**‘Examine the involvement of both non-endemic and endemic brands within the world of Esports. It's important to provide a handful of examples of brands who have already activated well / badly within the industry.’**

Esports is one of the largest industries in the world with massive growth and potential, in 2022, the value of the global eSports market was just over 1.38 billion U.S. dollars. Additionally, its forecasted that by 2025 the market revenue will grow to as much as 1.87 billion U.S. dollars in 2025 (Gough, 2023). This has caused sponsorships and advertising to be the largest contributors to market revenue in esports in 2021 (Gough, 2023). Brands are prominently featured in the esports, sponsoring events, teams, and individual players. These partnerships and sponsorships are beneficial to both the sponsor and the teams, organisations, tournament hosts, etc. Teams and events receive crucial funding to run, but brands also get the opportunity to elevate brand awareness, expand their audience reach, and enhance their overall brand image.

The esports market consists of endemic and non-endemic brands. Endemic brands are “brands that create products that are used in the production or playing of eSports” (Nichols, 2017). Some examples could be peripheral manufacturers such as HyperX and Razer, as well as chair brands and tech companies such as intel. Non-endemic however are brands that “create products that are not vital to the production or playing of eSports” (Nichols, 2017). Examples in the esports scene include betting companies (e.g. Bet365) as well as car manufacturers (e.g. Kia).

Twitch is a prime example of an endemic brand that is successful in esports. Originally launched in 2006 as Justin.tv, as a general streaming platform, it rebranded into Twitch in 2011 when gaming emerged as its dominant category. The platform was then acquired by Amazon 2014 for $970 million. Twitch is now one of the biggest live streaming services having with it having 76.7 percent of the market share for hours watched as well as being the host of millions of streamers as the platform had 9.6 million unique channels streamed in Q2 (May, 2022).

Twitch distinguishes itself from competitors (e.g. YouTube gaming) by relying heavily on its audience. For example, one of Twitch’s marketing strategies is through Twitch drops. Drops campaigns on twitch offer a way for viewers to acquire in game loot by simply watching streams (Twitch help portal, no date). This is just one of the strategies employed by Twitch to attract viewers to watch streamers on its platform. Twitch also collaborates with esports organisations, implementing drops during their tournaments. For instance, in the VALORANT Champions Tour (VCT), the main competitive esports tournament for VALORANT, viewers had the opportunity to earn drops such as gun buddies and sprays simply by tuning in on Twitch.

Twitch also hosts numerous events throughout the year to maintain audience engagement, a critical factor as retaining or expanding viewership creates more opportunities for major tournament organisers to choose Twitch over other platforms. One example method is Twitch Rivals, where Twitch streamers compete in top games for substantial prizes. In 2023 twitch hosted Twitch Rivals 10th anniversary team battle IV with close to 250k peak views (Esports Charts Twitch Rivals, 2023). This not only offers entertaining content for viewers but also highlights Twitch's potential as a platform for hosting tournaments.

As well as Twitch rivals Twitch organises TwitchCon, a gaming convention providing fans with the chance to meet streamers, while also serving as a platform for companies to showcase new games and tournaments in the Expo Hall. These events draw in large crowds throughout the year with around 14,500 people attending, which was 65 percent higher than the 9,500 who attended the one previously (Nightingale, 2023).

Through these marketing campaigns Twitch has become the main platform for live-streaming gaming content which includes esports events and esports players streaming their games (Block and Haack, 2021). Twitch has created a service that offers something to nearly every viewer. With the implementation of drops its expected that it should bring in more viewers to use twitch to engage with creators and tournament organisers. Moreover, Twitch has shaped a community where its audience comes together to watch events like Twitch Rivals as well as Twitch con. Twitch understands that for their platform to be successful in gaming and esports, they must keep the Twitch community at the forefront, as the Twitch community is one of the most important elements of twitch that separates them from the competition.

Not every streaming platform can achieve the level of success as Twitch for example Facebook Gaming is Facebook's live streaming platform for gaming content. The platform is designed to attract content creators, a significant element in esports, where teams often sign content creators to represent them, acting as a marketing source as well as bringing in new fans.

Facebook Gaming’s history could be one of the factors that has made it less successful in terms of lower viewership with just 7.9% of the market share for hours watched (May, 2022). Facebook Gaming launched a mobile app in 2020. However, it had a few problems as Apple rejected its app numerous, citing its rules that prohibit apps with the main purpose of distributing casual games. Apple’s rules forced Facebook to remove actual gameplay functionality from the app (Malik, 2022). and just 2 years later the app was shut down leaving just the online website left. With all this change over a short time this could leave lots of people confused with Facebook Gaming which could explain the low number of streamers only having 283 thousand unique channels (May, 2022).

Facebook Gaming however have had some marketing campaigns which could be seen as quite successful. For example, in November 2019 they signed Disguised Toast, a streamer with over 1.3M followers on Twitch at the time. This was a big deal as Disguised Toast had a big following and the first stream was very successful with his fist steam getting over 2.6 million views. (Chen, 2019).

Looking at the way Facebook used its marketing they focused more on the creators rather than community. Also after the contract Toast did not resign and openly admitted that being on Facebook was not helpful saying “I wish I was on Twitch [for 'Among Us'] because it was the biggest game in the world by a huge margin and I was the biggest content creator for it, streaming-wise, but I got severely hampered because I was on a platform that not a lot of viewers used" (Victoria, 2022). This might not have put Facebook in a good light and might have impacted how many people use the site to stream on.

When comparing both Facebook Gaming and Twitch there are some clear reasons why Twitch could be considered more successful with higher viewership. When focusing on the marketing campaigns Twitch focused more on #its engagement with the audience, rather than bringing big names on their platform. Twitch also has expanded past gaming into other streaming content such as ‘just chatting’ which has been since Q3 2020 twitches most watched category (May, 2022). Although not related to esports directly, the audience that watch those streams on Twitch have a chance of seeing tournaments in their recommended section which could passively bring more viewers into esports.

The esports scene is not just made up from endemic brands; non-endemic brands such as Jack Link’s which is an American meat snack company. Entered Esports in 2019 when they signed with Envy (esports team). They have gone on to sponsor multiple teams as well as partnering with companies and have cemented themselves as an esports sponsor.

Jack Link’s have opened the door into the esports scene by marketing its product towards gaming whilst being a non-endemic brand. On their website they describe their product as being a better alternative to typical snack foods. Describing the product helps provide the fuel to keep players going without making a mess or a fuss (Jack Link’s & Team Envy partnership, 2020). This creates the connection needed to bond their product to gaming and esports.

In 2021 Jack Link’s became one of the sponsors of Fnatic, who are one of the most successful esports brands of all time, winning more tier 1 game tournaments than any other team globally (Fnatic, no date). By partnering with Fnatic a European esports team, Jack Link’s shows that it wants to be more than just an American brand and is trying to be an international brand. An example of their marketing ventures with Fnatic include their community focused campaign called ‘The Beef Mode Challenge’ this involved both companies coming together to design a Jack Link’s branded Counter-Strike: Global Offensive map, which would allow players can compete against themselves and others in a time-trial test (Luongo, 2021). With prizes including Beef Jerky, gaming equipment and custom Fnatic apparel. This is a great way of building a community with the Fnatic fans as well as being a great way to reach other potential Fnatic fans.

Jack Link’s is the sponsor OpTic Gaming another giant esports team in America. This Partnership means that they featured on the jersey, while also having Jack Link’s products available for players and staff who work at OpTic Gaming. They also worked together to create custom video content for fans on social media and Jack Link’s activations at live events in OpTic Gaming's Esports stadium (Jack Link’s & Team Envy partnership, 2020). This partnership both benefits OpTic with funding however it also benefits Jack links as they are featured on the jersey and can sell their products at OpTic Gaming events.

Jack Link’s stand out as a non-endemic brand that has fitted itself into esports by supporting teams as well as being community driven. On the contrary BMW is a great example of a car company entering esports as a non-endemic brand that although had success was not enough to keep them committed to stay.

BMW entered esports with the challenge “To enter the esports industry in a sustainable way and support the teams and discipline as a whole before, during and after times of uncertainty” (Fnatic, no date). In November 2021 BMW partnered with a high-powered hybrid of arcade-style soccer and vehicular mayhem video game called Rocket league (Rocket league, no date). In this coloration BMW worked with Rocket League to put their BMW M240i into the game. Also adding decals for the car including the slogan ‘United in rivalry’ reference to another one of BMW campaigns. On top of that BMW also worked with Rocket league Championship series (RLCS), who run Official Rocket Leagues Esports tournaments. BMW would sponsor the second regional tournament in Europe called the BMW Rocket League Open. However, before that event took place, they also hosted an Invitational BMW Freestyle Tournament with a $25,000 Prize pool. (Parker, 2021)

The United in rivalry campaign was a unique idea by BMW which involved sponsoring six of the biggest esports organisations around the world: Fnatic, Cloud 9, T1, OG Esports, G2 Esports and Funplus phoenix. This campaign was designed to encourage these teams to compete against each other in a more relaxed environment using friendly jokes back and forth using the ‘United in Rivalry’ hashtag. They also held a tournament for the teams to compete in called the Berlin brawl which was successful with a peak viewership of 12,212 people (Esports Charts BMW Berlin Brawl, no date)

Fnatic was one of the teams they partnered with as part of the ‘United in rivalry’ campaign. This partnership involved BMW being on Fnatic’s Jersey as well as the 2 companies working together to make content for example having some Fnatic players driving BMWs. The results show that the campaign had been a success with an 87% campaign Awareness, 84% more favourable brand perception with 74.4% of fans finding the content entertaining (Fnatic, no date)

In a Digiday report, the previous spokesperson for BMW Esports Trosten Julich the previous said “BMW has decided to end its esport[s] engagement from [the beginning] of 2023 on” then going on to say, “In the future, our focus will be even more on the individual than before” (Lee, 2023). BMW may have seen that although they were not unsuccessful in esports, there could be more opportunities for them in gaming.

Although it could be argued both companies had success in esports, when comparing the two companies Jack Link’s entered the scene in a more traditional way by sponsoring teams and relating their product to gamers as much as possible. On the contrary BMW went into the scene with a big champaign sponsoring multiple teams and working with multiple companies and could be argued that they bit too ambitious. If BMW where to re-enter into esports It might be beneficial if they start at a smaller level starting in one region and then gradually expand into the other regions.

**‘Describe and explain the ‘Esports eco-system’, using existing business models and real-world examples. Discuss the future growth of Esports with reference to potential facilitating and debilitating factors.’**

Esports consist of many different stakeholders which have been defined as “groups without whose support the organisation would cease to exist” (Freeman & Reed, 1983, P. 89). The esports eco-system works by having the individual stakeholders working around one another. This paper will explore the different stakeholders and the roles they play in the ecosystem. Examining the potential weaknesses and strengths of the eco-system and what can help improve it.

A basic overview of esports eco-system. Teams in esports often called organisation consist of staff who enable the teams/players to play games at a high level. Esports teams normally have more than one team for each different games for example Fnatic will have a team for VALORANT and a team for League of Legends. These teams compete in games which are made by game developers and publishers such as Riot games and VALVE. Teams will compete in league/tournaments which can be organised by companies such as ESL who have the licence from the game developer (VALVE) to run counter strike tournaments. On the other hand, you have game developers such as Riot Games organise their own tournaments such as VALORANT Champions Tour. Sponsors such as Red Bull and HyperX will pay to be advertised at event as well as sponsoring teams. Fans can then watch the tournaments on live streaming platforms such as YouTube and Twitch.

According to Finch et al., (2019) there are multiple secondary elements which play a significant role in the esports ecosystem. These include merchandise which will be made mainly by the teams in a form similar to traditional sports such as a jersey, this can provide teams an extra source of income. The NBA and McLaren F1 team are some examples of Investors who are entering the eco-system. Associations for example British esports is a regulatory body as well as foundations such as the World Anit-Doping Agency (WADA) each serving different purposes in the eco-system. Hardware has developed into two major categories which are the platform and peripherals (i.e. mice and keyboards). Facilities additionally play a role, with specific gaming facilities being made (e.g. 100 Thieves esports gaming compound) which allow teams to have a to develop and train players.



Figure 1 Primary and secondary stakeholders in the sports industry (Scholz, 2019)

Looking at figure one, Scholz (2019) is displaying each stakeholder and power they hold. With the audience being at the centre, it’s the responsibility stakeholder’s job to please the audience. without an audience for the events, sponsors may not want to sponsor events, resulting in events not happening, leading to teams not existing.

Scholz splits the graph into two sections the primary section and the secondary section. In esports the primary stakeholders are linked by a value chain and to some degree need each other to survive. These stakeholders are the tournament organisers, game developers, professional teams, players as well as the audience. (Eesley and Lenox, 2006; Scholz, 2019). Secondary stakeholders influence the esports industry in a more indirect way. They are not directly linked to the value chain but influence the primary stakeholders through opinions, regulations and investments. With the primary stakeholder’s job being to react to the actions of the secondary stakeholders (Eesley and Lenox, 2006; Scholz, 2019).

Other than the fans, the game publisher (e.g., Riot Games and Blizzard) is one of the most determining stakeholders in the ecosystem. Unlike regular sports where no one owns the right to it, in esports the publishers of the games own the Intellectual property (IP) rights. This gives the publisher creative freedom to do what they want with the competitive scene of their game (Carrillo Vera and Aguado Terrón, 2019). This includes the controlling of third-party tournaments which has led to disagreements between the publishers and the third-party tournament organisers as its unclear how much property rights the developers have due to a lack of precedence (Tu, 2021; Jonathan Tong, Abid Ahmed, Desmond J. Christy, 2020).

Tournament organisers in esports (e.g., ESL and Blast Premire) have been the force driving esports especially when producers would neglect the esports scene. In beginning of esports, it was necessary to bring competitors together in a fair environment even if there was not a big audience however, nowadays arenas can be filled with people (Thompson, 2015; scholz, 2019). As stated, before tournament organisers have lost power to developers as they start running their own tournaments such as Riot Games. Publishers still require tournament organisers to create a working structure especially in the beginning for example Riot Games worked with ESL to get its tournament up and running showing the significance of the tournament organiser in the esports eco-system (Scholz, 2019).

Professional teams (e.g., Fnaict and Cloud 9) are a relevant stakeholder in esports as they are necessary in creating a setting for competitions at the highest level. To do this they try to get the best players, coaches, and facilities. (Scholz, 2019). This all comes at a cost which is mainly funded by sponsors (Gough, 2023). However, in talks with experts in the scene it was pointed out that there is too much money leading to teams not staying focused on their business model, with the added external stakeholders demanding return on investment this can lead to problems for the organisations causing teams to announce severe layoffs (Carpenter, 2018; Goldhaber, 2018; sholz, 2019).

Professional Players (e.g., s1mple and Boaster) also play a crucial role in the esports ecosystem but at the same time there is an abundancy of players. With many armatures wanting to become professional players and make money through gaming (Scholz, 2019). This does not come without its problems, Work and play can blend into one which can be seen as problematic, as this can players have trouble relaxing … being a professional player seems to be a realm where work and life are the same (Scholz, 2019). Moreover, players need to find something to do when they retire. There are alternative arears after retirement such as analysts and coaches but are not every player is cut out for them. This is worsened when most players start their career early having a negative impact on their own education (Scholz ,2019).

With now an understanding of how the esports eco-system works there are some clear debilitating factors that could be hindering the growth and the future of esports. With esports being described as the wild west (Scholz, 2019) this could be due to its lack in governance. The esports business model differs from traditional sports, this is because subsequently game publishers have complete ownership of property rights to the games. This has led to a lack of an independent and recognised global esports governing body whose job would be to manage the stakeholders, regulations, and rules (Finch et al., 2019). With a lack of governing body, stakeholders are not held accountable for issues within the esports scene, for example player health, as stakeholders are not aware of who is responsible for monitoring esports players’ physical and mental health (Hong, 2023). This leads into other health concerns, with some arguing that playing eSports for a sustained period can cause mental health issues such as mood and sleep disorders as well as poor performance (Wenzel et al., 2009; Eickhoff et al., 2015; Hong, 2023). However, it’s not just mental health, with Some esports players having their careers ended early or forced to take long breaks due to injuries for example tennis elbow and back pain (Jolly, 2019; Hong, 2023). With professional players in Scholz (2019) diagram being one of the primary stakeholders it’s important that their health and wellbeing is looked after.

Esports is also facing legitimisation issues at all levels form society to parents this could be due to a lack of understanding of what esports is. In a research paper Cestino, Macey and McCauley (2023) found that the one of the subjects received negative validity judgment form his parents due to esports not being a regular sport. Its be said unlike regular sports, Videogames are still not accepted by society (Radman Peša, Čičin-Šain and Blažević, 2017; Torres-Toukoumidis, 2022). This is not helped through the negative portrayal of violent video games in the media. With these claims the media puts out this then puts pressure on esports as it could cause sponsors and investors who leave the industry, so they are not associated with violence (Torres-Toukoumidis, 2022). Without the proper legitimisation of esports, people may never understand what it is which could hinder the growth and the future.

There are however some facilitating factors that could be what is needed to push forward into the future of esports. One example is the Olympic games embracing esports. In June 2021 the International Olympic Committee (IOC) announced it would run an event called ‘The Olympic Virtual Series’. These events included virtual cycling, rowing, and motorsport. The events were aimed at maximising online participation and prioritizing inclusivity to mobilize gamers, esports, and virtual sport enthusiasts around the world. (Palar, 2021) However a survey in the United Kingdom during April 2021, showed that 43 percent of people would be not likely at all to watch it. (Gough, 2022. However, in 2023 the IOC announced that it has created a new official commission focused on esports this commission includes G2 Esports CEO Alban Dechelotte as well as Ubisoft’s Senior Director of Global Competitive Gaming Zeynep Gancaga as well as TikTok’s head of gaming and esports Harish Sarma and Mia Stellberg a esports and sports psychologist (Šimić, 2023). In 2023 the IOC then launched the ‘Olympic Esports Series’, where professional and amateur players around the world take part in the qualifiers which will lead to a live in person event for the first time called ‘Olympic esports week’ (International Olympic Committee, 2023). This event involved a wider verity of games with more popular games included such as Rocket League, NBA 2K23 and Steet fighter. Rocket league was the most popular event with 22 thousand peak viewers. (Esports Charts Olympic Esports Series Finals Rocket League, 2023) This is promising for the world of esports as having an official body like the IOC backing esports could be what’s needed to help legitimise esports helping with its growth and future.

Additionally, there is constant growth of esports could be another positive contributing factor. Block and Haack (2021) have stated there are multiple contributing factors to the steady growth of esports. One of the contributing factors is the accessibility with the cost of hardware going down more and more people can afford. Also, with the cost of smartphones being more accessible mobile gaming is on the rise and was one of the biggest contributors to the esports market. Other platforms such as Twitch have also been innovating the market from turning the niche esports into a spectator sport. With this growth all around the industry creating untapped markets this allows the constant growth and development of the esports industry. (Block and Haack, 2021).

In conclusion, for the growth and future of esports Shulz (2019) suggests that the esports eco-system could improve significantly, with more cooperation between the primary stakeholders (e.g., tournament organisers and game publishers). As well as more competing between the secondary stakeholders (e.g., hardware providers and sponsors). With the primary stakeholders working together such as the tournament organisers and game publishers this could lead to better tournaments for the fans. As well as potentially helping towards the players health if all the primary stakeholders implement ways and work together. A study done by Hong (2023) suggests that the responsibility of esports players health and wellbeing should be shared among the stakeholders.

As the esports industry continues to grow more people will begin to learn about the industry which is further exposed IOC implementing esports into the Olympic games. This should help deal with some of the Legitimacy issues esports is facing showing it’s a stable career path with many opportunities. (Explore career pathways in esports, 2023).

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