Julian Heinz Anton Ströh

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Tectum Verlag

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ISBN: 978-3-8288-6648-5
(Dieser Titel ist zugleich als gedrucktes Buch unter
der ISBN 978-3-8288-3891-8 im Tectum Verlag erschienen.)
Umschlagabbildung: shutterstock.com © Adam Ziaja

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www.tectum-verlag.de

Bibliografische Informationen der Deutschen Nationalbibliothek
Die Deutsche Nationalbibliothek verzeichnet diese Publikation in der Deutschen Nationalbibliografie; detaillierte bibliografische Angaben sind im Internet über http://dnb.ddb.de abrufbar.

Dedicated with deep gratitude to my beloved mother Doris
and my beloved father Michael who left us too early on 31st of July 2016

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List of Abbreviations

AMM	Automatic Matchmaking
CBLoL	Circuito Brasileiro de League of Legends
CEO	Chief Executive Officer
CPL	Cyberathlete Professional League
CS:GO	Counterstrike: Global Offensive
DDoS	Distributed Denial of Service
DeCL	Deutsche Clanliga
DotA 2	Defense of the Ancients 2
GEICO	Government Employees Insurance Company
GSL	Global StarCraft II League
E3	Electronic Entertainment Expo
EE	ESports Entrepreneur
EEDAR	Electronic Entertainment Design and Research
e.g.	for example
ESB	Deutscher eSports Bund
ESIC	ESports Integrity Coalition
ESPN	Entertainment and Sports Programming Network
ESL	Electronic Sports League
ESLM	ESL Meisterschaft
ESWC	Electronic Sports World Cup

EU LCS	European League of Legends Championship Series
e. V.	Eingetragener Verein
FPS	First-Person Shooter
IeSF	International e-Sports Federation
IEM	ESL Intel Extreme Masters
IOC	International Olympic Committee
IPTV	Internet Protocol Television
KeSPA	Korean eSports Association
LAN	Local Area Network
LCS	League of Legends Championship Series
MIT	Massachusetts Institute of Technology
MLG	Major League Gaming
MMO	Massive Multiplayer Online Game
MOBA	Multiplayer Online Battle Arena
MTG	Modern Times Group AB
PC	Personal Computer
PS4	Playstation 4
RTS	Real Time Strategy
TBS	Turner Broadcasting System
USA	United States of America
VACS	Valve Anti-Cheat System
VR	Virtual Reality

VRH	Virtual Reality Headset
WADA	World Anti Doping Agency
WCA	World Cyber Arena
WCG	World Cyber Games
WESA	World ESports Association

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1 Introduction

1.1 Problem Statement

In the last decades, the market for digital games has grown to nearly $100 billion.[1] During this growth, a special gaming segment and community formed surrounding the direct competitive aspect of games: eSports. The core of eSports is similar to traditional types of sport. Players train to become better, clubs are established, tournaments are organized to compete against each other, and fans enjoy watching their game being played on the highest level of performance. Media expert Michael Wagner identifies the growth of eSports as "a logical and irreversible consequence of a transition from an industrial society to the information and communication based society of today."[2]

In South-Korea this transition has already put eSports on a level of maturity and social acceptance that is in no way inferior to traditional sports. ESports in Western cultures still lags behind this status, but recent developments show that it is steadily catching up. Historically, gaming as competitive sports started in university labs, got popular in amusement arcades and went on at LAN-parties and on the Internet. Finally eSports rose to become a new media sport attracting millions of viewers and filling large arenas for live competitions. In such a live competition, The International DotA 2 Championships 2015, all five players of the victorious team Evil Geniuses became millionaires by winning record prize money of approximately 1.32 million U.S. Dollars each.[3] This exemplifies that eSports cannot be seen as a marginal or regional phenomenon anymore, but has grown into a whole new globally spread industry with athletic professionalism and economical significance.

Due to this significance, the eSports ecosystem and its key components are investigated as first main objective of this thesis. This investigation reveals, that companies from the computer and gaming industry acting as sponsors to present and promote their products are the most important financial pillars and key drivers of eSports. Additionally, with progressing professionalization and growing viewership numbers in the past years, eSports increasingly attracts sponsors from outside the computer and gaming sphere as well. This importance and ongoing diversification of sponsors make sponsoring in eSports with its unique aspects, risks and opportunities a marketing field especially worth researching. Consequently, sponsoring within the eSports ecosystem with a regional focus on America and Europe has been chosen as second main objective to be analyzed in depth in this thesis. Sponsoring of endemic companies is naturally rooted in the eSports clockwork and eSports affine consumers are a fit by definition for those sponsors. Considering

1 Cf. Newzoo (2016f), pp. 10-13
2 Wagner (2006), p. 3
3 Cf. Tassi (2015)

this, the current increase of attention from non-endemic companies in Western eSports, and the major consequences their entrance may have for the whole ecosystem, the exigency for research on non-endemic sponsoring is higher in comparison in the author's opinion. Furthermore, no former scientific efforts were taken in this specific subject according to the author's state of knowledge. Thus, non-endemic sponsoring was chosen as the center of the analyses and the consumer behavioral aspects of such sponsoring are the focus of the conducted primary empirical research. To gain insights into these aspects - which are decisive factors for effective and successful sponsoring - a recent example of non-endemic sponsorship in Germany is used as case study and evaluation approaches for sponsorship effectiveness used in sports sponsorship literature are modified for eSports and this example.

1.2 Disambiguation

To disambiguate the term ***eSports***[4] (abbr.: electronical sports) for this specific thesis, a broader definition of Wagner is introduced first. He defines eSports as "an area of sport activities in which people develop and train mental or physical abilities in the use of information and communication technologies"[5] in which the term sport is mainly defined via the attributes of 1) voluntary engagement, 2) conscious development of mental or physical abilities, 3) comparison with others and 4) acceptance of rules according to the definition of sport scientist Tiedemann.[6] Taken this as basis to describe the fundamental activity, in this thesis eSports refers to the playing of digital games on a platform such as a PC, a gaming console or a handheld device for the primary aspect of competition mostly in an organized framework, e.g. in leagues, tournaments and ladders, on an amateur or professional level. To exclusively describe the professional level the term pro-gaming (professional gaming) is often used in culture and literature.

This definition clarifies, that eSports does not describe a single type of sport but is a superior collective term, comparable to e.g. water sports. ESports contains different eSports game genres, each requiring different specific abilities to play. These genres consist of games that require rather similar basic abilities. As used by Wagner (2006), Müller-Lietzkow (2008) and Breuer (2011), the term eSports discipline is used in this thesis as synonym for a game that is relevant for eSports.

The term ***sponsoring*** needs to be disambiguated from the term patronage. A definition in the matter of marketing determined by Hermanns (1997, pp. 36-37) and used by Drees (2003, p. 49-50) states, that "a company acts as a sponsor when it supplies a sponsored counterpart (e.g. a person, group, organization or institution)

4 Other notations: esports, e-sports

5 Wagner (2006), p. 2

6 Cf. Tiedemann (2004) as cited in Wagner (2006), p. 1

that is part of its social environment with financial capital, products or services in exchange for rights to use the sponsored counterpart and/or its activities for communication purposes on a contractual basis."[7,8] The emphasized difference to patronage is a clear expected benefit by the sponsor to reach commercial targets, while a patron's contributions are donations without own commercial, but only altruistic, underlying motives.[9]

7 Congruent translation in regards to content as seen in Drees (2003), p. 49
8 Comparable definition also to be found in Gross (2015), p. 34 and Bruhn (2010), pp. 6-7
9 Cf. Drees (2003), p. 49; also see Bruhn (1987), p. 190; Bruhn (2010), pp. 3-7

2 The eSports Market

2.1 Historical Development

At first, the development of eSports and its way to the shape it got in the 21st century is explained.

1970-1990: The First Tournaments and the Arcade Era

While the first video game in history Tennis for Two[10] was already developed in 1958[11], the first recorded video game competition took place on October 19 in 1972 at Stanford University, USA, for the game Spacewar!.[12] This two-players game was developed by the student Steve Russell and his colleagues in 1961-1962 and became a leisure time activity for workers in research labs.[13] The tournament was called Intergalactic Spacewar Olympics and the first prize was a year's subscription to the Rolling Stone magazine.[14]

In 1980, the video games company Atari hosted one of the first sponsored tournaments for its game Space Invaders, which was visited by over 10.000 people in the USA.[15] In the late 70s built in high score lists enabled competition on arcade games in amusement arcades.[16] In 1982, the arcade company Twin Galaxies launched the Twin Galaxies National Scoreboard to accumulate high scores from the USA and soon from all over the world.[17] In July of the following year, this company established the first professional video gaming team called U.S. National Video Game Team. This team toured through the USA to show their abilities and organize competitions, even a World Championship against Japan, Great Britain and Italy, covered by famous magazines, e.g. LIFE and The Washington Post and television broadcasting companies, e.g. ABC-TV and NBC.[18,19]

1990-2000: Rise of Modern eSports Structures

This period of arcade-focused competitions took an end when arcade gaming was to a high degree squeezed out of the market by home gaming consoles, such as the

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10 There are debates about the title "first video game" as there are different definitions of related terminologies

11 Cf. Baker (2013), p. 9; Stanton, R. (2015), p. 19

12 Cf. Hiltscher (2015), p. 9

13 Cf. Kent (2010), part: Forgotten Fathers; Good (2012)

14 Cf. Brand (1972) - Transcription: http://www.wheels.org/spacewar/stone/rolling_stone.html

15 Cf. Winnan (2016), part: Introduction; Taylor (2014)

16 Cf. Zahard (2015)

17 Cf. Angelides/Agius (2014), part: 20.3.2

18 Cf. Stammermann/Thomas (2007), p. 44; Wolf (2012), p. 651

19 Video of the North American Video Game Challenge in the TV show That's Incredible! on ABC-TV is available at Settle it on the Screen (2008)

Nintendo Entertainment System,[20] and personal computers (PC). Due to this, eSports was transformed to an at-home-activity.[21] In the early and mid 90s, it was the PC gaming alongside with major developments, that shaped eSports towards its form it has today: 1) The introduction of Wolfenstein 3D by the studio id Software as first-person-shooter (FPS) (s. chapter 2.2) for PC in 1992 and its followers Doom (1993), Doom II (1994) and Quake (1996)[22] and 2) The increase in network capabilities and connectivity that made it possible to play in a local area network (LAN) to compete against each other at home on so called LAN-parties[23] and also online via the Internet against other players.[24]

Besides id Software, several other game developers started to integrate online clients into their games, most famously Blizzard Entertainment's Battle.net, which made automatic matchmaking (AMM)[25] popular and thus finding similar skilled opponents to play and train easier.[26,27] In this time players started to organize themselves in teams, so called clans, and leagues and tournaments started to arise creating the fundamental structure of modern eSports.[28] Important milestones, all reached in 1997, were the Red Annihilation Quake Tournament at the Electronic Entertainment Expo (E3) in Atlanta, USA, that offered valuable prices such as a Ferrari car,[29] and the establishing of the Cyberathlete Professional League (CPL) as well as the Deutsche Clanliga (DeCL) which became the Electronic Sports League (ESL) (s. chapter 2.3.4) in the year 2000.[30]

Yet, it is South Korea, that is seen as *"the Mecca of eSports"*[31] and *"the cradle of professional eSports"*[32], as the subsidized expansion of broadband internet connections ignited a high increase of players and a high social acceptance of pro-gaming, emphasized by the rise of TV channels dedicated to eSports[33], especially the dominant real time strategy (RTS) game StarCraft (s. chapter 2.2).[34] In the USA and Europe,

20 Cf. Nintendo of Europe GmbH (2016)
21 Cf. Taylor (2012), part: Playing for Keeps
22 Cf. Taylor (2012), part: Playing for Keeps
23 Cf. Stammermann/Thomas (2007), p. 41
24 Cf. Winnan (2016), part: Introduction; Taylor (2012), part: Playing for Keeps; Taylor (2014); Armitage et al. (2006), pp. 12-18
25 AMM systems automatically match players (of similar skill level) that are looking for an opponent on a provided server to play against each other
26 Cf. Winnan (2016), part: Introduction, p. 2
27 Cf. http://classic.battle.net
28 Cf. Armitage et al. (2006), p. 21; Stammermann/Thomas (2007), p. 44; Wagner (2006), p. 1
29 Cf. Winnan (2016), part: Introduction; Taylor (2012), part: Playing for Keeps
30 Cf. Stammermann/Thomas (2007), p. 44; Taylor (2012), part: Playing for Keeps
31 Winnan (2016), subchapter: South Korea, the Mecca of eSports
32 Stammermann/Thomas (2007), p. 44
33 Cf. Winnan (2016), subchapter: South Korea, the Mecca of eSports; Stammermann/Thomas (2007), p. 44; Wagner (2006), p. 2
34 Cf. Gackenbach/Snyder (2012), Chapter 2; Seo (2013), p. 1545

the FPS Counter-Strike, released in 2000,[35] was the most important contributor to a following growth in prize money and viewership.[36] In this time, the term ***eSports*** was created. One of the first sources for the use of this term dates back to 1999 to Mat Battinson and an article about the Online Gamers Association (OGA) at eurogamer.net.[37]

2000-Today: Steady Growth and Financial Crisis

As in the previous period, decreasing costs and technological advancements of internet connections and personal computers are the catalyzing framework for eSports and its growth.[38] Next to widespread leagues like ESL and CPL, the World Cyber Games, largely sponsored by Samsung and South-Korean ministries, became the most important yearly competition after its start in 2000.[39] The basic concept was to create an eSports equivalent to the Olympic Games featuring e.g. national teams, medal tables and fair play awards. In 2005, approximately 800 players from 70 different nations participated in the final event in Singapore. Over a million joined the preliminary national qualifiers.[40,41] The WCG shut down all activities in 2014 after some years of decline.[42]

The financial crisis in 2009 had a significant impact on eSports which in consequence led to a significant decrease in prize money, sponsorships and leagues despite of a growing number of eSports players.[43] This struggle clarifies that eSports is already firmly rooted within industry and economy. Nevertheless, the eSports ecosystem recovered and experienced a rapid growth within the past five years as the next chapters illustrate.

35 Cf. Jakobsson et al. (2007), p. 157
36 Cf. Diserens/Lindahl (2012), p. 15; Taylor (2012), part: Playing for Keeps
37 Cf. www.eurogamer.net
38 Cf. Hjorth (2011), p. 143; Breuer (2011), pp. 9-10; Hutchins (2008), p. 852
39 Cf. Arora (2014); Tayor (2012), part: Playing for Keeps
40 Cf. Farquharson/Marjoribanks (2012), p. 208
41 Recommended documentation: Starcraft: World Cyber Games 2005 from National Geographic, available at MickeyToss (2010)
42 Cf. Arora (2014)
43 Cf. Messier (2011), p. 54; Breuer (2011), pp. 83-84

2.2 ESports Disciplines

In this subchapter, a basic overview of the most important hardware devices and eSports disciplines is provided. The importance is analyzed via the data available at www.esportsearnings.com, a data base of eSports tournaments, teams, players and prize money driven by the eSports community members themselves.[44]

2.2.1 Hardware Systems

The relevant hardware systems and devices (also often referred to as *platform*) on which eSports is practiced can be categorized as follows:

1. Personal computer
2. Three relevant major gaming consoles[45]
   - XBOX ONE from Microsoft Corporation
   - Playstation 4 (PS4) from Sony Interactive Entertainment LLC
   - Wii U from Nintendo Co., Ltd.
3. Mobile/handheld devices

The PC is the most relevant platform as four of the five most important eSports disciplines of 2015 are only available for PC (s. Appendix 1). ESports on gaming consoles lags behind.[46] This is mainly caused by higher entrance barriers, e.g. the need to buy a gaming console instead of using a PC, that is already available, because it is needed and used for other purposes as well, and a shorter history of playing online, according to expert Frank O'Connor.[47] The expansion of eSports to mobile devices is a novel but growing phenomenon[48] and will be closer examined in chapter 2.6.3.

2.2.2 Genres and Games

The importance of and attention towards eSports genres and disciplines are very dynamic and can shift very quickly, when e.g. a new game is released.[49] A clarifying example is Jonasson and Thilborg's quote in 2010, that "the most popular genres within eSport are first-person-shooter (FPS), real-time strategy (RTS) and sports games"[50], not yet including multiplayer online battle arenas (MOBA) that are the most famous genre today in 2016 (s. Appendix 1). Yet, a certain longevity and per-

44 Cf. www.esportsearnings.com
45 Cf. Breuer (2011), p. 125
46 Cf. Breuer (2011), p. 23
47 Cf. O'Connor (2015)
48 Cf. SuperData Research (2015a), p. 15
49 Cf. Breuer (2011), p. 79; a recent example is the title Overwatch from Blizzard Entertainment, see Szymborski (2016)
50 Jonasson/Thilborg (2010), p. 288

sistence can be observed too: the prime example Counter-Strike[51] was able to keep its status as one of the most important eSports disciplines since its rise in the early 2000's until today. In 2015, esportsearnings.com lists games from seven different genres in the Top 25 of the eSports disciplines providing the highest amounts of prize money. The allocation of the prize money between the top 25 disciplines is visualized in Appendix 1. The listed publishers Blizzard Entertainment and Activision are legally acting as Activision Blizzard, the world's largest games publisher, since their fusion in 2008, but keep acting as separate entities in most matters of eSports.[52] Appendix 2 provides a brief description of the most important genres' game plays. More detailed introductions, explanations and impressions of a certain discipline can be found on YouTube by e.g. searching for "let's play [name of eSports discipline]".

Just like in traditional sports, the popularity of the genres and disciplines differ regionally.[53] Traditionally in North America and Europe FPS disciplines, most of all Counter-Strike, are the central element of eSports[54], while Korea and China are RTS dominated.[55] Furthermore, data from esportsearnings.com show that fighter games are most popular in Japan and the fascination for MOBAs is globally very high. As most publishers are trying to get their share of this fascination, there are already at least 28 MOBA based games on the market.[56] For sports games, the assumption of a correlation of a sports game's popularity and the popularity of the respective type of sport that is simulated (e.g. football) within certain countries and regions seems plausible. Regarding differences in the preference of team and individual disciplines, Western cultures seem to be more affine to the former and Eastern cultures to the latter.[57]

2.3 Key Components of the eSports Ecosystem

In this chapter, the key elements and stakeholders of the eSports ecosystem, that contribute to the function of the previously introduced games as eSports are introduced and analyzed. Image 1 visualizes these elements. Next to these components, the role and status of associations is being investigated.

51 Referring to the whole franchise series from the first Counterstrike game to the newest release Counterstrike: Global Offensive
52 Cf. Activision Blizzard (2008)
53 Cf. Wagner (2006), p. 2
54 Cf. Witkowski (2012); Taylor (2012), part: Playing for Keeps
55 Cf. Huhh (2008) as cited in Seo (2013), p. 1545
56 Cf. www.mmobomb.com
57 Cf. Wagner (2006), p. 3

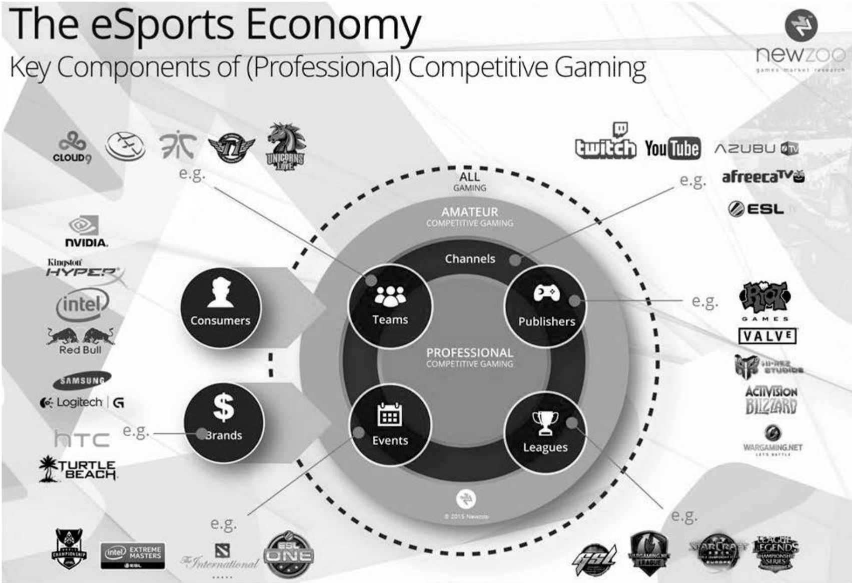

Image 1: The eSports Economy and Its Key Components
Source: Newzoo (2015b), p. 6

2.3.1 Consumers: The eSports Fans

The basis of large media sports industries are the media recipients, the passive viewers that are watching the sports being played.[58] In former literature, e.g. Sauer (2004) and Breuer (2011, p. 27), the passive viewers and the active players are considered as being congruent. This congruency is built up on the assumption that a viewer's interest in watching an eSports game mostly derives from playing the game in the first place and because he/she is most likely still playing as eSports is a rather young phenomenon.[59] Yet, according to a recent Newzoo report, 40% of all viewers are not playing any of the popular eSports disciplines themselves anymore. This result clarifies that the proposed congruency does not hold true anymore and there is a trend towards eSports as a spectator sport as it and its fans grow older and a certain share of fans may stop playing themselves.[60]

Also an expansion towards TV in Europe and America may lead to an increase of consumers that are only passive viewers as further discussed in chapter

58 Cf. Hagenah (2008), p. 30
59 Cf. Breuer (2011), p. 27; Sauer (2004), p .39; Taylor (2012), part: The nature of eSports fandom
60 Cf. Newzoo (2015b), p. 4

2.3.6.2. The sum of all passive viewers and active players are referred to as the entity *eSports fans* in this thesis. Two research companies released estimations for the number of worldwide eSports fans in 2016. The image below shows the estimations of Superdata Research and Newzoo:

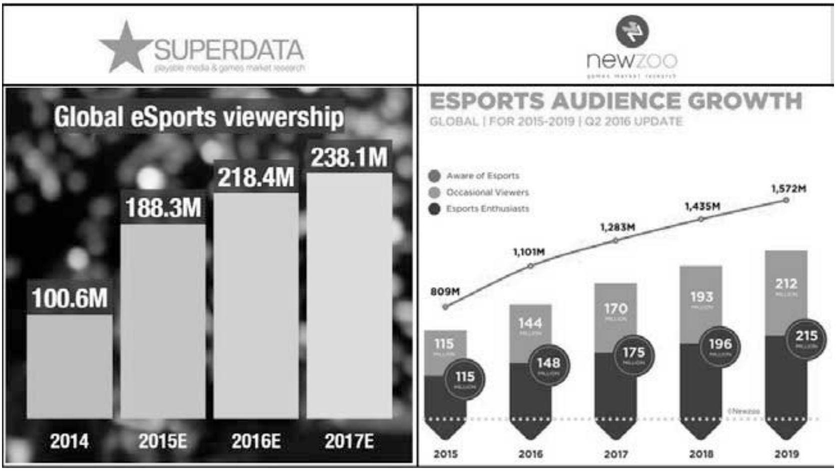

Image 2: Global eSports Audience in 2016 and Beyond
Sources: Superdata Research (2015a), p. 10; Newzoo (2016c)

As visualized, the estimations for 2016 differ to a certain extent: 218.4 million (Superdata Research) versus 292 million (Newzoo). Averaging both estimations leads to a global amount of eSports fans of approximately 255.2 million people, roughly 3% of the world population. Both studies predict annual growth rates of 9-14% for the future.[61] According to Newzoo, 148 million of the eSports fans (~51%) are *eSports enthusiasts*, meaning that they watch regularly and/or participate in amateur championships.[62] Newzoo furthermore estimates that with slightly over 1,1 billion people almost 15% of the world population is aware of eSports.

61 The future growth of eSports is analyzed in detail in chapter 2.6
62 This definition is used in Newzoo (2015b), p. 4 for the analog data of 2014

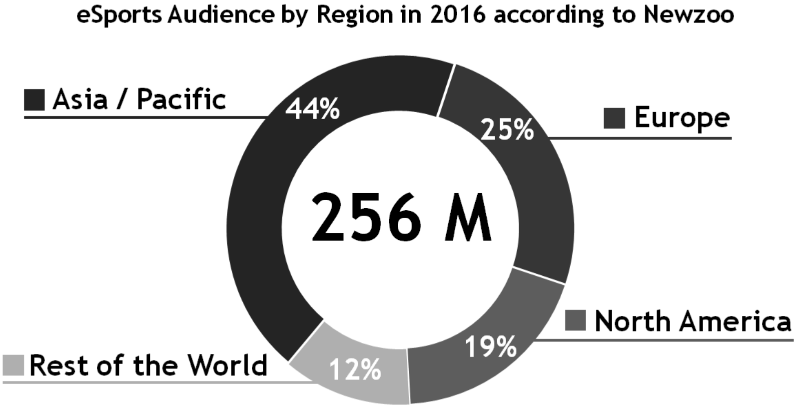

Image 3: Global eSports Audience by Region in 2016
Source: Newzoo (2016), p. 9 (facsimile)

To evaluate regional shares and the globality of the eSports fans, **Fehler! Verweisquelle konnte nicht gefunden werden.** shows the distribution of total audience in 2016 according to Newzoo. The Western eSports fans (Europe + North America) are now equalizing the Asian eSports fans in quantity. But there are also rapidly growing eSports communities in countries outside of the three major regions, such as Brazil, where 14.000 fans filled an instantly sold-out arena in Sao Paolo to watch the final games of the national League of Legends championship (CBLOL).[63] These figures clarify that eSports is a global phenomenon and may get a similar high maturity in other countries that it already has in South Korea. It is important to mention that despite eSports' globality, the market in Asia and Western countries differ due to an overall higher acceptance of video games in society in Asia. For detailed data about single countries, Newzoo's offerings of country specific reports are recommended.[64]

According to market research data of the Entertainment Software Association (2015), playing video games in general is popular within all age segments and genders, e.g. due to the easy accessibility of casual games for smartphones.[65] The situation for competitive gaming is different. Traditionally, eSports is male dominated. Euroforum Deutschland (2015) evaluates, that 85% of all competitive gamers are

63 Cf. Winnan (2016), subchapter: Brazil; see also Pase/Schulz (2015), pp. 23-28 for a detailed analysis of eSports in Brazil
64 These reports are available/purchasable at: www.newzoo.com/solutions/consumer-insights/esports
65 Cf. Euroforum Deutschland SE (2015), p. 6

male. Yet, the interest of women in eSports is growing: current results from The Nielsen Company (2016a, as cited in Brightman (2016a)) evaluates a 19% share of women in the eSports audience and Newzoo (2015b, p. 16) determines that even 31% of all eSports enthusiasts are female (s. Image 4).

Even though women are allowed to participate in tournaments and there are competitions only for female players (s. also chapter 2.3.2), the difficult stand of female players and fans due to sexism is a problem within the eSports scene - as well as in online gaming in general[66] - and a barrier for higher female participation.[67] Marketing efforts and game development within eSports almost exclusively target the male audience.[68] Furthermore, according to games studies, women prefer the aspect of competition in games less than men and are rather affine to less violent games with a focus on co-operation and social aspects.[69] It can be concluded, that creating an overall better atmosphere for female fans and taking female gaming preferences into consideration when developing eSports games can enhance the female fan base, which is a potential growth opportunity for eSports. Analog to this, there is a threat of image loss due to bad publicity concerning sexist harassment or discrimination that may hinder potential industry partners to engage with eSports or even lead to the exit of existing partners.

Concerning age, Newzoo's estimation of the age distribution clarifies the dominance of a rather young audience as 80% of all enthusiasts are below 35 years old as visualized in Image 4. The highest share is obtained by enthusiasts between 21 and 35 years. This is due to the fact that the players of the "early years", when the modern eSports scene was created and growing, are now in this age segment.[70] Euroforum Deutschland's experts state that the current situation puts "[...] the main part of the age structure of eSports fans to a segment between finishing school and getting a graduation from a university."[71] Yet, according to Newzoo, 65% of all eSports enthusiasts are already full-time employed, which is further evidence for an increasing maturity of the eSports fans (s. also chapter 2.5.3). In the respective conducted interviews the experts Malph Minns (2016, s. Appendix 20) and Alex Fletcher (2016e, s. Appendix 21) confirm this demographic core of the male millennials[72], but also emphasize the diversity of the overall eSports fan base regarding disciplines and the need for segmentation by different fan types.

66 Cf. Fletcher (2012)
67 For detailed information see Winnan (2016), subchapter: Women in eSports, further first-hand insights of sexism affected women in eSports are given by Campbell (2015)
68 Cf. Winnan (2016), subchapter: Women in eSports
69 Cf. Cassell/Jenkins (1998); Hartmann/Klimmt (2006) as cited in Shen et al. (2016), p. 3
70 Cf. Euroforum Deutschland SE (2015), p. 8
71 Euroforum Deutschland SE (2015), p. 8
72 A term used for people born in the approximate time span from 1980 - 2000, also known as Generation Y as the following generation of Generation X, see Espinoza/Ukleja (2016)

Differentiating demographically between eSports disciplines, an analysis of the US eSports fans conducted by Electronic Entertainment Design and Research (EEDAR) (2015, pp. 10-12) reveals that there are differences in gender and age distribution within disciplines. The age of the players and the age of a game's franchise partly correlate as a part of "older" initial players stick to their first favorite franchise.

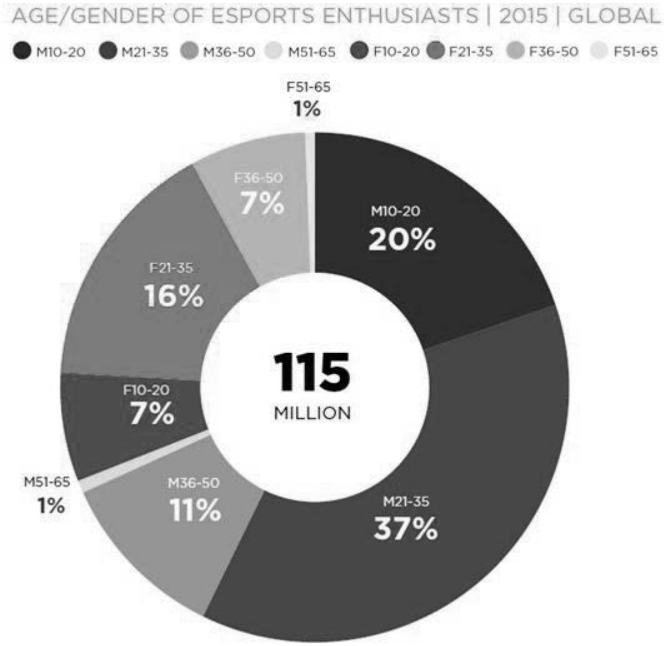

Image 4: Age and Gender of eSports Enthusiasts in 2015 according to Newzoo
Source: Newzoo (2015b), p. 16

A deeper analysis of further characteristics of eSports fans and their economical attractiveness within the eSports environment for companies and brands is provided in chapter 2.5.3: The Attractiveness of the Target Group.

2.3.2 Players

Considering Newzoo's estimated 40% of eSports fans that are not playing themselves lead to an amount of 142.5 million[73] active players that play eSports disci-

73 60% of the amount of viewers of 237,2 million as calculated by taking an average of the two studies

plines at least casually. From these players, approximately 32 million players competed in amateur eSports championships worldwide in 2015 according to Newzoo.[74] As in traditional media sports, a very small share - according to Winnan (2016, chapter: Go Pro or Go Home) over 5000[75] - of these players are professionals.[76] Within the eSports communities these professional players, so called *pro-gamers*, can gain celebrity "superstar" status and their nicknames[77] can become actual brands.[78,79] In Appendix 3 a list of the most famous eSports players measured by fans and followers in social networks is provided. With such high reach and status, they are important influencers and as such interesting for companies and their communication policies (s. chapter 2.5).

The role of female players is not yet determined: E.g. the competitions organized by the International e-Sports Federation (IeSF)[80] held separate tournaments for female players in the past years, but changed its policy to a gender-independent "open for all" approach in 2015 according to its regulations.[81] Rahul Sood, CEO of the eSports betting platform Unikrn, sees the possibility of women and men competing in eSports without physical gender-inequality as a unique advantageous characteristic that should be used and supported.[82] Shen et al. (2016) identified this gender-equality at least in massive multiplayer online games (MMOs), yet clarifying that it is unclear if these observations hold true for eSports games that are considered more challenging. As for now, a separation or integration of female players depends on the respective competition provider.

2.3.3 Teams: eSports Clubs

Historically, the clubs in which players unite are called ***clans***.[83] But there is a development towards overall more formal denotations as the degree of professionalism is growing.[84] In this thesis the term ***eSports club*** instead of clan is used. An eSports club often houses players and teams for different eSports disciplines and if so are referred to as multi-gaming clubs.[85] ESports clubs can be divided in three

74 Cf. Souza/Newzoo (2015), p. 16 based on data of Newzoo (2015a)
75 Cf. Winnan (2016), subchapter: Go Pro or Go Home
76 Cf. Breuer (2011)
77 In eSports a player is commonly known under an alias that the respective player chose for himself
78 Cf. Heaven (2014); Brightman (2016b)
79 Recommended documentation "E-Sports Superstars: gamers earning millions" by The Economist available at The Economist (2016)
80 The IeSF is introduced in chapter 2.3.9
81 Cf. Wood (2014); International e-Sports Federation (2015), p. 29
82 Cf. Silvers (2016)
83 Cf. Breuer (2011), p. 19
84 Cf. Kresse (2010)
85 Cf. Fletcher (2016j); Quandt et al. (2008), p. 152

categories: 1) Fun clubs in which the only focus is on fun and social interaction, 2) semi-professional clubs that also thrive for success in competitions to a certain degree and 3) pro-gaming clubs with a clear focus on competitive success.[86] The formal organizational degree varies among the pro-gaming clubs. Some are registered clubs (German: eingetragener Verein (e.V.)) and most are various types of non-incorporated and incorporated companies each according to their specific country of origin's laws. There are also works teams that are directly internally operated by and belong to major companies, such as ALTERNATE aTTaX[87]or Samsung Galaxy Pro-Game Team.[88] These organizational forms clarify that the management of pro-gaming clubs is getting more similar to professional traditional sports clubs.[89] Also financial motives became important and pro-gaming clubs are run as profit oriented professional organizations: They close deals with sponsors, earn prize money, operate own eSports web portals and media channels[90] and furthermore, the top pro-gaming clubs started to sell merchandise.[91]

Most clubs do not have a clear regional relation, because they were created and have their origin in the online world. Yet, teams start to consider to "settle" in a specific city, such as Team EnVyUs in Charlotte, North Carolina. This would open new potential revenue streams, such as revenue from own events (e.g. ticketing and catering), locally sold merchandise and memberships, and local sponsorship deals. Such income would decrease the dependency on performance, prize money and big sponsorships.[92] Taking all this into consideration it can be concluded, that these clubs build up brand value. A first monetary quantification was done by Esports Entrepreneur (EE), a website dedicated to provide "intelligent, researched, and knowledgeable information on the business of esports".[93] EE calculated the brand value of the top five Western eSports organizations taking the following variables into consideration: 1) Website viewership, 2) stream impressions (s. chapter 2.3.6.1), 3) social media followings, 4) sponsorships, 5) merchandise product mix & depth, and 6) tournament winnings. Table 1 visualizes the results:

86 Cf. Wenzler (2003) as cited in Breuer (2011), p. 20
87 Cf. Breuer (2011), p. 21; Müller-Lietzkow (2008), pp. 121-122
88 Cf. Keller (2015b)
89 Cf. Euroforum Deutschland SE (2015), p. 17
90 Cf. Taylor (2012), subchapter: Teams and their Owners; Euroforum Deutschland SE pp. 16-17; Jakobsson et al. (2007), p. 162
91 Cf. Seo (2013), p. 1552
92 Cf. Fletcher (2016i)
93 www.esportsentrepreneur.com

Top 5 of the most valuable Western eSports team brands according to Esports Entrepreneur

Team Brand	Origin	Value
FNATIC		$42,570,583
CLOUD9		$30,149,755
TEAMSOLOMID		$27,487,306
EVILGENIUSES www.myEG.net		$27, 315, 498
OPTIC GAMING		$24, 583, 758

Table 1: Five Most Valuable Western eSports Team Brands
Source: Own representation based on data of Nolte (2015)

As the variables of calculations for the value of traditional sports team brands by other agencies differ a lot, comparisons to traditional sports team brands, for which evaluations are in the hundreds of millions[94] are of very limited meaningfulness as for now. The variable sponsoring is the most important financial source, because neither ticketing revenue nor shared media revenue (s. chapter 2.6) - such as in major traditional sports - is generated.[95] The announcement of an approximate 100,000,000$ investment of the multi-billion dollars company USM Holdings[96] in the leading Russian eSports club/organization Virtus.Pro in 2015[97] set another benchmark that clarifies the high valuation of eSports clubs. A list of the most important clubs ranked by total prize money is available at www.esportsearnings.com/teams and in Appendix 4.

Traditional sports clubs will be an important future aspect as some start to integrate eSports divisions into their covered sports disciplines. Fletcher (2016h) already includes clubs from traditional sports as an outside force in his illustration of the eSports ecosystem. A recent prime example is the purchase of a slot and employment of a team for the European League of Legends Championship Series (EU LCS), one of the most important leagues in eSports,[98] by German football club FC

94 Cf. Brand Finance (2016)
95 Cf. Fletcher (2016c)
96 USM Holdings holds large shares in the metals and mining and telecommunication sectors with Alisher Uzmanov, an investor having the 3rd highest net worth in Russia, as majoritarian shareholder. See USM Holdings (2015) and Forbes Media LLC. (2016a) for more information.
97 Cf. USM Holdings (2015)
98 Cf. Fisher (2014), p. 1

Gelsenkirchen-Schalke 04 e. V.,[99] the 14th most valuable football club in the world according to Forbes' ranking.[100] Further involvements of other sports clubs[101] may reshape the whole team landscape. In July 2016, the Spanish eSports website VandalSports announced that a national eSports league provided by the Spanish soccer league operator Liga Nacional de Fútbol Profesional is planned to be established in Spain in 2017.[102] In the USA former and current sports stars started to invest in eSports organizations.[103] According to Fletcher (2016d) involvement of traditional sports stakeholders opens opportunities for an increase of credibility, integration of new sponsors, strengthening of the teams' positions and better governance. But he also points out that the superior financial and social power of sports clubs leads to threats for native members of the eSports ecosystem and that eSports itself may be in risk to drift towards becoming a side product of large traditional sports and the respective clubs.

2.3.4 Leagues and Tournaments

The clubs and their teams and players compete in leagues, tournaments and events against each other. These competitions range from small tournaments for amateur players, that are free to join and played only via the Internet, to football stadium filling offline events with prize money in the millions for qualified teams as shown in chapter 2.3.5. In an encyclopedia for eSports competitions, clubs, teams, players and strategies of Team Liquid, called *Liquipedia,* the gathered competitions are categorized by significance as follows:

Premier	Major*	Minor	Monthly / Weekly
• Outstanding prize pool • Only best teams and players • Frequently offline • Considered most prestigious	• Large prize pool (~$50,000) • High share of top teams and players • Frequently offline	• Smaller prize pool (~$15,000) • Decent level of competition • Also played only online	• Tournaments that are played on fix dates every month or week with a fix, mostly small prize pool • Played mostly online

*The term “Major” may be misleading as some premier events include this term in their event name

Table 2: Categorization of Tournaments by Significance
Source: Own illustration based on www.wiki.teamliquid.net

This categorization is to be seen as a first approach. Precise classifications for eSports are difficult to evaluate due to lack of centralized structures. In opposition

99 Cf. Bräutigam (2016a)
100 Cf. Forbes Media LLC. (2016b)
101 For further examples and analyses see Fletcher (2016h); for a timeline including 13 sports clubs entering eSports see The Esports Observer/Paspalaris (2016)
102 Cf. VandalSports (2016)
103 For examples see Mueller (2016a) and Rovell (2016)

to most media sports in Europe, competitions are organized by independent commercial companies instead of associations or companies closely tied to associations.[104] ESports teams can participate in several leagues as they are not bound to a certain provider/league.[105] An exception is League of Legends for which most of the professional and semi-professional competitive scene is governed and regulated by its publisher Riot Games and teams of the League of Legends Championship Series (LCS) are not allowed to participate in other competitions (s. chapter 2.3.7).[106] ESports communities (e.g. TeamLiquid's), associations (s. chapter 2.3.9), and publishers for which eSports gains importance as marketing tool (s. chapter 2.3.7) also act as providers.[107] The usage of eSports competitions for marketing purposes of other industry brands can also exceed the mere function as sponsor, such as the hardware company ZOTAC International (MCO) Ltd. acting as highest authority for its weekly ZOTAC Cup.[108] In most competitions the matches are only played online via the Internet. As mentioned before, also so called offline events, analyzed in chapter 2.3.5, are organized, at which the teams play on stage in front of an audience.

Independent from the level of professionalism and financial aspects, Breuer (2011, pp. 21-24) proposes a categorization of providers and competitions on the basis of regional and game-related attributes: 1) Regional focus, 2) focus on certain genres and/or disciplines 3) focus on a certain hardware system, 4) dependence on a single publisher. With today's Internet infrastructure, online eSports competitions can be easily held in a global framework. The only obstacle is the latency[109] (or *ping*) which gives players from certain regions disadvantages.[110] Yet, as in traditional sports, there are e.g. exclusive national or regional competitions, such as the *ESL Meisterschaft (ESLM)* as introduced in chapter 3.3. Concerning focus on games, there are leagues and providers that only focus on one discipline, such as the Global StarCraft II League (GSL).[111] Publisher dependency and involvement is clarified in chapter 2.3.7. Next to those discipline specific leagues, there are providers that try to cover a lot of different disciplines each according to its popularity. The two most important organizations pursuing this strategy of high market coverage in the

104 E.g. the German Football Association (DFB) transferred the operative business for the Bundesliga to its own subsidiary DFL Deutsche Deutsche Fußball Liga GmbH
105 Cf. Müller-Lietzkow (2007), p. 231
106 Cf. Fisher (2014), p. 5
107 Cf. Seo (2013), p. 1551
108 Cf. www.zotac-cup.com
109 Latency is the time of delay in which a player's action is transmitted to the server. As eSports mostly requires fast reaction times, different latencies lead to (dis)advantages
110 Cf. Jakobsson et al. (2007), p. 161
111 Cf. http://event.afreeca.tv/gsl/

Western eSports scene are the ESL, originated in Europe, and Major League Gaming (MLG),[112] originated in the USA.:

Electronic Sports League:
The second largest provider measured by members/players is the ESL. It is run by Turtle Entertainment GmbH with headquarters in Cologne, Germany.[113] In 2015, the Sweden based Modern Times Group AB (MTG) purchased a majority of Turtle Entertainment's shares for 78 million Euro.[114] In the same year, MTG also purchased the Swedish provider Dreamhack (s. chapter 2.3.5), and thus became one of the most important investors in European eSports.[115] The ESL is the most important organization of its type in Europe and expanded globally in the last decade and works with partners in over 40 different countries.[116] The ESL's size and their strategy of high market coverage are directly illustrated on the website's front page on which is stated that "ESL Play is the world's leading platform for esports. It provides tournaments & ladders across all games and skill levels. 6.155.321 members have played 12.178.033 matches in 78.285 tournaments." [117] ESL's structure consists of amateur, semi-professional and professional competitions.

Next to distinguishing its leagues and tournaments based on performance level, the ESL also provides regional competitions on national level (s. chapter 3.3). Furthermore, since 2007 the ESL is providing media coverage of its events itself via their streaming channel ESL TV (s. chapter 2.3.6.1)[118] and produces some of its content in modern production studios installed in key markets. This content is also streamed on the platform Twitch.tv (s. chapter 2.3.6.1) on which ESL has a market share of 23% of all viewership hours of professional eSports providers (s. Appendix 5). Next to the commercial monetization of its content and events, the ESL also manages a network of over 400 influential eSports persons, e.g. pro-gamers, Twitch.tv streamers, and YouTube gaming content providers, to create significant social media reach with its campaigns for their commercial customers. [119]

Major League Gaming:
Founded in 2002 with headquarters in New York City, MLG became the largest provider in the Western eSports scene measured by members/players with approximately 9 million members.[120] Its approach and structure is comparable to the ESL: coverage of a lot of disciplines, all levels of skill and regular offline pro-gaming

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112 A name analog to e.g. Major League Baseball and Major League Soccer
113 Cf. www.turtle-entertainment.com
114 Cf. Turtle Entertainment GmbH (2015a)
115 Cf. Modern Times Group AB (2015)
116 Cf. Niemann (2016)
117 http://play.eslgaming.com (as of 15 August 2016)
118 Cf. Kopka/Weber (2011), p. 130
119 Cf. Niemann (2016)
120 Cf. Gaudiosi (2016a); www.majorleaguegaming.com

events.[121] MLG is also broadcasting eSports content via own streaming services, called MLG.tv, such as the ESL. According to the MLG homepage, its mission is to "promote eSports globally through premier competition and to deliver premium gaming content to viewers anytime, anywhere through our global streaming platform - MLG.tv."[122] On January 1st 2016, MLG was acquired by the world's biggest games publisher Activision Blizzard for $46 million.[123] The most important parts of MLG's international expansion strategy is MLG Brazil, a partnership with Grupo Âguia, the largest Brazilian sports entertainment company,[124] and the construction of an eSports dedicated arena in China (s. chapter 2.3.5).[125]

2.3.5 Events

ESports events and the provided price money have grown rapidly over the past years as displayed in Appendix 6. Final games of the most prestige championships are filling big arenas and commercial football stadiums with thousands of eSports fans, such as the *Lanxess Arena*, Germany's largest multi-purpose hall, for ESL One Cologne and the 2006 Football World Cup Stadium Commerzbank-Arena Frankfurt for ESL One Frankfurt.[126] In the USA, the League of Legends 2016 World Championship will be held at Bill Graham Civic Auditorium in San Francisco, at The Chicago Theatre in Chicago, at Madison Square Garden in New York City and at Staples Center in Los Angeles in fall of 2016.[127] Seo refers these events to as an *"embodied monument of contemporary eSports culture"*[128], clarifying the important status for the eSports economy and culture. It is recommendable to watch so called aftermovies, such as of the ESL Intel Extreme Masters (IEM) and ESL One in Katowice, Poland, in 2015[129] to get an impression of the makeup of these events.

From the eSports fans' perspectives these events are a way to pass the threshold of the online to the offline experience to share their fascination with others in 'the real world'.[130] Next to the given primary motive of watching the high level eSports competitions, a study amongst U.S. American and European eSports fans published by Eventbrite (2015, p. 3) identified social aspects, such as the sense of community and the meeting of online and potential new friends, as well as a different experience of games created by an event's unique atmosphere as most important motives to visit offline events. This study also identified an increasing de-

121 Cf. www.majorleaguegaming.com
122 www.majorleaguegaming.com
123 Cf. Gaudiosi (2016a)
124 Cf. Major League Gaming (2014a)
125 Cf. Major League Gaming (2014c)
126 Cf. http://en.esl-one.com
127 Cf. Rozelle (2016)
128 Seo (2013), p. 1551
129 Available at ESL (2015)
130 Cf. Seo (2013), p. 1551

mand for more events and a high willingness to pay for tickets. Most offline events focus on pro-gaming teams competing in final games for which they qualified in online leagues and tournaments before.[131] But there are also 'hybrid' events, such as the Dreamhack, world's biggest LAN-party. It sticks to its roots and offers free-to-join tournaments for everyone participating in the LAN-party as well as tournaments for professional players.[132] Furthermore, some events are embedded in conventions, such as the Gamescom*,* the world's largest gaming exhibition, which was e.g. host for the European qualification tournament for the World Cyber Arena 2015 (WCA)[133], as well as the ESL Sommermeisterschaft 2016.[134]

For advertisers, sponsors and publishers, these events are the most attractive way to reach the eSports fans, because 1) the matches have the highest overall media reach[135] (s. chapter 2.3.6.1), 2) they can get in direct contact with the fans that are present at the event and 3) thus can clarify and emphasize their acceptance of and interest in eSports. These industry partners are the most important revenue sources for the providers. According to ESL Senior Sales Manager Marco Niemann (2016), 30-40% of an ESL event's revenue is generated with sponsors (s. also chapters 2.3.8 and 2.6.1). A list of the most important eSports events of 2015 measured in terms of prize money is provided in Appendix 7. Due to the increasing number of events and visitors, ticketing as a source of revenue is becoming more important. In 2015, ticket revenue is estimated at $15.9 million by SuperData Research (2016, p. 9) and at $21 million by Newzoo (2016a, p. 13, s. Image 5) contributing 2-6%[136] of all eSports generated revenue as discussed in chapter 2.6.1. Globally, Newzoo lists 112 major events[137] in 2015:

131 Cf. Witkowski (2013), p. 219
132 Cf. www.dreamhack.se
133 Cf. www.gamescom.de; www.wca-europe.com
134 Cf. www.pro.eslgaming.com
135 Cf. Scholz (2012), p. 95
136 Variance caused by different estimations and depending on the in- or exclusion of eSports betting revenue and prize money, see chapter 2.6.1
137 Newzoo does not provide a definition of "major event". The term is partly comparable with Liquipedia's definition of Premiere and Major events (s. table 2), but not to be confused with "ESL Majors"

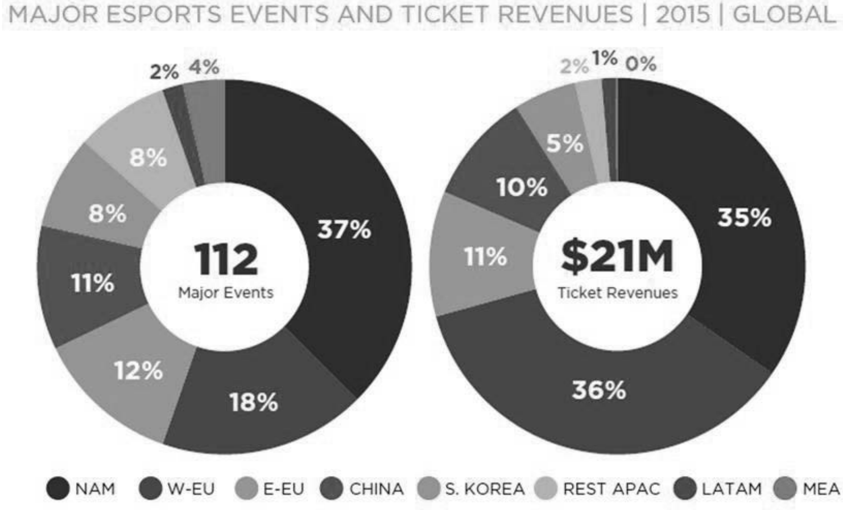

Image 5: Regional Shares of Major Events and Ticket Revenues in 2015
Source: Newzoo (2016a), p. 13

Regionally, these major events are rather equally distributed between the three large regions with Northern America being the location for slightly more than a third of events while Europe and Asia contribute a bit less. ESports' growth in the other parts of America was already exemplified with Brazil in chapter 2.3.1. Events in Western Europe and Northern America generate significantly more revenue. Reasons for this are more events in large multipurpose halls[138] and also the higher overall price level in these two regions[139] can be assumed to lead to higher revenue in comparison.

Regarding venues for eSports events, in most cases, as for now, event organizers are using venues that were made for other purposes (see above). This may change in the future to some degree as arenas are built that are devoted to eSports. The first eSports venue ever was opened in 2005 in South Korea.[140] Recently new venues have been installed or planned around the globe. In the USA, for example, the Esports Arena, LLC opened an eSports arena in Orange County, California, in 2015 and is planning to install a whole infrastructure of eSports venues throughout

138 Cf. Kresse (2016a)
139 Cf. www.laenderdaten.info
140 Cf. Yoon (2015)

the country.[141] Pro Gaming League Inc. is trying to further establish eSports in Las Vegas with a 500 seats eSports arena under its new name Millennial Esports.[142] The largest eSports arena is being built as a part of a huge gaming theme park in Zhuhai, China, by the Chinese Lun Sai Group in co-operation with MLG. More details on these examples and further examples of eSports venues are listed and described in Appendix 8.

The eSports events and its increasing popularity also become the interest of regions and cities as a way to integrate gaming in their "[...] entrepreneurial ambitions [...] to present themselves as "world-class" centers of digital industry, technological innovation, tourism and entertainment."[143] An example is the previously mentioned World Cyber Arena that was established with the help of former WCG employees[144] as successor of this event[145] by the municipal government of the Chinese city Yinchuan and the Yinchuan International Game Investment Co. Ltd.[146] According to a press release of the WCA, the main purpose of a fund of over $800 million from the Chinese Investment Corporation[147] is to boost international eSports and to establish Yinchaun as an "eSports metropolis".[148] This also includes a partnership with the International e-Sports Federation (IeSF) (s. chapter 2.3.9) to establish and improve a professional education system for the eSports value chain.[149]

2.3.6 Media Channels

A large difference to traditional media sports is the use of media channels for coverage. As other sports rely on TV broadcasting, eSports' most important media platform is the internet and can be considered the first sports segment that gained commercial success without mainstream television.[150] Team and tournament websites, web portals dedicated to eSports such as www.readmore.de or gosugamers.net and recently established eSports sections of sports web portals, such as esport.kicker.de or espn.go.com/esports, are the most important source of information for fans.[151] Also Yahoo!, one of the world's biggest web portals, started

141 Cf. www.esportsarena.com; an introduction movie is available at eSports Esports Arena (2014)
142 Cf. Carpenter (2016); www.millennialesports.com
143 Borowy/Jin (2016), p. 207
144 Cf. Custer (2014)
145 The approach as "Olympic Games of eSports" has not been adopted
146 Cf. www.wca-america.com
147 A state-owned company that manages China's foreign exchange holdings, see: www.china-inv.cn
148 In accordance World Cyber Arena (2015)
149 Cf. International e-Sports Federation/Yinchuan International Game Investment Co. Ltd. (2016)
150 Cf. Winnan (2016), subchapter: eSports as a Spectator Sport
151 Cf. Breuer (2011), pp. 118-119

an eSports section[152] and already gained significant reach.[153] Next to that, the eSports matches themselves are broadcasted via online streaming (see below). Because of the target group's high online affinity, eSports coverage in print media is low and mostly limited to single articles within print magazines about video games in common[154] and does not need closer examination.

2.3.6.1 Online Streaming

The matches are being brought to the eSports fans via ***online streaming***, often referred to as WebTV and/or Internet Protocol Television (IPTV).[155] The streaming content providers of competitions use the so called observer modes (also: spectator modes) in which they can join a game as a neutral observer, that does not affect the game play itself, and watch it from different perspectives while having additional information provided. The screen of what these streamers are viewing within the game is being captured and streamed to the viewers. The matches are commentated and analyzed by commentators like in traditional sports. Streams of pro-gaming events also consist of content beyond the in-game action such as camera recordings of the production site, the moderators' desk, the live audience, interviews with experts or players or the stage and the players themselves.[156] Appendix 9 provides impressions of different content of an online stream of ESL Frühlingsmeisterschaft 2016 (s. chapter 3.3) and Heroes of the Storm World Championship 2015.

This type of broadcasting has several advantages over classic TV broadcasting: the live streams and videos on demand are accessible at any place in the world with an internet connection at any time and also on mobile devices. Furthermore, chat clients are directly inserted in the stream interfaces allowing the viewers to discuss the matches live with other viewers and even the streamers/commentators themselves.[157] When the first eSports online streaming provider started in 2003, technological capacities were still very limited. But with improvement of PC performance and internet bandwidth its accessibility increased quickly. With the start of platforms like ***Twitch.tv*** or own3d.tv in and after 2009, watching live streams and live streaming was made very easy for the broad audience and the platforms started to create ad-commercial revenue.[158]

152 Available esports.yahoo.com
153 Cf. Newzoo (2016a), p. 24
154 Cf. Breuer (2011), pp. 13-14
155 To avoid too detailed technical definitions, the term *online streaming* is used to describe any kind of live stream and video on demand offerings that is available via internet
156 Cf. Scholz/Stein (2016), p. 89; Scholz (2012), pp. 80 ff.
157 Cf. Scholz (2012), p. 90
158 Cf. Scholz (2012), p. 95

According to SuperData Research, 24% of all gaming video content viewed online in the US is related to eSports, showing eSports' importance within the whole gaming industry.[159] Private streamers, e.g. gamers that are streaming their training sessions and giving advice to their viewers, generate revenue by subscriptions with monthly fees that provide certain privileges to the subscribers, donations from their viewers, and advertising and sponsorship.[160,161] In Western eSports Twitch.tv is by far the largest platform for live streaming, considered a "monopoly on streaming in the West"[162] by Winnan and "the biggest contributor to the growth of eSports"[163] by the experts of Synergy Sponsorship, while YouTube is the most important platform for videos on demand. Most content providers use and benefit from both.[164] Twitch.tv is further analyzed in this section below. Streaming platforms are also negotiating and collaborating with eSports leagues and events providers to gain exclusive rights of broadcasting certain competitions, e.g. Afreeca.tv and Global StarCraft II League,[165] comparable to the traditional sports leagues and TV stations.[166]

Twitch.tv:

In 2011, the online live-streaming provider Justin.tv established Twitch.tv as its new platform only dedicated to gaming and especially eSports streams.[167] The rapid success and growth of Twitch.tv is visualized in the timeline below:

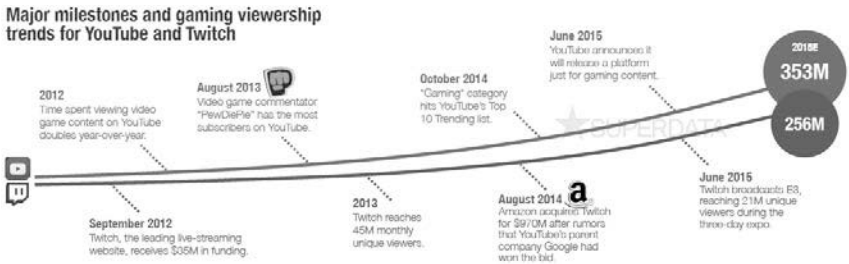

Image 6: Timeline of Milestones and Gaming Viewership Trends for YouTube and Twitch.tv
Source: SuperData Research (2015b), p. 17

159 Cf. SuperData Research (2015b), p. 6
160 Winnan (2016), part: subhcapter: eSports as a spectator mode; SuperData Research (2015b), p. 14
161 Private Twitch.tv channel examples: www.twitch.tv/followgrubby and www.twitch.tv/froggen
162 Winnan (2016), subchapter: Ancillary Employment Opportunities
163 Synergy Sponsorship (2015), p. 14
164 Cf. SuperData Research (2015b), pp. 15-17; Fisher (2014), p. 3
165 League website available at: event.afreeca.tv/gsl
166 Cf. Seo (2013), p. 1553
167 Cf. Lynley (2011)

Within only two years, Twitch.tv grew a user basis of 45 million unique viewers per month and got into focus of the "internet giants" Google and Amazon. In August 2014, Twitch.tv was finally purchased by Amazon for nearly $1 billion clarifying its huge success and potential within the rapid growth of eSports. According to Twitch.tv's website, over 100 million viewers watch content on Twitch.tv every month and over 1.7 million users broadcast themselves,[168] resulting in a market share of all gaming video content of 43% with revenue of $1.8 billion in 2015.[169] Such a large amount of streamers also clarifies the low entrance and production cost of broadcasting eSports.[170]

Twitch.tv's significance is further affirmed by the fact that ESL and MLG stream their content, e.g. the matches of the large offline events, on Twitch.tv next to their own platforms ESLTV and MLG.tv.[171] Game publishers such as Riot Games and Activision Blizzard also run their own Twitch.tv channels.[172] Blizzard Entertainment and Twitch.tv even have a partnership that allows users to connect their Battle.net[173] and Twitch.tv accounts to gain some company related special bonuses.[174] According to Newzoo (2016b) 14-31% of all viewership hours of Twitch is generated by professional eSports tournaments each month. Appendix 5 provides an overview over the shares of top eSports organizers showing the importance of the ESL (23%) as independent organizer with high market coverage and the media success of Riot Games' (28%) approach of controlling the competitive scene of its own game (s. chapter 2.3.7). The live streams of the largest events are being watched by millions of eSports fans. Appendix 7 lists the events attracting the highest numbers of viewers in 2015 illustrating the reach that online streaming can generate for eSports events.

2.3.6.2 TV

In contradiction to South-Korea's eSports dedicated TV channels,[175] eSports did not strongly take root in mainstream television in the Western world as for now. In the past several attempts have been made to establish TV shows but without sustainable success.[176] Maric (2011) provides an analysis of former shows in Germany. Lingle (2016) illustrates former approaches and their problems in the USA. Never-

168 Cf. www.twitch.tv

169 Cf. SuperData Research (2015b), p. 15

170 Basic streaming equipment only includes a PC, broadband internet, a microphone/headset, an optional webcam, and an open source streaming software

171 ESL and MLG Twitch.tv channel examples: www.twitch.tv/ESLTV and www.twitch.tv/MLG

172 Riot Games and Blizzard Entertainment Twitch.tv channel examples: www.twitch.tv/riotgames and www.twitch.tv/team/blizzcon

173 Blizzard Entertainment's online gaming platform

174 Cf. Blizzard Entertainment (2015)

175 Cf. Winnan (2016), subchapter: eSports as a Spectator Sport; Breuer (2011), p. 18; p.109

176 Cf. Breuer (2011), p. 18

theless, with the growth of eSports in the past years, the interest of established TV channels increased: USA's largest sports channel, the Entertainment and Sports Programming Network (ESPN), aired eSports on their online streaming channel ESPN3 and made the transition to its cable TV channel ESPN2 in July 2015.[177] Another large U.S. TV channel Turner Broadcasting System (TBS), owned by Time Warner, Inc., started the E-LEAGUE, its own Counter-Strike: GO league with $1.2 million prize money, and established a partnership with Twitch.tv to stream matches on Twitch.tv on the one hand and every Friday night on their television channel TBS on the other hand.[178] According to daily data of the Nielsen Company approximately half a million TV viewers on average watched the first show during the broadcast.[179] Sports TV Ratings calculated approximately 250,000 viewers per show on average.[180] According to E-League general manager Christina Alejandre attracting new viewers to TBS was the primary target of the E-League.[181] TBS stated in an announcement that E-League brought 3.4 million new viewers to its channel and led to an increase of 97% in the age group of the 18-34 years old male in comparison to their previews broadcasts on the same Friday night slot.[182] Relating to these results, Alejandre evaluates that "we [TBS] think we have been hugely successful."[183] Highlights of this league were also broadcasted in German television by ProSiebenSat. 1 Media SE's channel for the male audience ProSieben MAXX.[184] The viewing figures were satisfying as analyzed by Meyer (2016). Yet, Germany's largest sports channel Sport1 premiered the DotA 2 finals of the ESL One Frankfurt 2016 with rather disappointing results below the channel's average share, partly caused by the one-sided match and the competing parallel broadcasting of football games of the UEFA Euro 2016.[185] There are a lot of further recent examples, e.g. the launch of an eSports dedicated TV channel in the Nordic and Baltic states by ESL and its owner MTG[186] or TV 2, Norway's largest private TV network, broadcasting several disciplines.[187] ESports expert Alex Fletcher is summarizing those developments by stating that "2016 is shaping up as a big year for eSports programming on TV."[188]

177 Cf. Moris/Wolf (2016)
178 Cf. Minotti (2016); Hermann/Wingfield (2016)
179 Cf. Mueller (2016b)
180 Cf. Kresse (2016b)
181 Cf. Alejandre as cited in Erfanian (2016)
182 Cf. Turner Broadcasting System, Inc. (2016)
183 Alejandre as cited in Erfanian (2016)
184 Cf. ProSiebenSat.1 Digital GmbH (2016); full episodes formerly available at: www.prosiebenmaxx.de/tv/eleague/video
185 Cf. Weis (2016)
186 Cf. McConnell (2016)
187 Cf. Winnan (2016), subchapter: eSports as a Spectator Sport
188 Fletcher (2015)

Despite the involvement and investment of major players from the TV industry and the eSports economy, it is uncertain if and to what extent eSports on TV will be successful in the future. ESports' growth without TV support in the last years proved that it doesn't need TV coverage to function. Furthermore, TV is a rather "old" media channel with declining viewer numbers especially in the group of young adults according to Nielsen[189] and does not provide the advantages of online streaming mentioned in the previous chapter. This, in addition with historical unsuccessful experiences, puts into question whether this regression from eSports' native and new media (PCs and the internet) to the foreign medium of classic television will be successful. This position is taken e.g. by Scholz who criticizes that "this distinct audience is solely reachable over the Internet and classical television has no place in it."[190] and Winnan who asks if "eSports really need to go backwards to proceed forward?"[191] referring to a decrease of television audience of 50% from 2002 to 2012.

Yet in accord with Fletcher (2015), he also sees the chance of transforming people who are not yet aware of eSports into fans with the help of television broadcasting and thus increasing the eSports audience.[192] The extent to which eSports will be accepted by traditional sports viewers is difficult to forecast as well as what status eSports will reach in between traditional sports on TV (s. also chapter 2.6.4). The overall increasing acceptance and integration of digital games in society[193] give reasons for positive predictions from an eSports perspective. With the former mentioned success of the E-League, eSports on TV in the USA may be on a sustainable path. A higher awareness, acceptance and new viewership, if so, would raise the attention of eSports unrelated industry partners as future growth potential as analyzed in chapter 2.5.3. Nevertheless, eSports' main stream acceptance and TV success - at least in Germany - was harshly struck when the show on ProSieben MAXX was canceled due to external events, clarifying the hard and infirm stand of FPS games in the media and society as further analyzed in chapter 2.4.[194]

2.3.7 Publishers

Publishers are the holder of the intellectual property of a game[195] and mostly act as distributor.[196] In 2011, Breuer (2011) stated that the significance of eSports for publishers, expect from Blizzard Entertainment and Electronic Arts, is rather

189 Cf. Wieser (2016) based on The Nielsen Company (2016b)
190 Scholz (2012), p. 102
191 Winnan (2016), subchapter: eSports as a Spectator Sport
192 Cf. Winnan (2016), subchapter: eSports as a Spectator Sport
193 Cf. Entertainment Software Association (2015)
194 Cf. Wartenberg (2016)
195 Cf. Blum (2016)
196 Cf. Breuer (2011), p. 123

low.[197] This situation has changed drastically since then. As Appendix 7 shows, most of the most rewarded events are either organized by the publisher of the specific game itself or sponsored and planned in cooperation with the providers. In addition, as mentioned before, the largest provider MLG was purchased by publisher Activision Blizzard. This clarifies the increasing role of publisher investments for eSports and of eSports for publishers.[198]

As the eSports aspect of a game was mostly rather secondary in its development process, it now became a primary aspect for competitive multiplayer games.[199] As consequence, an enhancement of the competitive game play and observer features will lead to an improved experience for the players, broadcasters and viewers and thus a higher production value can be expected. Primarily, supporting an organized professional competitive scene functions as a marketing tool to raise awareness and increase number of players to increase direct game revenue that is to a high share generated by microtransactional sales for in-game items and upgrades for the most big eSports disciplines.[200] The perceived increased attractiveness of a game sparked by a well functioning professional eSports environment also helps to extend the lifespan of a game.[201] Taking this even a step further, Joost van Dreunen, CEO of SuperData Research, predicts that "ESports will likely evolve into a method to monetize players indirectly by connecting audiences with brands, thereby further enlarging the revenue potential."[202] This statement clarifies that publishers also start considering eSports as a profitable direct source for monetizing their games and realize that also viewers, not only players, grant attractive revenue opportunities.[203]

Nevertheless, the overall role of publishers within eSports is not yet defined and differs in between disciplines. Furthermore, there is no comparable component in traditional sports as a sport discipline, in opposition to an eSports game, cannot be legally owned. A publisher for example has the rights to prohibit the broadcasting of matches of his games and can stop a certain stream provider from showing content related to its game.[204] Blum (2016) carved out two different publisher approaches that arose and that lead to different consequences for the other members of the value chain:

1. "The Riot Model" based on control

197 Cf. Breuer (2011), p. 124
198 Cf. Winnan (2016), subchapter: Existing Real World Comparisons
199 Cf. Chapple (2015); Breuer (2011), p. 124
200 Cf. van Dreunen as cited in Gaudiosi (2016b)
201 Cf. Newzoo (2016a), p. 6
202 van Dreunen as cited in Gaudiosi (2016b)
203 Cf. Newzoo (2016a), p. 6
204 Cf. Blum (2016)

The first model is named after its prime example Riot Games. Its only title League of Legends is the most played eSports game in the world with approximately 67 million unique players each month according to Riot Games.[205] Riot Games is controlling most parts of the professional competitive scene itself and acts as de-facto governing body.[206] It manages, regulates and operates the most important leagues, LCS and its qualification leagues, itself. Teams participating in the LCS are not allowed to play in any other league and can be suspended by Riot Games.[207] For example, at the 7th e-Sports World Championship Seoul 2015, organized by the International e-Sports Federation (IeSF) (s. chapter 2.3.9), Riot Games only allowed amateur players, that do not play in the LCS, to participate.[208] Riot Games furthermore also functions as media producer for the matches that it streams on and in co-operation with several platforms including Twitch.tv, YouTube and Azubu.tv.[209] It acts similar to a major association in traditional sports but with the difference that it is a profit oriented commercial company instead of an association of the clubs. Thus, the clubs' interests are not represented sufficiently and they do not receive a share of revenue.[210] Fletcher (2016a, 2016c) evaluates this situation that applies not only for the LCS, but most of the eSports scenes, as problematic and hindering for the eSports economy and its sustainability. An important step to change this situation is the formation of strong associations and unions as further analyzed in chapter 2.3.9.

2. "The Valve Model" based on a laissez-faire approach

A different approach is used by Valve for Counter-Strike: GO. It is less involved in the competitive scene of its games and only acts at the highest level of competition. This leads to high decentralization with a lot of providers using different sets of rules. For the largest events, so called "Majors",[211] Valve is basically only providing the price money.[212] The events themselves were and are organized by MLG, ESL and DreamHack. These organizers also provide the media production and streaming.[213] There are no restrictions for teams to participate in other leagues and events such as in the E-League that was introduced in chapter 2.3.6.2. Yet, Valve - just like Riot Games - also interfered by excluding certain players from all Valve sponsored competitions acting as a governing institution (s. also chapter 2.4.1).[214] For DotA 2, Valve pursuits the same strategy to improve the competitive scene by sponsoring

205 Cf. www.riotgames.com
206 Cf. Fletcher (2016a); Fisher (2014), p. 1 ff.
207 Cf. Blum (2016); Fisher (2014), p. 1 ff.
208 Cf. International e-Sports Federation (2016a)
209 Cf. Cocke (2015)
210 Cf. Fletcher (2016a)
211 Not to be confused with the major category of Liquipedia in table 2
212 From 2013-2015 with $250,000, since 2016 with $1,000,000, see Lahti (2016)
213 Cf. wiki.teamliquid.net
214 Cf. Winnan (2016), subchapter: Gambling Opportunities

Majors next to the main event, called The International DotA Championships, which is organized by Valve itself and comparable to Riot Games' League of Legends World Championship. This way Valve provides four major events every year as highlights and let the rest of the scene develop itself independently.[215] The International's high price money (s. Appendix 6) is partly crowd funded by Valve by giving all DotA 2 players the opportunity to contribute to the event as Valve puts a share of revenue (25%) of special in-game purchases in the prize pool.[216] This crowd funding policy is also pursuit by Hi-Rez Studios for its game Smite.[217] On the positive side this is a new revenue stream, or at least boost, directly related to professional eSports, that minimizes the publisher's event costs.[218] On the negative side Minotti (2014) states, that this puts an eSports discipline under a certain pressure and risk: when the crowd funded prize pool is smaller compared to the year before, players and fans may interpret it as declining popularity and consider switching to a different discipline within the genre.

2.3.8 Brands

The relevance of sponsors and advertisers for the eSports ecosystem in its appearance today is very high. According to estimations of SuperData Research, partnerships with these industry partners make up for approximately three quarters of all revenue as visualized in Image 9 on page 59. The improvements of online streaming and its processes and viewer numbers and the entrance to classic television lead to increasing revenue generated with **advertisers**. Newzoo (2016d) evaluated a doubling of this revenue stream in 2015 compared to 2014 and that advertising accounts for 60% and sponsorships for 40% of indirect revenue.[219] According to analyses done by Franke (2015, pp. 140-141), the acceptance of online advertising in eSports content, e.g. commercial breaks or banner ads, of eSports fans is rather high. Yet, the usage of ad-blocking software[220] is very popular among eSports fans as analyzed in chapter 2.5.3.

In a five forces analysis[221] Breuer (2011, pp. 132-133) identifies the power of the **sponsors** as a big threat for eSports providers. A confirming negative example is the abandoning of the sponsoring activities of computer chip producer NVIDIA

215 Cf. Zacny (2015)
216 Cf. Senior (2015)
217 Cf. Minotti (2014)
218 Cf. SuperData Research (2015a), p. 4; Souca, E./Newzoo (2015), p. 6
219 Cf. Janoff (2016) based on data of Newzoo (2016e)
220 For explanation and further analyses of ad-blocking in general see PageFair/Adobe Systems Inc. (2015)
221 In a Five Forces Analysis the competitive structure of an industry is investigated in terms of bargaining power of customers and suppliers, threats of substitute products and new entrants, and intra-industry rivalry. See Michaux (2015).

Corporation for the Electronic Sports World Cup (ESWC) during the financial crisis which led to liquidation of the operating company and enforced the sale of the ESWC brand.[222] After the crisis former professional eSports athlete Messier (2011, pp. 54-60) took a critical view on this situation, stating that this high dependence on sponsors for mere survival (not only as leverage) and fast abandoning of sponsoring funds during the financial crisis is also internally caused by the lack of defined structures, a strong viewer base that is provided with a great spectator and social experience, degree of organization, and group thinking as an eSports unity instead of only caring for one's favorite game or league.

The developments of the eSports ecosystem since then, as analyzed in the previous and next chapters, lead to the conclusion that these problems have been improved and eSports as a sport and as an industry became a) more self-sufficient b) less risky and more important for the marketing efforts of sponsors. To a certain extent the situation changed towards a 'natural' attraction of sponsors due to a constant large and well provided viewership and away from an attraction of viewers due to 'unnatural' large sponsored prize pools. Cornwell (2015) emphasizes, that sponsorship was, is and will be a key driver for eSports' development and furthermore, that the whole industry is under a certain pressure and risk to meet the big expectation sparked by high sponsor investments. Closer analyses about sponsors and sponsoring in Western eSports is provided in chapter 2.5.

2.3.9 Associations

Associations, mostly national, formed over the past decades but did not reach a high significance yet. An exception is the Korean eSports Association (KeSPA) that was formed in 2000 with the approval of the Korean Ministry of Culture, Sports and Tourism to oversee and regulate eSports in South-Korea.[223] The development and influence of the KeSPA makes it the most important national eSports association and puts it on a comparable level of traditional sport associations.[224] Internationally, the IeSF is the most important institution. It was founded in 2008 by eight national associations[225, 226] and has grown to a federation of 45 member states today.[227] Germany is not represented in the IeSF, because the former Deutscher eSports Bund (ESB), a founder member of the IeSF, is not active anymore.[228] The IeSF is sponsored by the Korean Ministry of Culture, Sports and Tourism and Ko-

222 Cf. Breuer (2011), pp. 83-84; Phillips (2009)
223 Cf. Taylor (2012), subchapter: Governing bodies
224 Cf. Thiborg (2009), p. 9
225 From Denmark, Germany, Austria, South-Korea, Belgium, The Netherlands, Switzerland, Vietnam and Taiwan
226 Cf. Winnan (2016), subchapter: Governing bodies
227 Cf. www.ie-sf.com
228 Despite of a "comeback" statement in 2010, the ESB's website www.e-sb.de is offline since 2011

rea's largest telecommunication company SK telecom and furthermore partners with several publishers.[229] Its subjects include global development, standardization and regulation, human resource development and the organization of the IeSF World Championship. The regulation efforts also include an anti-doping policy[230] as doping becomes a problem and risk factor like in traditional sports (s. chapter 2.4.1).[231] To fight problems that threaten the integrity of eSports, the Esports Integrity Coalition (ESIC) was founded,[232] which is further analyzed in chapter 2.4.

Furthermore, seven clubs of the top eSports clubs in the West joined together in 2006 to form the G7 Teams[233] with the aim "to promote and improve all aspects of professional e-sports and safeguard the general interests of the entire e-sports community."[234] Triggered by a conflict between the significant members Fnatic and SK Gaming, this union split in 2010, showing the difficult situation for associations in eSports.[235]

In May 2016, a new similar effort has been undertaken by creating the World Esports Association (WESA). It's an association of seven leading Western eSports clubs[236] and the ESL.[237] For now, it is only focused on CS:GO and leagues organized by the ESL.[238] If successful, other games may be considered as well for implementation in the future.[239] WESA positions itself as "Based on similar traditional sports associations [...]" and "[...] an open and inclusive organization that will further professionalize eSports by introducing elements of player representation, standardized regulations, and revenue shares for teams."[240] As mentioned in chapter 2.3.7, Fletcher (2016a, 2016c) identifies the missing of revenue sharing for teams as a hindering problem and sees equal distribution of generated revenues as an important factor when "eSports evolves out of [its] current role as marketing channel for game publishers and line of business for tournament organizers, into a standalone ecosystem".[241] The WESA can be seen as a first step to overcome this problem. Nevertheless, the WESA is also seen skeptically, especially by the eSports

229 Cf. www.ie-sf.com
230 Cf. International e-Sports Federation (2014)
231 Cf. Winnan (2016), subchapter: Nootropics and Drug Use
232 Cf. www.esportsintegrity.com
233 Cf. Breuer (2011), pp. 25-26
234 www.G7Teams.com as cited in Breuer (2011), pp. 25-26
235 Cf. Syrota (2011)
236 Fnatic, Team EnVyUs, Ninjas in Pyjamas, G2 eSports, Virtus.Pro, Natus Vincere and Mouseports
237 Cf. www.wesa.gg
238 Cf. Campbell (2016)
239 Cf. Gaudiosi (2016c)
240 www.wesa.gg
241 Fletcher (2016c)

fans themselves.[242] The overall skepticism is further clarified by the exit of the founder member FaZe Clan approximately two weeks after the launch of WESA due to lack of transparency regarding the plans of how to reach WESA's stated goals.[243] The association is too young to evaluate its success, but a SWOT analysis[244] conducted by Fletcher (2016b) as well as a first analysis of Blum (2016) grants an overview on potentials and limitations, that are summarized and visualized in Appendix 10.

A comparative approach including e.g. share of profit and social benefits for players is undertaken by seven North American team organizations that formed the Professional eSports Association in September 2016 that will start to operate a CS:GO league in 2017.[245] If such associations grow in the future, the significance of and interaction between them and the games' publishers will be another important factor, because publishers as owners of the intellectual properties can put a spoke in an association's wheel and thus gaining their support is an inevitable necessity.

2.4 Risk Factors

ESports underlies several risk factors that may negatively affect the reputation of the whole ecosystem and can cause the aversion of fans, players and industry partners. ESports sponsors must be aware of these risks as they can lead to negative spillover effects and to decreasing media reach of sponsoring activities. The risk factor sexism has already been discussed in chapter 2.3.1.

2.4.1 Corruption

To tackle corruption, ESL and Dreamhack created the ESIC with the help of the British sports lawyer Ian Smith to become *"guardian of the sporting integrity of esports"*.[246] Members from various stakeholder groups, such as Intel and betway, already joined.[247] Ian Smith identified four significant problems:[248]

1) Manipulating a player's internet connection

By manipulating or disrupting a player's internet connection in online matches, e.g. by a so called DDoS[249] attack in which a large amount of internet data traffic is send to a player's PC leading to a denial of internet access, the outcome of a match

242 Cf. Fletcher (2016b)
243 Cf. Blum (2016)
244 A SWAT analysis figures out internal strengths and weaknesses and external opportunities and threats, see Pahl/Richter (2007)
245 Cf. Auxent (2016b)
246 According to its mission statement at www.esportsintegrity.com
247 All members are listed at www.esportsintegrity.com
248 Cf. Fischer (2016)
249 Abbreviation for Distributed Denial of Service

can be influenced. This can be either used to win matches or to manipulate a match's result for illegal betting purposes (s. 4) Match Fixing and Gambling).[250] For more details on DDoS in eSports see Maiberg (2015): eSports has a DDos Problem.

2) Cheating

Commonly, cheating can be referred to as consciously breaking any kind of rule of a competition's regulation. This subchapter will focus on cheating in the matter of manipulating the game itself[251] such as using cheating software that helps aiming ('aim bot') or grants more vision of the virtual battleground ('wallhack' or 'maphack'). Programming and distributing such software is a lucrative business with revenue in the millions.[252] To detect cheating, publishers are operating anti-cheating programs, such as Valve's Anti-Cheat System (VACS).[253] The ESL One Rulebook for CS:GO makes the usage of ESL's control software 'ESL Wire Anti-Cheat' mandatory for players of the important leagues.[254]

Cheating in amateur and casual gaming of a discipline negatively influences the gaming experience and can lead to a decrease of players. The problem affects mostly online competitions in which the players and their hard- and software set-ups cannot be controlled completely. In 2014, well-known professional CS:GO players were caught cheating and thus banned by Valve. These players subsequently claimed that several other players are cheating as well. This incident has put the whole scene and the integrity of other players into question.[255] In offline events this problem basically disappears as hard- and software are under full control of the organizers.[256] Nevertheless, the loss of integrity and reputation due to cheating incidents or suspicions in the professional and semi-professional scene can harm it by dragging away viewers and industry partners.[257] Thus, cheating is a risk for all stakeholders involved.

3) Doping

As in traditional sports, players can enhance their performance by taking stimulating substances which necessarily led to the integration of anti-doping policies. In eSports, mostly psychological stimulants to improve e.g. concentration, reaction

250 Cf. Maiberg (2015)

251 Other cheating methods are e.g. the abusing of in-game bugs or the installation of macros, that allow to execute a certain combination of klicks/keypresses by only pressing one key/mousebutton

252 Cf. Maiberg (2014)

253 Cf. Winnan (2016), chapter: Cheaters and Hackers

254 Turtle Entertainment GmbH (2015b), p. 18

255 Cf. Lahti (2014)

256 Cf. Winnan (2016)

257 Cf. Minns (2016)

time and alertness, such as Ritalin, Adderall and Vyvanse, are effective drugs.[258] The IeSF already published an anti-doping policy in its regulations.[259] In 2015, a CS:GO player of the professional eSports club Cloud 9 admitted to have taken Adderall in a match played at ESL One Katowice and furthermore claimed that the use of Adderall is very common in the professional CS:GO scene.[260] ESL has started to implement anti-doping policies with the help of the National Doping Agency of Germany and the World Anti Doping Agency (WADA). The ESL One Rulebook now states in section 2.6.4 Drugs and Alcohol, that playing an online or offline match "[...] under the influence of any drugs, alcohol, or other performance enhancers is strictly prohibited, and may be punished with exclusion [...]".[261] Since ESL One Cologne in August 2015, ESL is performing tests for prohibited substances at their major offline events (regardless of the featured disciplines) with support of WADA.[262] While such tests can be done at offline events, there are no opportunities to control players of online matches. In conclusion, drug abuse and eventual consequences of it for the respective players in eSports can harm its image and thus can lead to economical consequences. The IeSF's regulations and the ESL's efforts with the support of major agencies are a first step to fight doping and diminish this risk.

4) Match Fixing and Gambling

The problem of match fixing – the manipulation of a match by the players itself, e.g. by being bribed to lose intentionally or agree on the outcome with the opponent beforehand – to make profit with wagering is a problem that occurred with the rise of eSports betting opportunities.[263] Several incidents concerning multiple disciplines happened in the last years. Scandals in the South-Korean StarCraft II scene included top players and the arrest of several involved people.[264] A League of Legends pro-gamer attempted suicide after admitting match manipulation that was commanded by his team manager.[265] In Western eSports, the lack of regulating bodies is a problem when dealing with match fixing, and thus the publishers are the most important institution to deal with such issues.[266] For instance, Valve permanently banned several players from Valve involved CS:GO competitions because of match fixing for skin gambling profit (see below).[267] Companies that help sports

258 Cf. and more detailed information available at Winnan (2016), chapter: Nootropics and Drug Use
259 Cf. International e-Sports Federation (2014)
260 Cf. Winnan, chapter: Nootropics and Drug Use
261 Turtle Entertainment GmbH (2015b), p. 7
262 Cf. McConnell (2015)
263 Cf. Winnan (2016), subchapter: Gambling Opportunities
264 Cf. Sinclair (2015); Wood (2016a); Durrani (2016)
265 Cf. Mitchell (2014)
266 Cf. SportTechie (2016)
267 Cf. Durrani (2016)

institution with such issues, such as SportsIM and Sportradar AG, start to integrate services for eSports league providers and publishers.[268] ESL already has a partnership with Sportradar which includes e.g. the usage of the Sportsradar's Fraud Detection System to monitor betting activities.[269] According to Ian Smith, match fixing is still on a very low level, but when eSports and eSports betting is growing as expected (s. chapter 2.6.1), it reaches a size at which "[...] serious fixers get involved [...]" and "[...] organized crime gets interested."[270]

In conclusion, the potential loss of integrity due to illegal betting activities is a threat for the affected scene and the whole eSports industry, but the stakeholders are aware of this risk and steps to diminish it have already been taken.

The gambling with virtual items of Valve's games, so called "skin gambling", for real money on third-party sites is a market with a total wagered amount of $7,4 billion according to a study of Narus Advisors and Eilers & Krejcik Gaming.[271] This kind of betting is in a legal 'grey area', e.g. due to lack of regulations to avoid gambling of underage players. As consequence of the mentioned match fixing scandal, criticism that skin gambling leads to serious gambling problems of young gamers[272] and even law suits against Valve,[273,274] Valve announced the prohibition of such third-party skin gambling offerings on 13th of July 2016 and clarified that the rumors about its involvement in such gambling pages are not true.[275] As a first consequence, several effected sites ceased its operations.[276] The impact on eSports of Valve's decision cannot yet be determined. But it can be assumed, that on the one hand, this may positively impact the image of the eSports scene as perceived by industry partners and governmental authorities, but on the other hand may decrease viewer numbers as for some viewers the main motive to watch might be to see their bets being played out.[277] A possible transition of viewers to real money betting sites is an opportunity for those sites.

2.4.2 Virtual Violence

A lot of research about the display of violence in media and its consequences has been conducted in the past.[278] Whether playing of computer games can transfer

268 Cf. SportTechie (2016); Wood (2016c)
269 Cf. Sportsradar AG (2015)
270 Smith (2016)
271 Cf. Narus Advisors LLC/Eilers & Krejcik Gaming (2016), as seen in Grove (2016)
272 Cf. Brustein/Novy-Williams (2016)
273 Cf. Bräutigam (2016b)
274 For the document of a law suit see United States District Court District of Connecticut (2016)
275 Cf. Johnson/Valve Corporation (2016)
276 Cf. Bräutigam (2016b)
277 Ebenda
278 For a summarization see Breuer (2011), pp. 209-216; see also Zimmermann/Schulz (2007)

virtual violence into the real world is not to discuss in this thesis, but instead the focus is on the influence that media attention towards this topic can have on eSports.

Virtual violence in computer games got into media focus as the cause of shootings in high schools was partly attributed to FPS games, mostly referred to as 'killer games' with Counter-Strike as primary example.[279] For instance, in 2002 the Frankfurter Allgemeine Zeitung, one of Germany's most important news papers, published an article called "The software for the massacre: A computer program of Sierra Entertainment [author's note: Counter-Strike] trained the school shooter of Erfurt".[280,281] A subsequent examination of responsible German authorities did not lead to the prohibition of the game.[282] A certain risk of potential bans on national markets for eSports disciplines that include virtual violence remains. A certain level of skepticism towards Counter-Strike can still be observed, as for example Wüstenrot excluded CS:GO in its branding activities at the multi-discipline event ESL Frühlingsmeisterschaft 2016 (s. chapter 3.3).

This clarifies, that in conclusion, the eSports scenes of such games, especially CS:GO, are under a certain risk of losing (potential) industry partners due to negative display in the media concerning this topic.[283] The assumption that in case of another shooting incident, that is being associated with 'killer games' in the mass media, companies may end their support of competitions or teams related to CS:GO to avoid possible negative spillover effects seems plausible and is thus a big risk. This assumption was proven right when the killing of ten persons in a shooting in Munich[284] ignited a new discussion about 'killer games' and as consequence the newly joined media partner ProSiebenSat. 1 Media SE's canceled the broadcasting of their TV show about the E-League.[285] As the significance of CS:GO for major eSports clubs and providers is very high, it can be concluded that this is a risk for the whole eSports ecosystem. The potential generalization of this topic for all of eSports in mass media may also affect the whole industry and especially other eSports disciplines that include virtual violence, e.g. MOBAs, fighter games and RTS games.

2.5 Sponsoring in Western eSports

In marketing literature sponsoring is considered as an own instrument within the communication mix.[286] Sponsoring and especially sport sponsoring have gained

279 Cf. Breuer (2011), pp. 201-215; Müller-Lietzkow (2008), pp. 111-112
280 Literal translation
281 Article online available at www.genios.de, see Frankfurter Allgemeine Zeitung (2002)
282 Cf. Spiegel Online (2002)
283 Cf. Minns (2016)
284 For more information see Portal München Betriebs-GmbH & Co. KG (2016)
285 Cf. Wartenberg (2016)
286 Cf. Bruhn (2003), pp. 39-41; Sachse (2010), pp. 11-13

significance over the last decades.[287] For the integration into the communication mix Bruhn (2003, pp. 39-43) emphasizes the importance of inter-instrumental integration, the systematic coordination with other instruments[288] as exemplified in the case study in chapter 3.3, as well as intra-instrumental integration, the systematic coordination with other sponsoring activities.

The common motives of sports sponsoring are reaching a target group or a broad mass with the multiplier effect of mass media in a non-commercial environment to increase brand awareness, improve brand image and gain goodwill.[289] Minns (2016), Pilcavage (2015) and Keller (2015a) point out the importance of inter-instrumental integration by creating relevant added value for the target group that should go along with sponsoring engagement in eSports. In the following, sponsoring properties and activities in eSports and their major differences to traditional sports, the sponsor composition and the special attractiveness of eSports sponsoring and the eSports fans are analyzed. These analyses only consider the Western eSports sphere.

2.5.1 Sponsoring Properties and Activities

To classify sponsoring properties, a classification approach as used by Drees (2003, pp. 55-58) and Bruhn (2010, pp. 83-85) for traditional sports sponsorship is applied and adapted to eSports (Image 7, left). In addition with further specifications of sponsorships (Image 7, right), significant special sponsoring conditions in eSports are analyzed. Despite basic similarities of the sponsoring properties, Fletcher (2016e) emphasizes that it is important to keep in mind that eSports derives from the gaming community and not the sports community and thus mere copying of approaches from traditional media sports sponsoring is not a reliable strategy. The sponsoring properties are mainly characterized by the chosen discipline/s, the level of performance and professionalism and the organizational unit. Concerning disciplines, the changeability of popularity caused by the constant creation of new disciplines explained in chapter 2.2 is very high and unique to eSports.[290]

287 Cf. Bruhn (2003), pp. 12-41; Lucas (2015), p. 141

288 A list of other instruments and how they can systematically interact with sport sponsoring is available in Bruhn (2003), p. 40; pp. 149-155

289 Cf. Drees (2003), pp. 52-54

290 The popularity of traditional types of sport also vary, but mostly triggered by the success/failure of national athletes and not due to the emergence of new disciplines, see Horky (2009)

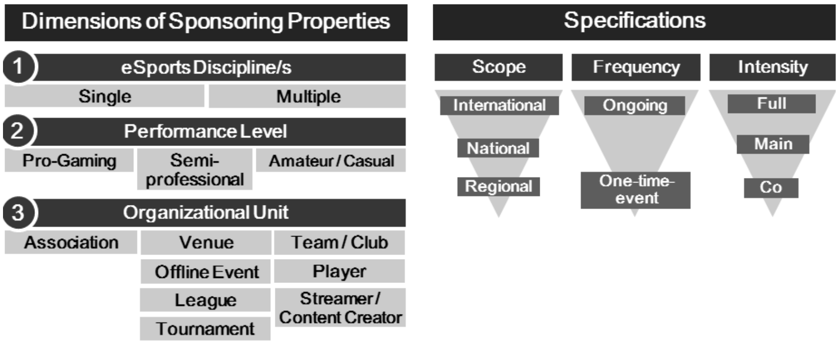

Image 7: Dimensions and Specifications in eSports Sponsoring
Source: Own illustration based on Drees (2003), pp. 55-64; Bruhn (2010), pp. 83-85; Lucas (2015), p. 16

For sponsors deciding to specifically focus on the support of certain disciplines, it is important to observe and eventually adapt to possible shifts. The main differences in comparison with traditional sports are triggered by the dichotomy of offline and online which also is unique to eSports. On the one hand, this grants the possibility to organize and/or sponsor online events with (top) teams from around the world participate at very low cost. On the other hand it limits regional sponsoring: In popular traditional sports teams of all performance levels mostly have a clear regional relation and origin. This gives the opportunity for big companies as well as medium or small sized enterprises to address geographically narrowed target groups.[291] In eSports most clubs were created online and given fantasy names by its regionally spread founders (s. chapter 2.3.3) and thus there is a "lack of built-in regional affinity".[292] Furthermore, eSports clubs do not have (offline) club facilities to play their matches with nearby residents as spectators.[293] These given factors largely limit the potential of regional sponsoring and an identification of a company with a region and its residents via sponsoring of a local eSports club. Settling of major clubs, such as EnVyUs (s. chapter 2.3.3), and the establishment of eSports dedicated arenas may open new opportunities in the future.

This situation of limited targeting does not hold true on a country basis. There is an increasing number of national leagues and events.[294] Furthermore, players and streamers that are especially popular in their countries of origin can serve as gateways to respective national segments. In general, the wide-spread online streaming is considered a unique strength of eSports by Pilcavage (2015), as it allows eSports

291 Cf. Drees (2003), p. 57
292 Fletcher (2016f)
293 Cf. Fletcher (2016i)
294 For examples see Newzoo (2016c)

persons and pro-gamers to have constant bilateral interaction with their fans. He identifies this situation as an "incredible opportunity to activate a highly contagious network of advocates and influencers on a global scale at such a low cost".[295] Associations do not grant as attractive sponsoring opportunities as in traditional sports due to their lack of significance. If they are able to strengthen their status in the future, they may grant new possibilities for expansive sponsoring on an international and national level.

The possible activities to implement sponsorships are rather similar to traditional sports. Bruhn (2010, pp. 82-85) and Drees (2003, pp. 58-63) categorize those activities as follows:

- Branding of equipment
- Physical presence at sports events
- Usage of titles[296]
- Naming of sponsoring properties
- Use of popular sports persons as endorsers

Next to those, a direct integration in an eSports broadcast is predominately done by standard online stream branding.[297] For a sponsor with indirect appearance of its logo on used branded equipment and peripherals as well as branded player jerseys display time is rather low, as a major share of broadcasting time is spent showing the virtual playground of the discipline. To increase a sponsor's display time and effectiveness 'in-game branding' opens new opportunities special to eSports: The brand is directly inserted into the game itself by appearing on an accordingly modified virtual playground. In this way the brand is directly part of the game and the action. This does not only increase the overall time of display, but also increase the unconscious and conscious awareness of the logo and lead to stronger perceived connections of the brand with the respective eSports discipline, tournament and players/teams.[298] For an example for a solution of Valve for DotA 2 see LaFleuer (2015) and for an example in StarCraft II see HuskyStarcraft (2014).

2.5.2 Sponsor Composition

In sports sponsoring sponsors can be categorized by the degree of relation of their products to the respective type of sports and its activities. Drees (2003, pp. 50-52) and Berndt (2005, p. 157) distinguish between four different categories:

295 Pilcavage (2015)
296 E.g. "Official sponsor of", "sponsored by", "presented by"
297 The display of the logo on the stream, as visible in Appendix 9 and Appendix 12
298 Cf. LaFleur (2015)

Degree	Relation of products / services to type of sports	in eSports	Referred to as
1st	Directly needed and used to practice. The companies predominately act as equipment suppliers.	Producers of computer hardware, equipment, peripherals or software	Endemic sponsors
2nd	Not necessarily needed for practice, but their usage/consumption is directly connected with and/or triggered by the sport activities.	E.g. telecom. services, energy drinks, eSports betting platforms	Fluent border
3rd	The products are in no direct relation with the sport activities themselves, but can contribute indirectly.	E.g. logistics companies providing transportation services	Non-endemic sponsors
4th	In no direct or indirect relation with the type of sport. Thus, a company's support is mostly financial.	E.g. banks and insurances	

Table 3: Sponsor Categories by Degree of Relation to Respective Type of Sports Source: Own illustration based on Drees (2003), pp. 50-52; Berndt (2005), p. 157; Fletcher (2016i)

The first degree companies are usually referred to as endemic sponsors. Yet, the border to distinguish between endemic and non-endemic is fluent for second degree companies.[299] Sponsoring has the highest significance for those endemic companies.[300] That's why mostly endemic brands are using the young eSports landscape for sponsoring as a channel to present and sell their products to the gamers.[301] This situation is usual for immature marketplaces that grant sponsoring opportunities.[302] Fletcher (2016e) estimates this share of sponsors at approximately 95% and confirms their financial importance.[303]

Important second degree sponsors are beverage companies. Historically, there is a linkage between video gaming and drinking caffeinated soft drinks to stay concentrated and thus eSports is attracting big beverage companies, such as Cola-Cola,[304] PepsiCo[305] Red Bull,[306] Rockstar,[307] Bud Light[308] and more.[309] These companies installed own marketing teams that focus on eSports.[310] Next to sponsorships, Red Bull opened an eSports studio in its Red Bull Media House in Santa Monica, California, to host some of its own tournaments and produce high quality

299 Cf. Fletcher (2016e, 2016i); Newzoo (2016a), p16
300 Cf. Drees (2003), p. 51
301 Cf. Franke (2015), pp. 121-122; Minns (2016)
302 Cf. Minns (2016)
303 Examples are listed in Euroforum Deutschland SE (2015), p. 19
304 eSports section on website available at www.coca-colacompany.com/tags/coke-esports; for details also see SuperData Research (2015a), p. 17 and Euroforum Deutschland SE (2015), p. 15
305 Twitch cooperation section on website available at: www.ampenergy.com/Twitch
306 eSports section on website available at www.redbull.com/de/de/esports; for details also see Fletcher (2016f)
307 Rockstar appears as "Official Drinks Partner" for the European Gaming League, see Wadsworth (2016)
308 eSports section on webiste available at www.budlight.com/eSports.html
309 Cf. Fletcher (2016g)
310 Cf. Pilcavage (2015)

eSports content.[311] Similarly, telecommunication companies, such as Verizon, T-Mobile and Vodafone started to engage in eSports to address the millennials.[312]

Yet, despite from these branches, investments of non-endemic companies is still on a low level[313] and a possible entrance is often rather seen as an 'experiment' instead of a valid long term strategic investment.[314] Only few third and fourth degree companies are engaged as sponsors. Examples include the U.S. based Government Employees Insurance Company (known as GEICO),[315] car care company Turtle Wax,[316] and car manufacturer Nissan.[317] Several reasons that lead to this overall hesitating and skeptical behavior can be identified:

- Most marketing decision makers are not in the age segment of "native" gamers and have no personal identification with or real knowledge of eSports and its scene[318]
- Doubts about adequate representation of the brand and its products[319]
- The still partly negatively shaped perception of video gaming in society and the representation in mass media by being considered unhealthy and lazy, addictive, and advocating and transferring violence (s. chapter 2.4.2).[320]
- Fragmentation and a lack of professionalization, fixed structures and governance[321]
- Possible bad publicity due to the introduced risk factors in chapter 2.4.[322]

Nevertheless, SuperData Research (2015a, pp. 8, 17), Newzoo (2016a, p. 16) and experts from the industry[323] expect an increase of non-endemic brands in eSports due to the growing media reach (chapter 2.3.6) and increasing professionalization and maturity of the market (chapter 2.3). Furthermore, agencies and consultancies start to integrate eSports in their portfolio and eSports specialized agencies and consultancies arise. These companies are able to close the 'gap' between eSports unfamiliar companies and the respective partners for co-operations from the

311 Cf. Daley (2015)
312 Cf. Fletcher (2016f)
313 Cf. Fletcher (2016f)
314 Cf. Franke (2015), p. 120
315 Cf. Lingle (2015)
316 Cf. Gaudiosi (2016d)
317 Cf. www.teamliquidpro.com
318 Cf. Minns (2016)
319 Cf. Härig (2014), p. 56
320 Cf. Minns (2016); Breuer (2011), pp. 201-215; Müller-Lietzkow (2008), pp. 111-112
321 Cf. Minns (2016)
322 Cf. Minns (2016)
323 E.g. Minns (2016), Visser (2015), Cornwell (2015), Gehlen (2015), Galvin (2015), Remmert (2015), Bister (2015)

eSports ecosystem to a certain extent.[324] Considering the past and predicted developments, Fletcher clarifies, that "for non-endemics eSports is emerging as a cost-effective way to reach valuable audiences."[325] A further analysis of these ***valuable audiences*** is provided in the next chapter.

2.5.3 The Attractiveness of the Target Group

For endemic brands, whose products are directly demonstrated in eSports, the target group is an obvious fit. The eSports fans are high spenders on computer equipment.[326] In a study of Eventbrite (2015, p. 4) 38% of the surveyed eSports fans are likely to buy equipment of showcased products after attaining an event. Their affinity to technology and often taken roles as early adopters make them important influencers and multipliers: According to Euroforum Deutschland SE (2015, p.7) on average each eSports fan has an influence on the technology-related buying decision of four of their friends or family members.

Non-endemic brands lack this obvious fit. This raises the question of what other factors increase the attractiveness of eSports sponsoring and the target group. Four major factors can be identified:

1) The financial strength of the eSports fans:
According to Newzoo (2016a, p. 17) 65% of eSports enthusiasts have a full time job and 53% are in the high income segment, which is a significantly higher share than for all internet users. As the fan base matures, more eSports fans will graduate, have full time jobs and enter this high income segment.[327]

2) The (in-)accessability of the millennials:
This age segment is a target group that is specifically difficult to reach via advertising and classic media, as they spend more time online and less time watching TV or reading printed media.[328] Furthermore, millennials and especially tech-savvy eSports fans are likely to use ad-blockers.[329] According to a report of Pagefair and Adobe Systems Inc. (2015, p. 8), websites related to gaming have the highest ad-blocking rate of 26.5% and Twitch.tv-streamer Steven "Destiny" Bonnell[330] estimates that over three fourth of his channel's viewers use ad-

324 Cf. Fletcher (2016e); Minns (2016)
325 Fletcher (2016e)
326 Cf. PricewaterhouseCoopers AG (2016), p. 10; Newzoo (2016a), p. 19
327 Cf. Minns (2016)
328 Cf. Newzoo (2016a), p. 16; Minns (2016); Euroforum Deutschland SE (2015), p. 7; Fletcher (2016e); Spiegelmann as cited in Knight (2016)
329 Cf. Minns (2016); Fletcher (2016e)
330 The respective channel is available at www.twitch.tv/destiny

blockers.[331] By using sponsoring as a communication approach, these barriers can be bypassed, as the brand's engagement can directly contribute to the eSports content instead of being perceived as unpleasent interruptions and distractions.[332]

3) The emotional environment and the fans' involvement:
In their eSports environment, the fans are very involved and engaged with the games they follow.[333] The particular followed discipline provides escape, entertainment and excitement.[334] Even though this attachment primarily derives from passion for the discipline itself,[335] the fandom for particular players and teams increases: According to SuperData Research's results, 69% of the U.S. fans cheer for a favorite player and even 76% have a favorite team.

Furthermore, almost a third watches particular competitions due to the involvement of a certain team or player.[336] In conclusion, this emotionality makes eSports more valuable for marketing efforts - on a common and also on a team/player-related level.[337]

4) The development towards mainstream and mass media reach:
The mere growth in viewer numbers and eSports' potential to gather significant mainstream attention can lead to higher media multiplier effects. If so, the entrance costs will increase. Thus, in conclusion, gaining a strong position in the eSports ecosystem and build up close partnerships while entrance costs are still rather low can be a cost efficient investment with the potential of high pay offs in the future.[338]

2.6 Consolidation and Future Outlook

To summarize and consolidate, this chapter provides an overall picture about size and growth prospects of the economical side of eSports. Furthermore, possible changes triggered by new technologies, prospective legal and political consequences, and the relation of eSports and traditional media sports are analyzed.

2.6.1 Overall Market Size and Growth

As reference, numbers about the market size and growth are taken from the freely available insights provided by SuperData Research and Newzoo. These figures do

331 Cf. Bannell as cited in Egger (2015)
332 Cf. Minns (2016); Pilcavage (2015)
333 Cf. Seo (2013)
334 Cf. Lee/Schoenstedt (2011)
335 Cf. Blicx Ltd. Market Research Services (2016)
336 Cf. SuperData Research (2015a) , p. 10
337 Cf. Franke (2015), p. 121
338 Cf. Spiegelmann as cited in Knight (2016); Minns (2016)

not include direct game revenue of the game publishers[339], but revenue generated by eSports as a popular competitive sports marketed via media (s. Image 9).

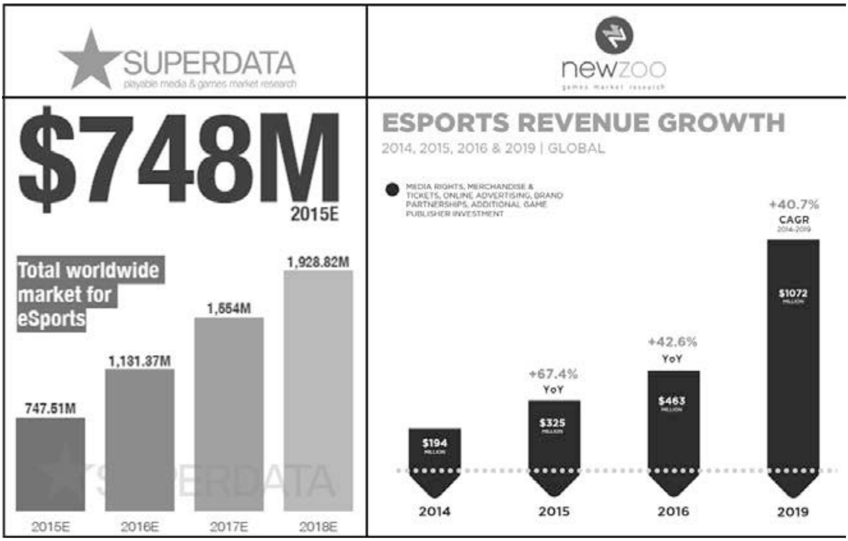

Image 8: eSports Market Size and Growth Prediction According to SuperData Research and Newzoo
Sources: SuperData Research (2015a), p. 5; Newzoo (2016a), p. 10

As Newzoo does not include prize money and revenue generated by eSports betting, the estimations of SuperData Research for those two revenue streams (s. Image 9) must be added for the purpose of comparison, resulting in an adjusted estimated market size of $462.3 million by Newzoo in 2015. Taking this into consideration, the given range of reference is between $462.3 million and 748$ million. Newzoo's alternative best case scenario (s. Image 10) predicts very similar numbers to those of SuperData research. Both research institutions predict high future growth rates of approximately 40% p.a. for the future, making eSports become a billion dollar industry in the next years.

339 For an overview of game revenue of five important eSports game, see SuperData Research (2015a), p. 4

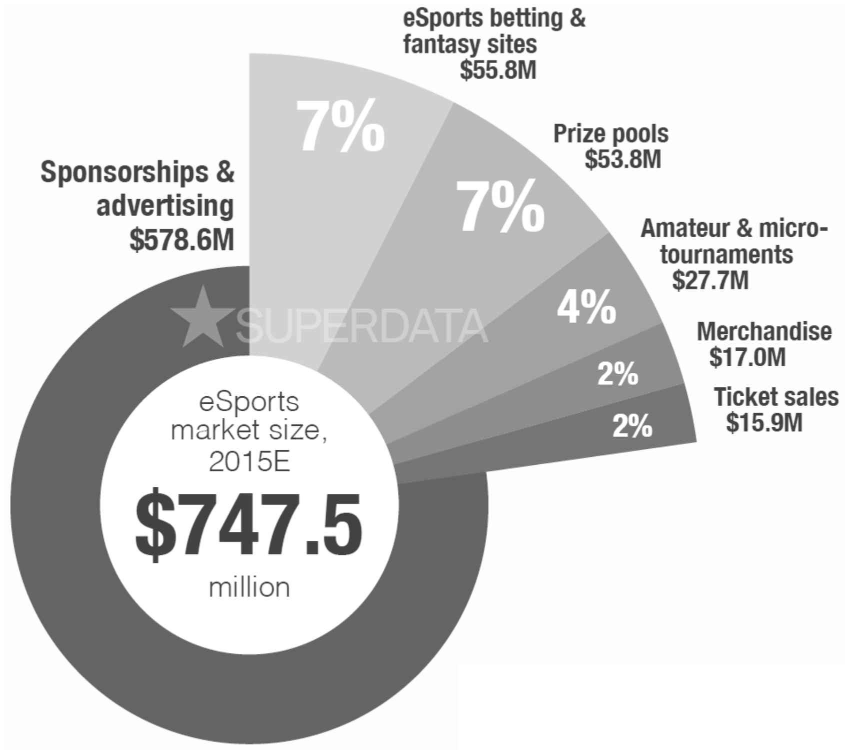

Image 9: Size of the eSports Market by Revenue Sources in 2015
Source: Superdata Research (2015a), p. 9

As the image above visualizes, the market's revenue is dominated by indirect revenue generated with sponsoring and advertising. The increasing audience (s. chapter 2.3.1) sparked high investments[340] by publishers (s. chapter 2.3.7) and media companies (s. chapter 2.3.6) and puts eSports on classic television and a path to more mainstream acceptance and attention. In combination with higher professionalization and learning curve effects regarding commercialization processes, indirect revenues are expected to grow.

Ticket sales and merchandise are a rather young significant source of direct revenue. The analyzed growing popularity of eSports clubs (s. chapter 2.3.3 and 2.5.3) and events paired with installments of eSports venues (s. chapter 2.3.5) are signals of an absolute growth of these revenue streams. Nevertheless, a higher relative significance in comparison to indirect revenue is questionable. Another new

340 A list of major investments is provided in Appendix 11

important source, eSports betting, is lagging behind expectations. ESports fans are only slowly transitioning from betting virtual in-game goods to wagering real money, yet after the prohibition of skin gambling on third-party websites (s. chapter 2.4.1) this transition may speed up. Illegal match making is a factor for reluctance to do so (s. chapter 2.4.1).[341] Yet, SuperData Research (2015a, p. 9) expects a five-fold growth until 2018 due to high investments into eSports betting platforms.[342] Moritz Maurer (as cited in Sporttechie (2016)), Head of eSport Integrity for SportIM, confirms this growth prospect as major sports and virtual casino gambling platforms increase their offerings to bet on eSports matches.

Considering the regional distribution of revenue, Northern America has outpaced Asia as largest region with a prospected share of 38% in 2016 according to Newzoo (2016a, p. 10; 2015d). SuperData Research (2015a, p. 5) estimates Asia as the largest market in 2015 but predicts a relatively larger growth in the Western world due to high investments. Next to the mere quantity of fans, revenue per fan is another important indicator for growth potential in a media sports industry. Compared to other media sports the revenue per eSports enthusiast is yet low (s. Image 10). Next to the total market growth, Newzoo also expects a relative revenue growth per enthusiast due to the discussed developments.

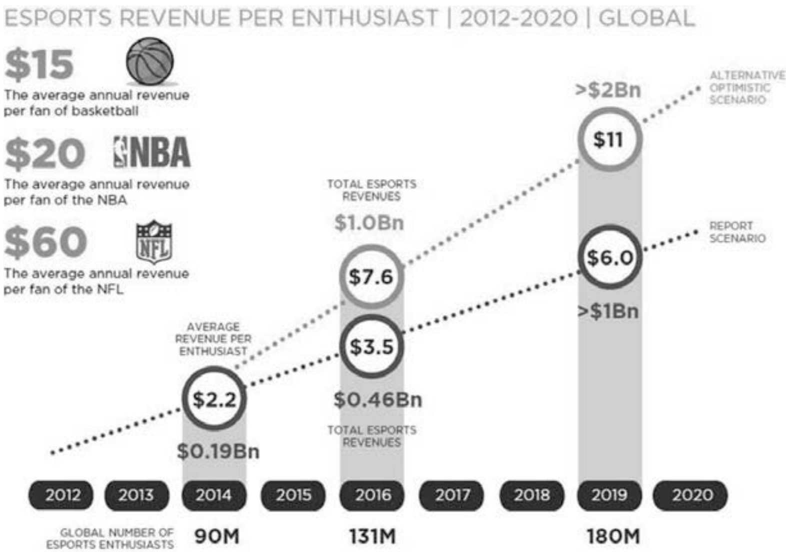

Image 10: Revenue per eSports Enthusiast 2012-2020
Source: Newzoo (2016), p. 11

341 Cf. SuperData Research (2015a), pp. 11-12
342 Also see Grove (2016)

2.6.2 Magic Triangle of Sports and the Flow of Money

In traditional media sports the ***Magic Triangle of Sports***, as proposed by Bruhn in the 1980s, is one fundamental model to explain the basic clockwork of a popular sports industry.[343] It describes the relation between the sport, the (mass) media and the industry as strongly separated elements with the audience as the respective consumers as central component in between.[344] The more efficiently and cooperatively these three parts interact, the more successfully revenue can be generated from commercial partners and the fans.[345]

In research literature the model of the magic triangle has also been applied for eSports.[346] It can be assumed that revenue generated per fan lags behind traditional media sports, because the key elements did not yet have that much time to optimize their interaction with each other. Thus, on a fundamental basis, the improvement of this interplay can be seen as an economical key factor for each component and the ecosystem as a whole. Image 11 illustrates the parts of the triangle and visualizes the flow of money within the eSports ecosystem as an overview of the monetary connections of the different elements.

The respective findings of the secondary research and the various analyses in chapter 2 revealed two major unique characteristics and differences to the traditional media sports triangle: Firstly, **a strong overlapping or even merge of media and sports** as playing video games itself is a form of media and furthermore, broadcasting rights are not strictly sold, but tournament organizers produce content on their own and even operate own broadcasting platforms to monetize their tournaments. Also clubs, players and even consumers create monetized media content. Secondly, **publishers are unique to eSports** and can act as sponsors, tournament organizers, governing bodies and media channels themselves. These differences, the recent entrance of eSports into classic mass media television and the undefined, but increasingly significant role of publishers and associations give reasons for future research of a potential adapted *Magic Tri- or Rectangle*[347] *of eSports* and close analyses of single factors of the elements' interactions to reveal potentials for economical growth and improvements of respective stakeholders.

343 Cf. Breuer (2011), p. 71; Hagenah (2008)
344 Cf. Bembennek/Meier (2003), p. 121; Breuer (2011), pp. 71-72
345 Cf. Onnen/Ufer (2005)
346 Cf. Müller-Lietzkow (2008), pp. 123-125; Breuer (2011), pp. 71-72; pp. 108-109
347 With publishers as a new fourth element

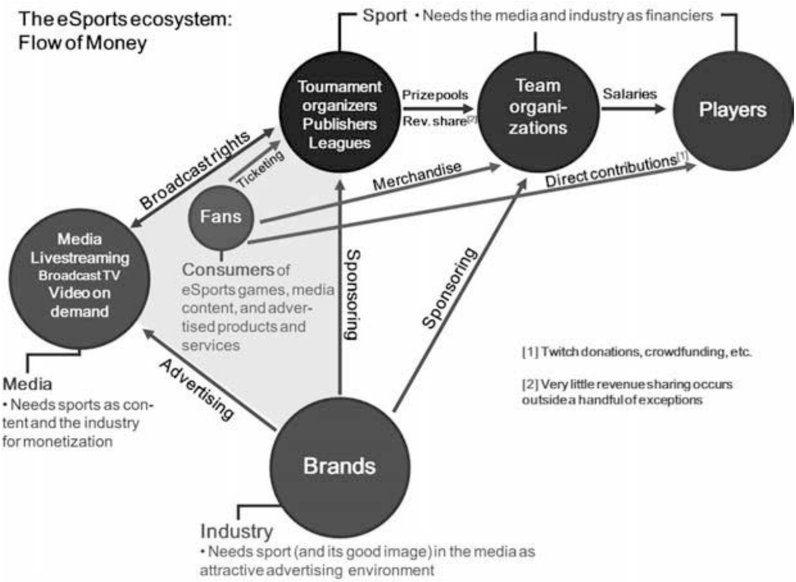

Image 11: Flow of Money in the eSports Ecosystem and the Magic Triangle of Sports
Source: Modified illustration based on Fletcher (2016c) (facsimile); Bembennek/Meier (2003), p. 121

2.6.3 New Technologies

Progress and innovations in consumer electronics can bring changes or additions to the eSports industry. As for now, two technological trends are or may be significant for eSports in the future: Mobile devices and virtual reality devices.

For watching eSports, **mobile devices**[348] are already popular: 69% of U.S. eSports fans use mobile apps, e.g. the apps of YouTube Gaming and Twitch.tv, to view eSports according to SuperData Research (2015a, p. 14). With expected generated revenue of $36.9 billion, mobile games take a share of 37% of the games market in 2016[349] and over two billion people play games on mobile devices.[350] Considering this potential, games developed as eSports disciplines for mobile devices were released. Blizzard's collectible card game Hearthstone, that exceeds 50 million regis-

348 Mobile devices include smartphones and tablet computers with touch screens and do not include handheld gaming consoles
349 Cf. Newzoo (2016f), p. 11
350 Cf. van Dreunen as cited in Gaudiosi (2015)

tered users[351] and is managed as an eSports title by Blizzard, is available as mobile app and its mobile release in 2014 increased the number of players by approximately 140%.[352] The game's mobile playability derives from its game play, which does not require any specific control devices, e.g. a computer mouse and a keyboard, and is only based on strategy and not on skills like fast reactions and aiming comparable to chess or skat (s. Appendix 2).

Next to that, the game Vainglory, a MOBA designed for touch screens, entered the eSports market and is considered the first mobile-only eSports title. In 2015, the ESL added Vainglory to their covered eSports titles and partnered with its publisher, Super Evil MegaCorp, for tournaments.[353] In South-Korea, a Vainglory competition in 2015 already attracted over a million viewers.[354] Red Bull's eSports studio in Santa Monica was host for the offline finals of a $25,000 dollar North American Vainglory championship in March 2016.[355] More insights and information on Vainglory can be found in an interview video with executive director Kristian Segerstrale.[356] For Kristian Segerstrale and Joost van Dreuen (as cited in Gaudiosi (2015)) the easier accessibility and higher penetration of mobile devices in comparison with eSports capable PCs and the possibility to play everywhere are a strong basis for high future growth potential. This may attract new consumers and fans to the eSports ecosystem.[357] The future of eSports on mobile devices is not yet defined, but the current success of Hearthstone and Vainglory are positive signals for increasing popularity that may reach the significance of PC and console games.

A more radical new way to play video games is opened by **virtual reality**[358] **devices**. Virtual reality headsets (VRH) of major companies[359] made for gaming were launched in 2016 for the consumer market. It is predicted that approximately 12.2 million VRHs will be sold in 2016.[360] VR in combination with locomotion simulators ("treadmills") can add a new physical element to gaming and eSports as actual physical movements like jumping, walking or moving a gun are translated into the game. This is referred to as Active VR.[361,362] Valve, who partners with HTC Corpo-

351 Cf. Activision Blizzard (2016)
352 Cf. SuperData Research (2015a), p. 15
353 Cf. SuperData Research (2015a), p. 15
354 Cf. Gaudiosi (2015)
355 Cf. Klick (2016)
356 Conducted by Andrea Rene for Yahoo!'s eSports section, available at Yahoo! eSports (2016)
357 Cf. Newzoo (2016f)
358 For detailed information about this technology see Fuchs et al. (2011)
359 Facebook (via Oculus VR, Inc.), Sony, HTC and MergeVR
360 Cf. Winnan (2016), chapter: The Advent of Virtual Reality; Gaudiosi (2016e)
361 Cf. Bastian (2016); Dyet (2016)
362 A demonstration video of the from locomotion simulator Virtuix Omni is available at Virtuix Omni (2016a)

ration in terms of VR, is already on the forefront of VR gaming with the operating system SteamVR. For Valve's VR developer Chet Faliszek (as cited in Gaudiosi (2016e)) a merger of eSports and VR is first of all about spectating: On the one hand Valve is already developing an integrated VR observer mode for DotA 2 to grant a whole new experience for spectators in a normal eSports discipline.[363]

On the other hand for an Active VR game, "it is fun to watch someone play a VR game because they're physically moving around in this space and making these motions that people can understand what's happening,".[364] Virtuix already hosted a tournament for their Active VR first-person-shooter.[365] With its technology, Virtuix wants to add a clear physical element to eSports, already referring it to as "active eSports" for which it predicts high gaming and watching potential.[366] The role of VR for eSports in the future is not yet determinable.

VR overall and in gaming may become mainstream.[367] As for now, due to the low accessibility and very high prices of the technology, VR may not yet have a great impact on eSports.[368] Yet, in conclusion it can be predicted that a higher penetration of the VR technology can lead to 1) additive VR integration for normal eSports games and 2) the development of significant active eSports scenes surrounding VR games. Furthermore, it seems likely that publishers of VR games and producers of VR hardware will organize and sponsor a competitive scene as a marketing tool analogy to today's publishers of normal eSports disciplines (s. chapter 2.3.7). For van Dreunen (as cited in Gaudiosi (2016e)), the eSports enthusiasts as early adopters, heavy spenders on technology and passionate gamers are a key target group for initial consumer demand and thus VR companies need to compete for their attention.

2.6.4 Legal and Political Aspects and the Relation to Traditional Sports

The increasing awareness and acceptance of eSports in Western society also lead to legal and political changes. Governments start to pay closer attention to evaluate needed regulations from the legislative point of view. A report written by French parliament members lists eleven propositions concerning governmental regulation of eSports including e.g. the status of competitions, player rights and status and financial aspects such as tax regulations.[369] Furthermore, eSports players are increasingly accepted as professional athletes. This was e.g. achieved in the U.S. in 2013 and is important in terms of VISA issues to participate in major tournaments

363 Cf. Plumlier (2016)
364 Faliskek as cited in Gaudiosi (2016e)
365 Impressions of the tournament available at Virtuix Omni (2016b)
366 Cf. Bastian (2016)
367 Cf. Walker as cited in Dyet (2016)
368 Cf. Dyet (2016)
369 Cf. Durain/Salles (2016); for a brief summarization of the report see Auxent (2016a)

abroad.[370] Official recognition as sports (s. Scenario 2 below) also qualifies eSports for integration in government sports funding programs.[371]

As counterpart to possible negative influences on the players and viewers, such as transfer of violence and addiction, Breuer (2011, pp. 190-201) analyses four positive influential aspects of eSports: 1) The transfer of positive values, such as team work and the acceptance and adherence of rules, 2) the improvement of media literacy, 3) the development of technological skills, and 4) the improvement of motoric abilities, such as hand-eye-coordination. A study of Glass et al. (2013) revealed a positive impact on decision-making and cognitive flexibility. Considering these effects, eSports is integrated in educational institutions.[372] Some disciplines are already housed as varsity sports in universities to play collegiate tournaments[373] and eSports athletes can apply for scholarships.[374] In Norway in 2016, a school added eSports as an elective subject to its curriculum.[375]

To investigate the current and future relation to traditional sports three formulated scenarios by Jonasson and Thilborg (2010) are used as basis.

Scenario 1: eSport as a counterculture or alternative to modern sport
This scenario is based on the fact, that eSports derives from gaming and not from sports culture and is not (yet) or only partly considered as a conventional sport in society. Within eSports fans take different positions in this matter and don't fully identify with traditional sports and rather call themselves "gamers".[376] In a survey among eSports fans conducted by Franke (2015), approximately only a fourth of the respondents thought that eSports belongs to general sports sphere and over a half sees eSports as an independent own culture.[377] Yet, recent developments (s. Scenario 2) show that the separation from traditional sports is decreasing and the realization of the scenario of eSports as a mostly isolated counterculture in the future is unlikely.

Scenario 2: eSport accepted as part of the hegemony of sport
In the second scenario, eSports becomes part of the hegemonic sport family.[378] Thriving forces of this integration are Western national eSports associations that are pursuing the official recognition of eSports as sport. The current situation in

370 Cf. Tassi (2013)
371 Cf. Breuer (2011), pp. 227-238
372 Cf. Borowy/Jin (2016), p. 2015
373 Cf. Hiltscher (2015), p. 14
374 Cf. and detailed information to be found at Winnan (2016), chapter: eSports Scholarships
375 Cf. Ciubotaru (2016)
376 Cf. Jonasson/Thilborg (2010), pp. 292-293
377 Cf. Franke (2015), p. 130
378 Cf. Jonasson/Thilborg (2010), pp. 193-194

this matter differs from country to country.[379] The official recognition as sport in Russia, Italy and Denmark[380] and the effort of the IeSF regarding acceptance by the International Olympic Committee (IOC)[381] are indicators for overall further advancements in the future. Another sign of this integration in the sports hegemony is the increasing involvement of traditional sports clubs as discussed in chapter 2.3.3.

The main barriers for such integration indentified by Jonasson and Thilborg (2010, pp. 293-394) in 2010 are the lack of internal organization to fit IOC standards[382] and the negative aspects connected with computer gaming in society. Previously mentioned efforts of the IeSF, WESA and ESIC show that the first barrier is steadily diminished. With increasing numbers of people playing video games[383] and adults that grew up with video games and the inclusion of video games in educational institutions the associated negative aspects are also decreasing. Yet, negative public perception due to the display of virtual violence in eSports disciplines is still very present as shown in chapter 2.4.2. Furthermore, Jonasson and Thilborg identified a possible expansion to traditional TV and sports channels as a clear sign for this scenario. This expansion is ongoing as previously examined in chapter 2.3.6.2.

Scenario 3: eSport as the future hegemonic sport

The third scenario is formulated as a speculative outlook to the distant future. In this scenario eSports replaces traditional sports as predominant type when the development of the knowledge society continues and intensifies to a point at which the attitude towards sports changes to a high preference of intellectual skills over physical capacity. As for now, this scenario is not relevant from a business point of view.

In summary eSports combines characteristics of the first and second scenario. Recent developments show that it is in a transitional phase from the first to the second scenario which is the likeliest one for the near future. Yet, the attitude of the fans indicates the conservation of a certain degree of separation. The possible replacement of traditional sports as hegemonic sports is speculative and not relevant at this point of time. It can be concluded, that the transition will go along with an increase of the social awareness and legal credibility of eSports and will thus attract more attention of consumers and industry partners.[384]

379 The author has no complete list of countries in which eSports is recognized as official sports. The Deutsche Olympische Sportbund in Germany rejected all applications so far (July 2016).
380 Cf. International e-Sports Federation (2016b)
381 Cf. International e-Sports Federation (2016c)
382 Such as an autonomous representative association and adherence of anti-doping-policies
383 Cf. Electronic Entertainment Design and Research (2015)
384 Cf. Jonasson/Thilborg (2010), p. 293

3 Empirical Research on 3rd and 4th Degree Sponsoring

As discussed in chapter 2.5, the attention of third and fourth degree sponsors is increasing and their entrance holds large potential for the eSports ecosystem. Despite this significance, research on this topic is not available according to the state of knowledge of the author. In a literature review about eSports, Franke (2015, pp. 122-123) also identifies a gap of research about non-endemic sponsors by stating that "The attitude of the eSports sphere to the sponsorship entry of sector-foreign companies is currently not researched, as well as the acceptance among the audience." Considering this, third and fourth degree sponsoring was chosen as research topic and examined from the consumer's point of view as a first attempt to close this gap. To present the conducted research, the different parts of the research process are introduced. Furthermore, the investigated case study and the model derived from previous scientific researches on sports sponsoring that is used as framework are explained.

3.1 Previous Research on eSports

The focus of the rather rare research about eSports is on the matter if eSports can be considered as sports or not, while making comparisons to traditional sports, e.g. Wagner (2006), Müller-Lietzkow (2008), Jonasson and Thilborg (2010), Lee and Schoenstedt (2011), and Witkowski (2012).[385] Concerning genres, the center are mostly FPS games which inevitably brings game ethics into focus.[386]

Yet, some researchers examined eSports from the consumers and players perspective, e.g. Wiess and Schiele (2011) by using the use and gratification model, Seo (2013, 2014) by putting eSports in the frame of the 'experience economy' and by examining identity transformation, and Martoncik (2015) by investigating needs and goals. Trepte et al. (2012) analyzed the potential of eSports to build valuable social connections. Franke (2015) explored the fans' attitude towards eSports' entrance into mainstream media, eSports as a sport and its commercialization. Research with clear focus on sponsoring in eSports is rare. Breuer (2011) analyzes the power of sponsors in the ecosystem. In a report of The Nielson Company (2015) U.S. eSports fans were asked to evaluate eSports sponsoring (s. chapter 3.6.8).[387] Eventbrite (2016) relates its research only on endemic sponsors and ss stated before, a study about non-endemic sponsoring is not available to the author.

3.2 Research Problem Definition and Objectives

The eSports ecosystem increasingly attracts the attention of third and fourth degree brands, but there is still a certain high level of hesitation to enter the eSports industry (s. chapter 2.5.2). From a consumer behavior perspective this leads to the ques-

385 Cf. Franke (2015), p. 112
386 Cf. Wagner (2006), p. 1
387 Cf. The Nielsen Company (2015)

tion of how eSports fans evaluate sponsoring engagement from third and fourth degree companies. According to research on sponsorship, the fit of the sponsor with the respective sponsoring property is a very important factor and leverage for successful sponsorships.[388] By that, the attitude of consumers towards sponsoring can vary in-between product categories.[389] In regard to products, the sponsor-fit in relation to eSports in general is low by definition for third and fourth degree sponsors. The lack of regional affinity (s. chapter 2.5) limits geographical fits. This study's target is to examine the potential qualitative[390] effectiveness of third and fourth degree sponsoring despite of this missing natural fit by investigating the additional determinants (besides the sponsor-fit) of sponsorship effectiveness. To do so, a cooperation between Wüstenrot Bausparkasse AG and ESL as a real case study is integrated as the center of the research. This case study is introduced in the following chapter.

3.3 The Case Study

As a practical example, the cooperation between the home loan bank Wüstenrot Bausparkasse AG and ESL Frühlingsmeisterschaft 2016 was chosen. This example precisely fits the research problem as clarified after an introduction of the partners and their cooperation. **Wüstenrot Bausparkasse AG** is the oldest and one of the largest private home loan banks in Germany and part of the Wüstenrot & Württem-bergische Group. It employs approximately 1600 employees and administrates approximately 3.3 million contracts and total assets of almost 22 billion Euro. It was founded in 1921 and its headquarters are in Ludwigsburg, Baden-Württemberg, Germany.[391]

ESL Meisterschaft is the most important national league in the product portfolio of the ESL and can be considered as the "German Championship" for the currently played disciplines League of Legends, Counter-Strike: GO, StarCraft II[392] and FIFA 16. It is formerly known as ESL Pro Series and was first held in 2002. With 50,000 Euro in total prize money allocated to the four disciplines, it has not the same significance as major international ESL events. Yet, the viewership is increasing and the tournament is a good chance for players to attract attention and for brands to reach the German eSports fans. Each year, three seasons (Winter, Spring, Summer) are organized.[393] ESL Meisterschaft's overall reach is above one

388 Cf. Huber et al. (2008); Woisetschläger et al. (2013); Siebert (2013)
389 Cf. Dudzik (2006), p. 47
390 Quantitative measures, such as viewership numbers and impressions in the broadcast as well monetary efficiency indicators are not examined
391 Cf. Wüstenrot Bausparkasse AG (2016)
392 Starcraft II is no longer included in the ESL Meisterschaft since ESL Sommermeisterschaft 2016 in August, see Electronic Sports League (2016a)
393 Cf. Niemann (2016); www.pro.eslgaming.com

million unique fans.[394] More information, e.g. the qualification and tournament structure, is available at: pro.eslgaming.com/deutschland/gate.

Wüstenrot acted as main sponsor for ESL Frühlingsmeisterschaft 2016. A detailed interview with Frank Dolipski, one of the decision makers for this cooperation, is provided in Appendix 23. As Mr. Dolipski explains, the sponsorship is the core of an eSports centered campaign that was embedded in Wüstenrot's broader "Endlich, genau mein Ding" marketing campaign targeting the 14-25 years old age segment.[395] The eSports campaign was initiated by and created with marketing agencies. The main factor in favor of the decision to engage in eSports is the high relevance of eSports for this group. Wüstenrot's aims are the increase of currently rather low brand awareness within this age segment and the positioning as a modern and sympathetic financial partner for the future that helps make your wish (e.g. of the first own flat) come true.[396] The focused product is Wüstenrot Wohnsparen, a home loan offer especially for people younger than 25 years.[397] The sponsorship was mainly visible by branding on the ESL Meisterschaft's website, on ESL's online streams for respective ESL Meisterschaft broadcastings[398] and at the offline finals at Open-Air-Bühne Gießhalle 1, Landschafts-Park Duisburg on 7th and 8th of May 2016 (s. Appendix 12 and Appendix 13) that was visited by approximately 1500 fans.[399] The sponsorship was synergistically combined with further communication activities including:

- An information desk with a green screen photo booth at the event site
- Ad-impressions of the TV spot on the stream during commercial breaks
- Interviews and further relevant content with eSports influencers with focus on their eSports lives[400] and posts spread via their and Wüstenrot's social media channels
- A specific landing page - www.wuestenrot.de/esl - with all information about the cooperation and a prize raffle for special tickets for Gamescom 2016

394 Cf. Niemann (2016)
395 The respective TV spot is available at Wüstenrot & Württembergische (2016a)
396 German term used by Mr. Dolipski: "Wunschverwirklicher"
397 Product information available at www.wuestenrot.de
398 The Wüstenrot logo was not visible during Counterstrike: GO broadcastings due to internal resistance based on the criticism towards Counterstrike in mass media and society
399 Cf. Niemann (2016)
400 All videos available in the respective YouTube playlist at Wüstenrot & Württembergische (2016c)

Image 12: Header Cutting of ESL Meisterschaft's Website (April 2016)
Source: www.pro.eslgaming.com

From ESL's perspective Wüstenrot is an important national partner. By being in contact with marketing agencies and informing them and potential customers about recent developments in eSports, ESL is trying to establish more co-operations with non-endemic brands.[401] In June 2016, the ESL and Wüstenrot announced an extension of the cooperation for two more seasons.[402]

Several given factors led to the decision of choosing this case study. The main reasons are listed below:

- Home loan banks are fourth degree sponsors for and not related at all with the eSports market
- Wüstenrot acts as main sponsor
- ESL Meisterschaft has a very high significance for German eSports
- Sponsoring of an event that includes several disciplines minimizes specific player, team and game related sympathy/antipathy biases
- The time and location allowed for a field study at the event site
- The additively created online content allowed for an integration in an online survey and the investigation of the content's impact

401 Cf. Niemann (2016)
402 Cf. Electronic Sports League (2016b)

3.4 Theoretical Model, Research Design and Methods

The research design is descriptive. By picking Wüstenrot as case study and limiting the sample to eSports fans and actual visitors of ESLM (see below), required conditions are created: 1) The sponsor fit with the eSports industry and the sponsoring property (ESLM) is low, 2) the attitude towards and personal involvement[403] in the eSports industry and/or sponsoring property is positive and high, and 3) the sample fits the relevant target group of eSports fans.[404] Under these conditions consumer behavioral determinants are explicitly measured, described, and analyzed.

Two quantitative surveys are conducted to gain data. The first survey is designed as a field study among visitors of ESL Frühlingsmeisterschaft 2016 with support of an online questionnaire that is completed with the participants' smartphones onsite. This allows examining influence of the sponsoring on the target group when under high exposure right at the sponsored event.

The second survey is conducted online among eSports fans in general. This study's sample serves as control group for some analyses and also creates independent results for the broader German and European eSports fan bases. The questionnaire structures are provided in Appendix 14 and Appendix 15. For clarity reasons the single questions are numerated and further marked by color: **teal for the field study** and **blue for the German participants of the online survey**. In the data collection process (s. chapter 3.5.2) also non-German eSports fans were reached coercively and thus also a modified English part was integrated, which is not part of the main research and briefly examined separately in chapter 3.6.8.

In previous research, several determinants as factors for sponsorship effectiveness on the basis on theoretical and empirical consumer research have been identified. Detailed literature reviews of consumer research in the field of sponsoring is provided in Johne et al. (2004, pp. 27-46), Marwitz (2006, pp. 387-396), Siebert (2013, pp. 12-14), Gross (2014, pp. 19-115) and Lucas (2014, pp. 21-38). For the research of this thesis the causal models for event sponsoring in sports created by Huber et al. (2008) and Siebert (2013) and their way to operationalize them for empirical research are the basis of conceptualization. Image 13 visualizes the derived and modified model of factors and connections used as foundation for this research. The single determinants and their respective way of operationalization are explained subsequently.

403 Defined as *"a person's perceived relevance of the object based on inherent needs, values and interests"* by Zaichkowsky (1985), p. 342

404 These required conditions are validated in chapter 3.6.2

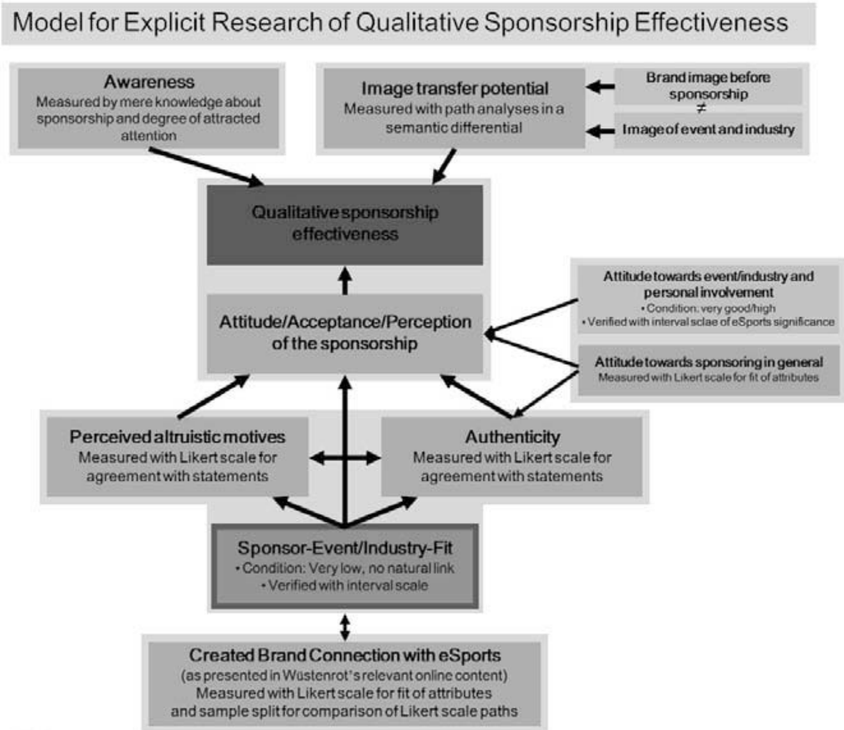

Image 13: Modified Model of Qualitative Sponsorship Effectiveness
Source: Own illustration based on Huber et. al (2008); Siebert (2013)

The **general attitude towards sponsoring** activities has an impact on effectiveness and is most of all determined by the perception of its necessity for and the disturbance of the experience in regard of the sponsoring property.[405] For further analyses about the case study, it is important to understand the basic mindset of the target group concerning (e)sports sponsoring. To measure the general attitude, a seven dimension Likert scale for the two determinants has been used based on Siebert's (2013, pp. 137-138) approach. For additional insights the perceived likability and altruism have been added.

Consumers must be **aware of the sponsorship** in the first place to be effected by it. Next to Wüstenrot, large endemic partners of ESLM, such as Zowie, ONE.de, and logitech were present at the event with attention attracting interactive promo-

405 Cf. Siebert (2013), pp. 137-138; Dudzik (2006), p. 45

tion booths[406] and furthermore with onsite and stream branding. As main sponsor, Wüstenrot operated the promotion booth with the most prominent position and largest size and furthermore had unique and labeled[407] branding (s. Appendix 12 and Appendix 13). The measurement of the awareness was operationalized with an unaided recall test of the main sponsor (= Wüstenrot) and a following interval scale based question about the degree of attracted awareness. The validity of the recall test was assured by a prior request to the correspondents to answer this question immediately (s. Appendix 14, part V) without gaining this information by checking the event site. Furthermore, the author asked for honesty when catching a respondent doing so.

Once aware of the sponsorship, several determinants - next to the sponsor-property-fit - have an impact on the effectiveness of the sponsorship. In previous research Stipp and Shiavone (1996) and Forehand and Grier (2003) concluded that the overall attitude towards a sponsor and the perceived authenticity is influenced by the balance of **perceived ego- and altruistic motives**. Taking this into consideration, Huber et al. (2008, pp. 94 f.) investigated these correlations and approved a correlation of altruistic motives and authenticity.

This **authenticity's** influence was researched and proven in former research about advertising effectiveness.[408] Based on that, Huber et al. (2008, pp. 89 f.) investigated the perceived authenticity of a sponsor in regard of a sponsored event and proved a correlation with the overall attitude and future purchase intention. These determinants of the effectiveness of the sponsorship were measured with a seven dimensional Likert scale[409] that included statements to agree or disagree on to a certain extent based on the approach of Huber et. al. (2008, pp. 121 ff.). The answers were given by moving a slider. The formulated statements derive from this respective research and have been adjusted to the research's specifications and the case study. For the online survey, the respondents have been requested to view ESLM objectively as an eSports event to diminish event-related biases.

In addition, a statement about a **common acceptance** of Wüstenrot's engagement and a statement about a **change in sympathy** as first indicator for image change were added. Furthermore, two final statements as an inductive transition towards the **attitude about third and fourth degree sponsors in general** have been implemented. All except these final statements were randomized in order to diminish sequence effects.

Another construct that is being investigated is the **brand image and potential image transfer** effects. Burmann et al. (2015, p. 56) describe brand image as the

406 E.g. installed PCs and consoles to try new equipment by playing against friends
407 "ESL Meisterschaft - präsentiert von Wüstenrot"
408 Cf. Huber et al. (2008), pp. 89 ff.
409 For a closer explanation of Likert scales, see Kreis et al. (2014), pp. 100-101

result of the subjectively interpreted and evaluated signals sent by a brand as perceived by an individual. In the matter of the associative network-based perspective of brand image, this leads to the allotting of human traits towards the brand.[410] Thus, as a target of sponsoring, Hermanns (1997, p. 113) defines image transfer as "the transfer of image components (e.g. dynamics, internationality, juvenileness) from the sponsoring property to the sponsor."[411] For a detailed examination of the brand image concept in regard to sponsoring and its history see Gross (2015, pp. 56-114). For a closer examination of theories that try to explain this transfer effect, such as conditioning, the mere-exposure-effect and the balance theory, see Siebert (2013, pp. 78-83) and Lucas (2014, pp. 38-68).

A common method to measure and compare such brand images is the semantic differential, which uses bipolar interval scales of oppositional adjectives[412] as applied by Siebert (2013, pp. 130-131) and Leuteritz et al. (2008, p. 121) in sponsoring related research. The difference between sponsoring property image and sponsor image at the start of the sponsoring is the theoretical maximum transfer potential.[413] Image effects appear rather in the long term and the actual effect should be measured at later points of time.[414] As a panel survey was not realizable, the difference in perception of the brand at the event by the visitors in comparison to its 'normal' image in the target group was measured as an indicator for potential image transfer. To do so, Wüstenrot's brand image as perceived by the online survey's participants without direct prior cognitive processing of the sponsorship is taken as point of reference. The semantic opposites were adjusted to the statements about image (transfer) goals of Wüstenrot's person in charge Mr. Dolipski (2016). Despite from the first semantic pair *young versus old* that was chosen as a simple example to start with, all pairs were randomized in their order of appearance to prevent sequence effects. As awareness of the brand by an individual is a necessary condition to create an individual image about it,[415] those respondents of the online survey that were completely unfamiliar with the brand (26,03%, Q4.1) were asked to rate home loan banks in general.

Minns (2016), Pilcavage (2015) and Keller (2015a) clarify the importance of **relevant added value** for the target group that should be part of an eSports sponsoring engagement. By doing so, even non-endemic brands can create a **connection**

410 Cf. Gross (2015), pp. 173-174
411 Abbreviated coextensive translation
412 Cf. Cotting (2003), p. 105; Kreis et al. (2014), pp. 101-102; Sarstedt/Mooi (2014), pp. 67-68
413 Cf. Leuteritz et al. (2008), pp. 120 ff.
414 Cf. Bruhn (2010), p. 138
415 Cf. Burmann et al. (2015), p. 57

with eSports and become a relevant part of it as shown by the successful second degree sponsoring of Red Bull and Coca-Cola.[416]

As introduced in chapter 3.3, Wüstenrot added an eSports-related landing page and created relevant content with famous German eSports persons. The connection is drawn by showing these persons fulfill their wishes and pursuing 'their own eSports thing' with Wüstenrot as sympathetic helpful financial partner on their side.[417] The German online survey sample was evenly split[418] by random chance to investigate the perception of this linkage: Subsample A was only informed about the sponsorship and presented a screenshot of the ESLM stream which clarified the sponsorship. Subsample B was shown the interview video featuring the German StarCraft II player Julian "Lambo" Brosig[419] in addition. After watching this video, the perceived Wüstenrot-eSports-connection is measured with a Likert scale for fit of attributes. Furthermore, a comparative path analysis of subsample A and subsample B is conducted for the statements about altruistic motives, authenticity and change in sympathy to measure potential effects.

The center of the **international part of the online survey** were seven dimensional Likert scales with statements to (dis)agree on or respectively to tell the likelihood of one's certain reaction. The latter is based on a survey of The Nielsen Company (2015) among U.S. eSports fans. The sample was randomly split into subsample A (n = 53) for which the statements were mostly related to eSports sponsors in general and subsample B (n = 50) for which the statements were related to non-endemic sponsors. This allowed for comparisons of the attitude towards general eSports sponsors and non-endemic sponsors.

3.5 Data Collection

The surveys were created with and the data collection was operated by Unipark Questback Enterprise Feedback Suite. The participation was incentivized with the chance to win a 50.00 Euro coupon for computer equipment of the winner's choice. Pre-tests to optimize the handling and understandability were conducted with three eSports friends of the author.

3.5.1 Field Study

The data was collected on 7th and 8th of May 2016 on site of ESL Frühlingsmeisterschaft by the author. Flyers (s. Appendix 17) were spread on the seats and visitors were approached directly with the support of those flyers in an open and

416 Cf. Pilcavage (2015); SuperData Research (2015a), p. 17; Euroforum Deutschland SE (2015), p. 15
417 Cf. Dolipski (2016)
418 Different cancel rates led to unequal subsample sizes: n(A) = 341 and n(B) = 293
419 Available at Wüstenrot & Württembergische (2016b)

friendly manner when the approached fans seemed not to be interested in the currently shown match/discipline and during breaks in-between matches. The participants were informed that the survey is 1) about eSports among the visitors, 2) part of a research for the author's thesis, 3) independent from any third-parties, and 4) available at www.esl-umfrage.de. This web address was registered and configured to forward to the survey's original complex web address to make the survey easy to access. Furthermore, the technical design was optimized for smartphones. During the completion processes, the author was available for the participants to answer questions about potential uncertainties to avoid misinterpretations. Yet, for most participants there was no need for call backs, proving the overall high comprehensibility of both surveys.

The risk of interviewer biases[420] was diminished by clarifying that there is no preference for specific results and by not being in constant dialogue with the interviewees during completion on their smartphones. Yet, a certain risk of interviewer biases cannot be fully excluded as the interviewer received a high level of sympathy due to the shared interest in eSports with the respondents, which may lead to positive spillover effects on the attitude towards the researched case study.

The survey was started by 155 visitors and completed by 142 of these. Thus the adjusted sample size is n = 142. This sample represents approximately 10% of the 1500 visitors that were present at the event.[421] The visitors were approached randomly and in each area of the event site without preference for certain sociodemographical attributes to maximize representativeness in relation to the universal set of all visitors.

3.5.2 Online Survey

The data was collected online from 7th of May 2016 until 6th of July 2016. The registered web address www.esports-survey.de together with the necessary information was posted in relevant groups of eSports games and club communities in a personal manner on www.facebook.com. The promotion via Twitch.tv channels/streamers with personal connection to the author only provides a minor share of participants. The sample was split into German and non-German participants, because the case study and the related video clip are only relevant for German eSports fans.

The German part was started by 1007 participants and finished with a completion rate of ca. 63% by n = 634. Out of 181 international eSports fans, n = 103 completed the survey. Only those 634 and 103 complete questionnaires are considered. 293 German respondents were exposed to and rated the video clip (subsample B).

420 For more information see Kreis et al. (2014) p. 141
421 Cf. Niemann (2016)

3.6 Data Analysis

3.6.1 Socio-Demographics

Male eSports fans have a dominant share. In comparison to the analyzed age distribution in chapter 2.3.1, the participants are rather young on average with 19.69 years for the field study and 21.51 years for the German online survey. The under 21 years old represent 66% and respectively 53% of the samples. The share of 26 years old is less for the field study (4%) than for the online survey (14%). Despite of these differences in age distribution, both samples represent young male millennials with a minor female share and thus 1) sufficiently represent the eSports fan base and 2) allow for comparative analyses to a satisfactory degree. The same holds true for the genre segments: In both samples, fans of the commonly most popular genres MOBA and FPS dominate, but other genres are also represented with shares in the range of 8% and 20%. Yet, it has to be kept in mind that the comparability is limited to a certain degree by the different survey situations.

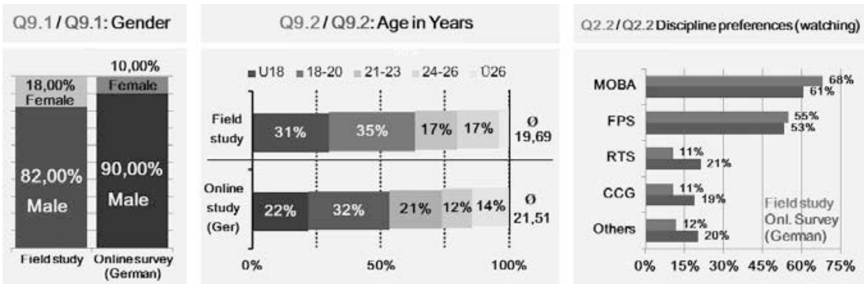

Image 14: Demographics and Discipline Preferences of the Field Study and German Online Sample

3.6.2 Verification of the Required Conditions

To confirm the **eSports affinity** of the online sample, and thus the relevance, the significance of eSports for those participants was evaluated on an interval scale.[422] ESports is rather a side hobby for only 9.46%, while almost two thirds of the sample marked eSports as one of their most important hobbies or even their passion. Furthermore, 63.4% watch at least 5-10 hours of eSports related content per week (Q2.4). In conclusion, the sample group can be described as very eSports affine and thus represents the targeted eSports fans to a satisfying extent concerning this variable.

422 Ordinal denotations were assigned to the interval values as points of reference for less subjective interpretation variations

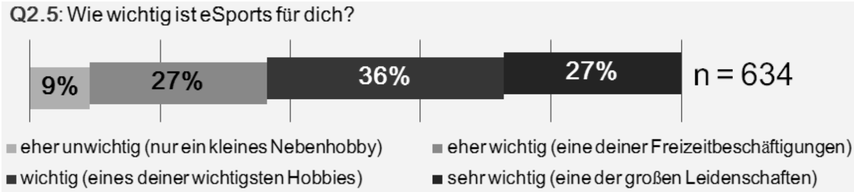

Image 15: Significance of eSports for the German Online Respondents

The **sponsor-fit** as perceived by the online respondents affirm the assumed and required low fit: For 75% percent, Wüstenrot and home loan banks do not fit to eSports as measured with an interval scale, that is visualized below.

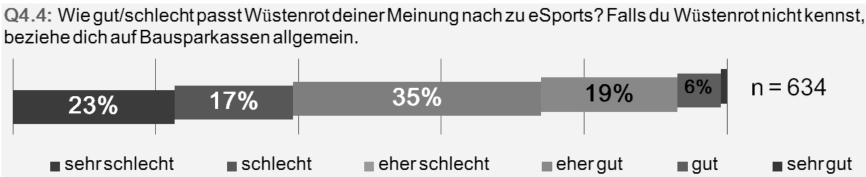

Image 16: Evaluation of the Sponsor-eSports-Fit by the German Online Respondents

3.6.3 Attitude towards Sports Sponsoring

The average values of the four dimensions for the general attitude towards (e)sports sponsoring measured with the Likert scale are illustrated in the following image.

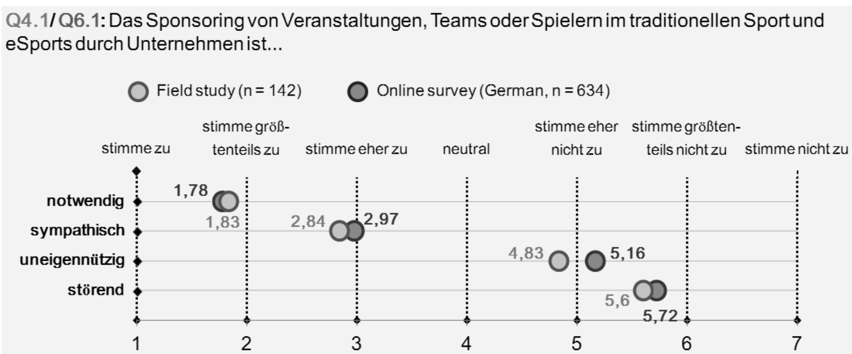

Image 17: General Attitude Towards (e)Sports Sponsoring

The results show clear attitudes towards (e)sports sponsoring in general. The target group realizes the (economical) necessity of sponsoring, but rather doesn't evaluate it as altruistic. The overall attitude is positive, as sponsoring is rather seen as likeable and not as annoying or disturbing. This information has to be considered when drawing conclusion about the researched case study.

3.6.4 Awareness at Event

The results of the unaided recall test (left) and the interval scale of the attracted attention (right) are provided below.

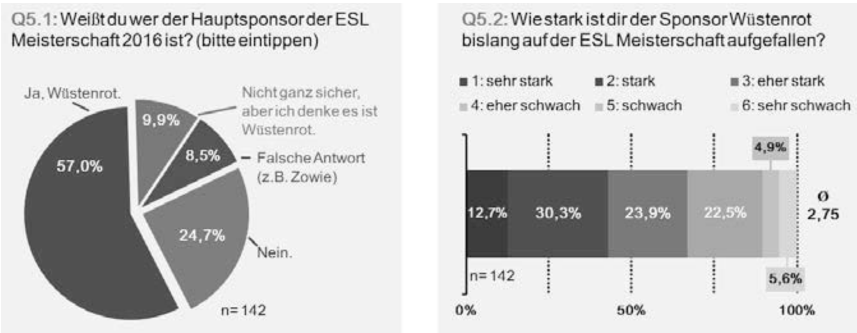

Image 18: Awareness of Wüstenrot at the Event Site

Despite the tough endemic competition, the unaided recall rate was 66.9% from which 85.3%[423] were doubtless and confident about their answer. 8.45% recalled the main sponsor incorrectly[424] and 24.65% were not able to tell the main sponsor. A majority of the respondents (66.9%) at least rather strongly noticed Wüstenrot leading to an average value between rather strong and strong attention (Ø 2.75). In conclusion, these results show that Wüstenrot as non-endemic brand is recognized amongst famous endemic sponsors and can attract high level of attention. The unexpectedness of its appearance may even catalyze this effect.

3.6.5 Attitude and Perception

As explained in chapter 3.4, the determinants of the effectiveness of the sponsorship were measured with a seven dimensional Likert scale. Image 19 shows the used interval scale and serves as template for a demonstration of how the results of the single statements are visualized.

423 Related to the total sample, not to the 69,7% share
424 By mentioning one of the endemic sponsors

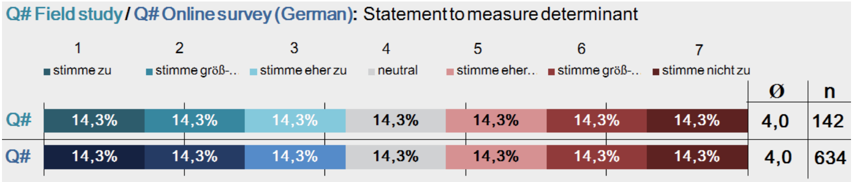

Image 19: Template for Visualization of the results of Q6.1 and Q8.1
Source: Own illustration

3.6.5.1 Acceptance

The overall acceptance and basic mindset as a foundation for effective sponsorship are examined as a first indicator. The results are visualized in the following image. The results are unambiguous. Only a small share of the respondents (2.84%/9.52%) disagree to a certain extent that they consider Wüstenrot's sponsoring as good, while nearly a fourth of the ESLM visitors and over a third of the online participants completely agree. This positive basic acceptance is a solid foundation for successful sponsorship, but does not unconditionally lead to such. Thus, the perceived appearance of the sponsor is further investigated in the next subchapters. The result that almost half of the respondents evaluate Wüstenrot more likeable[425] is a first indicator for image transfer potential, which is closely analyzed in chapter 3.6.6.

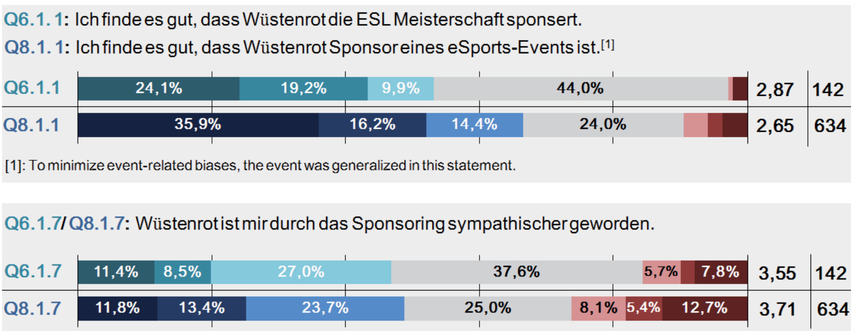

Image 20: Overall Acceptance and Change of Sympathy

425 The German term "sympathisch" and the English term "sympathetic" are not used in the same way in the respective languages and cultures and thus "likable" is chosen as translation

3.6.5.2 Altruistic Motives and Authenticity

The following diagrams visualize the results of the statements about perceived altruistic motives.

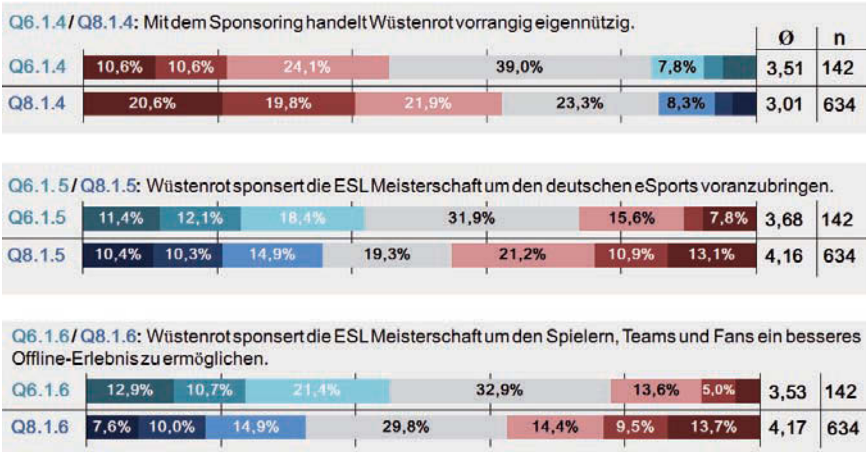

Image 21: Perceived Altruistic Motives

The data show that a majority share of the sample group sees the own commercial benefit of Wüstenrot as Wüstenrot's primary motive. Only 15.6%/14.5% at least rather disagree with this. Yet, compared to this, more respondents see altruistic motives as secondary motives. 45% of the ESLM visitors at least to some extent assigned motives to improve the quality of the event to Wüstenrot and most of them (41.9% of the sample) even see these motives to be directed towards eSports in Germany in general.

The next image shows the outcome of the statements about authenticity.

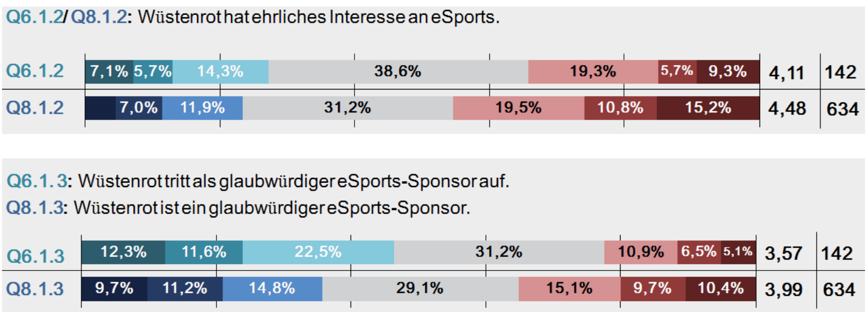

Image 22: Authenticity

The results seem contradictory at first view. Even though rather small shares (27.1%/23.3%) agree to some extent that Wüstenrot has honest interest in eSports, larger shares in comparison (46.4%/35.7%) see Wüstenrot at least as a rather authentic sponsor. This result goes along with Q6.1.4/Q8.1.4 and indicates once more that the target group is aware of Wüstenrot's commercial interest and sees it as dominant to its interest in eSports itself. Despite this perception, the respondents appreciate Wüstenrot's efforts (Q6.1.1/Q8.1.1, Q6.1.7/Q8.1.7) and its appearance is not perceived as not authentic by a majority. An increased assignment of real interest in eSports by the fans can be reached by creating relevant content,[426] as shown for this case study in chapter 3.6.7, and over time by committing to a lasting long-term engagement.[427]

Another noticeable aspect of these results is the high share, approximately a third on average and higher for the ESLM visitors, of neutral opinions. This neutrality may indicate that for a certain part of the eSports fans cognitive, explicit processing and evaluation of information about sponsorships is rather rare limiting the potential effect of sponsorship. In combination with the findings of the general attitude towards sponsoring (Q.4.1/Q.6.1, chapter 3.6.3), these fans may just see sponsors as a necessity that is inevitable, but not disturbing.

In comparison, non visitors that did not experience the sponsoring onsite are more skeptical in terms of altruism and authenticity. It can be assumed that higher exposure to the sponsorship and the activities lead to this more favorable evaluation of the visitors indicating a positive impact. Yet it must be noticed that higher event involvement has a positive effect on the evaluation of a sponsor and sponsorship[428] and thus also contributes to the observed effect.

3.6.5.3 Non-Endemic Sponsors in General

After specifically investigating Wüstenrot's sponsorship, a general attitude about the engagement of non-endemic brands was examined. The results are shown below:

426 Cf. Pilcavage (2015)
427 Cf. Pilcavage (2015)
428 Cf. Dudzik (2006), pp. 47-51; Huber et al. (2008), pp. 52-57; pp. 98-101; Siebert (2013), p. 210; Lucas (2014), p. 35

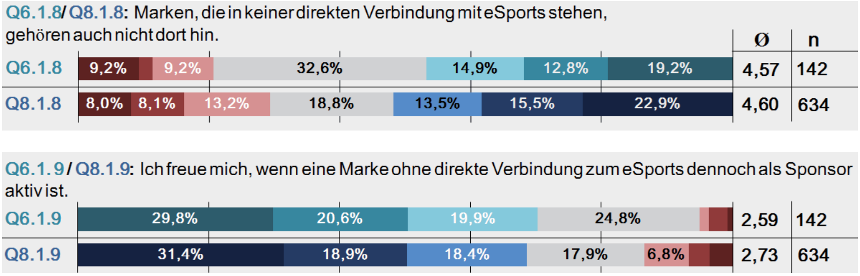

Image 23: Attitude towards Non-Endemic Sponsors in General

The data clarify that the respondents accept non-endemic brands as sponsors and are glad about them engaging with eSports in general. 20.5% and respectively 29.3% at least rather think that non-endemic brands just do not belong to the eSports environment, but yet only 4.9% and respectively 13.5% would rather, mostly, or completely not appreciate the appearance of non-endemic brands as sponsors. This indicates that even though the fans are skeptical about engagements of brands without natural relation to eSports to some degree, they still have an overall positive mindset.

3.6.6 Image Transfer Potential

The following image shows the different paths that were created within the semantic differential.

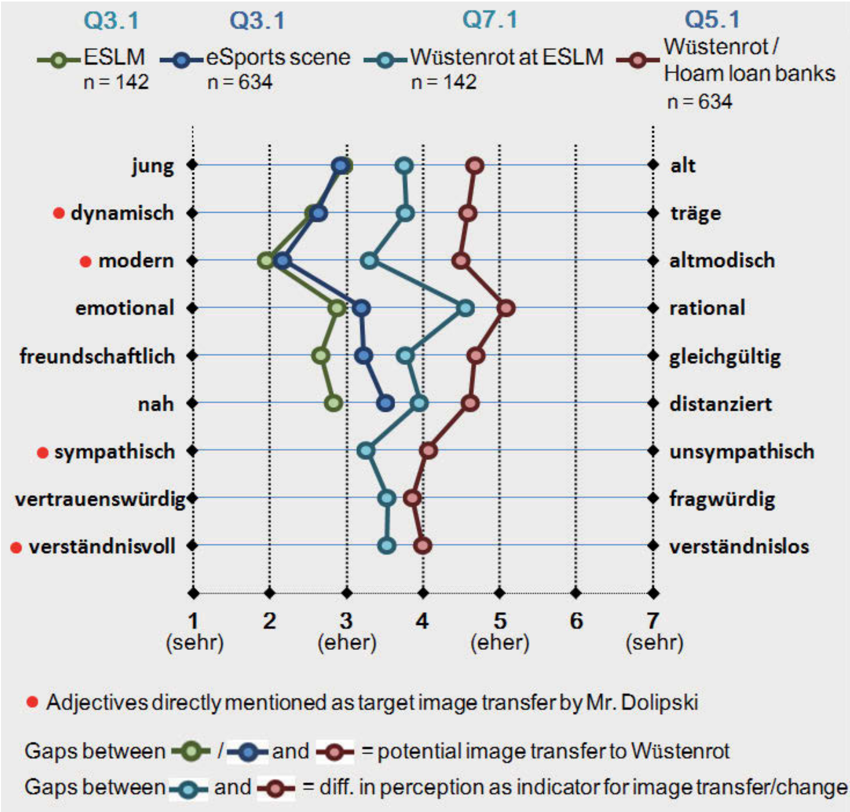

Image 24: The Paths of the ESLM, eSports Scene and Wüstenrot Images Within the Semantic Differential

The two paths that run in the left area of the grid show the dynamic (Ø 2.58/Ø 2.63), modern (Ø 1.97/Ø 2.17) image of the ESLM and the eSports scene that may be transferred to Wüstenrot. The image of Wüstenrot or respectively home loan banks was measured in the questionnaire before the sponsorship was mentioned, and thus acts as control image and reference point within the target group. It is represented by the red path and stands in opposition to the ESLM/eSports image with values above 4.0 in direction of the respective semantic counterpart. The analysis of the perception of Wüstenrot at the event, represented by the teal path, clearly reveals a different brand perception triggered by the sponsoring effort as rendered by the position of the path in-between the others: There is a significant ($\alpha = 0.05$) shift towards ESLM's image for every dimension as statistically confirmed with a one-sided independent sample t-test (s. Appendix 24). Contrary to the reference image, the perception of Wüstenrot at ESLM is rather modern (Ø 3.31), dynamic (Ø 3.78) and amicable (Ø 3.78), as set as targets by Wüstenrot. Another image-related target stated by Dolipski (2016) is the increase of overall sympathy towards the brand and trustworthiness. Consistent with the results of Q6.1.7 (s. Image 20), the fans at the event perceive the brand as being more likable. Furthermore, yet to a smaller but significant extent, Wüstenrot is grasped more trustworthy and sympathetic/understanding.

In consolidation, the target group's perception of Wüstenrot when under exposure of the sponsoring activities is a favorable condition and an indicator for 1) successful image transfer in regard of modernity and dynamic and 2) the successful overall ignition of a more sympathetic, likeable and trustworthy image.

3.6.7 Created Brand Connection with eSports

Subsample B was asked to evaluate the perception of the connection in the shown video clip. The results of the used Likert scale is visualized in the following diagram.

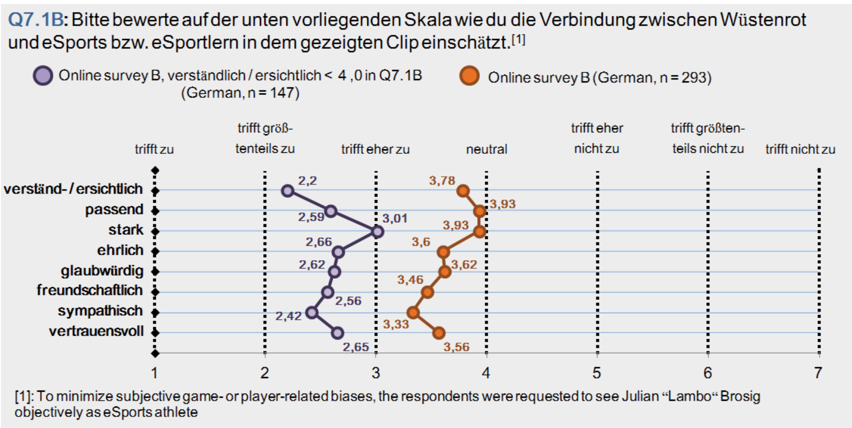

Image 25: Perception of the Wüstenrot-eSports-Connection in the Video Clip

The evaluation of the connection in the shown video is rather positive. Even though, it is not highly perceived as strong (Ø 3.93), it clearly appears rather amicable (Ø 3.46) and likable (Ø 3.33) and by that rather honest (Ø 3.6), authentic (Ø 3.62) and trustful (Ø 3.56). Approximately a third of the respondents perceived the connection as neither comprehensible and apparent nor fitting. This shows that building up a real link with eSports, that is perceived as such, is a difficult task for third and fourth degree companies. This lack of understanding demands for a separate analysis of the results for the part of the sample that can be assumed to have actually recognized and decoded the connection shown in the video. A rating of the connection as at least rather comprehensible and apparent (= a value below 4.0) was used as indicator for such higher comprehension. The results for the respondents fulfilling this condition are represented by the violet path.

The data show that the participants with a better understanding of the created link in the first place evaluated the connection more favorable (0.99 scale points on average) in all other aspects. In conclusion, a lack of comprehensibility lessened the effectiveness to some degree. It cannot be clarified to what extent, as it can be assumed that an overall more favorable mindset towards the sponsorship leads to a better rating concerning all aspects including understandability and apparentness and an overall less unfavorable mindset vice versa.

To investigate, if the perceived link had an impact on the perception of the researched determinants, a path analysis of the subsamples' results of Q8.1 was additionally conducted and is illustrated in Image 26. The graph shows an overall more positive evaluation of the fans that watched the video, represented by the orange path, in comparison to those who did not, represented by the blue path. Due to the rather slight differences, each statement was statistically analyzed with a one-sided independent sample t-test to prove significance (α = 0.05, s. Image 26).[429]

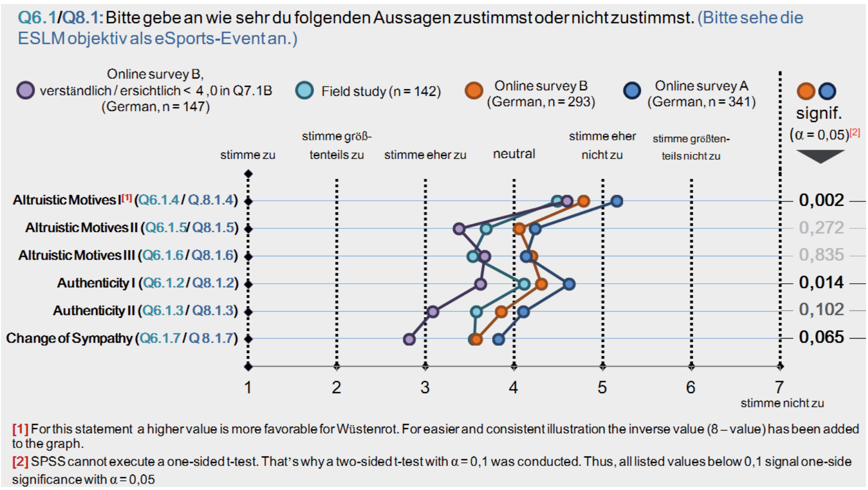

Image 26: Comparative Path Analysis of Q6.1/Q8.1

429 The detailed results are provided in Appendix 24

In detail, the fans who watched the video assigned significantly more honest interest in eSports to Wüstenrot (Q8.1.2) and significantly gained more sympathy for the brand (Q8.1.7). They also perceived Wüstenrot as being more authentic (Q8.1.3), but not quite with the same statistical significance. Nevertheless, these results are clear indicators for positive effectiveness of the shown relevant content. Concerning altruistic motives, the respondents significantly perceived Wüstenrot's engagement not as primarily self-serving as the subsample A (Q8.1.4), but there is no significant effect on the perception of altruism towards eSports (Q8.1.5 and Q8.1.6).

The violet path represents the same part of the subsample analog to Image 25. The path analysis shows that these respondents with better comprehension of the link and more favorable evaluation of the connection accordingly evaluated the sponsoring significantly more positive concerning altruism, authenticity and sympathy.

3.6.8 International Results

The basic results of the central Likert scales that are analyzed in this chapter as well as the regional distribution of the mostly European respondents (86.4%) are provided in Appendix 18 and Appendix 19 respectively. Similar to the German fans, the international participants have an appreciative attitude towards non-endemic eSports sponsoring: 76% of subsample B stated to appreciate non-related sponsors at least to some extent (Q5.1.3 B/Ø 2.28). Furthermore, almost 70% of subsample A want to see more non-related brands in eSports in the future (Q5.1.4), while only a fourth of subsample B does not want to see non-endemic brands in eSports to some extent (Q.5.1.4 B). The assignment of altruistic motives to sponsors in general is stronger (Q5.1.1 A/Ø 3.74) than to non-endemic brands (Q5.1.1 B/Ø 4.02), but overall rather hesitant, which goes along with the German fans' results. As expected, subsample B gave less credit concerning honest interest in eSports to non-endemic brands (Q5.1.2 B/Ø 3.78) than subsample A to sponsors in general (Q5.1.2 A/Ø 3.25), affirming the lower natural authenticity of non-endemic brands due to the missing fit.

The average likability of a more favorable evaluation of a brand due to eSports sponsoring did neither vary significantly by sponsoring property category nor degree of sponsor relation. All values are in the range of 2.92 to 3.00 (Q5.2.1 A, Q5.2.2 A, Q5.2.1 B, Q5.2.2 B). In the Nielsen eSports Report from The Nielsen Company (2015), over half of the surveyed U.S. eSports fans stated to feel somewhat or much more favorable about a brand that occurs as eSports sponsor. Q5.2.1 and Q5.2.2, that were conceptualized to give comparable results to this report to a certain degree, affirm such a high more favorable evaluation of the European eSports fans: For 67.3% on average[430] it is at least rather likely to evaluate a brand more favorable when it sponsors an eSports event or team/player. Concerning direct brand preferences, the effect of sponsoring for non-endemic brands is weaker according to the results: 64.15% of subsample A would at least rather likely prefer a brand over a competitive brand due to eSports event or team/player sponsoring (Q5.2.3 A/Ø 3.09 and Q5.2.4 A/Ø 3.11) while only 36.73% (Q.5.2.3 B/Ø 3.80) and respectively 44.9% (Q5.2.4 B/Ø 3.65) of subsample B would do the same in regard of eSports non-related brands. This result clarifies that for direct competition, eSports sponsoring has a higher importance for and missing out a harsher effect on endemic sponsors. Yet, in summary, an average of 40.82% of an at least rather likely preference and the further results of the international survey indicate that eSports sponsoring can be a way to gain direct competitive advantage in the European target group and that an overall high appreciation is not only present in Germany, but also in other parts of Europe.

3.7 Summarization and Implications

The research's target was to provide first insights into non-endemic sponsoring from a consumer behavioral perspective. The results of the field study showed that it is possible to attract high attention of fans as a non-endemic brand at an event site that results in a more positive attitude.

Regarding sponsoring in general, the surveyed German eSports fans are aware of the sponsor's primary commercial targets and the necessity of sponsors. This partly leads to a certain neutrality towards Wüstenrot. But nevertheless, it does not lead to an overall negative attitude: The fans may (still) have their doubts about Wüstenrot's actual interest in eSports itself, but still perceive Wüstenrot as rather authentic and appreciate Wüstenrot's engagement in eSports. Almost half of the ESLM visitors and approximately a third of the online respondents credited altruistic motives to Wüstenrot as secondary components to some extent. The overall appreciative attitude also holds true for non-endemic brands in general as clarified by a dominant share of ca. 70% of all participants, that are rather, mostly or completely glad about non-endemic engagements.

The comparative image path analyses revealed that image transfer effects from the sponsored eSports property towards a non-endemic brand is possible. Within the frame of eSports, Wüstenrot was perceived significantly more modern and dynamic and furthermore, more trustworthy, amicable and sympathetic. The created brand-eSports-connection presented in the online content was not perceived as strong, but still rather positively. It led to an increase in perceived authenticity as well as it triggered more positive change in sympathy. This effect was significantly higher for fans that stated to think that the linkage is comprehensible and apparent to some degree.

430 Averaging the results of Q5.2.1 A, Q5.2.2 A, Q5.2.1 B and Q5.2.2 B

For non-endemic companies, all these findings implicate, that the risk of not being accepted in the eSports sphere by the fans per se is low. ESports creates a favorable environment for effective sponsoring even for third and fourth degree brands. The results of the international side study indicate that this conclusion also holds true in other parts of Europe.

When engaging as sponsor, the creation of a connection and relevant content should be considered as it can positively affect the fans' attitudes and decrease the fans' doubt about honest interest in eSports. It may also diminish the identified degree of neutrality. For companies seeking to improve their image in terms of modernity and sympathy in the age segment of the millennials, eSports engagement can be a good choice. Yet, when evaluating eSports sponsorship opportunities each specific non-endemic brand needs more differentiated approaches in addition to these results as clarified in the next chapter.

3.8 Limitations and Future Research

The conducted research gives insights into the broad target group of eSports fans without distinguishing them specifically. In the conducted interviews, Minns (2016) and Fletcher (2016e) emphasize that the **fan bases of different disciplines and their specific consumer behavior are different**. Furthermore, each fan base consists of **diverse fan groups**. This missing differentiation by discipline is a limitation of the research.

Furthermore, Dudzik (2006, p. 47) clarifies that the attitude towards sponsors can vary according to the **respective industry**. Next to that, Lucas (2015, pp. 145 ff.) revealed **differences** in sponsorship effectiveness **in between cultures**. Considering all this, conclusions from the results of a case study including a German home loan bank about other industries, e.g. fashion or consumer goods, and about other cultures cannot be drawn unlimitedly. Yet, the inductive transition in chapter 3.6.5.3 and the international results are indicators for a certain degree of transferability to other industries and other parts of Europe.

In future research these missing differentiations should be integrated to give comparative insights on a **country, discipline and industry basis**. When third and fourth degree sponsoring grows, a sufficient amount of possible case studies from different industries will be available. For non-endemic companies considering to start engagements in eSports, it is important to analyze the attitude of the eSports fans towards their specific industry/products/services of each country's and discipline's fan bases to evaluate which properties to sponsor and how to create connections. As such connections can be decisive for an eSports sponsorship's success,[431] more detailed research about factors influencing the effectiveness of cre-

431 Cf. Pilcavage (2015)

ated relevant content and developed linkages is demanded in the future, as well as their respective impact on the determinants of sponsorship effectiveness.

Concerning possible image transfer effects, **long term** studies are necessary as a different perception at the event can only be seen as an indicator, as clarified in chapter 3.4. As Wüstenrot extended its co-operation, a **panel**[432] researching Wüstenrot's future efforts and image within the target group would grant further valuable insights. Another area about which this research does not provide information are possible **negative effects** of eSports sponsorship that it may have on the respondents that showed an overall rather negative attitude. An investigation into such negative effects is granted in Sachse (2010). An application of Sachse's findings in the matter of eSports is also a starting point for future research.

Siebert (2013, pp. 49-57) emphasizes that the subtleness and often unconscious perception of event-sponsoring activities demand for the application of **implicit methods** that do not require prior conscious processing of the respective sponsorship when surveying event visitors, because the less prominent and more subtle a sponsoring is visible, the less likely it is consciously processed by the recipients. Due to the exploratory character of this thesis' research and the complexity of implicit methods,[433] measurements were only conducted explicitly. This means, it only measures the conscious effects on the attitude towards Wüstenrot and its sponsorship, if the sponsorship is cognitively processed. The results in chapter 3.6.4 affirm, that the prominent appearance of Wüstenrot on the event site as main sponsor, e.g. with the largest information desk and ads being displayed during breaks, prior conscious processing was on a satisfactory level. Yet, as mentioned in chapter 3.6.5.2, the high amount of neutral ratings is an indicator for rather limited cognitive processing of a certain share of the respondents. In future research that seeks to measure all effects of eSports sponsoring in deeper detail, implicit effectiveness measurements should be included. To do so, Siebert's (2013) approach can serve as a basis.

4 Conclusion

ESports outside South-Korea has gone through a rapid development in the past years and risen to a media sports industry with a large, growing and maturing fan base and a market size that is estimated to exceed $1 billion soon. This development is characterized by an increasing level of professionalism within all its components. Players have fixed contracts and training schedules within their respective pro-gaming eSports club. These clubs have grown into professionally and profit-oriented managed companies that are gaining significant brand equity and fandom

432 Information about panels is available in Kreis et. al (2014), pp. 159-177
433 For an overview on implicit methods see Siebert (2013), pp. 27-53

that even enables them to generate revenue with merchandise and attract outside investors.

A new important force in the future will be traditional sports clubs that start to integrate eSports in their sports portfolio. Their economical power and social reputation can have significant impacts on the whole ecosystem: They are a chance for eSports in general on the one hand, but also a threat to native organizations on the other hand. The role cannot yet be determined and is an aspect to be closer analyzed in future research.

Further important steps for the sports aspect of eSports are further recognition as sport by sports associations and governments, the handling of risk factors to protect integrity and the establishing of strong club and player associations. As for now, the interests of clubs and players are mostly underrepresented and the respective publisher as holder of the intellectual property mostly acts as undisputed governing body. These publishers have experienced a paradigm shift in the past years and are now heavily involved in the organization and support of well functioning competitive scenes. ESports transformed from a side-effect to an important marketing tool to promote games to increase direct game revenue and is further transitioning to a new revenue stream itself by connecting fans with brands to monetize them. Publishers pursue different approaches as exemplified with Riot Games and Valve and the further development of differently managed scenes of eSports disciplines may reveal which precise role publishers will or should play in the long-run. Some publishers work closely together with large eSports providers like ESL and MLG, which was even acquired by Activision Blizzard, to organize large offline events for the major leagues and tournaments.

These events and the prize money have grown accordingly and are filling large multi-purpose halls worldwide opening direct revenue streams like ticketing. The events are the gateway for players, fans and brands to the offline world, in which eSports also started to take root with venues specifically dedicated to eSports. As such gateway, they grant opportunities for industry partners to directly get in touch with the target group in their emotional exciting eSports environment.

Furthermore, broadcasts of an event's competition can generate media reach in the millions via online streaming, the main media channel for eSports. These broadcasts are professionally produced by publishers like Riot Games and eSports providers like ESL and MLG. Besides this, also teams, players and fans produce streaming content and their popularity makes them attractive brand endorsers for companies.

The increasing media reach of pro-gaming has also attracted classic television networks that integrate eSports into their program to reach the millennials - the main age segment within the eSports fans - whose traditional TV consumption is low in comparison to older age segments and further decreasing. If successful, this expansion towards classic TV can be a decisive factor for eSports to enter mainstream culture in the Western world and may further extent the eSports audience.

The rise of eSports disciplines on mobile devices as well as the emergence of VR contains further potential to attract new viewers.

All these developments make eSports an attractive advertising environment. Companies from the computer and gaming industry using eSports commercially are and have always been a fundamental pillar of the ecosystem. Regional settling of clubs and new solutions for in-game branding may increase sponsoring opportunities and effectiveness in the future.

With increasing professionalization and media reach, an increasing number of eSports unrelated companies start to integrate engagements in eSports into their communication mix to target the economically very attractive, but hard to reach millennials. These companies are potential catalyzers for the whole ecosystem. While big players from second degree industries are already heavily involved in eSports, the appearance of third and fourth degree companies remains still rather rare due to several entrance barriers. Established eSports focused agencies can help diminish barriers caused by unfamiliarity with eSports, but a certain degree of uncertainty about the acceptance amongst the fans within the eSports environment and the potential effectiveness of sponsoring activities remains.

The conducted empirical research was designed to shed a first light on the attitudes of German and European eSports fans about such third and fourth degree sponsors, exemplified by a home loan bank, to evaluate effectiveness. In general, the eSports fans realize the necessity of sponsoring and do not perceive it as disturbing. Overall, a large majority of respondents has a very appreciative mindset towards outside sponsors and only a minor share refuses such sponsors by default. In conclusion, the basic initial conditions for non-endemic sponsors are favorable. This is further strengthened by the results of the image analysis that revealed indicators for significant image transfer effect. Yet, a high degree of skepticism concerning honest interest in eSports remains. The findings indicate that this lack of authenticity can be diminished by creating relevant eSports related content, which is further identified as an important key to effectively reach the millennials with eSports sponsoring by experts.

In the author's opinion, it is important for a non-endemic company, once it identified potential lucrative sponsoring opportunities by conducting company specific market research, to not only strive for mere media exposure, but for being perceived as quasi-endemic in the long-run by creating such added value and making long-term concessions. When starting to do so now, an outside brand can become a real part of eSports for rather low cost and contribute to and highly profit from further growth and mainstream integration of eSports in the future.

In this future, the author predicts eSports to be legally recognized as a genre of sports disciplines in most parts of the Western sphere which goes along with fixed regulations, e.g. concerning rules, anti-doping policies, and player rights, and governmental support increasing eSports' standardization and organizational efficiency. In the process, structures and processes of traditional sports as well as South-Korean eSports will be adapted. In contrast to this, eSports is expected by the author to be perceived as something different from sports within society. Yet, further involvement of traditional sports clubs as well as sports TV channels may be a counter force to this expectation.

FPS games will remain a hotspot for negative publicity, but still, positive aspects of video games and eSports are likely to be recognized to a higher degree leading to an overall better reputation of eSports in general. By that, the status of eSports in Western societies will steadily approach a level of acceptance it already has in China or South-Korea today. From an industry and media perspective, the author expects an improvement of the interplay of the components within the ecosystem and furthermore an increasing significance of traditional TV, that may play a vital role for mainstream attention towards eSports. As a result, the efficiency with which eSports is utilized and monetized as media sports in combination with its growth will make eSports more valuable and profitable for all stakeholders involved and an attractive business opportunity for outside investors. The high investments of companies that already started to use this opportunity put eSports under a the risk of overinvestment that can severely harm the whole ecosystem if the high growth expectations cannot be fulfilled.

But no matter how fast eSports keeps growing, it is already at a state at which it is highly recommendable and even necessary for marketing managers and executives to drop outdated stereotypical attitudes towards competitive gaming as a leisure time activity for lazy adolescences and start to see it as a serious, globally spread media sports industry that is supported by millions of economically attractive, socially influential and highly engaged fans and brings forth its very own unique superstars, success stories and goosebumps moments.

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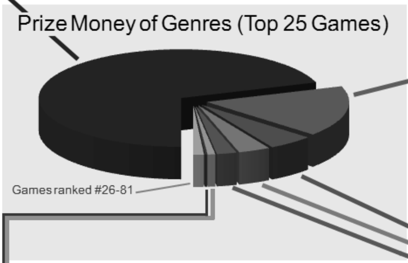
Appendix 1 Share of prize money by genre and discipline (top 25) in 2015

MOBA	#	Publisher	$45,66M
Defense of the Ancients 2	1	Valve	$31.02M
League of Legends	2	Riot Games	$7.70M
Smite	4	Hi-Rez St.	$3.71M
Heroes of the Storm	7	Blizzard	$2.44M
Heroes of Newerth	10	Frostburn St.	$0,81M



MMORPG (PvP)[1]	#	Publisher	$0.57M
World of Warcraft	12	Blizzard	$0.47M
Blade & Soul	24	i.a. NCSOFT	$0.17M

Sports Games	#	Publisher	$0.17M
FIFA 15 + FIFA 16	23	Electronic Arts	$0.17M

[1] Massive Multiplayer Online Role Playing Game (Player vs. Player Mode)

First/Third-Person-Shooter	#	Publisher	$11,01M
Counterstrike: GO	3	Valve	$6.28M
Call of Duty: Adv. Warfare	6	Activision	$2,47M
World of Tanks	9	Wargaming	$1.20M
Halo 2 Anniversary	14	Microsoft	$0.38M
CrossFire	15	i.a. Neowiz	$0.29M
H1Z1	20	Daybreak	$0.17M
Evolve	22	2K Games	$0.13M
S.K.I.L.L. Special Force 2	25	GameForge	$0,09M

Real Time Strategy	#	Publisher	$3,37M
Starcraft 2	5	Blizzard	$6.28M
Warcraft 3	18	Blizzard	$0.22M
Age of Empires 2	19	Microsoft	$0.18M
Starcraft: Brood War	22	Blizzard	$0.15M

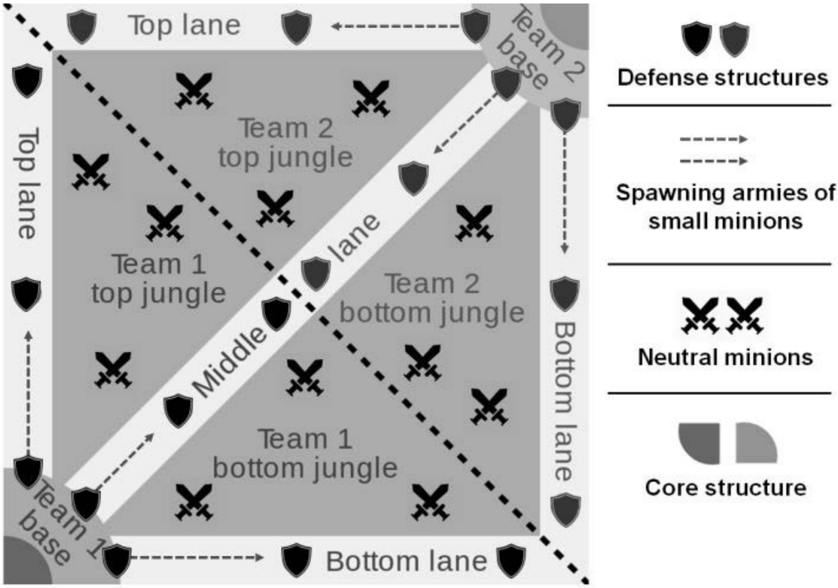
Collectible Card Games	#	Publisher	$2,37M
Hearthstone	8	Blizzard	$2.37M

Fighter / Beat'Em Up	#	Publisher	$1,49M
Ultra Street Fighter IV	11	Capcom	$0.57M
Super Smash Bros. Melee	13	Nintendo	$0.45M
Super Smash Bros. Wii U	16	Nintendo	$0.24M
Mortal Kombat X	17	Warner Bros.	$0.23M

Source: Own Illustration based on data of www.esportsearnings.com

Appendix 2 Introduction of the game plays of the most important eSports genres

Multiplayer Online Battle Arena: A MOBA is usually played 5vs5 and each player is controlling a character (*hero or champion*) with a certain amount of *health points* and distinct abilities. Mostly, the characters are being controlled from a bird's perspective such as in real time strategy, the genre it derived from. There are also MOBA-FPS hybrids with a FPS character control (such as *Smite* or *Paragon*) but are



Source: Own illustration based on a graph of Wikipedia-User Raizin available at https://de.wikipedia.org/wiki/Multiplayer_Online_Battle_Arena

not yet as popular. One game can last up to more than an hour. During the game these characters are getting stronger by killing neutral minions and killing the opponents' minions (*creeps*), structures and characters to gain *experience points*. Furthermore, gold is being gained with which items can be purchased that improve a character in a certain way. The whole game is taking place in a virtual fantasy world (*map*). The basic composition of such a map is illustrated in the image on the left. Mostly, there are three different lanes on which the teams' minions are approaching one another and fight. The lanes are fortified by defense structure that can attack minions and characters. Between these lanes, there are paths with gaps containing neutral creeps. Killing these gives experience points, gold and/or positive effects. The teams try to make their way step by step towards the core structure by destroying defense structures and winning fights against the opponents' characters. A team takes the victory once it destroyed the core structure. These game play features differ in detail for each different MOBA.

Fighter / Beat 'Em Up: Fighter games are mostly played 1vs1 from a third-person perspective. Each player controls a virtual fighting character. Depending on the specific game the fighter can be moved in two or three dimensions on the virtual battleground. By using the character's fighting moves and abilities, the players are trying to defeat the opponent warrior. The image shows a screenshot of two battling virtual fighters in Street Fighter 5.

Source: Capcom Fighters (2016)

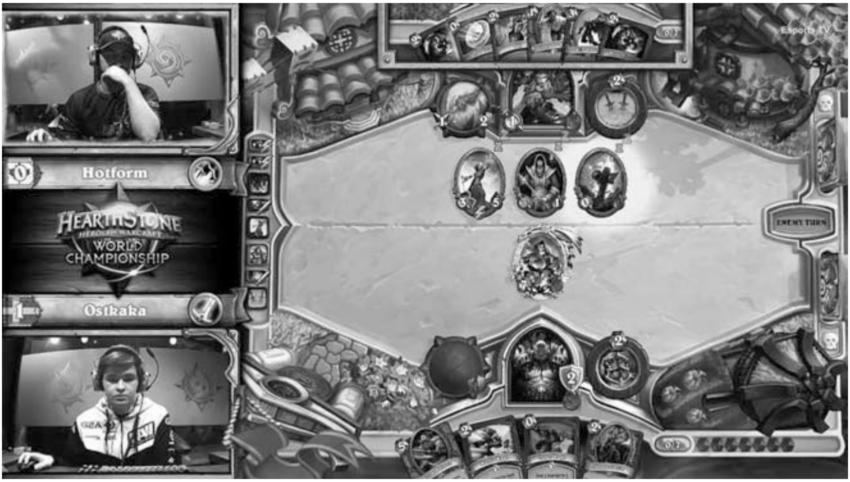
First Person Shooter: First person shooters are mostly played either 1vs1 (e.g. Quake, Unreal Tournament) or 5vs5 (e.g. Counter-Strike). As the team management considering strategy and tactic is very important in a 5vs5 FPS, they are often referred to as 'tactical shooters'. In the game a player controls a virtual character from the first-person perspective with which he tries to defeat opponents by shooting with virtual guns or using other weapons like hand grenades. In Counter-Strike, one team is playing as 'terrorists' trying to plant and explode a bomb on specific spots on the virtual map before the time runs out. The other team is playing as 'Counter-Terrorists' trying to prevent the terrorists from planting the bomb or trying to defuse it in time once it was planted. The image shows a screenshot of the first-person perspective in Counter-Strike: GO. The provided information of the map (upper left) and the teams' current weaponry (middle right and middle left) are additional information provided by the observer mode.

Source: ESL Deutschland (2016b)

Real Time Strategy: Real time strategy games are mostly played 1vs1 but can also include 2vs2 competitions. An RTS game is played from a bird's perspective. A player is not controlling a single character, but a whole 'economy' and armies. At the start of the game each player is provided with a first basic building and a few units to gather resources. A player spends the gathered resources to build further buildings in which units can be produced. The target is to create a superior army of units to destroy the opponent's army and structures. Next to the complex strategic skills needed in an RTS game, fast reactions and multi-tasking when controlling one's units/armies is required. Pro-gamers can reach up to 400 actions (pressing a keyboard or mouse key) per minute. The image shows an attack of an army on the opponent's buildings in StarCraft II.

Source: ESL Deutschland (2016c)

Collectible Card Game: At the start of a match of a collectible card game, in this case Hearthstone, both players decide for a deck of cards that are representing e.g warriors or weapons. In a turn based system they can use their cards which appear on the battleground and are used to "fight" against the opponents' cards. Each turn and each card has specific abilities, grants specific advantages and must be thoroughly chosen. Once a card is used, a player gets a new card from his deck by random chance, bringing in a certain factor of randomness/luck into the game. The target is to counter the opponent's decisions with a superior strategy to finally destroy the opponent's hero, which is constantly visible on the board. Special to this discipline is that aspects such as aiming and fast reactions are irrelevant. The game is only based on strategic and tactical abilities.



Source: HS Esports (2015)

Appendix 3 List of the most famous professional eSports players on Facebook, Twitter and Twitch

eSports MARKETING BLOG

THE MOST FAMOUS PROFESSIONAL ESPORTS PLAYERS ON FACEBOOK, TWITTER AND TWITCH

	Fans	Followers	Followers	Total
Søren Bjerg (Bjergsen)	296,000	604,000	1,017,000	**1,917,000**
Jarowslaw Jarząbkowski (pasha)	671,000	133,000	725,000	**1,529,000**
Yiliang Peng (Doublelift)	238,000	393,000	681,000	**1,312,000**
Enrique Cedeño Martínez (xPeke)	415,000	596,000	235,000	**1,246,000**
Zachary Scuderi (Sneaky)	376,000	244,000	564,000	**1,184,000**
Jason Tran (WildTurtle)	181,000	376,000	538,000	**1,095,000**
Lee Sang-hyeok (Faker)	806,000	74,500	95,000	**975,500**
Henrik Hansen (Froggen)	172,000	270,000	526,000	**968,000**
Martin Larsson (Rekkles)	364,000	258,000	320,000	**942,000**
Danil Ishutin (Dendi)	127,000	334,000	389,000	**850,000**
Christopher Alesund (GeT_RiGhT)	384,000	169,000	289,000	**842,000**
Gabriel Santos (Kami)	504,000	157,000	146,000	**807,000**
Felipe Gooncalves (brTT)	507,000	196,000	41,000	**744,000**
Zaqueri Black (Aphromoo)	78,000	184,000	433,000	**695,000**
Mike Grzesiek (shroud)	22,000	118,000	553,000	**693,000**
Hai Du Lam (Hai)	106,000	297,000	273,000	**676,000**
Olof Kajbjer (olofmeister)	138,700	127,000	404,000	**669,700**
Alexey Ichetovkin (Alex Ich)	217,000	166,000	252,000	**635,000**
Clement Ivanov (Puppey)	334,000	179,000	49,000	**562,000**
Adil Benrlitom (ScreaM)	120,000	132,000	305,000	**557,000**

Source: Fletcher / eSports Marketing Blog (2016)

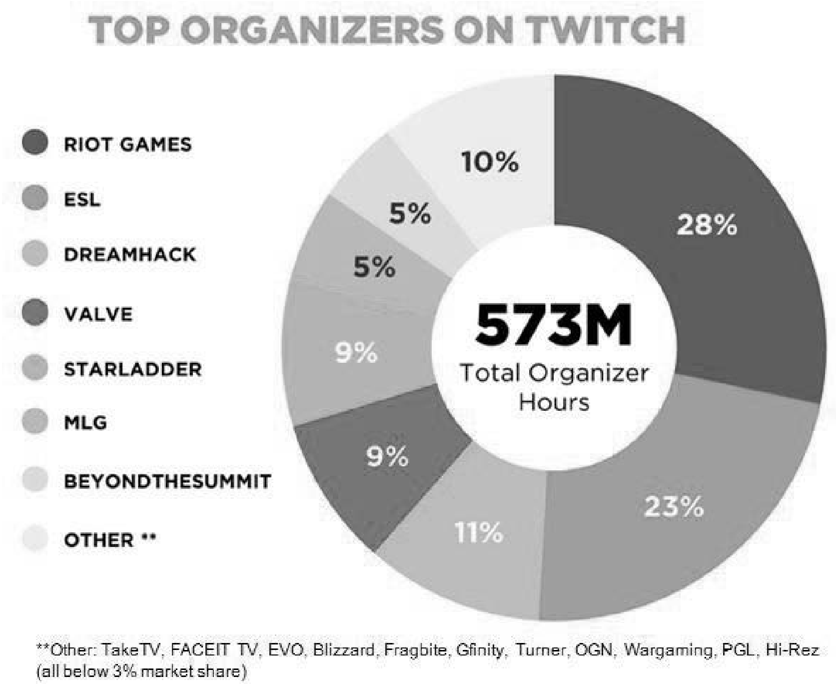
Appendix 4 Top 30 of the most successful eSports teams ranked by total prize money won as of 22 August 2016

Highest Overall Team Earnings

1.	Evil Geniuses	$14,629,749.91	580 Tournaments
2.	Wings Gaming	$9,453,066.08	10 Tournaments
3.	Newbee	$6,756,820.75	65 Tournaments
4.	Fnatic	$6,707,427.63	580 Tournaments
5.	Natus Vincere	$6,013,950.42	304 Tournaments
6.	Vici Gaming	$5,136,114.24	100 Tournaments
7.	LGD Gaming	$5,037,466.36	77 Tournaments
8.	SK Telecom T1	$4,710,592.06	177 Tournaments
9.	MVP	$4,333,936.38	353 Tournaments
10.	Team Liquid	$4,249,721.54	725 Tournaments
11.	Invictus Gaming	$4,113,452.37	280 Tournaments
12.	Team Secret	$3,801,880.25	36 Tournaments
13.	Virtus.pro	$3,757,510.45	262 Tournaments
14.	Cloud9	$3,614,184.56	311 Tournaments
15.	Digital Chaos	$3,510,802.00	9 Tournaments
16.	CDEC Gaming	$3,458,796.29	25 Tournaments
17.	Alliance	$3,398,427.86	146 Tournaments
18.	SK Gaming	$3,277,352.90	504 Tournaments
19.	EHOME	$3,096,859.57	25 Tournaments
20.	Team OG	$3,055,001.00	14 Tournaments
21.	Samsung	$2,386,100.89	315 Tournaments
22.	Counter Logic Gaming	$2,173,737.83	162 Tournaments
23.	KT Rolster	$2,065,381.54	176 Tournaments
24.	compLexity Gaming	$2,005,433.90	324 Tournaments
25.	COGnitive Gaming	$1,995,410.15	144 Tournaments
26.	Team DK	$1,761,408.03	41 Tournaments
27.	mousesports	$1,740,376.40	636 Tournaments
28.	Team SoloMid	$1,731,036.00	200 Tournaments
29.	Team EnVyUs	$1,714,057.27	148 Tournaments
30.	Ninjas In Pyjamas	$1,700,721.27	165 Tournaments

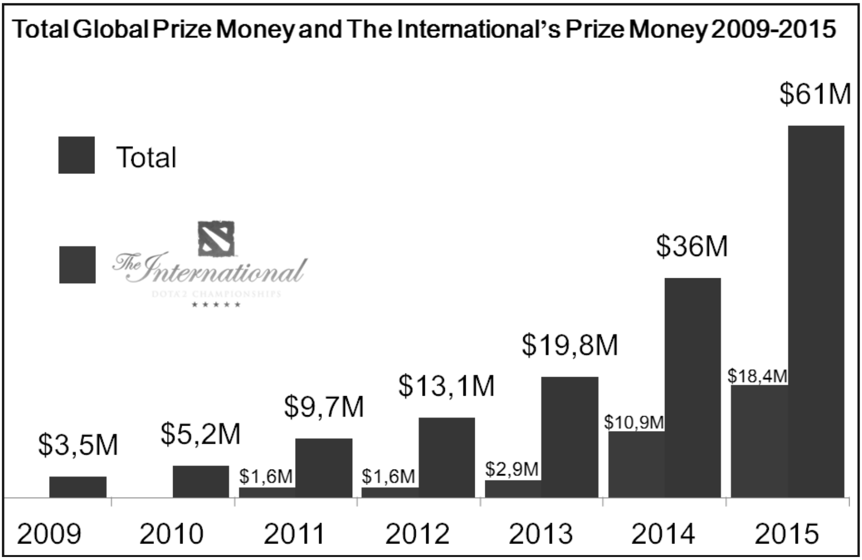
Source: www.esportsearnings.com/teams

Appendix 5 Top organizers on Twitch by viewership hours August 2015 - May 2016



Source: Newzoo (2016b)

Appendix 6 Total global prize money and The International's prize money 2009-2015



Source: Own illustration based on data from Newzoo (2016a), p. 14 and www.esportsearnings.com

Appendix 7 Lists of eSports events by highest prize money provided and by largest unique viewer numbers

Event	Discipline(s)	Provider	Location	Prize Money
The International 2015	DotA 2	Valve	Seattle	$18,429,613
DotA 2 Asia Championship 2015	DotA 2	Perfect World, Valve	Shanghai	$3,057,519
The Frankfurt Major	DotA 2	ESL (main sponsor: Valve)	Frankfurt	$3,000,000
Smite World Championship 2015	Smite	Hi-Rez Studios	Atlanta	$2,612,260
Halo World Championship 2016[1]	Halo 5: Guardians	343 Industries	Hollywood	$2,500,000
LoL 2015 World Championship	League of Legends	Riot Games	Berlin	$2,130,000
World Cyber Arena 2015	Multiple disciplines	Word Cyber Arena	Yinchuan	$1,900,000
BlizzCon 2015	Multiple disciplines	Blizzard Entertainment	Anaheim	$1,250,000
Call of Duty Championships 2015	CoD: Advanced Warfare	Activision (main sponsor: XBOX)	Los Angeles	$1,000,000

[1] Included because no tournament was held in 2015

Source: Own illustration based on data from www.esportsearnings.com; wiki.teamliquid.net; www.esportspedia.com

Event	Discipline(s)	Unique viewers	Concurrent viewers
LoL 2015 World Championships	League of Legends	~ 36,000,000	~ 14,000,000
ESL One Cologne 2015	CS:GO	~ 27,000,000	~ 1,300,000
DreamHack Cluj 2015	CS:GO	~ 25,000,000	~ 985,000
The International 2015	DotA 2	~ 20,000,000[1]	~ 4,600,000
ESL One Katowice 2015	CS:GO	~ 8,780,000	~ 1,000,000
Gfinity Championship Series 2015	CS:GO	~ 8,750,000	n/a
ESL One Frankfurt 2015	DotA 2	n/a	~ 1,000,000
WoT World Championship 2015	World of Tanks	~ 2,600,000	~ 120,000[2]
ESL Championship Spring 2015	Multiple disciplines	~ 1,000,000	n/a
Smite World Championship 2015	Smite	~ 1,000,000	~ 80,000[3]

[1] Data of The International 2014, no data available for 2015,
Additional source: McWhertor (2014)
[2] Additional source: Sillis (2015)
[3] Additional source: https://www.reddit.com/r/Smite/comments/3ns6zc/swc_tournament_viewership/

Source: Own illustration based on Kresse (2016a)

Appendix 8 Examples of venues dedicated to eSports

The Gfinity Arena in London, United Kingdom
It is the first eSports arena in the United Kingdom, part of Vue's Fulham Broadway Multiplex Cinema and contains 600 seats. Gfinity states that this arena was established to *"to help push eSports within the UK to a professional level, to raise awareness and to provide an arena for gamers to showcase their talent"* (www.gfinity.net). It is supposed to host approximately 25 events in 2016. Sources: www.gfinity.net; Winnan (2016, subchapter: Sporting Venues)

Esports Arena, LLC's arenas in the United States
Esports Arena, LLC is a company that opened its first eSports venue in 2015 in Orange Country, California, with a size of circa 1400m². For the future, it plans to build a whole infrastructure of eSports venues throughout the U.S. Sources: www.esportsarena.com; Esports Arena (2014) (Introduction Video)

MLG.tv Columbus Arena in Columbus, Ohio
MLG installed this arena in 2014 in Columbus, Ohio, to host some of MLG's own tournaments. The venue's size is 1300m². Source: Major League Gaming (2014b)

Seoul OGN e-Stadium in Seoul, South Korea
This eSports complex opened in 2016 and was build by the The Seoul Metropolitan City Government and the Ministry of Culture, Sports and Tourism for approx. $3.8 million. It has a capacity of 1,000 seats and is operated by the video gaming channel OGN. It acts as venue for a large diversity of eSports competitions. Source: Byung-Yeul (2016)

Intel Chengdu eSports Stadium, Chengdu, China
This arena was built in the course of the ESL Intel Extreme Masters 2009 and is considered the first eSports venue in China. It contains seats for 1,000 fans in an area of 2,000m². Source: Turtle Entertainment GbmH (2009)

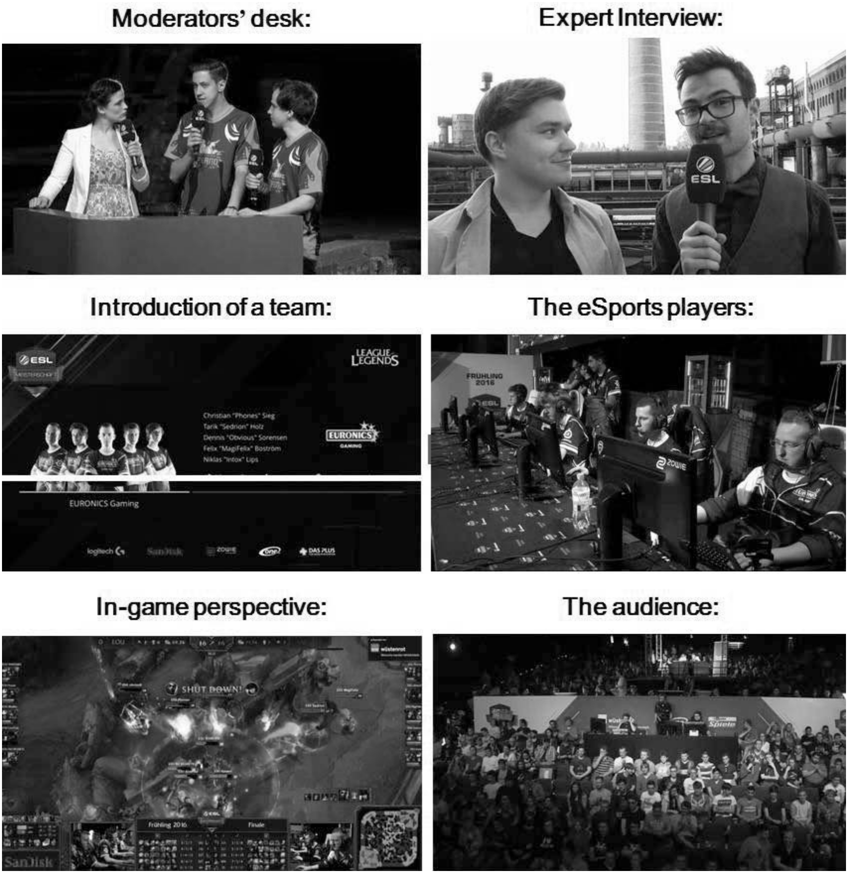
MLG Gaming Arena, Zhuhai, China
When finished in 2017, this arena will be the largest eSports venue with a seating capacity of 15,000. It is installed within the V-Zone, a huge gaming theme park that is part of an approximately $2.8 billion complex called The Hengqin Creative Culture City on Hengqin Island, a part of the city Zhuhai, located off the coast of Macau. The arena is built in co-operation with the Lun Sai Group, the investor of the V-Zone. The main tournaments hosted in this arena are the MLG Pro Circuit competitions. Mike Sepso, president and co-founder of MLG, referrs this project to as *"yet another step in our plan to make eSports and MLG a part of mainstream culture worldwide."* Sources: Major League Gaming (2014c); Borowy / Jin (2016), p. 215

Millennial eSports Arena Las Vegas, Nevada
Pro Gaming League Inc., under its new name Millennial Esports, is establishing this 1400m² arena in the retail center Neonopolis in Las Vegas. It has a capacity of 500 fans and is available year round for eSports competitions. Source: www.millennialesports.com

The sources are provided in the respective table segment

Appendix 9 Sample of stream content of an event exemplified by ESL Frühlingsmeisterschaft 2016 and Heroes of the Storm World Championship 2015

ESL Frühlingsmeisterschaft 2016:



Source: Own illustration based on screenshots of ESL Deutschland (2016a)

Heroes of the Storm World Championship 2015:

Source: Own illustration based on screenshots of Heroes of the Storm (2015)

Appendix 10 Potentials and limitations of the WESA as analyzed by Fletcher and Blum

Potentials

• Higher degree of organization, common regulation, professionalism and thus efficiency

→ More appealing for and easier to get in touch with new industry partners

→ Consistent policies (e.g. for transfers and sanctions) weakens the threat of conflicts

• Fixed schedules that raises predictability

→More and consistent viewers, easier integration for media channels

• Higher event standards → WESA as organizer and effective governor of leagues may increase event and production value

• A balanced representation of the interests of providers, teams and players

→synergy effects triggered by better collaboration and exchange of knowledge

Limitations

• The scope: 1) Only CS:GO is covered so far

2) ESL is the only provider who joined

→Big part of CS:GO competitions not covered (e.g. from MLG, or E-League)

→ ESL in a superior spot in economical strength → impartial and equitable behavior doubtful, focus on own financial profit may get in focus

• The power of and the dependency on the publisher remains untouched without Valve needing to contribute to WESA → approval of Valve inevitably necessary

Source: Own illustration based on Fletcher (2016b); Blum (2016)

Appendix 11 Major investments in the eSports ecosystem in 2015

Investments and buyouts in the eSports market in 2015

Investor/Buyer	Company	Investment
USM Holdings	Virtus.pro	$ 100,000,000
Modern Times Group	Turtle Entertainment GmbH	$ 84,987,000
Activision Blizzard	Major League Gaming	$ 46,000,000
Riot Games	Curse	$ 30,000,000
Index Ventures and more	Super Evil Megacorp	$ 26,000,000
Modern Times Group	DreamHack	$ 25,000,000
FanDuel	AlphaDraft	< $ 25,000,000
Universal Music Group and more	Vulcun	$ 12,000,000
Binary Capital, Mark Cuban and more	Unikrn	$ 10,000,000
March Capital Partners and more	Dojo Madness	$ 2,260,700

Source: Kresse (2016a)

Appendix 12 Wüstenrot online and offline branding at ESL Frühlingsmeisterschaft 2016

All photos taken by the author


ESL
wüstenrot
Wünsche werden Wirklichkeit.


ESL
wüstenrot
SanDisk
ZOWIE
one
logitech
ESL
FRÜHLING 2016
CS:GO
LEAGUE LEGENDS
FIFA 16

Appendix 13 Wüstenrot information desk at ESL Frühlingsmeisterschaft 2016

All photos taken by the author

Appendix 14 Structure of the field study questionnaire

Field study online questionnaire			
I	**Welcome and information page**		
Info	Greeting, appreciation and general information about the survey and prize raffle		Hallo eSports-Fan, willkommen zu meiner Umfrage zur ESL Meisterschaft 2016. Ich freue mich sehr, dass du dir 10 Minuten Zeit nimmst um meine Fragen zu beantworten und bedanke mich vielmals [...]
	To be measured	**Method**	**Question**
II	**eSports related consumer behavior as 'hook' questions**		
2.1	Fav. genre (playing)	Multiple choice	Welche dieser eSports-Genres sind deine Favoriten zum selbst spielen?
2.2	Fav. genre (watching)	Multiple choice	Welche dieser eSports-Genres sind deine Favoriten zum Zuschauen?
2.3	Consumption (playing)	Time scale	Wie viele Stunden spielst du eSports-Disziplinen in der Woche?
2.4	Consumption (watching)	Time scale	Wie viele Stunden eSports-Content wie z.B. Twitch-Livestreams oder Youtube-Videos schaust du pro Woche?
2.5	Reasons for event visit	Multiple choice	Aus welchen der folgenden Anlässen bist/warst du primär auf der ESL Meisterschaft 2016 in Duisburg?
III	**Image of ESL Meisterschaft**		
3.1	Event image	Semantic Diff.	Welche der jeweils gegensätzlichen Eigenschaften würdest du dem Event ESL Meisterschaft zuschreiben und wie sehr?
IV	**Bias control: general attitude towards (e)sports sponsoring**		
4.1	General attitude towards sponsoring	Likert scale (degree of agreement)	Bitte kreuze an wie sehr du folgenden Aussagen zustimmst bzw. nicht zustimmst:Das Sponsoring von Veranstaltungen, Teams oder Spielern im eSports und traditionellen Sport durch Unternehmen ist...

V	**Wüstenrot: Awareness of sponsorship and brand/product familiarity**		
Info	The next question should be answered immediately		Bitte beantworte die Frage auf der nächsten Seite sofort ohne 'zu cheaten'.
5.1	Awareness of Wüstenrot as main sponsor	Closed question with text field	Weißt du wer der Hauptsponsor der ESL Meisterschaft 2016 ist?
Info	Revealing Wüstenrot as main sponsor		Der Hauptsponsor ist die Marke *Wüstenrot*.
5.2	Degree of attracted attention	Interval scale	Wie stark ist dir der Sponsor *Wüstenrot* bislang auf der ESL Meisterschaft aufgefallen?
5.3	Brand familiarity I	Interval scale	Wie gut kanntest du die Marke *Wüstenrot* bevor du ihr auf einem ESL-Stream oder der ESL Meisterschaft begegnet bist?
5.4	Brand familiarity II	Multiple Choice	Weißt du, dass *Wüstenrot* eine Bausparkasse ist und falls ja, seit wann?
5.5	Product/industry familiarity	Ordinal scale	Wie intensiv hast du dich bereits schon einmal mit Bausparen auseinandergesetzt?
VI	**Attitude towards Wüstenrot and non-endemic sponsoring: deter-**		
6.1	Likert scale with seven dimensions (degree of dis/agreement)		Bitte gebe an wie sehr du folgenden Aussagen zustimmst oder nicht zustimmst.
6.1.1	Acceptance Wüstenrot		Ich finde es gut, dass Wüstenrot Sponsor der ESL Meisterschaft ist.
6.1.2	Authenticity I		Wüstenrot hat ehrliches Interesse an eSports.
6.1.3	Authenticity II		Wüstenrot tritt als glaubwürdiger eSports-Sponsor auf.
6.1.4	Altruistic motives I		Mit dem Sponsoring handelt Wüstenrot vorrangig eigennützig.
6.1.5	Altruistic motives II		Wüstenrot sponsort die ESLM um den deutschen eSports voranzubringen.
6.1.6	Altruistic motives III		Wüstenrot sponsort die ESLM um den Spielern, Teams und Fans ein besseres Offline-Erlebnis zu ermöglichen.
6.1.7	In/decrease of sympathy		Wüstenrot ist mir durch das Sponsoring sympathischer geworden.
6.1.8	Acceptance non-endemic I		Marken, die in keiner direkten Verbindung mit eSports stehen, gehören auch nicht dort hin.
6.1.9	Acceptance non-endemic II		Ich freue mich, wenn eine Marke ohne direkte Verbindung zum eSports dennoch als Sponsor aktiv ist.

VII	**Perception of Wüstenrot at event**		
7.1	Brand perception	Semantic Diff.	Wie wirkt die Marke *Wüstenrot* auf der ESL Meisterschaft auf dich und wie sehr? Benutze wiederum den Schieberegler.
VIII	**Comments**		
8.1	Comments	Free text field	Falls du weitere Anmerkungen zum Sponsoring von *Wüstenrot* und dessen Sponsorauftritt hast, kannst du diese gerne hier im freien Textfeld mitteilen.
IX	**Basic demographics**		
9.1	Gender	Dichotomous choice	Du bist ein...? (weiblicher/männlicher eSports-Fan)
9.2	Age	Two digit integer field	...und bist wie viele Jahre alt?
X	**Acknowledgement and price raffle**		
Info	Acknoledgement and information about prize raffle		Vielen herzlichen Dank für das Durchspielen meiner Umfrage. Wie versprochen kannst du hier als Dankeschön deine E-Mail-Adresse hinterlegen um am Gewinnspiel teilzunehmen. [...]
10.1	Prize raffle participation	Dichotomous choice and e-mail address text field	Möchtest du am Gewinnspiel teilnehmen?
Info	Notice of confidentiality		Datenschutzhinweis: Deine E-Mail-Adresse wird ausschließlich dafür verwendet [...]
Info	Conditions of participation		Teilnahmebedinungen: Teilnahmeberechtigt ist jede Person, [...]
XI	**End page**		
Info	Appreciation and recommendation request		Vielen Dank und viel Spaß weiterhin auf der ESL Meisterschaft. Wenn dir die Umfrage gefallen hat, freue ich mich, wenn du sie **deinen Nebenleuten weiterempfiehlst**.

Appendix 15 Structure of the online survey questionnaire - German part

Online survey questionnaire - German part		
I	**Welcome and information page + geographical split**	
Info	Greeting, appreciation and general information about the survey and prize raffle	Hello eSports-Fan, welcome to my survey about eSports. I am very glad you take 10 minutes of your time to answer my survey questions and am very thankful for your support. [...]
Info	Photo of and information about the researcher, that was added due to very low click-through-rate	
1.1	Geographical split: Germany / Rest	At first, please let me know where you are from.

	To be measured	**Method**	**Question**
II	**eSports related consumer behavior**		
Info	Short definition of eSports		Als "eSports" versteht sich in dieser Umfrage das ettbewerbsorientierte Spielen auf Amateur- und Profiebene. [...]
2.1	Fav. genre (playing)	Multiple choice	Welche dieser eSports-Genres sind deine Favoriten zum selbst spielen?
2.2	Fav. genre (watching)	Multiple choice	Welche dieser eSports-Genres sind deine Favoriten zum Zuschauen?
2.3	Consumption (playing)	Time scale	Wie viele Stunden spielst du eSports-Disziplinen in der Woche?
2.4	Consumption (watching)	Time scale	Wie viele Stunden eSports-Content wie z.B. Twitch-Livestreams oder Youtube-Videos schaust du pro Woche?
2.5	Significance of eSports	Ordinal scale	Wie wichtig ist eSports für dich?
2.6	Consumption of	Time scale	Am 7. und 8. Mai fand die ESL Frühlingsmeisterschaft 2016 statt. Wie viele Stunden

	ESLM		hast du diese per Livestream (z.B. bei ESL TV) verfolgt?
III	**Image of professional eSports**		
3.1	Industry/scene image	Semantic Diff.	Welche dieser jeweils gegensätzlichen Eigenschaften würdest du der professionellen eSports-Szene zuschreiben und wie sehr? Benutze zum Antworten die Schieberegler.
IV	**Wüstenrot: Awareness, familiarity and sponsor-fit**		
4.1	Brand familiarity	Interval scale	Einige Fragen werden sich auf die Marke *Wüstenrot* beziehen. Wie gut kennst du diese Marke bzw. Unternehmen?
4.2	Awareness of youth campaign	Interval scale	Erinnerst du dich daran, kürzlich einen Werbespot von *Wüstenrot* im Fernsehen, auf einem Stream oder einer Internetseite gesehen zu haben und falls ja, wie gut?
4.3	Product/industry familiarity	Ordinal scale	Wie intensiv hast du dich bereits schon einmal mit Bausparen auseinandergesetzt?
4.4	Sponsor-fit	Interval scale	Wie gut/schlecht passt *Wüstenrot* deiner Meinung nach zu eSports? Falls du *Wüstenrot* nicht kennst, beziehe dich auf Bausparkassen allgemein.
V	**Brand image Wüstenrot / Industry image home loan banks**		
5.1	Brand / industry image (before awareness of sponsorship)	Semantic Diff.	Welche der folgenden jeweils gegensätzlichen Eigenschaften würdest du der Marke *Wüstenrot* zuschreiben und wie sehr? Benutze dazu die Schieberegler. Sollte *Wüstenrot* dir nicht bekannt sein, beziehe dich bitte auf Bausparkassen allgemein.
VI	**Bias control: general attitude towards (e)sports sponsoring**		
6.1	General attitude towards sports sponsoring	Likert scale (degree of agreement)	Das Sponsoring von Veranstaltungen, Teams oder Spielern im traditionellen Sport und eSports durch Unternehmen ist...

<table>
<tr><th>VII</th><th colspan="3">Random split into two equally sized groups (A and B)</th></tr>
<tr><th>VIIA</th><th colspan="3">Information page about Wüstenrot's eSports engagement</th></tr>
<tr><td>Info</td><td colspan="2">Wüstenrot is main sponsor of ESLM</td><td>Wüstenrot ist Hauptsponsor der diesjährigen ESL Frühlings-meisterschaft, die als 'deutsche Meisterschaft' für die vertretenen eSports-Disziplinen gilt.

</td></tr>
<tr><td></td><td colspan="3"></td></tr>
<tr><th>VIIB</th><th colspan="3">Information page about Wüstenrot's eSports engagement and brand connection video clip</th></tr>
<tr><td>Info</td><td colspan="2">Wüstenrot is main sponsor of ESLM</td><td>Wüstenrot ist Hauptsponsor der diesjährigen ESL Frühlings-meisterschaft, die als 'deutsche Meisterschaft' für die vertretenen eSports-Disziplinen gilt. (+Image see above)</td></tr>
<tr><td>Info</td><td colspan="2">Integrated video clip from Wüstenrot's campaign with StarCraft II player 'Lambo'
(Available at: https://www.youtube.com/watch?v=1SgUEFfbwPs)</td><td>Bitte schau dir dazu diesen kurzen Clip an. Bitte schaue bei den letzen 20 Sekunden besonders aufmerksam hin. Versuche dabei Lambo objektiv als eSportler/Pro-gamer anzusehen und nicht subjektiv als StarCraft- oder Zergspieler und ob du dieses Spiel und diese Rasse magst oder nicht.</td></tr>
<tr><td>7.1B</td><td>Perceived brand-eSports connection</td><td>Likert scale
(assignment of attribute values)</td><td>Bitte bewerte auf der unten vorliegenden Skala wie du die Verbindung zwischen Wüstenrot und eSports bzw. eSportlern in dem gezeigten Clip einschätzt.</td></tr>
<tr><td></td><td colspan="3"></td></tr>
<tr><th>VIII</th><th colspan="3">Attitude towards Wüstenrot and non-endemic sponsoring: determinants of effectiveness</th></tr>
<tr><td>8.1</td><td colspan="2">Likert scale with seven dimensions
(degree of dis/agreement)</td><td>Bitte gebe an wie sehr du folgenden Aussagen zustimmst oder nicht zustimmst. Bitte sehe die ESLM objektiv als eSports-Event an.</td></tr>
<tr><td>8.1.1</td><td colspan="2">Acceptance Wüstenrot</td><td>Ich finde es gut, dass Wüstenrot Sponsor eines eSports-Events ist.</td></tr>
</table>

8.1.2	Authenticity I		Wüstenrot hat ehrliches Interesse an eSports.
8.1.3	Authenticity II		Wüstenrot ist ein glaubwürdiger eSports-Sponsor.
8.1.4	Altruistic motives I		Mit dem Sponsoring handelt Wüstenrot vorrangig eigennützig.
8.1.5	Altruistic motives II		Wüstenrot sponsort die ESLM um den deutschen eSports voranzubringen.
8.1.6	Altruistic motives III		Wüstenrot sponsort die ESLM um den Spielern, Teams und Fans ein besseres Offline-Erlebnis zu ermöglichen.
8.1.7	In/decrease of sympathy		Wüstenrot ist mir durch das Sponsoring sympathischer geworden.
8.1.8	Acceptance non-endemic I		Marken, die in keiner direkten Verbindung mit eSports stehen, gehören auch nicht dort hin.
8.1.9	Acceptance non-endemic II		Ich freue mich, wenn eine Marke ohne direkte Verbindung zum eSports dennoch als Sponsor aktiv ist.
IX	**Basic demographics**		
9.1	Gender	Dichotomous choice	Du bist ein...? (weiblicher/männlicher eSports-Fan)
9.2	Age	Two digit int. field	...und bist wie viele Jahre alt?
X	**Acknowledgement and price raffle**		
Info	Acknoledgement and information about prize raffle		Vielen herzlichen Dank für das Durchspielen meiner Umfrage. Wie versprochen kannst du hier als Dankeschön deine E-Mail-Adresse hinterlegen um am Gewinnspiel teilzunehmen. [...]
10.1	Prize raffle participation	Dichotomous choice and e-mail address text field	Möchtest du am Gewinnspiel teilnehmen?
Info	Notice of confidentiality		Datenschutzhinweis: Deine E-Mail-Adresse wird ausschließlich dafür verwendet [...]
Info	Conditions of participation		Teilnahmebedinungen: Teilnahmeberechtigt ist jede Person, [...]
XI	**End page**		
Info	Appreciation and recommendation request		Thanks a lot for participating. If you liked the survey, feel free to send it to your eSports friends. I'd really appreciate it. GL HF! URL of this survey to send to your friends: *www.esports-survey.de*

Appendix 16 Structure of the online survey questionnaire – international part

Online survey questionnaire - international part			
I	**Welcome and information page + geographical split**		
Info	Greeting, appreciation and general information about the survey and prize raffle		Hello eSports-Fan, welcome to my survey about eSports. I am very glad you take 10 minutes of your time to answer my survey questions and am very thankful for your support. [...]
Info	Photo of and information about the researcher, that was added due to very low click-through-rate		
1.1	Geographical split: Germany / Rest		At first, please let me know where you are from.
	To be measured	**Method**	**Question**
II	**eSports related consumer behavior**		
Info	Short definition of eSports		Please note that the term "eSports" in this survey describes professional and amateur competitive gaming. Playing e.g. single player games or MMORPGs is not part of eSports.
2.1	Significance of eSports	Ordinal scale	How important is eSports to you?
2.2	Fav. genre (playing)	Multiple choice	Which eSports genres are your favorites to play?
2.3	Fav. genre (watching)	Multiple choice	Which eSports genres are your favorites to watch?
2.4	Consumption (playing)	Time scale	How many hours do you spend playing eSports games in a week?
2.5	Consumption (watching)	Time scale	How many hours do you spend watching eSports games a week, e.g. Twitch streams or Youtube videos?

III	**Image of professional eSports**		
3.1	Industry/scene image	Semantic Diff.	Which of these opposite characteristics would you attribute to the professional eSports-scene and in what extent? Please use the slider.
IV	**General attitude towards (e)sports sponspring**		
4.1	General attitude towards sports sponsoring	Likert scale (degree of agreement)	Sponsoring of events/teams/players in traditional Sports or eSports is...
VII	**Random split into two groups (A and B)**		
V A	**Attitude towards and evaluation of general sponsors in eSports**		
5.1	Likert scale with seven dimensions (degree of dis/agreement)		Please read the following statements carefully and mark the extent to which you agree or disagree with each statement in general.
5.1.1	Altruistic motives		Companies do sponsoring, because they want to support the eSports scene, teams and fans.
5.1.2	Authenticity		Sponsors have honest interest in eSports.
5.1.3	Acceptance		I appreciate the sponsoring of companies in eSports.
5.1.4	Attitute towards non-endemic sponsors		I would like to see more brands as sponsors in eSports, that are not directly related to eSports.
5.2	Likert scale with seven dimensions (likelihood)		Please mark how likely the following statements might be true for you in general.
5.2.1	Effect of eSports event sponsoring		I evaluate a brand more favorable, when it sponsors an eSports event.
5.2.2	Effect of eSports player/team sponsoring		I evaluate a brand more favorable, when it sponsors an eSports team or player.
5.2.3	Effect of eSports event sponsoring on brand preference		I prefer a brand that sponsors an eSports event over a competitive brand.
5.2.4	Effectof eSports team/player sponsoring on brand preference		I prefer a brand that sponsors an eSports team or player over a competitive brand.
5.2.5	Effect on degree of identification		I can better identify with a brand, when it acts as sponsor in eSports.

V B	**Attitude towards and evaluation of non-endemic sponsors in eSports**	
Info	Explanation of the term "non-related companies/brands"	**Please read this information:** Most sponsors in eSports are directly related to eSports, such as computer companies, gaming gear companies, etc. But some sponsors in eSports are not directly related to eSports. Examples: • German home loan bank 'Wüstenrot' sponsoring ESL Meisterschaft, the German Championship • Swedish fashion brand 'Björn Borg' sponsoring a 6,000$ CS:GO invitational • U.S. American car insurance 'GEICO' sponsoring Team SoloMid and a Hearthstone championship series • U.S. American beer brand 'Bud Light' setting up an All-Star team consisting of players from all famous eSports disciplines to sponsor These sponsors are called **"non-related companies/brands"** in the next parts of the survey.
5.1	Likert scale with seven dimensions (degree of dis/agreement)	Please read the following statements carefully and mark the extent to which you agree or disagree with each statement in general.
5.1.3	Altruistic motives	Non-related companies do sponsoring, because they want to support the eSports scene, teams and fans.
5.1.2	Authenticity	Non-related sponsors have honest interest in eSports.
5.1.3	Acceptance of non-endemic sponsors I	I appreciate the sponsoring of non-related companies.
5.1.4	Acceptance of non-endemic sponsors II	I don't want non-related brands to enter eSports.
5.2	Likert scale with seven dimensions (likelihood)	Please mark how likely the following statements might be true for you in general.
5.2.1	Effect of eSports event sponsoring	I evaluate a non-related brand more favorable, when it sponsors an eSports event.

5.2.2	Effect of eSports player/team sponsoring		I evaluate a non-related brand more favorable, when it sponsors an eSports team or player.
5.2.3	Effect of eSports event sponsoring on brand preference		I prefer a non-related brand that sponsors an eSports event over a competitive brand.
5.2.4	Effectof eSports team/player sponsoring on brand preference		I prefer a non-related brand that sponsors an eSports team or player over a competitive brand.
5.2.5	Effect on degree of identification		I can better identify with a non-related brand, when it acts as sponsor in eSports.
VI	**Basic demographics**		
6.1	Gender	Dichotomous choice	You are a...? (female eSports fan / male eSports fan)
6.2	Age	Two digit int. field	...and are how many years old?
VII	**Acknowledgement and price raffle**		
Info	Acknoledgement and information about prize raffle		Thanks a lot for finishing my survey. GG! As promised, you can enter your e-mail-address* below to participate in a price draw. The winner of the draw [...]
7.1	Prize raffle participation	Dichotomous choice and e-mail address text field	Do you want to participate in the price draw?
Info	Notice of confidentiality		*Notice of confidentiality: Your e-mail address will only be used to send you the link to the VOD and to contact you in case you are the lucky winner. All e-mail addresses will be deleted after the drawing.
Info	Conditions of participation		Participation Conditions: Able to participate is every person over 14 years old, who completed this survey [...]
VIII	**End page**		
Info	Appreciation and recommendation request		Thanks a lot for participating. If you liked the survey, feel free to send it to your eSports friends. I'd really appreciate it. GL HF! URL of this survey to send to your friends: www.esports-survey.de

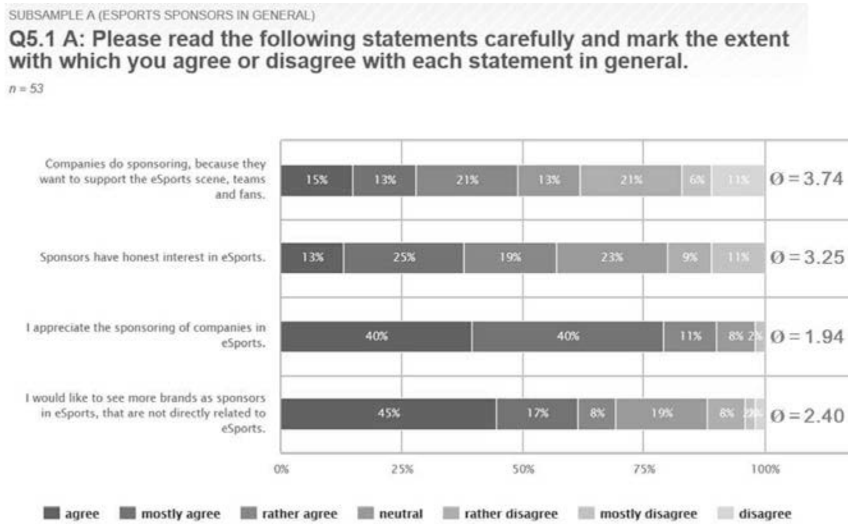
Appendix 17 Promotion flyer used for the field study

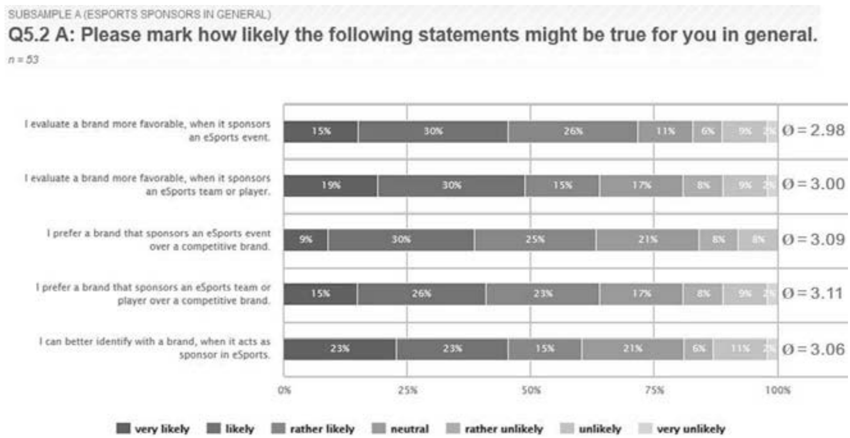
The flyer was designed by the author on the basis of a template provided by Vistaprint at www.vistaprint.de.

Appendix 18 Results of the central Likert scales of the international online survey

The images have been generated with EFS Reporting+ within the Unipark Questback Enterprise Feedback Suite.

Subsample A:



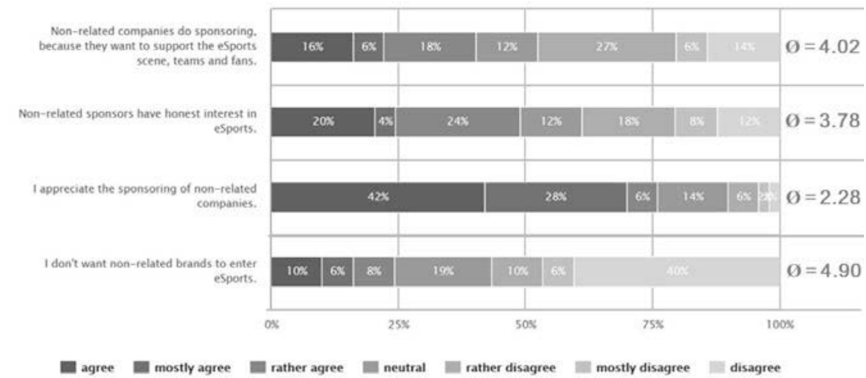


Subsample B:

SUBSAMPLE B (ESPORTS NON-RELATED SPONSORS)

Q5.1 B: Please read the following statements carefully and mark the extent with which you agree or disagree with each statement in general.

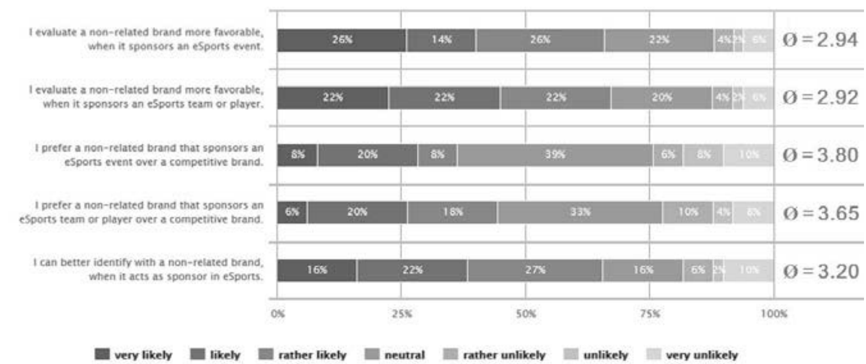
n = 50



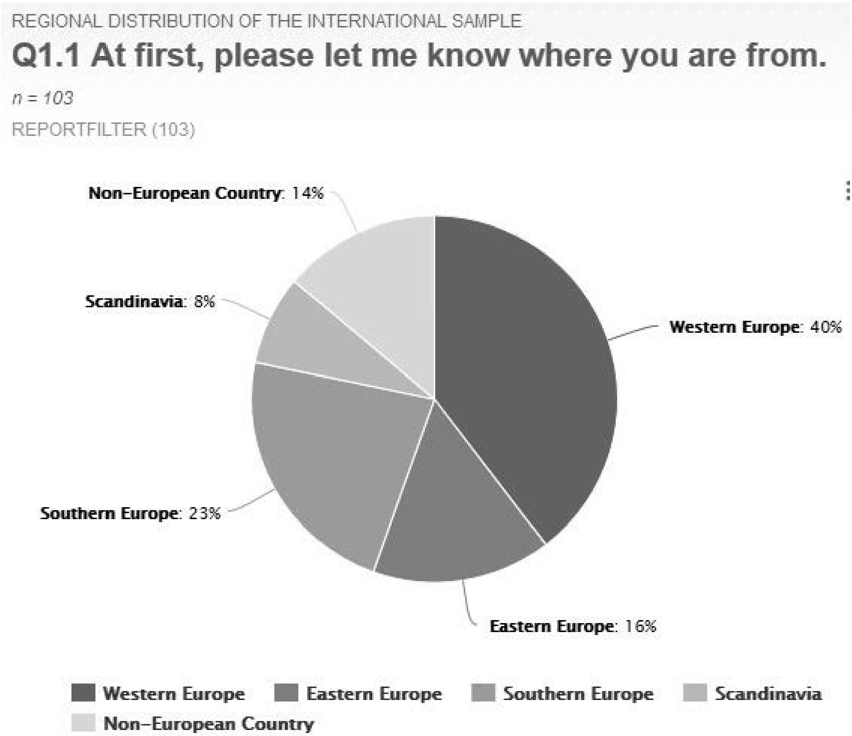
SUBSAMPLE B (ESPORTS NON-RELATED SPONSORS)

Q5.2 B: Please mark how likely the following statements might be true for you in general.

n = 50



Appendix 19 Regional distribution of the international survey's respondents



Appendix 20 Written interview with Malph Minns

Interview via E-Mail with Mr. Malph Minns about eSports and sponsoring - conducted by the author

Karlsruhe / London, 17.06.2016

Malph Minns

Founder & Managing Director
Strive Sponsorship

Author: *Hello Mr. Minns. First of all, I'd like to thank you a lot for contributing to my thesis with your expertise and knowledge. To start off the interview, please explain your job at Strive Sponsorship and your overall relation to eSports and sponsoring in eSports.*

Malph Minns: *I'm Managing Director of Strive Sponsorship. Strive offers evidence based and insight led sponsorship, marketing and brand consultancy services to brands (i.e. sponsors) and rights holders (e.g. events, teams, leagues, venues etc) both directly, and through specialist strategic partners.*

We specialise in sport, music, eSports and film partnerships and also work with companies with interests in fashion, the arts, causes and broadcast sponsorship. We have a core internal sponsorship and marketing expertise built up over 16 years from working brand, agency and rights holder side.

We have worked with global brands like Guinness, British Airways, Sky and 888.com and innovative rights holders like Team Sky. Our expertise is supplemented by a network of specialist strategic partners whom are called upon as the brief dictates, ensuring the best available bespoke solution is delivered to our clients.

Specific to eSports, we have so far worked with Gfinity and hope to confirm a few more eSports clients soon.

Author: *How important are agencies and consultancies for fixing partnerships of eSports players/teams/leagues/events and industry partners?*

Malph Minns: *There are many different types of agency and consultancies. If you look at more mature sponsorship markets, like sports, you'll see that agencies play a key role in four main areas:*

1. *Sponsorship rights sales (on behalf of the league, event, team etc)*
2. *Sponsorship strategy (advising the brand on which sponsorships can help them deliver their objectives. This may extend into negotiation of specific partnerships)*
3. *Sponsorship activation (bringing to life the relationship between the sponsor and the rights holder, through delivering communications to the audience)*
4. *Sponsorship research and insight (providing data to help influence and evaluate sponsorship decision making, for both brands and rights holders)*

Agencies can specialise in one of these areas, or a number of them. The nature of agencies is that they work with a number of different brands, and rights holders, across the various verticals of sponsorship (e.g. sport, music, eSports etc) giving them a better understanding of the broader sponsorship market than any single rights holder or brand. This context is important in understanding value, as an eSports team or event isn't just competing against other eSports properties for sponsorship investment, but other rights holders in other in other verticals. This understanding is used by brands to help determine their own strategy.

Agencies also play an important 'bridging' role between rights holders and brands. You tend to find rights holders, especially in emerging markets like eSports, are experts in their own area (i.e. esports), but not in articulating this for people who aren't part of that scene. There isn't the expertise in eSports business, generally speaking, to undertsnad what brands want and how to shape their proposition to this. Equally, on the brand side, they are experts in their business and what they want to achieve, but not in the world of eSports. Therefore there is a need for an entity, often an agency, which has an under-

standing of both sides to bring them together. Agencies play an especially valuable role for non-endemic brands who need more help.

Furthermore, once a partnership has been established, agencies can (and do) play a vital role in ensuring the partnership delivers a return on investment for both sides, maximizing the opportunity of partnership renewals.

The one watch out for non-endemic brands is hiring an agency based on its brand name rather than it's specific eSports knowledge, capabilities and credentials. A brand doesn't know, what it doesn't know, and I have seen evidence before of agencies overstating their capabilities to brands purely to win the business. This is dangerous both to brands and rights holders as the chances of a successful relationship are seriously impacted. Brands need to do more due diligence before hiring agencies, and rights holders could assist non-endemic brands by recommending agencies whom they know understand the eSports market.

Author: *What characteristics define the target group "eSports fans"? What makes them especially valuable for sponsors/advertisers? What are the main advantages of an engagement in eSports to reach this target group?*

Malph Minns: *There is no such thing as 'an eSports fan'. There is no such thing as a 'sports fan'. It is one of the common mistakes made by both rights holders and brands in sponsorship. Fanbases are generally quite diverse and you may find there are five or six different types of fan in any one sport, let alone across sport (or eSports) more generally. There may indeed be similarities between different fan sets, e.g. demographic information, but we would advise rights holders undertake segmentation research to identify the types of fans there are and how best to engage with them.*

What we do know, however, is that eSports attracts a concentrated millennial fanbase, of largely males. And that a large portion of this fanbase is highly engaged in both participation and viewership of eSports. Whilst the relative current spend of millennial is smaller than other generations, it is the fastest growing as this generation progresses in life.

This demographic is hard to reach through traditional channels because they tend to spend a lot of their time online. In addition, a large percentage of millennials use ad blockers, this is believed to be even higher amongst the eSports audience. What makes eSports valuable to brands as an opportunity to engage this millennial audience therefore, is that sponsorship messaging can be part of the fabric of the content (i.e. not subject to ad blocking), rather than trying to interrupt what millennials are doing online (which is what advertising does)

Author: *How important are industry partners as sponsors for the competitive eSports scene nowadays?*

Malph Minns*: The importance of sponsors varies depending on which stakeholder you are within the eSports ecosystem. Suffice to say they will benefit stakeholders from a point of view of:*

- contributing to legitimacy of eSports
- income/revenue
- attracting new fans to the sport (non-endemic brands are likely to be larger, with more reach and capacity to make an impact that existing entities)
- professionalism of eSports
- positive change to the broader governance and integrity of the scene
- attracting more talent from outside eSports into the industry
- employment

To name a few

Author: *How is the "landscape" of sponsors traditionally composed in eSports? What are their main reasons and motives to sponsor eSports teams, leagues or events?*

Malph Minns: *Like many immature sponsorship marketplaces, the eSports sponsorship landscape is largely made up of endemic brands. You then have the usual non-endemic sponsorship early adopters of brands like Coca Cola and Red Bull, who are not risk averse and take the time to understand the landscape before making more serious plays.*

We’re now starting to see other non-endemic brands make light touch entries into the market whilst they feel their way in. Note that in a lot of cases the re-

ported value of some of these deals is largely made up from an ad spend rather than actually true sponsorship (e.g. ELeague partner value is delivered largely through traditional broadcast ad spots rather than genuine sponsorship activation)

The motivation of brands in eSports sponsorship is no different to any other sort of sponsorship. Brands want to connect to audiences, via a passion point, in order to change a behaviour or attitude of that audience to their brand. The specific behavior or attitude that is being influenced could be be different for each brand and each element of the audience. It could be a simple brand awareness play, it could be a familiarity play, it could be to associate certain brand attributes (e.g. innovation, high tech etc) or for endemic brands, it could be more directly commercial purchasing.

Author: *What are the main differences between Asia and the Western world in terms of eSports sponsoring? How similar/different is the situation in Northern America and Europe?*

Malph Minns: *I can't talk to eSports specifically as I don't have experience of working with eSport sponsor brands in Asia and the US. But if you look at how brands use sponsorship in Asia in sport, for them it is more of a badging exercise. By that I mean it is about getting their logo in as many places as possible – it's more about visibility.*

In Europe there is generally a more integrated approach where sponsorship assets are used as part of a broader marketing strategy. Branding is only one element, but other assets are used in the delivery of campaigns to engage both current and potential customers within the fanbase.

Author: *How did the sponsor landscape develop in the past years? What role do non-endemic sponsors (3rd/4th degree) play today?*

Malph Minns: *Endemic sponsors still dominate the landscape in terms of volume of brands involved, as you would expect. There is a growing family of non-endemic sponsors joining, more around event sponsorship than team at the minute. What you'll find is that non-endemic sponsors may be less in number of brands, but their relative sponsorship investment will be far larger. Equally they* *will do more to integrate the sponsorship into their marketing communications as they look to build affinity with the fanbase. This has yet to happen at any real scale, but we'll see this in the next phases of maturity in the market.*

Author: *What significance may non-endemic sponsors have in the future and what consequences and chances may an increase in their appearance have for the eSports ecosystem?*

Malph Minns: Non-endemic sponsor involvement is likely to trigger a few changes, including:

1. *More agencies/third parties (e.g. law firms, wealth management, agents etc) coming into esports*
2. *More money coming in*
3. *Broadcasters developing their plays*
4. *Awareness of eSports outside of the existing gaming community*

These changes are likely to result in both positive and negative consequences, including:

1. *Increase in value of sponsorship deals (could affect the value endemic sponsors are bale to generate)*
2. *Wider traditional broadcast and media coverage (in news as well as showing live events)*
3. *Increase in staff and player income*
4. *Aggregation of events and more structured seasons*
5. *More of a focus from country law makers*
6. *A more concerted push for independent and professional governance*
7. *New fans coming into eSports both from a point of view of participation and fandome*
8. *Reduction in stigma surrounding gamers*
9. *Unionisation of different stakeholder groups*
10. *Professionalisation of how different stakeholders are run e.g. fit and proper tests, better contracts etc*
11. *Outside investors and marketmakers coming in to try and own a piece of the ecosystem*

12. *Aggregation of businesses (e.g. more businesses buying one another or bing bought by external parties)*

Author: *What prejudices and obstacles are there that hinder non-endemic brands/companies to start engaging in eSports? What do non-endemic brands need to consider to get highly accepted and positively recognized within the eSports scenes to have successful co-operations?*

Malph Minns: *A lot of decision makers at non-endemic brands are of an age that they aren't gamers and so can't immediately relate to the scene and the fans. This causes an investment problem unless there is a concerted effort to educate these people and show them the opportunities and potential, rather than just telling them.*

They will carry with them prejudices of their youth around gaming being for people with no friends, it being unhealthy and restricting other more physical activity etc.

Brands are very conscious about their own public image. This is both from a perspective of what they do as a business, and what they invest in. Therefore obstacles to eSports investment include:

- *Violence of games*
- *Doping issues*
- *Match fixing issues*
- *Poor treatment of players and teams*
- *Lack of professional skills/expertise in certain eSports businesses*
- *Lack of infrastructure around discipline and dispute resolution*
- *Fragmented nature of eSports and no common rule sets etc*
- *Poor to little governance*
- *Lack of a single competition calendar*
- *Perceptions of addicition and how this is managed*
- *Diversity and equality issues*
- *The power of the publishers to essentially have veto over all and any elements of eSports (within the titles they govern)*

They must show an understanding of the audience and either add value to their consumption of eSports as a fan, or solve an issue/challenge fans have with what they love. Meanwhile, they always need to act authentically and with respect. The same can be said of endemic brands though. Just being a brand that is more obviously relevant to eSports and the audience doesn't create a change in attitude and behaviour. Too many endemic brands get lazy with their sponsorship and think having a presence is enough. Like any brand you need to show why you're relevant and worth consideration.

Author: *What are the most significant differences between sponsoring in traditional sports and eSports? What is special about sponsoring in eSports in comparison?*

Malph Minns: *Other than all the differences outlined above from a point of view of market maturity, the biggest difference is that eSports offers a fairly unsaturated market for brands to engage people in without the noise of loads of other brands trying to catch fans attention too.*

Brands have an opportunity in eSports to own part of the ecosystem and the relative costs of entry are much smaller than in traditional sports.

In addition, eSports offers access to a global audience more readily. Engagement is also largely online, making it easier to measure the impact. It is one of the paradoxes of esports vs sport. Sport is trying to understand and leverage the benefit of digital, whist eSports is already digital and trying to work out how to leverage the value of traditional media and 'tangible live experience' e.g. stadia based. Finally, very few properties in sport have such a concentration of the same demographic of audience. Usually it's a lot more diverse and so your messaging is only ever relevant to a portion of the audience.

Author: *What developments do you predict for the future of eSports (next 5-10 years) in Western culture? Which position to traditional sports may eSports gain in case it gets more "mainstream attention"?*

Malph Minns: *There are many different aspects to answering this question. Unequivocally we'll see more non-endemic brands entering. A lot of the challenges outlined earlier, will have been addressed or will be in the process of being* *addressed (i.e. the obstacles), conversations about entering the Olympics will hold more weight, perceptions of eSports and gamers will have moved on considerably from where they are today, new titles and technologies will be part of the core of eSports (e.g. VR) playing and viewing experiences, aggregation will have taken place (and will continue to take place) with companies buying one another, publishers will be far more active in the space generating more direct revenues from eSports.*

There is too much to say!

Author: *Thanks a lot for your valuable insights and information. Good luck for the future to you and Strive Sponsorship.*

Appendix 21 Written interview with Alex Fletcher

Interview via E-Mail with Mr. Alex Fletcher about eSports - conducted by the author

Karlsruhe / London, 24.06.2016

Alex Fletcher

Founder and CEO Entiva Group

Author: *Hello Mr. Fletcher. First of all, I'd like to thank you a lot for contributing to my thesis with your expertise and knowledge. To start off the interview, please explain your job at Entiva Group and your overall relation to eSports and sponsoring in eSports.*

Alex Fletcher: *I am founder and managing director at Entiva Group, an eSports strategic consulting agency. We help customers achieve returns from the eSports marketplace, which includes advisory and strategic support for sponsorship programs.*

Part 1: Sponsoring

Author: *How important are agencies and consultancies for fixing partnerships of eSports players/teams/leagues/events and industry partners?*

Alex Fletcher: *The main issue facing partnerships in eSports is the cultural and knowledge gap between those familiar with eSports, and the wider gaming industry, and those unfamiliar. Agencies and consultancies help bridge this gap.*

Author: How important are sponsors for the competitive eSports scene nowadays?

Alex Fletcher: *Competitive video game scenes are literally run on sponsorship fuel. Aside from a handful of game developers and tournament organizers, revenues are basically limited to sponsorship dollars.*

Author: *What characteristics define the target group "eSports fans"? What makes them especially valuable for sponsors/advertisers? How will this group and its subgroups develop?*

Alex Fletcher: *These audiences are largely under 34 years of age, largely tech savvy, digital natives and difficult to reach using traditional advertising methods. Unfortunately, "eSports fans" are being grouped into a collective that obfuscates the segmentation which drives its subgroups. For example, fans of League of Legends feature a different profile from those of Counter-Strike: Global Offensive.*

Author: *How is the "landscape" of sponsors traditionally composed in eSports? What are their main reasons and motives to sponsor eSports teams, leagues or events?*

Alex Fletcher: *The landscape is split between endemic and non-endemic sponsors, of which the former composes ~95%. For endemic sponsors, or those directly serving the market for video game play, competitive gaming is an essential channel for selling products. For non-endemics eSports is emerging as a cost-effective way to reach valuable audiences.*

Author: *What are the main differences between Asia and the Western world in terms of eSports sponsoring? How similar/different is the situation in Northern America and Europe?*

Alex Fletcher: *Despite the fact that eSports is a largely global landscape, these markets are fundamentally different. Mostly due to the attitudes and acceptance of video games within mainstream culture, e.g. Asia is far more open to professional gamers as potential endorsement candidates.*

Author: *How did the sponsor landscape develop in the past years? What role do non-endemic sponsors (3rd/4th degree) play today?*

Alex Fletcher: *The sponsor landscape in eSports has grown from an ecosystem of endemics to an emerging sponsorship platform for a growing number of brands outside the video game industry.*

Author: *What significance may non-endemic sponsors have in the future and what consequences and chances may an increase in their appearance have for the eSports ecosystem? What obstacles are there that are hindering non-endemic brands/companies to start engaging in eSports?*

Alex Fletcher: *Despite increasing media buzz about the eSports opportunity, education is currently the biggest gap for non-endemic brands. Once this gap is bridged for more brands, sponsorship revenues will grow by 2-3 times current levels.*

Author: *What prejudices and obstacles are there that hinder non-endemic brands/companies to start engaging in eSports? How can or will they be erased? What do non-endemic brands need to consider to get highly accepted and positively recognized within the eSports scenes? How can they build the 'connection' with eSports, that they don't have naturally like endemic brands?*

Alex Fletcher: *Success for non-endemic brands begins with recognizing that eSports, more than anything else, is an export of gaming culture. Despite the push to recognize competitive video games as a sport, its core is a worldwide community of gamers. Approaching eSports like futbol, basketball, or tennis is an unsound strategy.*

Author: *What are the most significant differences between sponsoring in traditional sports and eSports? What is special about sponsoring in eSports in comparison?*

Alex Fletcher: *Segmentation is the biggest difference. The crossover in traditional sports is far different from that in eSports. Since video game titles form the basis of eSports, and there is a strong link between playing the game and watching it played, there is less general crossover between eSports audiences than in traditional sports.*

Author: *Are there any other important aspects concerning sponsors and sponsoring in eSports?*

Alex Fletcher: *Commercial partnerships with eSports teams, events, leagues are a great learning tool. Sponsors should look at leveraging these agreements as a chance to establish a competitive edge in reaching eSports audiences; especially for establishing best practices and tools for future activations in the space.*

Part 2: Governing

Author: *How do you evaluate the situation of governing bodies in eSports? Which role do associations and publishers play? How will the role of them and their interaction with each other develop? Will associations gain power in the future? Which situation in matters of the relation between associations and a game's publisher (and their respective degree of influence) do you evaluate as the "healthiest situation" for the eSports scene of a game? How could such a best-case-situation be reached?*

Alex Fletcher: *Effective governance is only possible through cooperation with game publishers. There is no eSport without the game. As a result, governing bodies that attempt to form without input from publishers will eventually run afoul of their control. The healthiest situation is non-profit groups that involve major publishers from the onset, even if just by proxy. This will be best achieved by learning and involving others outside the video game industry, including traditional sports.*

Part 3: Risk Factors

Author: *As investments and predicted growth rates of the industry are very high: do you see the risk of creating a "bubble" by 'over-investments'? What further risks are there for eSports (e.g. doping issues, match making,...)?*

Alex Fletcher: *The biggest risk for eSports is unsustainable investment, where money is poured into areas with little-to-no defined return-on-investment. For example, outside investors are buying eSports teams but without the guidance of leagues and federations, successful outcomes are largely case-by-case. Match fixing represents a substantial issue but its solution will require widespread governance and integrity standards.*

Part 4: Future development

Author: *What do you predict for the overall eSports scene for the next 5 years?*

Alex Fletcher: *Electronic sports will continue to mature as an industry and phenomenon. Further penetration onto linear TV will bring content to more mainstream audiences and boost the number of fans. The landscape is due for a new, popular eSports title that is designed for competitive success. As a result, the concept of what is an eSport will continue to expand, for better or worse.*

Author: *Thanks a lot for your valuable insights and information. Good luck for the future to you and Entiva Group.*

Appendix 22 Written interview with Marco Niemann

Interview via E-Mail with Mr. Marco Niemann about ESL, ESL Meisterschaft 2016, and its partners - conducted by the author in German

Karlsruhe / Köln, 20.05.2016

Marco Niemann

Senior Sales Manager Electronic Sports League Turtle Entertainment GmbH

Author: *Hallo Herr Niemann. Zunächst möchte Ich mich recht herzlich für Ihre Unterstützung und das Zurverfügung-stellen von weiteren Informationen und Ihrer Expertise bedanken. Zum Beginn des Interviews, wäre es hilfreich, wenn Sie sich und Ihre Arbeitsstelle vorstellen könnten.*

Marco Niemann: *Ich arbeite als Senior Sales Manager für Turtle Entertainment, dass ist die Firma hinter der ESL. In meiner Position unterstehen mir zwei Sales Manager sowie weitere Mitarbeiter, die dabei helfen, unsere Kooperationen mit Partnern umzusetzen. Ich selbst betreue vor allem wichtige Kunden der ESL, seien es globale Partner wie Logitech aber auch wichtige Partner im nationalen Bereich wie Wüstenrot.*

Author: *Welches Leistungsspektrum umfasst das Angebot der ESL und in wie vielen Ländern ist sie in welchem Ausmaß aktiv? In welchen Bereich neben der Organisation von Ligen und Turnieren ist die ESL bzw. Turtle Entertainment noch tätig?*

Marco Niemann: *Unser Angebots-Portfolio ist sehr umfangreich. Neben der Ausrichtung unserer großen Evens wie die ESL One oder Intel Extreme Masters und der damit verbundenen Möglichkeit für Unternehmen Sponsorings, Stände oder andere Brand-Aktivierungs-Maßnahmen einzubuchen, sind auch klassische Mediakampagnen (Banner etc.), Influencer-Kampagnen oder TV-Leistungen möglich. Wir haben mittlerweile ein Netzwerk von mehr als 400 Influencern,* *sprich Twitch- und YouTube-Größen, in unserem Netzwerk, welche wir mit den Produkten und Marken unserer Kunden zusammenbringen können. Da wir über all auf der Welt lokale Büros betreiben und in den wichtigsten Märkten (bspw. Deutschland, England, Niederlande, Polen, USA, Australien uvm.) voll ausgestatte TV-Studios haben, können wir unseren Kunden auch lokale Events anbieten.*

Author: *Wie viele deutsche Spieler sind bei der ESL registriert?*

Marco Niemann: *Insgesamt sind auf der ESL Plattform 6,1 Mio. User registriert. Ein Großteil davon kommt aus Deutschland.*

Author: *Wie wichtig sind Sponsoren für die ESL insbesondere für das Durchführen von Veranstaltungen wie der ESL Meisterschaft und Großveranstaltungen wie der ESL One Cologne/Frankfurt/Katowice?*

Marco Niemann: *Sponsoren gehören auch weiterhin zu einem extrem wichtigen Standbein beim veranstalten unsere Events. Sponsoring macht bei uns einen Anteil von 30-40% der Einnahmen aus. Dazu kommen dann Einnahmen von weiteren Lizenzen, Ticketing und Merchandising.*

Author: *Welche Rollen spielen die Spielepublisher für die ESL und Ihre Angebote?*

Marco Niemann: *Auch die Spielepublisher gehören zu unseren wichtigsten Partner. Am Beispiel der ESL One Cologne, wo Valve das Turnier als offizielles CS:GO Major mit einem Preisgeld in Höhe von $1 Mio. unterstützt, wird deutlich, wie eng wir mit den großen der Branche zusammenarbeiten.*

Author: *Wer sind die wichtigsten/größten Sponsoringpartner der ESL?*

Marco Niemann: *Generell sind alle unsere Partner wichtig für uns. Dabei geht es nicht primär um das Budget, welches hinter den Kooperationen steht. In diesem Jahr gehören aber sicherlich Intel, Logitech, paysafecard, HyperX, Red Bull aber auch ein Wüstenrot zu unseren wichtigsten Partnern.*

Author: *Für die ESL Frühlingsmeisterschaft wurde die Bausparkasse Wüstenrot als Hauptsponsor gewonnen. Bitte beschreibe den (auch historischen) Stellen-*

wert der ESL Meisterschaft innerhalb des ESL Angebotsspektrums und des deutschen eSports.

Marco Niemann: *Die ESL Meisterschaft ist für uns ein sehr wichtiges Produkt, auch wenn es die Kommentare der Community auf einschlägigen Szene-Seiten manchmal anders aussehen lassen. Mit dieser nationalen Liga schaffen wir für deutsche Spieler eine Plattform, sich zu zeigen und nach oben zu spielen. Schließlich gibt es auch auf nationaler Ebene eine eSports-Szene. Natürlich kann die ESL Meisterschaft nicht mit unseren oder anderen europäischen oder globalen Events mithalten, was bspw. das Preisgeld angeht, dass muss sie aber auch gar nicht. Auch für viele nationale Werbetreibende ist die ESL Meisterschaft eine ideale Plattform, die sehr kaufkräftige deutsche Zielgruppe anzusprechen. Des Weiteren wächst die ESL Meisterschaft in der Zuschauerschaft von Saison zu Saison. Das zeigt uns, dass dieses Produkt definitiv eine Daseinsberechtigung hat.*

Author: *Welche Bedeutung hat die Wüstenrot-Kooperation für die ESL?*

Marco Niemann: *Diese Kooperation zeigt vor allem, dass auch Unternehmen, die nicht direkt auf dem Gaming- oder PC-Umfeld kommen, eSport als Kommunikationsplattform für sich entdecken. Wenn dann noch ein Kunde wie Wüstenrot eine ESL Meisterschaft unterstützt, ist das besonders schön. Wüstenrot ist für die ESL Meisterschaft ein sehr wichtiger und starker Partner, der die Kooperation auf vielen Wegen aktiviert und auch der Community durch Gewinnspiele oder besonders hochwertigen Content etwas zurückgibt. In Duisburg hatten die Besucher darüber hinaus die Chance, am Stand von Wüstenrot Autogramme von ihren Stars zu bekommen.*

Author: *Zur medialen Reichweite der Meisterschaft: Wie viele Zuschauer waren in der Open-Air-Bühne Gießhalle 1 im Landschafts-Park Duisburg vor Ort? Wie viele (unique) Viewer wurden über die diversen ESL TV Streams erreicht? Wie viele (unique) Leute haben die Website der Meisterschaft im Kooperationszeitraum aufgerufen?*

Marco Niemann: *Wir hatten insgesamt 1.500 Besucher in Duisburg, was für ein nationales Event mehr als gut ist. Der Sonntag war sogar restlos ausverkauft, was die Tickets anging. Was die Zahlen auf dem Stream angeht, kann ich leider* *nicht allzu sehr ins Detail gehen, wir erreichen mit der ESL Meisterschaft allerdings eine niedrige siebenstellige Reichweite (Unique).*

Author: *Wie kam es zum Kontakt und schließlich zur Kooperation mit Wüstenrot? Welche Argumente waren ausschlaggebend für ein erfolgreiches Zustandekommen der Partnerschaft von ESL-Seite her und wie konnte man Wüstenrot von der Attraktivität des Sponsorings und Werbens im eSports bzw. deutschen ESL-Umfeldes überzeugen?*

Marco Niemann: *Die ESL ist im Werbemarkt breit aufgestellt und pflegt Kontake zu vielen Unternehmen, auch wenn sie bis dato noch nicht im eSport aktiv geworden sind. Dazu gehören auch bekannte Werbeagenturen, die im Falle von Wüstenrot ebenfalls involviert waren. Wir saßen gemeinsam an einem Tisch und haben uns die Bedürfnisse und Ziele von Wüstenrot angeschaut und dann ein Paket erarbeitet.*

Author: *Wüstenrot ist eine Marke, die nicht direkt im eSports oder der Computer- und Telekommunikationsbranche angesiedelt ist. Hat die ESL weitere Partnerschaften mit nicht eSports verwandten Marken? Aus welchen Branchen gibt es weitere Anfragen? Welche Entwicklung erwartet man in Zukunft für das Interesse von nicht verwandten Marken und welche Chancen sieht man darin?*

Marco Niemann: *Absolut. Unser Ziel ist es und muss es sein, zukünftig weiterer Marken in den eSports zu bringen, die bis dato nur im klassischen Sport werben. Wie oben erwähnt, stehen wir hierzu im ständigen Austausch mit Werbetreibenden und Agenturen. Und natürlich laufen bereits Gespräche im Hintergrund. Beispielsweise haben wir just heute GFUEL als neuen Energy-Drink Partner für die IEM vorgestellt.*

Author: *Gibt es eine bestimmte Strategie den potentiellen Partnern aus anderen Branchen den häufig vorherrschenden "Skeptizismus" gegenüber eSports zu nehmen?*

Marco Niemann: *Aufklärung. Wir sprechen mit diesen Partnern extrem viel über die aktuellen Geschehnisse aus dem Bereich. Wir halten Workshops ab und sind auf Fachtagungen mit Präsentationen präsent. Darüber hinaus wird der* *eSport aktuell von klassischen Medien mehr und mehr wahrgenommen, was ebenfalls immens hilft.*

Author: *Wird es auch in Zukunft Kooperationen mit Wüstenrot geben?*

Marco Niemann: *Aktuell laufen Gespräche, wenn nicht in diesem Jahr, ganz bestimmt aber wieder in der Zukunft. Die Kooperation war für beide Parteien sehr erfolgreich, dementsprechend werden wir Wüstenrot ganz bestimmt auch zukünftig zu unseren Partnern zählen dürfen.*

Author: *Vielen Dank für Ihre Unterstützung und die vielen Informationen. Ich wünsche Ihnen und der ESL eine erfolgreiche eSports-Zukunft.*

Marco Niemann: *Vielen Dank für das Interview.*

Appendix 23 Written interview with Frank Dolipski

Interview via E-Mail with Mr. Frank Dolipski about Wüstenrot's engagement in eSports - conducted by the author in German

Karlsruhe / Ludwigsburg, 20.04.2016

Frank Dolipski

Marketing Referent
Wüstenrot und Württembergische AG
KK Brandmanagement

Author: *Hallo Herr Dolipski. Zunächst möchte Ich mich recht herzlich für Ihre Unterstützung und das Zurverfügungstellen von weiteren Informationen und Ihrer Expertise bedanken. Zum Beginn des Interviews, wäre es hilfreich, wenn Sie sich und Ihre Arbeitsstelle vorstellen könnten.*

Frank Dolipski: *Frank Dolipski, 43 Jahre alt, seit 6,5 Jahren für Wüstenrot & Württembergische AG im Bereich strategische Markenkommunikation tätig. Dies umfasst sowohl die Markenkommunikation mit Awareness-Zielen, als auch Performancekampagnen mit klaren Lead-/Sale-Zielen.*

Author: *Welche Beteiligung haben Sie an der 'Endlich genau mein Ding-Kampagne' und an der Kooperation mit Turtle Entertainment bzw. der ESL und ESL Meisterschaft?*

Frank Dolipski: *Die Kampagne und das Sponsoring der ESL Frühjahrsmeisterschaft ist in der Konzerneinheit Brandmanagement zusammen mit Agenturpartnern entstanden und umgesetzt worden – deren Bestandteil mein Aufgabenbereich auch ist.*

Author: *Bitte beschreiben Sie den Prozess wie es zu der Idee und Entscheidung kam als Sponsor und Werbetreibender im Bereich eSports aufzutreten. Aus wel-*

chen Motiven entschied man sich dafür? Welche Potentiale wurden/werden darin gesehen?

Frank Dolipski: *Die erste Überlegung war ganz einfach: Welche Themen haben eine hohe Relevanz für die junge Zielgruppe? Wüstenrot möchte die Interessen und Bedürfnisse der Zielgruppe ernst nehmen und ihr dort auf Augenhöhe begegnen. E-Sports ist international aber auch gerade in Deutschland ein rapide wachsendes Feld, mit einer begeisterten und engagierten Anhängerschaft. Als Hauptsponsor der ESL Meisterschaft Frühlingssaison tritt Wüstenrot Bausparkasse positiv in den Fokus einer Zielgruppe, die bis dahin wenig mit der Marke in Berührung gekommen ist. Durch die Erstellung einer Videoserie, in der Wüstenrot authentisch und ehrlich mit bekannten Figuren der E-Sportsszene spricht, schafft das Sponsoring eine Brücke zur Jugendkampagne, und gewinnt echte Fürsprecher in der Zielgruppe.*

Author: *Worin sieht Wüstenrot die Hauptvorteile als Sponsor und nicht als 'normaler Advertiser' aufzutreten?*

Frank Dolipski: *In der Verbindung liegt die Kraft. Das Sponsoring wird mit „normalen" Werbemittelveröffentlichungen zusätzlich unterstützt. Sponsoring schafft Markenpräsenz und Aufmerksamkeit, die flankierenden Werbemittel kommunizieren darüber hinaus den Produktvorteil von Jugend-Wohnsparen.*

Author: *Weshalb entschied man sich für eine Kooperation mit der ESL-Meisterschaft und dem Hauptsponsorings dieses Events?*

Frank Dolipski: *Weil eine Deutsche Meisterschaft und deren mediale Verbreitung dem Kommunikationsgebiet der Wüstenrot Bausparkasse entspricht und wir mit der ESL einen kompetenten Partner an der Seite haben.*

Author: *Welche Sponsoring- und Werbemaßnahmen umfasst die Kooperation im Detail? Welche weiteren Werbemaßnahmen wurden/werden getätigt und wie ist die Kooperation in die Gesamtmarketingstrategie integriert?*

Frank Dolipski: *Das Engagement wird über die Kanäle der ESL Deutschland (Social Media Kanäle, Website der ESL Meisterschaft, Live-Übertragung der Spiele), über die Social-Media Kanäle von Wüstenrot & Württembergische, über* *die Social-Media Kanäle der Videoprotagonisten, Blogs und Gaming-Portale verbreitet. Als Linkziel und Kampagnenhub dient die Landingpage www.wuestenrot.de/ESL, auf der die Zielgruppe, die komplette Videoserie anschauen kann und durch ein Gewinnspiel die Chance auf ein exklusives VIP Erlebnis bei der gamescom 2016 hat. Die Aktivierung des Engagement findet rein digital und beim Finale der Meisterschaft durch einen Aktionsstand statt. Das Engagement ist in eine Jugendkommunikation eingebunden, die wiederum auch in TV und Kino erfolgt.*

Author: *Welche Ziele (primär/sekundär, qualitativ/quantitativ, kurzfritig/langfristig) werden mit der Kampagne und speziell der Sponsoring-Kooperation mit der ESL-Meisterschaft verfolgt bzw. sollen erreicht werden?*

Frank Dolipski: *a) Wüstenrot als Finanz-Partner für die Zukunft bekannt machen,*
b) Wüstenrot als Wunschverwirklicher mit dem Produkt Wohnsparen zu platzieren.
Author: *Möchte Wüstenrot ein bestimmtes Image in der Zielgruppe aufbauen, dass es von dem Image anderer Bausparkassen bzw. allgemein dem Image der Bausparbranche differenziert?*

Frank Dolipski: *An erster Stelle steht, in der jungen Erwachsenen Zielgruppe, Markenbekanntheit aufzubauen. Ohne Bekanntheit hat eine Marke gar kein Image. Mit dem Sponsoring der ESL Frühlingsmeisterschaft – also dem eSport Bereich, ist natürlich auch das Ziel verbunden ein Image zu fördern, welches eher modern, dynamisch als verstaubt und träge wahrgenommen wird. Markensympathie ist hier ein wichtiger Faktor. Eine Marke aus dem Finanzbereich muss nicht zwingend als cool, jung, visionär wahrgenommen werden um erfolgreich zu sein – sympathisch und vertrauensvoll aber durchaus.*

Author: *Wie wird eine Verbindung zwischen Wüstenrot und seinen Produkten/Dienstleistungen und dem eSports und der ESL hergestellt? Wo ist der "gemeinsame Nenner"?*

Frank Dolipski: *Sein eigenes Ding machen, die eigenen Wünsche erfüllen, unsere fünf ProGamer/Influencer-Partner machen es vor. „Mach auch du dein Ding“*

- bei finanziellen Dingen kann Wüstenrot mit dem Produkt Wohnsparen für junge Leute helfen. Das ist die Verbindung zu den Interviewfilmen mit den ProGamern und Kennern. Diese Aussage wird über die begleitenden Werbemittel, in der das Wohnsparen präsentiert wird und über die Onlineseite, die mit allen digitalen Sponsoringelementen verbunden ist transportiert.

Author: *In welcher Art und Weise werden qualitative oder quantitative Erfolgskontrollen der Kooperation durchgeführt (werden)?*

Frank Dolipski: *Das Engagement wird mit einer eigens aufgesetzten Marktforschung begleitet. Null-, Zwischen und Abschlussmessung werden uns im Nachgang genau Informationen über die Entwicklung der KPI's im Kommunikationsverlauf aufzeigen.*

Author: *Für welchen Zeitraum läuft der momentan bestehende Kooperationsvertrag? Wird eventuell eine Verlängerung angedacht? Wird sich Wüstenrot auch in Zukunft weiterhin im eSports präsentieren?*

Frank Dolipski: *Das Sponsoring umfasst die Frühlingsmeisterschaft 2016. Eine Verlängerung und ein weiteres Engagement ist nicht ausgeschlossen – bei positiver KPI-Entwicklung.*

Author: *Vielen Dank für Ihre Unterstützung und die vielen Einsichten in Ihre Kampagne. Ich wünsche Ihnen und Wüstenrot viel Erfolg für die Zukunft und bin gespannt, ob und wie man Wüstenrot in Zukunft im eSports antreffen wird.*

Appendix 24 SPSS outputs of conducted statistical analyses

One-sided independent sample t-test (α = 0.05) for Q7.1 and Q5.1:
Wüstenrot's perception at ESLM vs. Wüstenrot's image in the online survey

		t-test for Equality of Means						
							90% Confidence Interval of the Difference	
		t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
Jung	Equal variances assumed	-8,228	774	,000	-,948	,115	-1,138	-,759
	Equal variances not assumed	-7,636	193,966	,000	-,948	,124	-1,154	-,743
Dynamisch	Equal variances assumed	-6,939	774	,000	-,830	,120	-1,026	-,633
	Equal variances not assumed	-6,742	202,682	,000	-,830	,123	-1,033	-,626
Modern	Equal variances assumed	-9,231	774	,000	-1,201	,130	-1,415	-,987
	Equal variances not assumed	-9,355	211,970	,000	-1,201	,128	-1,413	-,989
Emotional	Equal variances assumed	-5,156	774	,000	-,660	,128	-,871	-,449
	Equal variances not assumed	-5,439	222,185	,000	-,660	,121	-,861	-,460
Freundschaftlich	Equal variances assumed	-7,408	774	,000	-,977	,132	-1,194	-,760
	Equal variances not assumed	-6,932	195,448	,000	-,977	,141	-1,210	-,744
Nah	Equal variances assumed	-5,578	774	,000	-,738	,132	-,955	-,520
	Equal variances not assumed	-5,466	204,459	,000	-,738	,135	-,961	-,515
Sympathisch	Equal variances assumed	-6,239	774	,000	-,758	,121	-,958	-,558
	Equal variances not assumed	-6,741	229,031	,000	-,758	,112	-,943	-,572
Vertrauenswürdig	Equal variances assumed	-2,288	774	,022	-,301	,131	-,517	-,084
	Equal variances not assumed	-2,399	220,591	,017	-,301	,125	-,508	-,094
Verständnisvoll	Equal variances assumed	-4,153	774	,000	-,472	,114	-,660	-,285
	Equal variances not assumed	-4,479	228,464	,000	-,472	,105	-,647	-,298

Conducted with IBM SPSS Statistics 21

One-sided independent sample t-test for Q8.1: Subsample A vs. Subsample B

		t-test for Equality of Means						
		t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	90% Confidence Interval of the Difference: Lower	Upper
Q8.1.4: Mit dem Sponsoring handelt Wüstenrot vorrangig eigennützig.	Equal variances assumed	-3,036	632	,002	-,377	,124	-,582	-,173
	Equal variances not assumed	-3,012	593,697	,003	-,377	,125	-,584	-,171
Q8.1.2: Wüstenrot hat ehrliches Interesse an eSports.	Equal variances assumed	2,454	632	,014	,317	,129	,104	,530
	Equal variances not assumed	2,442	604,979	,015	,317	,130	,103	,531
Q8.1.3: Wüstenrot ist ein glaubwürdiger eSports-Sponsor.	Equal variances assumed	1,638	632	,102	,228	,139	-,001	,457
	Equal variances not assumed	1,640	622,957	,102	,228	,139	-,001	,457
Q8.1.6: Wüstenrot sponsort die ESL Meisterschaft um den Spielern, Teams und Fans ein besseres Offline-Erlebnis zu ermöglichen.	Equal variances assumed	-,209	632	,835	-,029	,139	-,259	,200
	Equal variances not assumed	-,208	612,700	,835	-,029	,140	-,259	,201
Q8.1.5: Wüstenrot sponsort die ESL Meisterschaft um den deutschen eSports voranzubringen.	Equal variances assumed	1,100	632	,272	,160	,145	-,079	,399
	Equal variances not assumed	1,099	617,672	,272	,160	,145	-,080	,399
Q8.1.7: Wüstenrot ist mir durch das Sponsoring sympathischer geworden.	Equal variances assumed	1,848	632	,065	,266	,144	,029	,503
	Equal variances not assumed	1,855	627,179	,064	,266	,143	,030	,502

Conducted with IBM SPSS Statistics 21