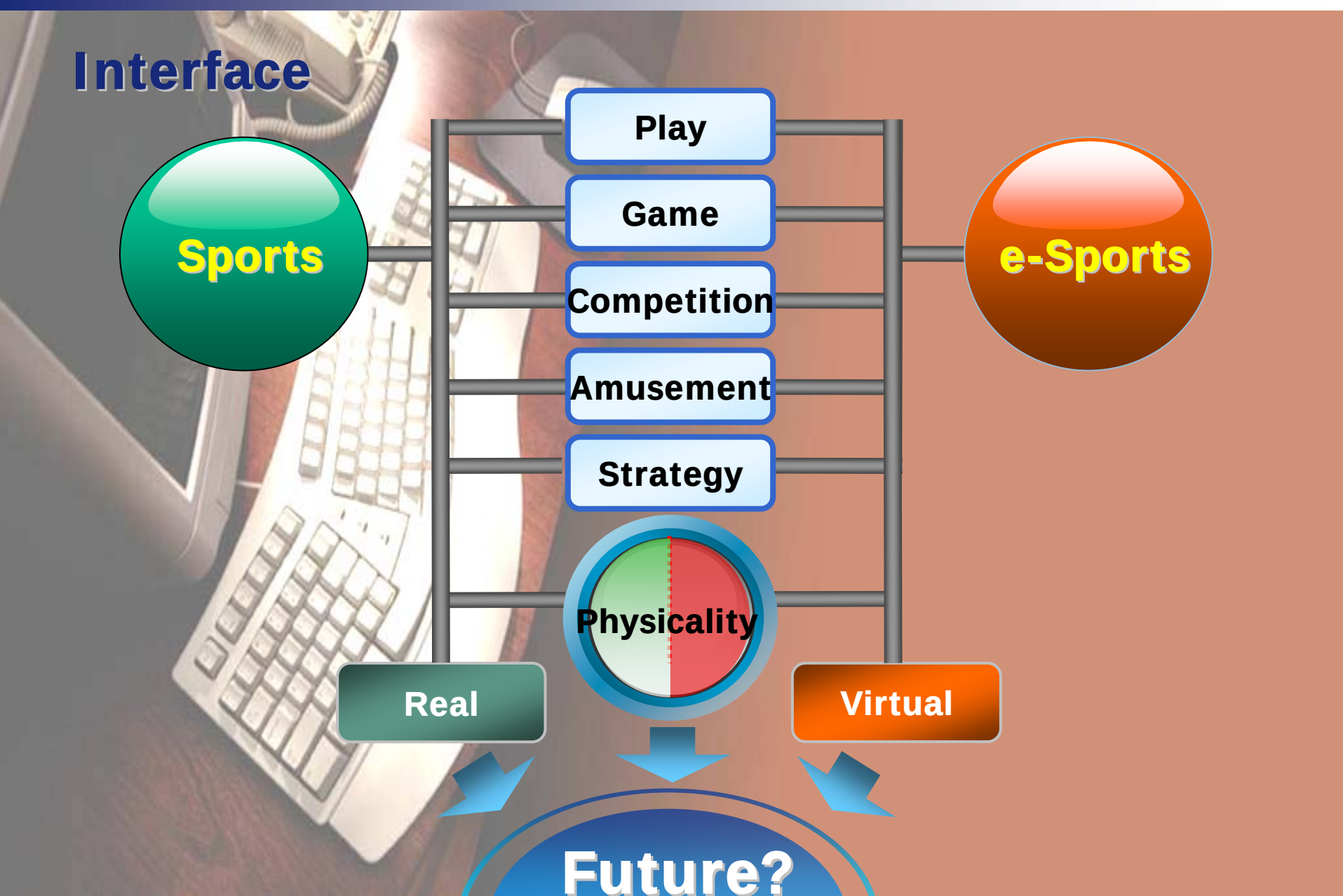
Physicality

Real

Virtual

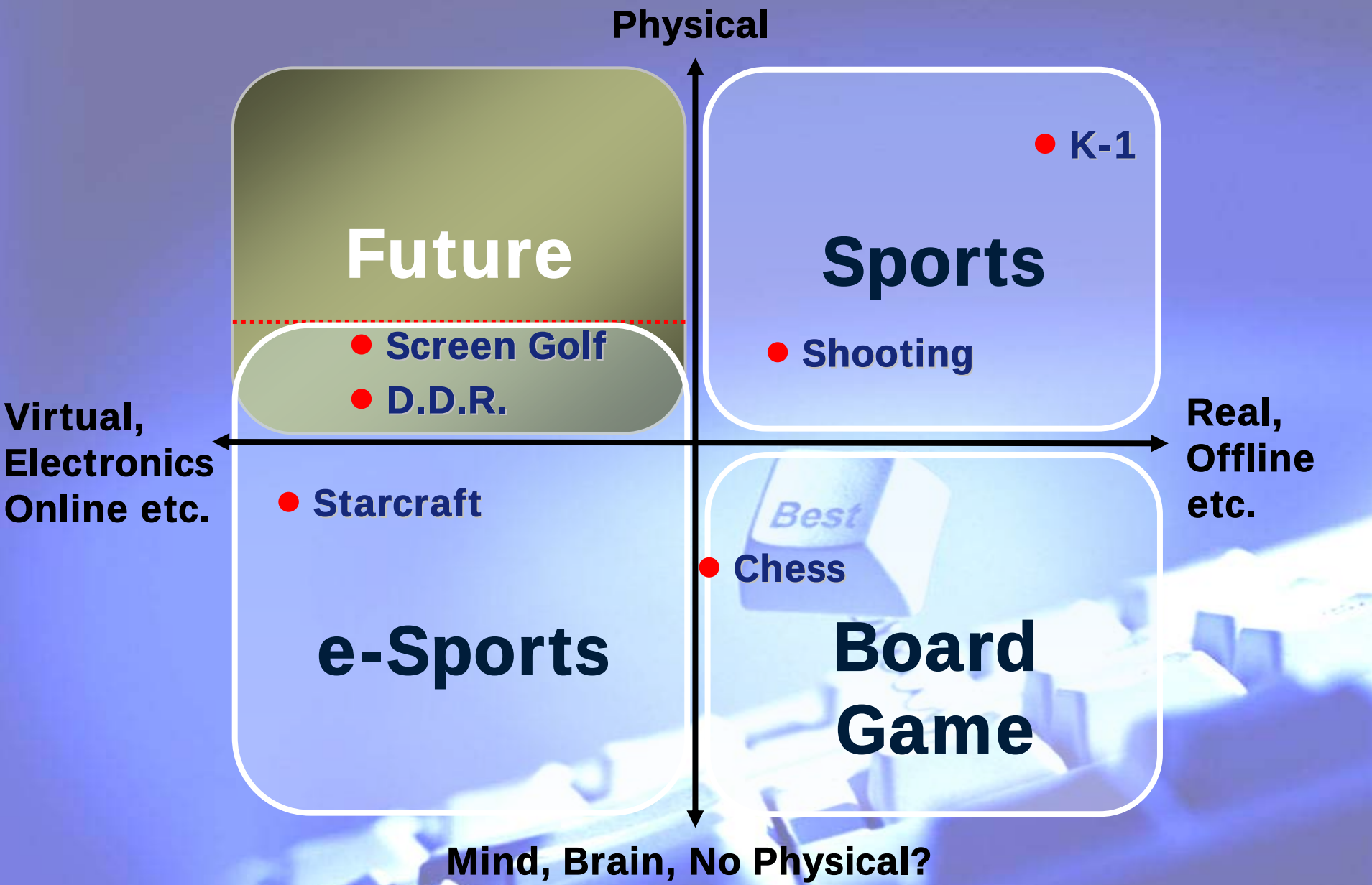
Future?

e-Sports





Introduction



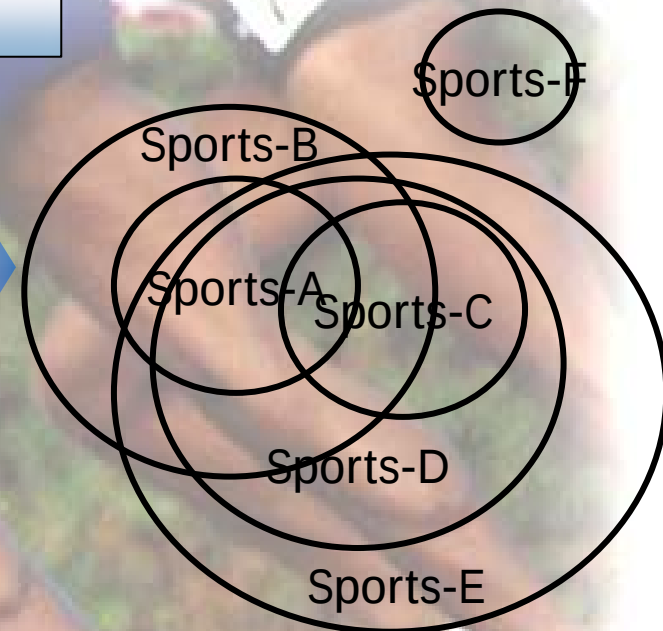


Concept

Sports

**Character: Well Organized
Competitive
Physical Activity**

Play → <Evolution> → Game → <Evolution> → Sports



Definition of Sports

Deim(1956)	Competitive play which is recognized seriously and institutionalized officially
Kenyon(1974)	Total physical activities which are institutionalized & competitive
Guttman(1978)	An organized and competitive play as physical contests



Types of Sports

Type 1

Skill

Overcome

Combat

Type 2

Individual

Person
to Person

Group
to Group

Type 3

Experience
Oriented

Nature
Oriented

Physical
Oriented



Types of e-Sports

RTS

FPS

Sports

Individual

Person
to Person

Group
to Group

Experience

Control

There can be various types of Sports,
but only few types exist in e-Sports



Definition of e-Sports

Narrow

Leisure Activity
Competition
Physical and mental abilities
Electronic environments

Public

Narrow definition + direct/indirect participation

Broad

Culture activity
: community + narrow/public definition in online/offline



Logical Definition

= specific difference + proximal genus

ex) Human is a rational animal

Sports is

an institutional and competitive physical culture (provisional agreement)

e-Sports is

an institutional and competitive electronic game (provisional agreement)



Value

Value of Sports

Social:
Health / Fun / Competition

Economical:
Nation Industrial Strategy
Job Opportunity, Infra

Educational:
Fairness / Ethics / Discipline

Cultural:
Identification / Fandom / Image

Political:
Unification / Nationality

Value of e-Sports

?

Y

?

Y

y



Human resource

Sports

Athletes

**Secondary
Participant**
(Service Provider)
(Official Org.)

Participants
(Sports for all, Leisure)
Spectators

e-Sports

Pro-gamer

**Secondary
Participant**
(H.W./S.W. Development Company)
(Korea e-Sports)

Participants
(User, Guild, Leisure etc.)
Spectators



Programs

Sports

e-Sports

Mega Event

Olympic Game

FINA World
Championship

WCG

Program

Programs(35)

Aquatics

RTS

Event

Events(400)

100m Freestyle

Starcraft

Environment

Nature/
Artificial Space

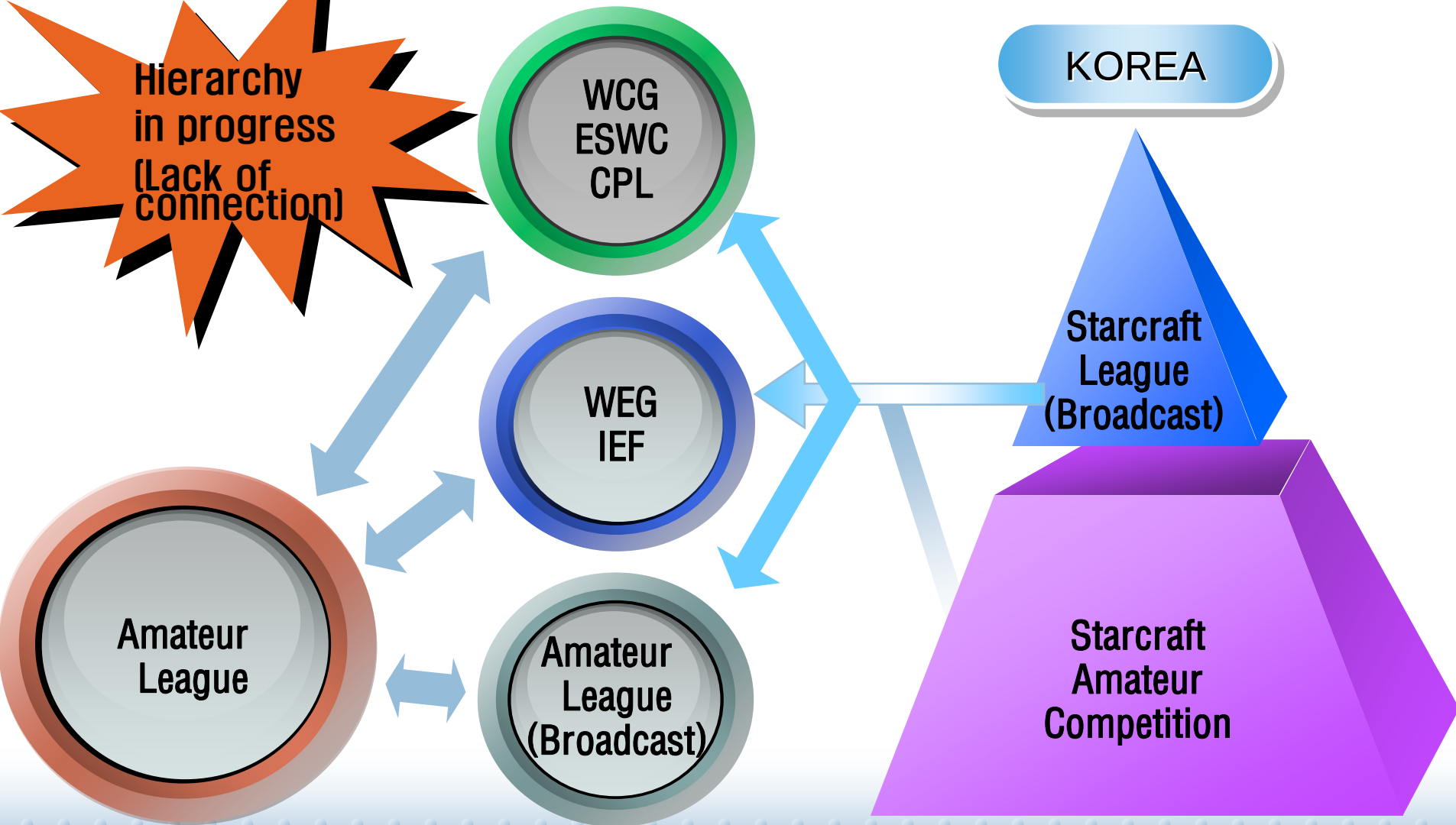
Water

Electronics
Cyber Space



e-Sports

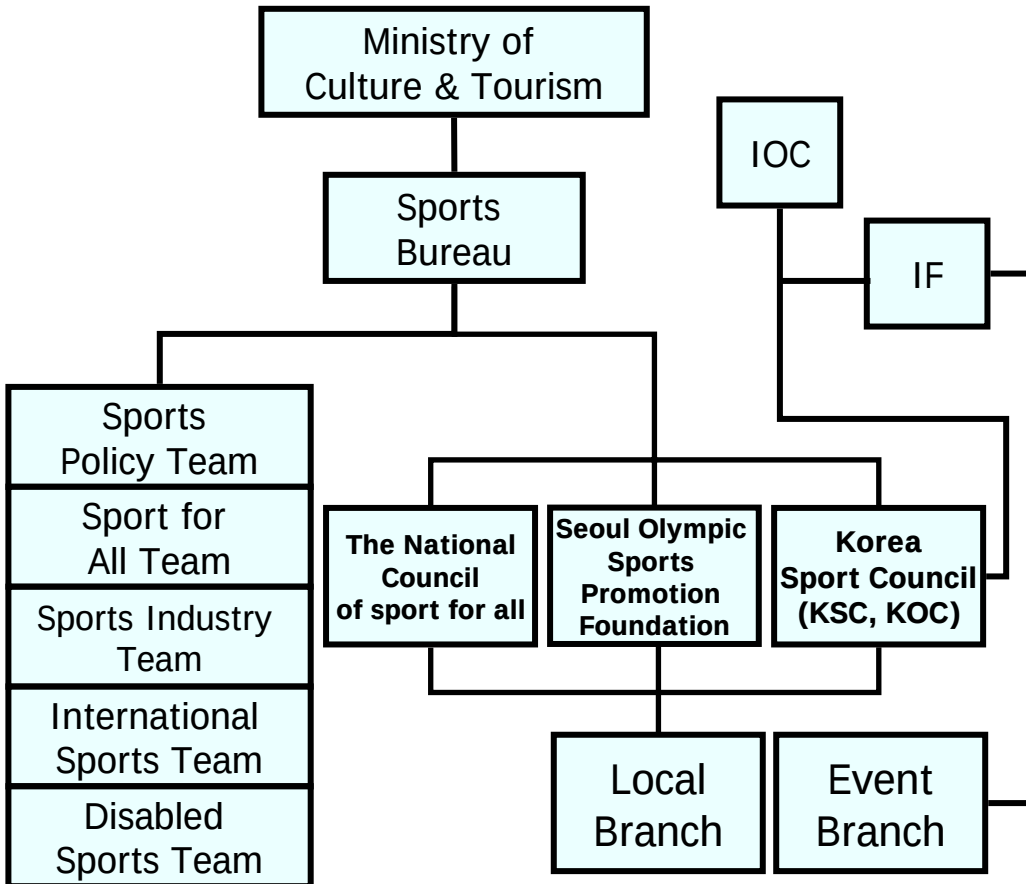
**Hierarchy
in progress
(Lack of
connection)**



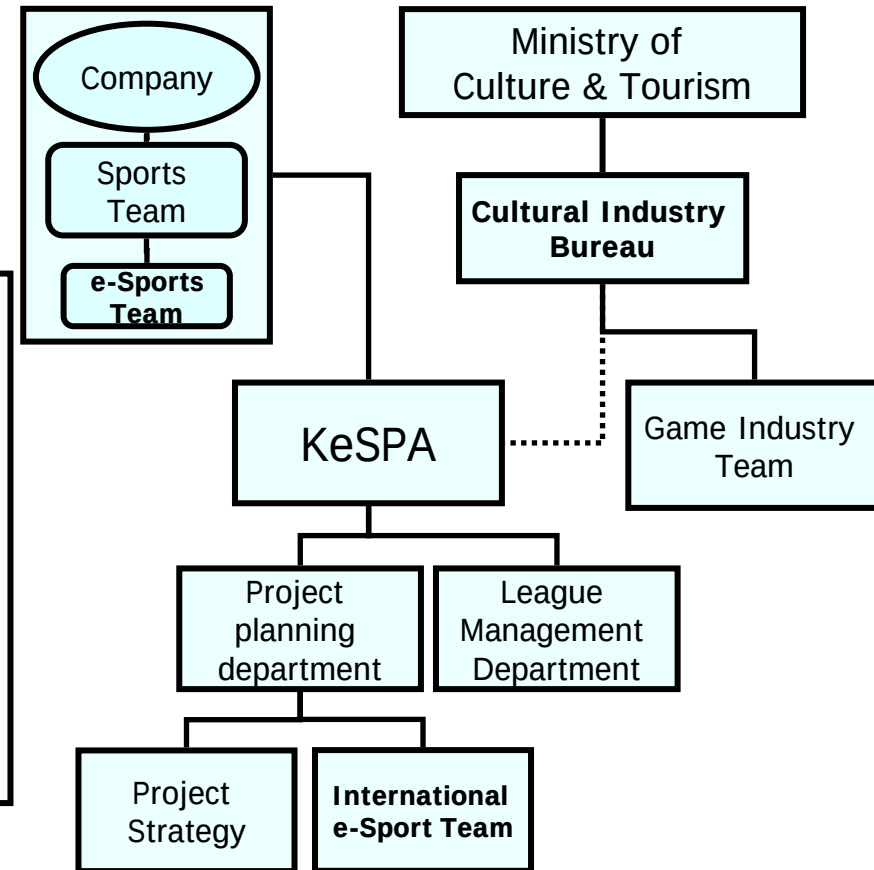


Organization

Sports



e-Sports





Revenue Structure

Sports

Sponsorship

Broadcasting Rights

Sports Facility

Ticket

Sport-Goods

License

Various revenue sources

e-Sports

Sponsorship
(from Company)

Broadcasting Rights

Internet Cafe

~~Ticket~~

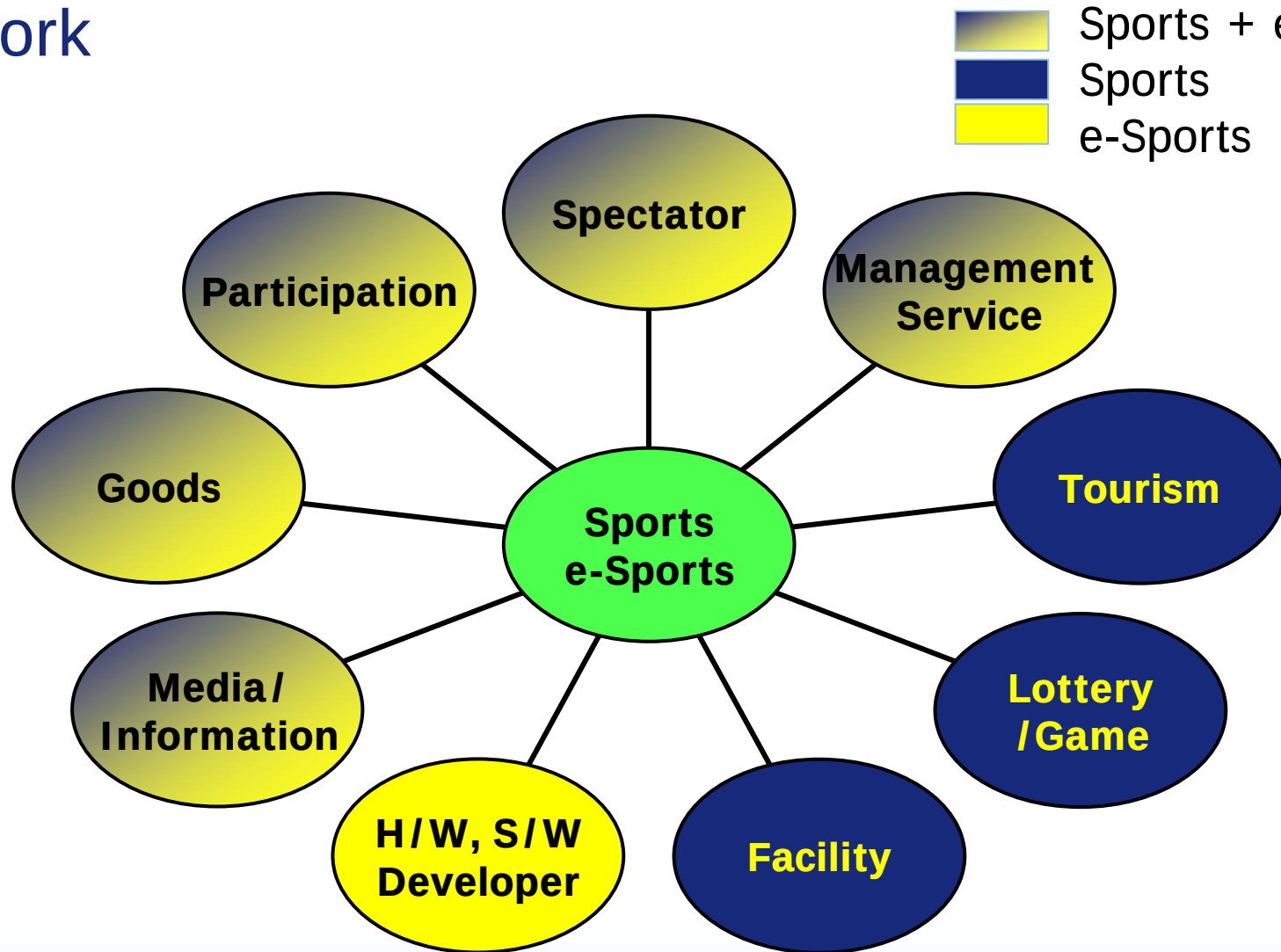
Game Software
Computer & Devices

~~License~~

**Simple revenue source
(Only Company Sponsorship)**



Network





Rule

Sports

Offense/Defense Foul

Cross the line

Disturb competitors

Time Limit

Rule Book

Being out of the game (or Expelled)

Handicap

Referee

Committee

Record

Rule Book

No change in the essence events

e-Sports

Cheat Program

Take advantage of bugs in the game

Using devices for cheating

Time Limit (Case by case)

Online

Offline
(same space)

Rule Book (in developing)

Defeat (or re-match) of the game

Referee

Committee

Record

Patch

Rapid change and infinite evolution



Law

Sports

- Sports has laws for promoting physical activity(1968), for supporting Seoul Olympic Games, for supporting 2002 World Cup
→ protect & promote sports as it is
- Not difficult to applying laws and standards
- laws & institutions for amateur sports exist

e-Sports

- Only Laws for promoting game industry
- Inaccurate applying laws (still developing)
- No laws & institutions for upbringing e-Sports

Require a clear definition of e-Sports whether a leisure or sports activities
(For protection of its own characteristics, legal examination requires)

Reinforcement laws are still in progress in terms of not only pro-sports, but also amateur sports.

Setting of laws and institutions does not pace up the growth of e-Sports. Above all, supporting for amateur e-Sports should be.

Sports

e-Sports

Concept

Real/Physical

Virtual

Value
Creation

Various

Not Yet

Human
Resource

Pyramid

Focus on only
pro e-Sports

Program

Consistent Hierarchy

Inconsistent Hierarchy

Industry

Various
Rev. Structure

Simple
Rev. Structure

Institution

Well-organized

In progress

Organization

Systematic

Not Yet



Conclusion

- The amount of Information in the next 2 years should be much more than until now

□ EMC社 : Pres. Michael Rutgers

$$E=M \times C$$

E: Energy

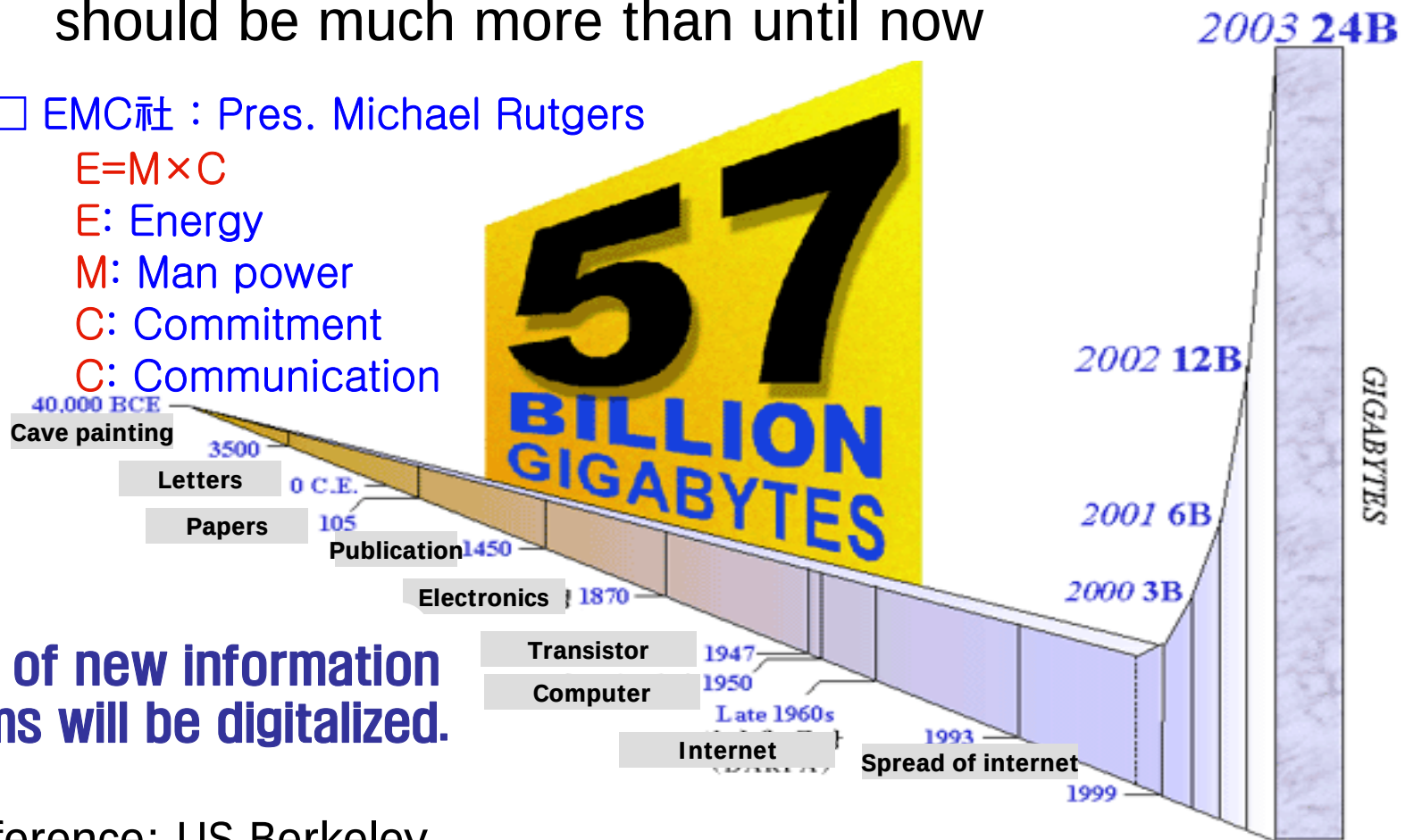
M: Man power

C: Commitment

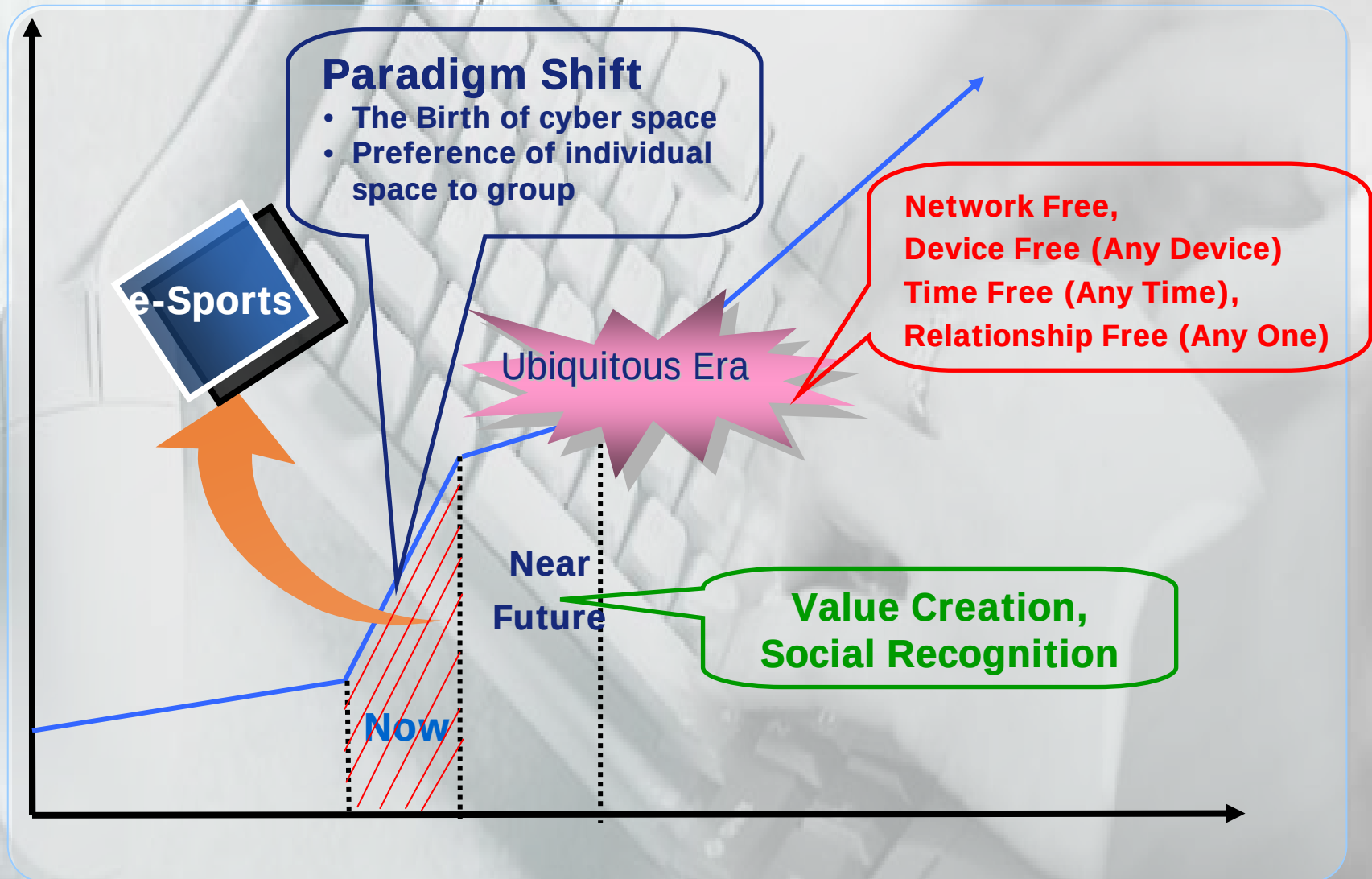
C: Communication

93% of new information forms will be digitalized.

Reference: US Berkeley



e-Sports



Further Issues

The Future will be an ubiquitous world (Sports, e-Sports will be changed)
Set up the new paradigm of physical activity
ex) McLuhan – Media is an expansion of physical

Suggestion

Institutionalization
Revision of laws for e-Sports
Club-lization of Guilds

Value Creation (Education / Social / Political / **Mental Fitness**)

他山之石 (an object lesson)

- Use the superior positions to the Korean Checkers

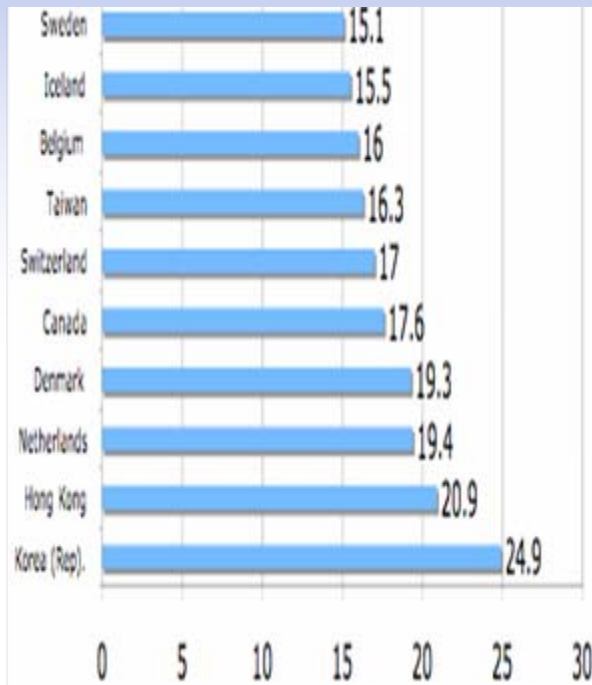
e-Sports as a Digital Leisure

Chung-Woon Kim
Professor, Myongji Univ.

2006. 09. 15.

Introduction of a Digital Society

- Infrastructure of Digital Society in Korea



Broadband subscriber per 100 inhabitants(2005)



Internet user: 60.9%
(World ranking# 3)



Cell phone user: 73%

Introduction of a Digital Society (Cont')

- Diffusion of Digital culture: Digital Nomadic



Online game as a play ground



Cy-jil??

A Festival of a Digital Age



2002 FIFA World Cup



2005 SKY pro-league finals

Change of Leisure Life

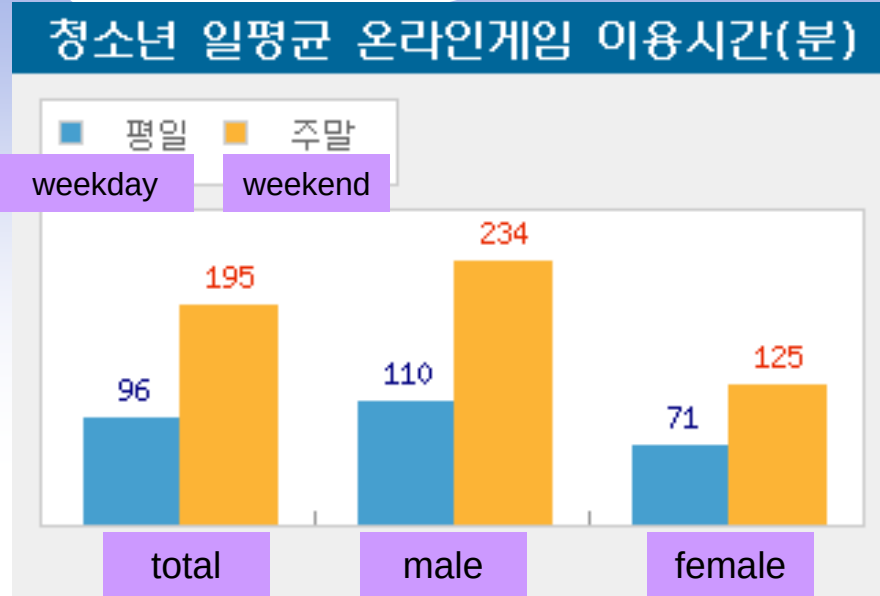


Would you know a new version of *The Ant and the Grasshopper* in the digital age?

Change of Leisure Life

	Industrial Society	Digital Society
Central Ideal of Society	Work	Life (Family, Leisure)
Individuality	Diligence, Sincerity	Creativity
Leisure Paradigm	Rest (free from~)	Play (free to ~)
Leisure Activity	Nap, TV, Watching Movies	Game, Outdoor Activity Participation
Leisure Function	Restoring One' Physical Strength	Fun, Satisfaction

Game becomes a lifestyle of teenagers



- Lifestyle of Teenagers
 - Over 95% of Elementary School Students retains Game site ID (S.Korea)
 - Average of weekday game hour : 96min, Average of weekend game hour : 195min

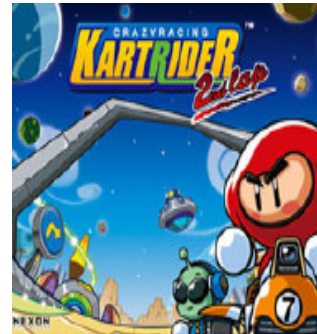
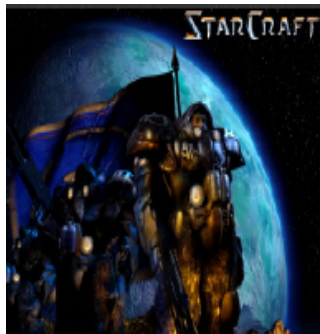
Characteristics of e-sports

- Kernelled Character

- Competition in a fair condition (unequal balanced game b/w character excluded)
- Competition decision by ability (gamble influenced by luck excluded)
- Competition decision in the limited hrs.(MMORPG game excluded)
- Agreement on social morality and customs (lewdly, speculatively spiritual game excluded)

- Secondary Character

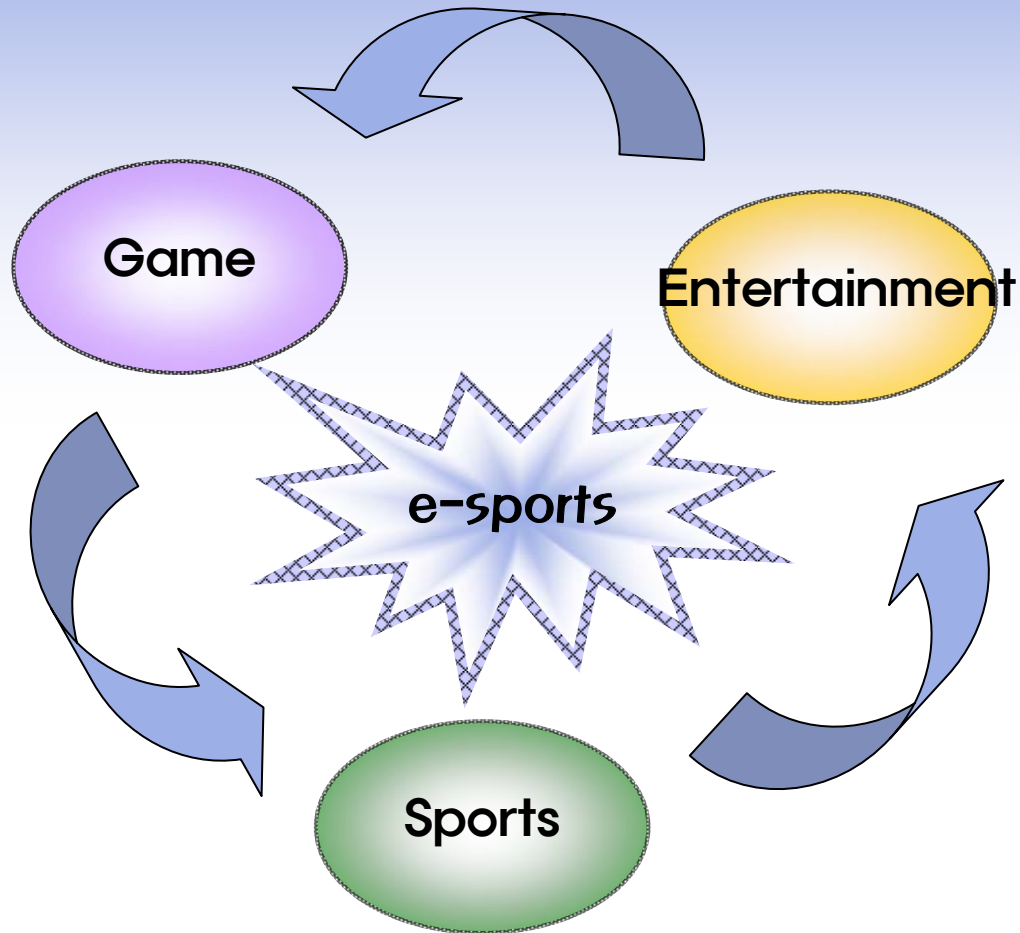
- Competition b/w persons (b/w person and computer deferred)
- Agreement on mind and body (unnecessary physical movement like checkers deferred)



e-sports as a New Sports(?)

- Decline of existing Sport spectators
 - Average of a game of professional baseball crowd: 10,727 (1995) → 6,722 (2005)
 - Average crowd of a football game in K league: 11,508 (1998) → 9,145 (the first half year of 2006)
- Increase of spectator of e-sports
 - 2004 & 2005 yrs.: over hundred thousand watched SKY pro league
 - e-sports stadium visitors: 70–80 thousand people every year
- Cause
 - The world best standard major league, Japan pro-league (baseball)
 - Low interest at a relatively low level of domestic league due to a live telecast of Premier league (football)
 - Attracting fan's attention b/c e-sports show the world best standard game

Fusion Leisure in Digital age : e-sports



Therapeutic recreation: e-sports

- Shadows of Digital age



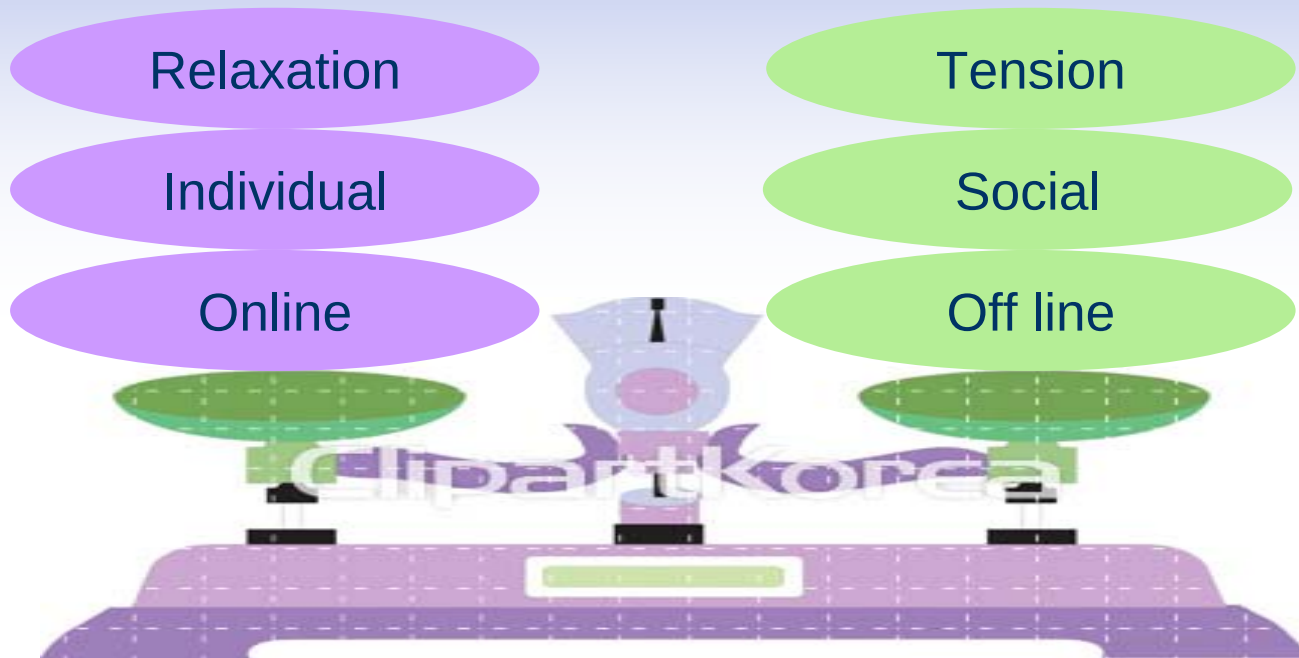
Addiction

Bipolar

Alienation

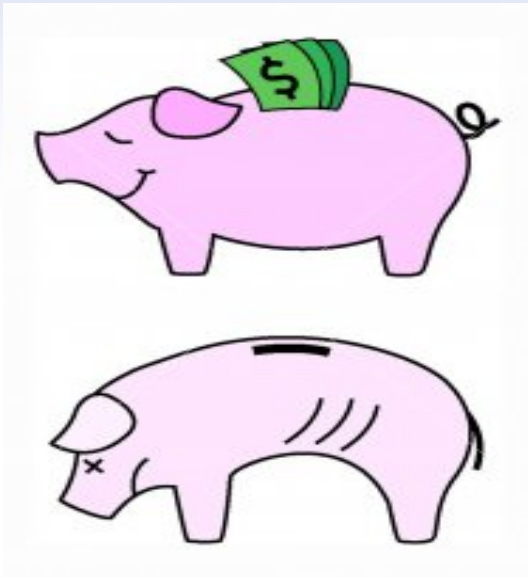
Therapeutic recreation: e-sports

- Cure function of e-sports



Vision & Value of e-sports as a Digital Leisure : Unity and Harmony

- Unitizing a Digital Society through Leisure : e-sports



Reducing the Rich & the Poor in their leisure life b/c leisure life is possible through inexpensive digital infra



Disabled persons' active social communication tool in a point of the minimum physical movement

Vision & Value of e-sports as a Digital Leisure : Unity and Harmony

- Unitizing a Digital Society through Leisure : e-sports



Easily approachable generation unity



Social health in an aging society by
maintenance & strengthening of
cognitive function



For the Digilog (Digital + Analog)



Thank you!!



eSports in the Media



Wrap up: GIGA History

- **ESL approach:**

**„not 2000 playing and 2 watching
2000 watching and 2 playing!”**

“League and Broadcaster should be separate organisations”

- **No interest in the german TV Scene in 2001-2005**
- **Management buy in GIGA December 2005**
- **GIGA refocussed on Digital Lifestyle**
- **GIGA new program grid**
- **GIGA2 launched May 2006**



GIGA Timetable

- **1am – 12am: Repeat**
- **12am – 6pm: Console / Casual Gaming**
- **6pm – 10pm: eSports / PC Gaming / Hardware**
- **10pm – 1am: Prime Time eSports / PC 16+**



GIGA and GIGA2

- **GIGA: Digital Lifestyle and entry window to eSports**
- **GIGA2: eSports round the clock, events Live**
(Germany 16+)



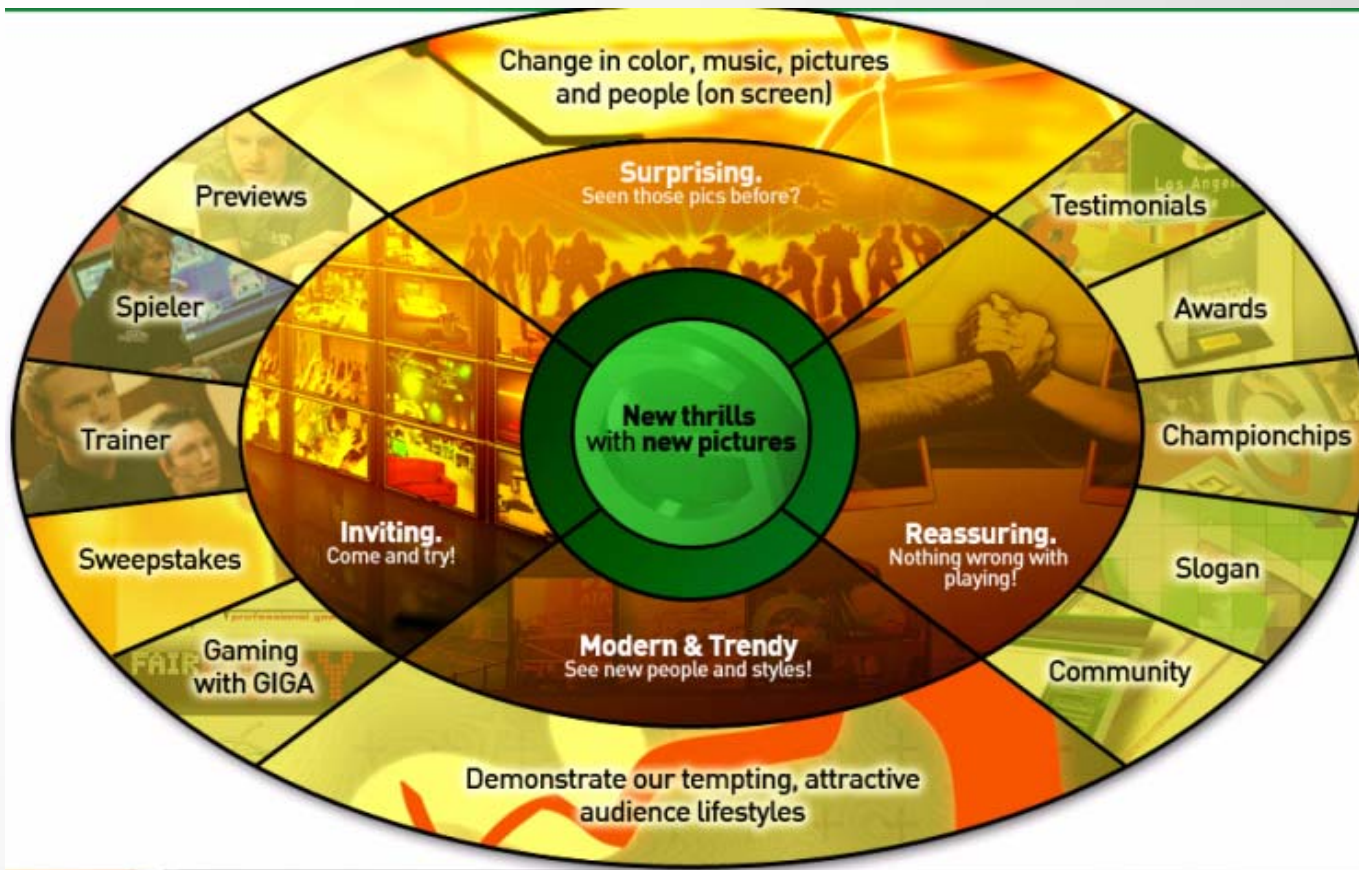
GIGA quick facts

- **24/7 Gaming channel GIGA1 and GIGA2**
- **Aired on Digital Satellite, various cable, IPTV, cellular**
- **German broadcast, english about to start**
- **Extended by VOD Portal**
- **16,5 hours of new content per DAY**
- + Broadcasting eSports events LIVE**
 - **ESWC, WCG, WSVG etc**
 - **Games Convention (Leipzig/DE), Cebit (Hannover/DE), E3 (LA/US)**
 - **Total of 40 Events LIVE per year**



Perspectives and Opportunities

- „at least one new picture every day“





Challenges for eSports in TV

- **Airtime Schedule for eSports Tournaments/games**
- **Lack of professionalism amongst Gamers**
- **Tournament organizers not used to TV Standards**
- **Age verification / youth protection**
- **Storyline, content continuity**
- **Transport emotions: Events are a key**



Airtime Schedules for eSports

- **Capability to broadcast full games**
 - **Postpone or skip advertisement breaks**
- **Don't change common rules to fit eSports to TV**
 - **Change the storyline / reception of spectators**
 - **Change the gameplay / tactics**
- **Capability to broadcast full tournaments**
 - **Change weekend schedule**
- **Capability to broadcast LIVE**
 - **Sports excitement is LIVE!**



Lack of Profesionalism amongst gamers

- **The skill of talking and representing in front of TV**
- **Weak Behaviour and outfit**
- **Missing attitude: „Want to be a star“**



Tournament organizers

- **LAN-Parties are NOT suited for TV**
- **Tournament Admin's don't understand Timing**
- **Tech Admins don't understand „LIVE“**



Age verification / youth protection

- **German Rating authority: USK**
- **Counterstrike is 16+ (Warcraft 12+)**
- **+16 Broadcast starting 10pm**
- **How to broadcast an event 16+**



Storyline / Content continuity

- **Content is the fundament for eSports Media**
- **Content needs to be created contineously**
- **The fundament for GIGA is ESL content**
- **ESL educated players/teams for TV behaviour since 3 years**



Emotions: Events are the key

- **Excitement level is at max with audience**
- **Feel and see emotions**
- **Challenge: GIGA comes in on an existing event**
- **Different language, infrastructure, legals, teams**



Conclusion

- **eSports is a TV phenomena**
- **Broadcasting eSports requires staff with mixture eSports and TV experience**
- **Setup eSports TV is not possible in „not mature“ markets, thus should be Windows Strategy First**



Perspective: Convergence TV/Internet

- **Gamers are „Digital Natives“**
- **Gamers will consume Video Content via the Internet**
- **Gamers will be the driving force for TV/Internet convergence**
- **Gamers will enable the new digital home**



Perspective: eSports on Consoles

- **X-Box360 and PS3 get connected (real-Multiplayer)**
- **A Console Online-community will arise**
- **Nintendo Wii will bring a new dimension with more physical gameplay**



Pro Gaming (eSports) in Media

Presented at the
International eSports Symposium 2006

September 15, 2006



Table of Contents



- Company Overview
- Pro Gaming Challenges
- Pro Gaming and Media
- Championship Gaming Invitational

Championship Gaming Series Overview



- The Championship Gaming Series was formed in May 2006 by DIRECTV and IGN Entertainment (a unit of Fox Interactive Media) with Mountain Dew, Best Buy and Microsoft Xbox as Founding Partners.
- The league will launch in 2007 and feature instant money payouts, huge prize money and massive media coverage leveraging News Corp television and online assets.
- In 2006, the Championship Gaming Series will focus on developing pro gaming into a television format.

IGN Entertainment Overview



- IGN Entertainment, a unit of Fox Interactive Media (News Corp Company), is a leading Internet media and services provider focused on the videogame and entertainment enthusiast markets
- Collectively, IGN's online properties reach more than 31 million unique users monthly worldwide
- 3 Major Divisions within IGN Entertainment
 - Media: Editorial sites include as IGN.com, GameSpy.com, FilePlanet.com, etc.
 - Consumer Products: Digital distribution of large files to the mass market
 - Technology: Software Developer Kits (Powered by GameSpy) used by video game publishers

Pro Gaming Challenges



- Negative stereotype of the “gamer”
 - Geek
 - Not social
 - Not “athletes”
- General public does not have a general understanding or reference point of most video games
- Skill set of the professional gamer is not intuitive
- Most games were not developed to be consumed as televised media content

Philosophy



Treat gaming as a sporting event and the players as athletes.



Approach



- TV Production
 - David Hill and DIRECTV
 - Mike Burks – Executive Producer
 - Arthur Smith Co – Executive Producer
- Internet Assets (Fox Interactive Media)
 - ChampionshipGamingSeries.com
 - IGN Entertainment
 - MySpace
- H2i
- Publisher/Developer Partnerships



2006 Events



- Championship Gaming Invitational
 - July 21st and 22nd
 - Treasure Island, San Francisco, California
- CPL Winter Finals
 - December 17, 2006
 - Dallas, Tx
 - Finals: Los Angeles, CA



Live shots from CG Invitational

Championship Gaming Invitational



- Shot using 18 HD cameras in addition to in-game cameras
- First run aired on September 8, 9 and 10 on DIRECTV Channel 101
- Summary show airs on Fox Sports Network's "Best Damn Sports Show Period"

Championship Gaming Invitational



Sample Footage from Episode 1 of the
Championship Gaming Invitational





Thank You.

Roderick Alemania

Vice President – Business Development

IGN Entertainment – A Unit of Fox Interactive Media

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