



Memorandum

To: John Black
From: Matt Marske
Subject: eSports
Date: 6-14-2017

John,

Competitive eSports are a growing phenomenon in our Country. I wanted to point out some intriguing stats and news that the NFHS may want to consider as we think about getting involved in this area of sport:

- Newzoo, a research firm that studies eSports, estimates that the industry brought in revenues of \$493 million globally last year, and predicts that will grow to \$1.1 billion in 2019.
- The University of Utah has become the 1st power-five university to offer scholarships to students that play eSports for the University.
 - There are 34 collegiate varsity eSports programs across the country and some officials project as many as 50 to 60 schools will sponsor an eSports team by the next academic year (predominantly NAIA schools).
- The NACE seems to be the current governing body for collegiate eSports. They were founded in September 2016 and are supported by the NAIA. They have a complete constitution and set of bylaws for their members.
 - 31 of the 34 varsity eSport programs are members of NACE
 - Averaging about \$7,600 per scholarship
 - NACE projects that about \$7 million in annual eSports scholarships will be granted by the next academic year from varsity programs.
- Last year's League of Legends championships attracted more than 43 million unique viewers, topping out at 14.7 million concurrent viewers during its peak. This year's NBA finals, by comparison, are averaging 19.3 million total live viewers on ABC and streaming platforms combined.
- In 2018, 17 NBA franchises, including the Utah Jazz, will participate in an eSports league centred on the NBA 2K gaming franchise.

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- The Big Ten Conference has agreed to a partnership with Riot Games (developer of League of Legends) to provide scholarships and a competition for eight of their conference schools.
 - Initially partnering with a video game developer may be way to enter eSport space
- Big East Commissioner Val Ackerman said the schools in her conference are intrigued by the connection with students focused on science, technology, engineering and math. Essentially, administrators see eSports as another way to recruit students in their hyper-competitive landscape.
- ESPN has entire page dedicated to eSports stories and results: <http://www.espn.com/esports/>
 - From John Lasker, vice president of programming and acquisitions at ESPN: "It's been clear to us that it's [eSports] a growing category on the global scale and now, more recently, in the United States. We see that there's a pretty good crossover in terms of audience comparisons and interest in terms of participating in video games and eSports and what you would call traditional sports. We feel like it's a natural thing for ESPN."
- AnyKey (<http://www.anykey.org/>) is an organization that is leading the effort to ensure a diverse and inclusive environment in eSports.
- eSports will be an official medal sport at the 2022 Asian Games in China
- eSport Fan Demographics (based on survey of 497 eSport fanatics conducted by Mindshare NA):
 - "Forty-three percent of eSports enthusiasts have an annual household income of \$75,000 per year or higher — and nearly one third (31 percent) have an HHI2 of \$90,000 or higher."
 - There is a large proportion of millennials in the demographic. Sixty-five percent of fans are between the ages of 18-34, but 60 percent are between 25 and 39.
 - Women make up a significant proportion of the fan base, registering 38 percent.
 - Fifty-eight percent of fans over the age of 25 have children of their own.



2017 Q2: SCHOOLS WITH ESPORTS SCHOLARSHIPS

#	Scholarship Start	State	College	Affiliation	Games	# of Scholarships (Est)	Total Per Student/Year	Total Scholarship \$'s
1	Fall '14	Illinois	Robert Morris University	NACE	7	90	\$9000 - \$18000	\$1,350,000
2	Fall '15	Kentucky	University of Pikeville	NACE	2	20	Up to Full Tuition/Room & Board	\$200,000
3	Fall '15	Missouri	Maryville University	NACE	5	12	2,000 up to Full Tuition /Room & Board	\$24,000
4	Spring '16	Kansas	Kansas Wesleyan University	NACE	4	10	\$5000 - \$20000	\$69,500
5	Fall '16	Nebraska	Midland University	NACE	1	25	\$15,000	\$225,000
6	Fall '16	Missouri	Columbia College	NACE	1	12	Up to 50%	No total available
7	Fall '16	Kansas	Southwestern College	NONE	1	6	Up to \$5,000	\$30,000
8	Fall '16	California	University of California Irvine	NONE	1	14	\$5,610	\$78,540
9	Fall '16	Missouri	Missouri Baptist University	NACE	1	9	\$13,000	\$117,000
10	Fall '16	Missouri	Southwest Baptist University	NACE	1	25	Performance and Merit Based	\$100,000
11	Fall '16	Kansas	Pratt Community College	NONE	1	9	No total available	No total available
12	Spring '17	Ohio	Tiffin University	NONE	3	40	20 @ \$3000, 20 @ \$15000	\$360,000
13	Spring '17	Maryland	University of Maryland	BTN	1	6	\$5,000	\$30,000
14	Spring '17	New Jersey	Rutgers University	BTN	1	6	\$5,000	\$30,000
15	Spring '17	Wisconsin	University of Wisconsin-Madison	BTN	1	6	\$5,000	\$30,000
16	Spring '17	Minnesota	University of Minnesota	BTN	1	6	\$5,000	\$30,000
17	Spring '17	Michigan	Michigan State University	BTN	1	6	\$5,000	\$30,000
18	Spring '17	Indiana	Indiana University	BTN	1	6	\$5,000	\$30,000
19	Spring '17	Illinois	Northwestern University	BTN	1	6	\$5,000	\$30,000
20	Spring '17	Illinois	University of Illinois Urbana-Champaign	BTN	1	6	\$5,000	\$30,000
21	Spring '17	Ohio	Ohio State University	BTN	1	6	\$5,000	\$30,000
22	Spring '17	Michigan	University of Michigan	BTN	1	6	\$5,000	\$30,000
23	Spring '17	Iowa	University of Iowa	BTN	1	6	\$5,000	\$30,000
24	Spring '17	Indiana	Purdue University	BTN	1	6	\$5,000	\$30,000
25	Fall '17	Indiana	Indiana Tech	NACE	2	20	\$2500 - \$5000	\$150,000
26	Fall '17	Indiana	Trine University	NACE	5	30	\$2,000	\$60,000
27	Fall '17	North Carolina	Lees-McRae College	NACE	2	20	\$1000 - \$5000	\$45,000
28	Fall '17	Illinois	University of Jamestown	NACE	5	25	\$2,000	\$50,000
29	Fall '17	Ontario	St. Clair College	NACE	7	40	70% tuition + \$500	\$290,000
30	Fall '17	Illinois	Illinois College	NACE	1	12	15000 - 20000	\$210,000
31	Fall '17	Utah	University of Utah	NACE	4	35	\$1000 - \$2000	\$52,500
32	Fall '17	Nebraska	Bellevue University	NACE	1	10	50% tuition to 100% tuition	\$50,000
33	Fall '17	Vermont	College of St. Joseph	NACE	2	20	\$16,250	\$325,000
34	Fall '17	Iowa	Morningside College	NACE	2	12	Up to \$5000	\$60,000
35	Fall '17	Ohio	Lourdes University	NACE	4	30	Merit Based	No total available
36	Fall '17	Ontario	Lambton College	NONE	1	10	Performance and Merit Based	No total available
37	Fall '17	Kentucky	Western Kentucky University	NACE	2	12	No total available	No total available
38	Fall '17	Missouri	Stephen's College	NACE	1	12	Partial scholarships	No total available
39	Fall '17	Kentucky	Brescia University	NACE	2	11	No total available	No total available
40	Fall '17	Iowa	Grand View University	NACE	4	12	Performance and Merit Based	No total available

655

\$ 4,166,540

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