

SPORT AND WELLNESS

Focus sectorial



Electronic sports (Esports)

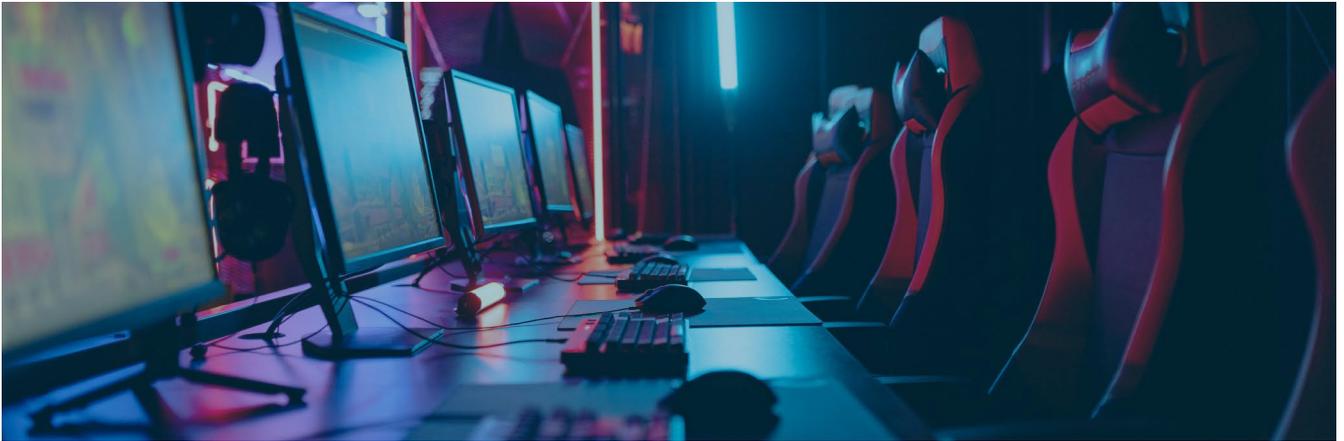
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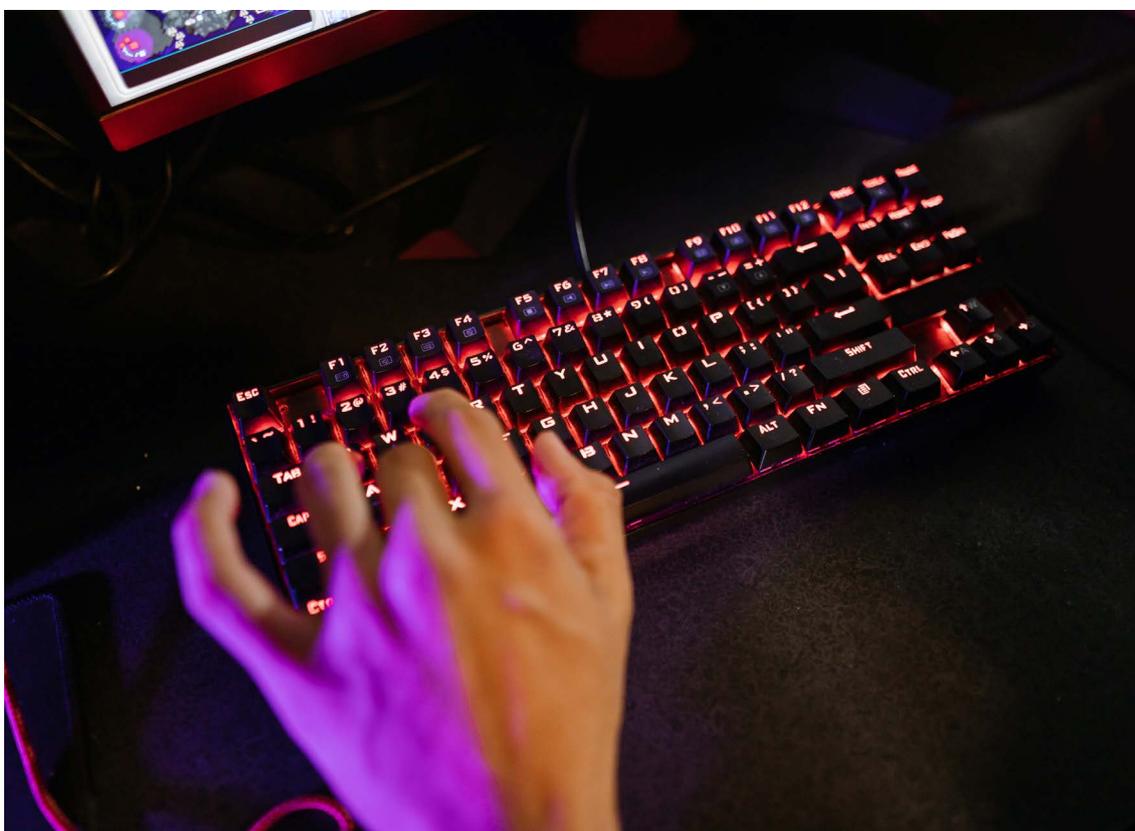
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Esports: a new sport mode?

Within the sports and welfare sector, in recent decades, Esports have become a reality hand in hand with the video game industry. Thus, while in the conceptualisation, programming and digitally-based arrangements, video games are a product of the audiovisual field and the creative industry sector, **the popularisation of the use of video games has generated an impact on the economic sector of sport** through competition, league organisation, the creation of sports companies, the emergence of new professional profiles and the consolidation of a genuine subsector of economic activity, which is called Esports.

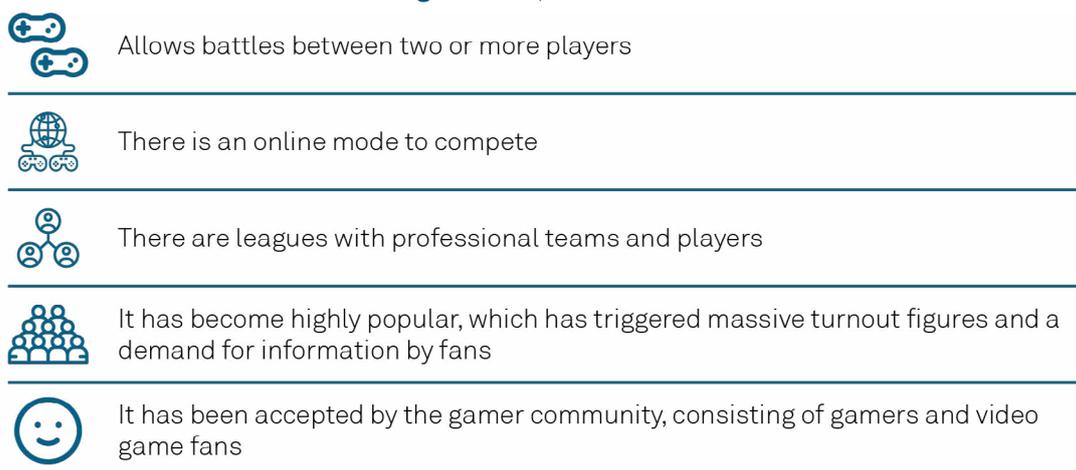
As defined by the [International Sports Federation](#), Esports are a competitive sport in which players (gamers) use their physical and mental skills to compete in different games in electronic and virtual media. Esports are an activity **in the process of being officially recognised as a sport**, and in which two or more players interact and compete, in a professional or amateur way, in a regulated virtual game —as in any other sports competition— where people play and there are professionals taking care of them and training them, regulations to follow, referees who monitor compliance with the regulations, and public attending the sports event, in figures that often outnumber traditional in-person sports such as football or handball.

The practice of Esports can either come from competitions linked to sports side games (Gran Turismo Sport, FIFA...) or set in fantastic worlds where challenges and adventures need to be overcome (League of Legends, Counter-Strike, Clash Royale...).



The concept of Esport was popularised in 2000 in South Korea, although the origins of Esports can be traced to the late 20th century, when in 1972 the first Esports event took place between the University of Stanford, in the United States, around Arcade Spacewar!. A few years later, in 1980, the company Atari hosted the Space Invaders Championship, which attracted almost 10,000 participants and became the first massive Esports event.

Figure 1. Esports features



**MOST POPULAR
E-SPORTS**

**LEAGUE OF
LEGENDS**

**COUNTER STRIKE
GLOBAL OFFENSIVE**

FORTNITE

DOTA 2

Source: Prepared by the authors, based on data in the reports "Esports" (Diputació de Barcelona) and "Guia per entendre què són els Esports" (Observatori de tendències)

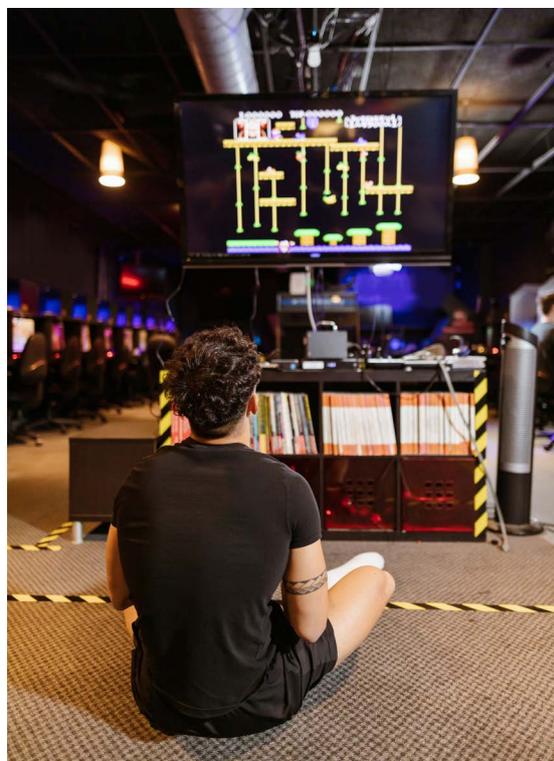
The development of the Internet in the late 1980s and early 1990s —when **Internet connection** entailed a great evolution for digital games and the possibility of online competition—, encouraged the organisation of tournaments, leagues and world competitions, with increasing audiences. This development resulted in the creation and articulation of a new economic subsector in which players no longer participated for their own sake and for ludicrous purposes, and **teams of professional players**, private sponsors, the organisation of territorial leagues, events and, at the same time, audiovisual content production companies also entered the Esports market.



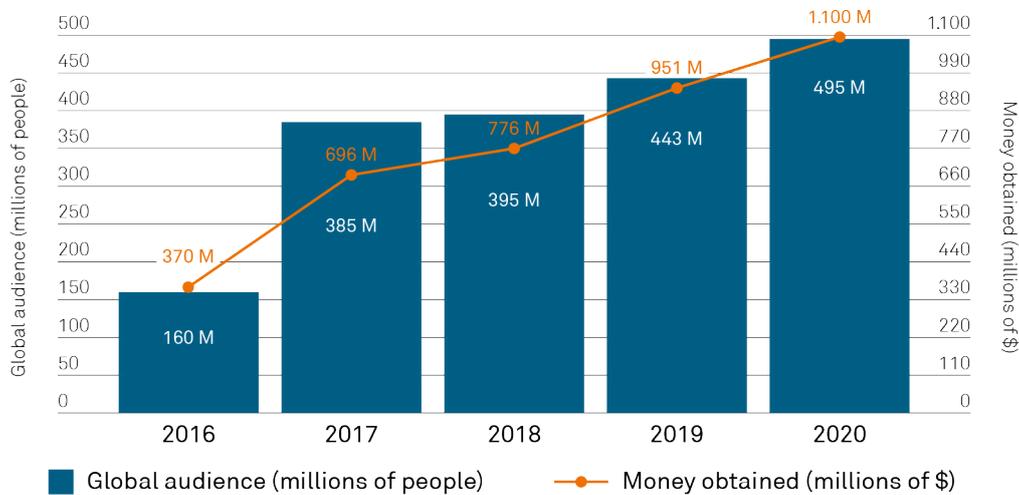
In short, the development of an amateur and amateur community, software developer companies and media interest in Europe, the United States of America and South Korea led to the **professionalisation** of Esports and a more regular organisation of **competitions and tournaments**. In 2008, the [International Sports Federation](#) was created with a clear goal: to professionalise Esports to ensure that people who play and train had **adequate conditions** (regulated and periodic training, health care and injury prevention, psychological support and remuneration adjusted to the demands of the position, among others) to respond in line with the level and intensity with which Esports competitions are developed.

For the Catalan case, the **Union of Sports Federations of Catalonia** promotes the Esports -with the sponsorship of a private telecommunications company- through the [Catalan League of Esports](#). The Catalan federations of tennis, chess, motoring, baseball, orientation, dance and bowling are already involved. On the other hand, to make it clear that Esports are being promoted Barcelona, since 2021 there is the [Barcelona International Gaming Center](#), a specific infrastructure for the promotion of Esports that has a business cluster, a high-performance sports centre and other specific equipment. Similarly, **in Spain the sector moves 1 billion euros**, with many teams and structures such as the [Liga de Videojuegos Profesional](#). Traditional sports clubs like FC Barcelona are also entering the Esports.

The growing Esports subsector had —in the context of the Barcelona Games World (BGW) in October 2017— the stage of the first day of the League of Legends Orange Super League organised by the [LVP](#) in collaboration with Fira de Barcelona, which also hosted the first Call of Duty Cup and the Clash Royale Super League. More than 135,000 people passed through the BGW, the largest fair in Spain in Esports, where other large companies offered various activities related to Esports. This exhibition had a new edition in 2019, under the name [NiceOne Barcelona – Gaming and Digital Experiences Festival](#).



Thus, in parallel to the expansion of the phenomenon of electronic sports on the social side, there has also been an almost exponential growth in the economic sphere, especially in recent years. As for its audience, since 2016 it has increased by more than 300%, reaching almost **500 million viewers and spectators**. In terms of turnover, Esports closed in 2020 with **\$1.1 billion**, 730 million more than 2016.

Figure 2. Evolution of economic turnover and the global audience of Esports

Source: Prepared by the authors, based on data by Revista Angle - Universitat de Barcelona

Besides, the incorporation of Esports into Catalonia is a reality and, according to the latest data, it concentrates 53% of the turnover of the sector in the whole of Spain (2021). In addition, in Catalonia there are already 145 companies dedicated to the world of Esports, with a total of **4,000 jobs** and invoicing some 500 M annually (2021). Esports are also supported by the Department of Digital Policies and Public Administration of the Generalitat of Catalonia, which seeks to position itself strategically in this new niche by supporting the aforementioned Catalan League of Esports through the federations.

Today, thanks to digital platforms known as new **over-the-top (OTT) platforms**, which broadcast live content over the Internet, the audience can live games almost in first-person and access services that make the experience more complete. By means of example, they allow access to the individual screens of each player, share interviews with them and offer podcasts after games, increasingly resembling competitions in many traditional professional sports. An example of this niche market is the platform **Twitch**, specialising in streaming Esports competitions, which is able to mobilise an audience of millions of people.



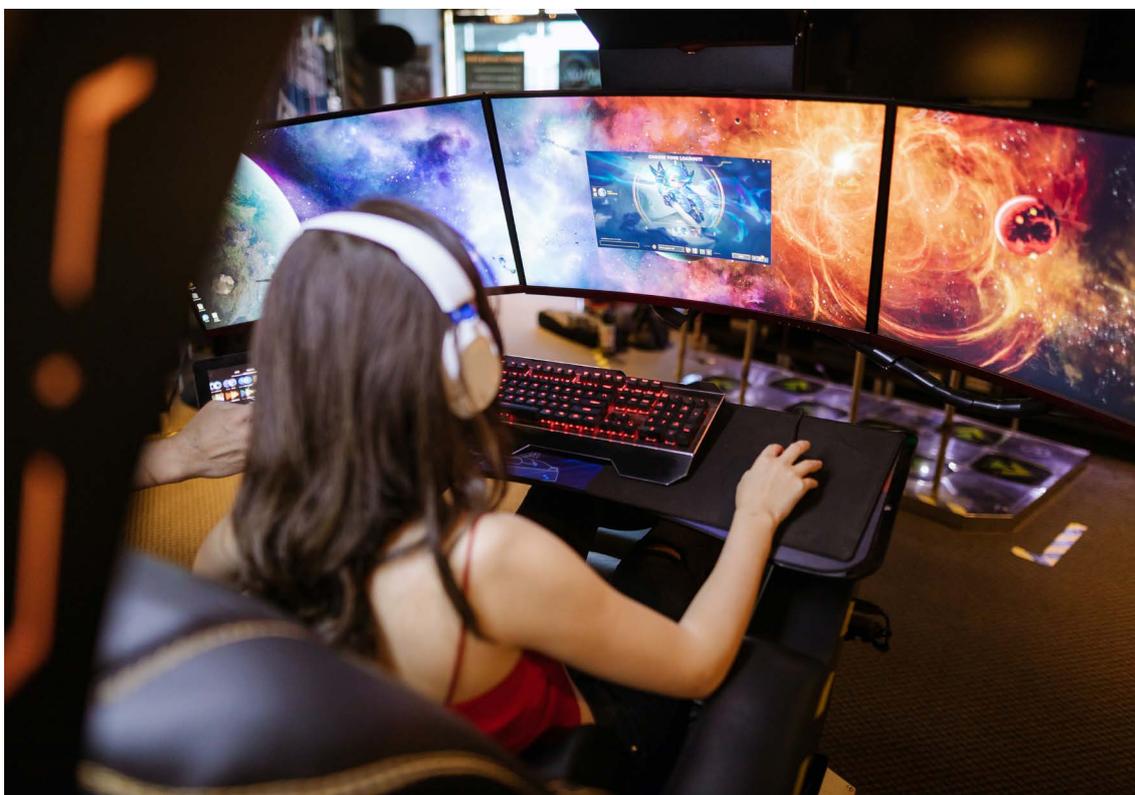
Esports challenges

The increased social presence of Esports has generated a double controversy over **whether or not their professional practice is healthy**, and about their very status as a sport in terms of official recognition.

There is a broad consensus among health and education professionals that an excessive dedication to digital games -especially by young people- can have harmful effects on the person, particularly in terms of isolation and inability for social interaction. In this sense, **Esports can be a source of recreation, entertainment and learning**, as well as an inclusive instrument, for example, for people with functional diversity, and also of promoting social relationships, physical activity and health.

Today, in order to foster the balance between the real and virtual world of players and the audience behind them, the agents involved **work to define a code of good practice** that collects advice and recommendations that act as a guide in the physical and mental aspects that these people should accomplish.

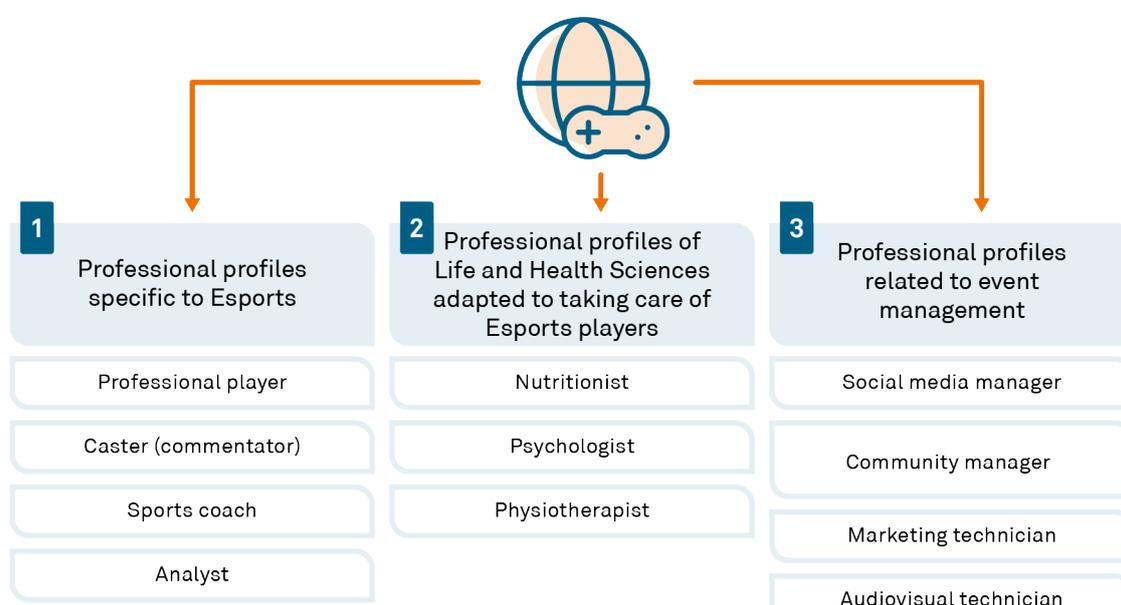
Finally, regarding the official recognition of Esports, it is worth saying that twelve years after the founding of the aforementioned International Sports Federation, the International Olympic Committee decided to **accept Esports at the Tokyo Olympics in 2021 as an exhibition sport**, among other reasons because they could help the Olympic Games regain access to the young audience. After this triumph, this sector does not rule out the possibility of participating as an official sport at the Paris Olympics in 2024, although the path to full recognition is long.



The impact of Esports on professional profiles

The exponential growth of Esports in recent years has led to the emergence of a **new market** that begins to demand both new and existing professional profiles that find an opportunity to offer specific new services. Thus, in some cases, these are newly created professional profiles, which are closely related to the practice of Esports, while others are already established professional figures, but that require a competitive adjustment to the new features surrounding the Esports labour market.

Figure 3. Impact of Esports on employment



Source: Prepared by the authors

Below are some of the most demanded professional profiles following the consolidation of Esports:



Professional player: the protagonist of the Esports. They usually are amateur players who become professionals when, due to their value in the world of competitions in Esports, they become sponsored by a private actor and join a gamer team or, individually, participate in events under sponsorship as well. Their professional skills and skills are those of any sportsman except for physical strength: physical resistance, constancy, analysis and concentration skills, resilience and teamwork.



Caster (or commentator): they are the voice commenting on competitions and are responsible for transmitting the game's emotion to the audience, analysing its mechanics, course and results. This profile requires knowledge of the Esports game in question. Also, people who practice as casters are skilled in social media management, know how to interact with the public to generate community, and produce content.



Esports trainer: having a thorough knowledge of Esports, they are the person responsible for designing and implementing a game strategy by collecting and processing data generated by the development of competitions. They also prepare physical and psychological training programs to ensure psychological emotional stability of the team's Esports players.



Esports analyst: they work with detailed game data to analyse what went well or wrong in a particular game. They also makes forecasts and predictions for different decision scenarios, which can be used to produce game reviews or by professional game companies and sports teams to improve their gameplay or train their teams to improve performance. If working for a game developer, they use data analysis techniques to understand how players use the game and to help report product and game developments.



Other occupations already established in other professional fields such as [nutritionists](#), [psychologists](#) and [physiotherapists](#), have a role in Esports of supporting the physical and mental state of the players, but adapted to the characteristics of games and competitions, with the aim of ensuring both their sporting performance and their health and well-being (defining and monitoring food, physical training plan and emotional well-being, among others).

Some of the functions that these professional profiles should look for would be:

- The seat **ergonomics** of the person who practices Esports.
- **Vision care** of the person who practices Esports, in the sense of avoiding eye wearying and excessive vision wear due to the overexposure to screens.
- **Tonification and general muscle flexibility** of the person practicing Esports, in the sense of reducing the physical risks arising from sedentary habits and maintaining the reflexes.
- Ensuring that **healthy living habits** are maintained in terms of food, night rest and avoiding dependence on stimulants such as coffee.



Finally, indirect employment generated in **event management** and **interaction with the public** involves the professional profiles that collide in any crowded sporting event to ensure its impact on social networks, technical success in broadcasting the event and in assessing its commercial possibilities and the potential generation of new contracts.

In short, it is estimated that the impact on employment of professional profiles linked to Esports will increase in new career opportunities, both for new profiles requiring specific and regulated training -which will inevitably start to be offered to the market- and for other traditional profiles from other economic sectors that can be retrained and incorporated into the world of Esports.

Esports, focused

Today, Esports are a rising market, both in terms of generating economic activity and in terms of generating employment. Its novelty lies in the fact that there is a combination of the digital products that began to be developed in the 1980s with the professionalisation of a sporting practice that generates a large media attention. This coincidence generates an expanding market from which its roof is not yet known.

Culturally, Esports are part of the so-called 'millennial culture' and are especially relevant to people born around the year 2000, so they identify with professional profiles linked to young people, all of them **digital natives**. The Esports market follows the patterns of the world of great sporting events (basket, football, Olympic movement...) and for this reason it seems clear that its evolution will follow these future patterns:

- Consolidation of the professional profiles explained previously.
- The recruitment of **new audience segments** will result in new expansions of the Esports market.
- **Professionalisation** of the Esports market, which will achieve similar patterns to those already made up by the markets of other sports such as football or handball: professional players who will have managers who deal with economic negotiations, management of image rights; incorporation of new professional profiles from technology, engineering, communication; and the right to support professional players and teams where they are placed, among others.
- **Interest of the big media** in broadcasting live Esports through media such as television, as is the case with other sports, even more so with the deployment and consolidation of professional leagues. In this respect, the incorporation of Esports as an Olympic discipline and the steps that have already been taken will result in this trend



In short, the Esports sector is currently in the **process of definition and growth**, but as an emerging market it will follow very similar development and job creation patterns to that of other sports, where players are professional, but they are only one piece of the gearing of the market and the professional profiles that are already being created.

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