Esports Feasibility Report

Games industry growth opportunities for Here East and Queen Elizabeth Olympic Park

Report by Here East and LLDC delivered in partnership with Arena Consultancy

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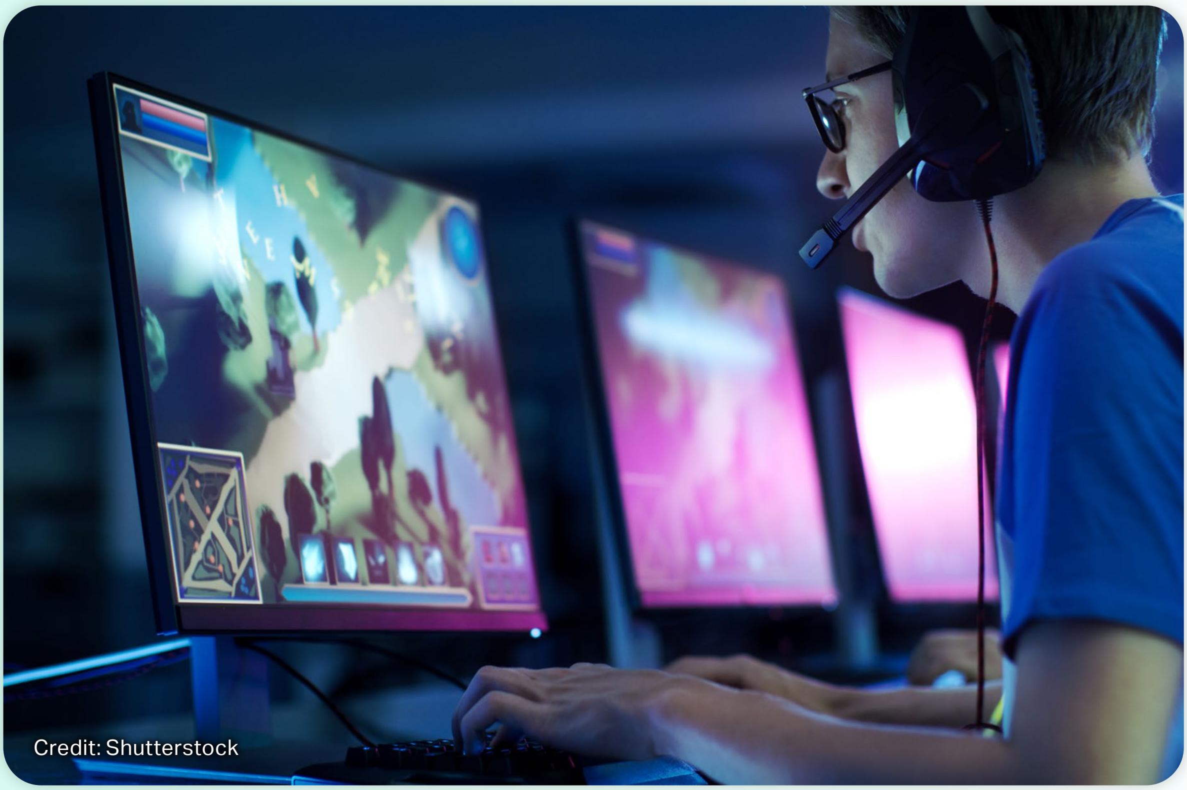


Credit: Shutterstock

Executive Summary

2021 marks 9 years since London hosted the 2012 Olympic and Paralympic Games. Since the closing ceremony of the 30th Olympiad in August 2012, there has been an exponential growth of the video games industry, aided by advances in technology, including mobile gaming. The global games market has more than doubled in value from $70.6Bn in 2012 to $180.1Bn in 2021 and with such growth come several questions for Here East and London Legacy Development Corporation to consider when reviewing plans for the next decade at Queen Elizabeth Olympic Park.

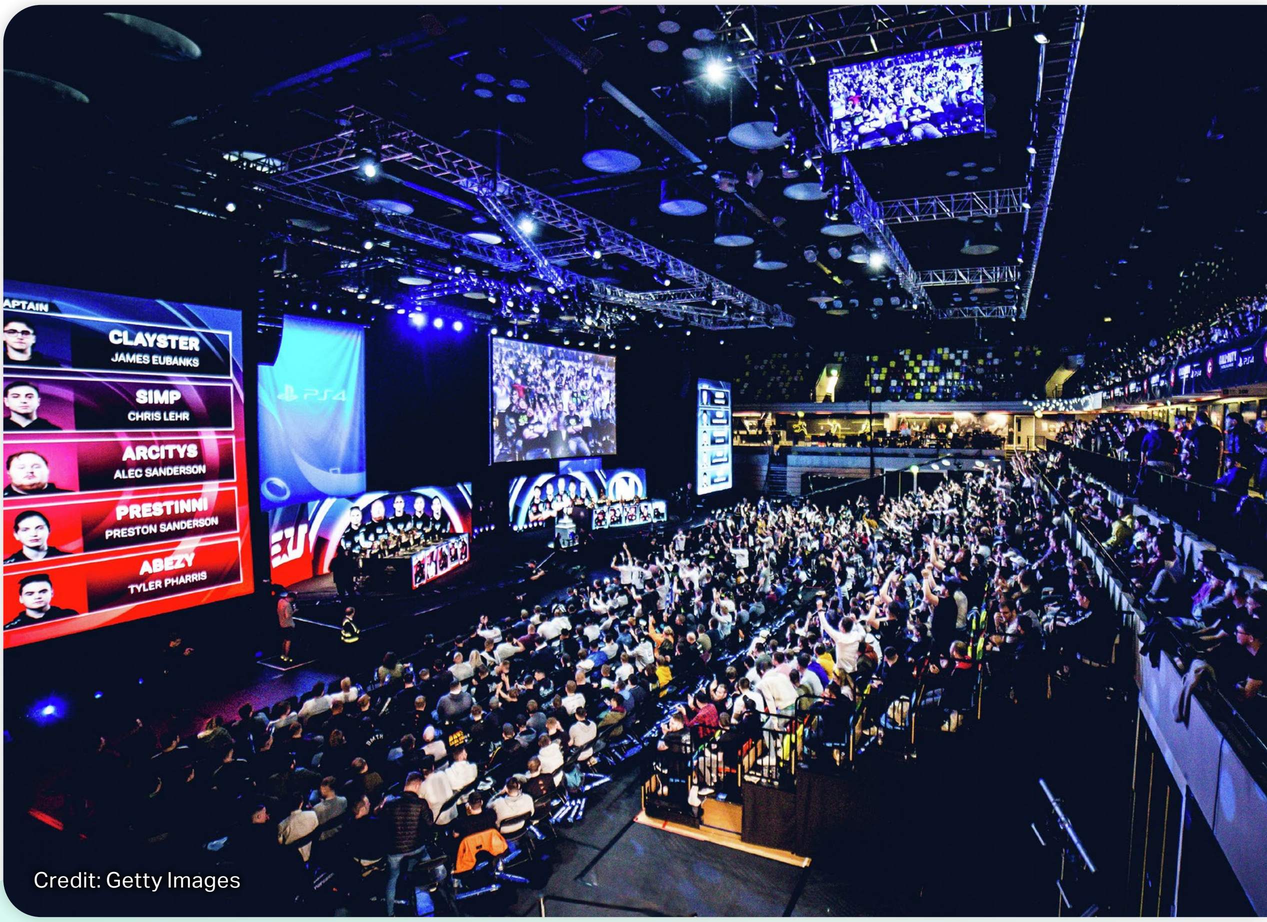
Can the growth of the games sector provide commercial opportunities to attract anchor tenants who are leading game development and who can benefit from both the presence of talent at Here East (for example, Staffordshire University's esports postgraduates) and collaborate with games developers such as Sports Interactive? Likewise, can the popularity of gaming and esports be used to engage with the wider host boroughs to support legacy promises of providing education and vocational opportunities to the local communities?

The success of the LLDC and Here East in developing a growing esports community underpinned by academia is allowing for the development of unique opportunities, none more so than the introduction of unique scholarships that draw upon both the commercial and education sectors to provide new pathways for successful applicants.

But it is the engagement with the wider community stakeholders that, if harnessed, can help sculpt how the video games and esports sector can be leveraged to provide unique opportunities that can educate, engage and inspire, and help fulfil legacy promises. Through interviews with commercial and community stakeholders, the opinions of those who can influence, as well as those who are influenced by the Park are noted. Furthermore, with such iconic landmarks in the Park as London Stadium, the Copper Box Arena and the Podium, there are numerous possibilities for utilising these publicly accessible buildings, as well as sustaining the growth momentum of the Park as a whole, to support the games cluster through hosting esports tournaments and engaging with local communities.

The future of the Park can be viewed through a series of recommendations/next steps that explore each solution as well as the complications and resolutions associated with them. Could the introduction of a dedicated internal and external communication expert help address some of the immediate issues identified to prevent businesses operating as “silos” with a lack of collective voice? Could such measures help deliver commercial opportunities that could see anchor tenants arriving at the Park to help realise both commercial and wider community engagement opportunities? How can the cyclical relationship between community, education and opportunity development help support commercial aspirations? Additionally, through an existing relationship with both tenants and associations such as UKIE (Association for UK Interactive Entertainment) and the British Esports Association, a community focused education programme could be devised to help support the pathways to foster talent and make the Park a cluster for games industry opportunities. The good news is that LLDC, Here East and other Park partners have rich experience in collaborating to create strong education and skills programmes that support talent pipelines in other growth sectors at the Park such as built environment, digital technology and creative business and so are readily able to bring this experience to bear in the games industry.

Introduction



Credit: Getty Images

As a centre of innovation with dark fibre low latency network connectivity and strong transport connections, the Park is perfectly placed to build on the work already undertaken to attract games industry stakeholders.

Furthermore, on an international level, the Park can develop existing relationships with esports teams and publishers to position itself as a destination for supporting and developing the games industry. As shown in figure 1, it is the close relationship between publishers producing commercially successful games and the competitive side of gaming (aka "esports") that can help sustain an ecosystem including education, opportunity and commercial prosperity.

While the locations of publishers, tournament organisers, teams and events can be anywhere in the world, given the large online viewership there are both commercial and community-focused benefits for clusters forming where ideas can be exchanged, teams can engage with their fans and publishers can collaborate with their communities. As detailed later in this paper, such clusters have developed internationally and have led to the growth of fresh opportunities, such as academic courses being developed in partnership with local games industry employers.

Given the location of the Park in London, in conjunction with the history of hosting tournaments at the Copper Box Arena, the presence of publishers already at Here East as well as "local" tier 1 esports teams such as Fnatic, Excel and the London Royal Ravens all having a home in London, the component parts exist for further collaboration to develop a games industry cluster at the Park.

> The Olympic and Paralympic Games can rightly claim to be the greatest show on Earth. They leave a host of indelible memories but also long-lasting benefits for the cities and countries that host them."

Tony Blair, 2004

Since the IOC chose London to host the 2012 Olympic and Paralympic Games, promises were made to offer long-term opportunities to the local communities as part of the legacy of the Games. With the continued success of Queen Elizabeth Olympic Park in attracting world-renowned businesses, this is an opportune moment to understand the potential that the games sector could offer to both fulfil legacy promises and build on the digital industry footprint that has already developed at Here East. The Park has huge potential to support the UK games industry as well as amplifying London as a global leader in game development and publishing.

This potential can be realised by attracting commercial stakeholders to support and develop pathways that provide greater vocational opportunities for youth communities. The Good Growth Hub, based on the Park, will not only provide advice and support to the huge pool of young talent that exists on and around the Park but it will also reach out to employers and emerging sectors like esports to understand their long-term talent needs and provide a long tail of suitably qualified and skilled employees for the future.

The Park has already attracted the attention of the UK games industry and can boast several tenants that are proud to call the Park their home, including Sports Interactive and Staffordshire University's esports degree campus. Furthermore, the Copper Box Arena has hosted several esports tournaments, including the inaugural Call of Duty homestead for the London Royal Ravens in 2019, as well as Clash of Clans and Minecraft tournaments.

Figure 1

Credit: www.stakrn.com

The UK Games Industry and Opportunities

Credit: Shutterstock

The games industry can be viewed from a commercial standpoint as a dominant force in the entertainment sector. With UKIE reporting that the esports sector in the UK ("The value of esports in the UK", 2020, UKIE / Olsberg SPI with Nordicity), excluding publishers and tourism spillovers, earned an estimated £60m in revenue in 2019, with year-on-year growth in Europe at 19.9% (Newzoo), the potential opportunities that this sector offers to both commercial and wider stakeholders is unparalleled.

The Growing Popularity of Gaming

> “The UK games industry is a cornerstone of the country’s cultural landscape and continues to work hard to create new, innovative and exciting content that consumers want to experience, and that helps to drive the industry forward year-on-year.”

Jo Twist, UKIE

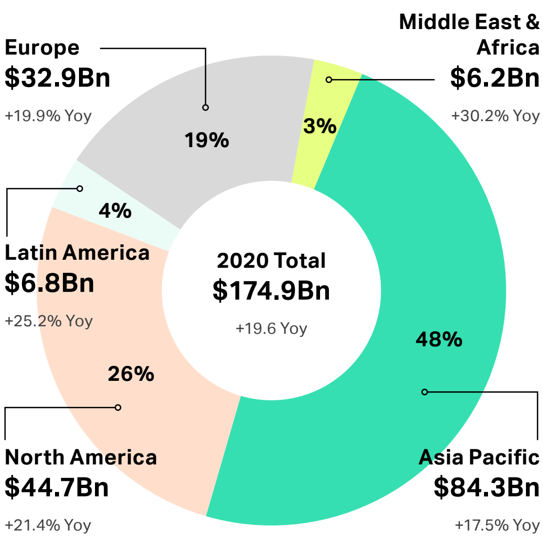
Figure 2

2020 Global Games Market
Per region with year-on-year growth rates

49%
of all consumer spending on games in 2020 will come from the US and China

$44.0Bn
China Total

$41.3Bn
US Total



Source: Newzoo

The UK Games industry has benefited from the rise in popularity of the sector and is now a major employer, offering 30,000 full-time jobs and supporting calls for more education to help develop future talent. The result of this has seen coding lessons now being integrated into classroom teaching agendas at the junior school level. Furthermore, UK government financial incentives have been created, such as the Video Games Tax Relief (VGTR), offering tax breaks for registered UK businesses that are developing video games. With reports that 68% of games supported by the VGTR would not have been made in the UK at all without it, the success is widely recognised (BBC).

> Esports has the potential to develop as an area of real national strength in the UK, building on our world-class video games, entertainment and sports sectors. The steep growth in online esports audience figures and the increasing number of esports events and investments in the UK indicate the existence of a solid foundation to build on."

Government response to the Digital, Culture, Media & Sport Select Committee Report on Immersive and Addictive Technologies

Figure 3

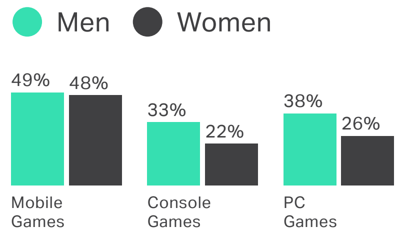
2018 Insights in to the UK's Games Market

$4.5BN
Games revenues

#6
World rank

37.3M
Players

Share of online population that plays



66%
of paying gamers spent money on in-game items or virtual goods in the past 6 months

31%
of men bought DLC/expansion pack

24%
of women bought power-ups

31%
of the online population watches gaming video content

34%
watch gaming video content on their PC

4%
watch but play less than once a month

6%
of those aware of esports watch esports video content several times per month

The most regularly watched franchise by the esports audience is Rocket League

64%
of esports viewers have a positive brand attitude towards Audi

49%
of esports non-viewers have a positive brand attitude towards Audi

Source: Newzoo

While DCMS noted in their response of 2019 a need for greater regulation when it comes to the content of games, specifically loot boxes and associated gambling mechanics, the response also noted esports is an area of "growth and innovation for the UK".

The government's response recognised that "esports has the potential to develop as an area of real national strength in the UK, building on our world-class video games, entertainment and sports sectors. The steep growth in online esports audience figures and the increasing number of esports events and investments in the UK indicate the existence of a solid foundation to build on". (Government response to the Digital, Culture, Media & Sport Select Committee Report on Immersive and Addictive Technologies.)

The Rise of the Franchise Model

With such government interest and support for the esports industry, it is worth recognising the changes and opportunities that have arisen in the past year on both a commercial and non-commercial basis.

The London Royal Ravens are the newly formed Call of Duty World League (CWL) team, who are based in London as the name suggests. With the decision to invest $25M to "buy" a league spot in the Activision Blizzard-owned CoD World League, Michael "Odee" O'Dell, General Manager of the newly formed team has had to train and make battle-ready this team of Brits competing and flying the Union Jack on the world stage.

With each of the twelve teams in the CWL competing across the globe and to an international audience of millions, the decision to enter (and invest) in this league has brought international attention to London. With plans to compete in front of a live audience twice a year being cut short to only one appearance at the Copper Box Arena in London due to the global pandemic (Jan 2020), the opportunities for fan engagement and possible training facilities being located in the Park still remain.

The training schedule for the team mimics that of a professional (traditional) sports team, with hours spent training on a weekly basis as well as a support team, including sports psychologist, nutritionists and physical trainers. Making it to the top of the esports ladder and staying there takes a lot of hard work. It takes clicks, sweat and maybe some tears to make the cut to not only join the team as a player but to succeed as a team.

The Ravens have a strong UK following which is yet untapped and the "bedroom to podium" stories of the five players competing in the CWL is an aspirational story for the wider community.

Credit: London Royal Ravens

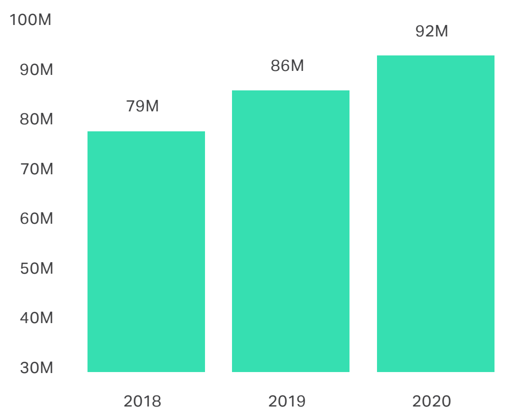
The Growth of Online Broadcasting

> “With the growth of online broadcast and the opportunity for anyone to produce content comes a new dawn for engaging with brands and communities.”

Figure 4

European Esports Audience Growth

Audience growth (aggregate of esports enthusiasts and occasional viewers)



Source: Newzoo

The esports industry has an issue to solve: persuading fans to leave the comfort of their homes (where they can watch live “online” tournaments) to travel to live “offline” events and experience the atmosphere of the tournament in person.

While numbers watching online far exceed those that can watch in the largest of stadia, it is the ability to broadcast to millions online that holds the key to the continued growth of this sector, as well as the arrival of “non-endemic” sponsors that want to market to this community.

As figure 4 shows, the numbers of those watching online is growing rapidly, with estimates that, by 2023, the numbers watching will increase by 10%. While other platforms have tried to compete, Twitch still holds the market share of gaming (and now traditional sports) with a staggering 205.6M hours streamed in Q3 2020 and a market share of 91.1% (Newzoo).

Such staggering numbers reflect the new paradigm in entertainment with on-demand content provision produced not only by broadcast studios but now (as Twitch testifies) by users themselves. This is reflected in the growth of influencers as a means of marketing to target audiences.

With the growth of online broadcast, and the opportunity for anyone to produce content, comes a new dawn for engaging with brands and communities.

The broadcast studio at the Staffordshire University campus at Here East is testament to this; here, undergraduates are being given the skills to understand technical broadcasting as well as content curation.

The Park’s facilities offer huge potential to engage with a wider audience and deliver key messages through live online or offline events, as LDN UTD’s inter-borough championship has demonstrated with their London Digital Institute initiative, which aims to highlight esports as a viable career option and is backed by Mayor of London and the Rio Ferdinand Foundation.

The Rise of Esports Education

"The world of esports offers huge employment potential both in the UK and across the world and these new BTEC qualifications will give learners the knowledge and skills they need to build a career in this exciting sector. We have worked closely with industry experts to create a career-focused set of qualifications that will support the rapid growth of the esports sector and offer learners a pathway into working in esports and related industries."

Cindy Rampersaud, Senior Vice President, Pearson

Naturally, as the popularity of esports has increased, the providers of higher and further education courses have responded, with 19 colleges across the UK now offering BTEC esports courses (which have been jointly launched with the British Esports Association) and six universities offering undergraduate esports degree courses, including Staffordshire, Nottingham Trent and Sheffield Hallam.

The growth is testament to the opportunities that this sector offers for longer-term vocational opportunities.

Likewise, the growing number of students involved with esports has led to the increased popularity of the collegic esports scene, with the two largest organisers in the UK, namely NSE (National Student Esports) and The NUEL (National University Esports League) hosting inter-university esports tournaments.

The NUEL has formed a strategic partnership with Twitch to develop the "Uni Heroes" competition, which allows rival universities to compete to get as many minutes of content streamed as possible. The content might be traditional esports or any other creative content that Twitch supports, in return for which Twitch supports streaming communities with "packages" to share with the content team.

Never has there been a better time to provide opportunities for both higher and further education training to ensure that the UK produces talent that can fill roles and drive the success of the esports and wider games industry in the future.

We will explore the opportunities for wider community engagement in later chapters.

A Catalyst for Community Engagement

As noted in the next section of this report, a number of key stakeholders were identified and interviews were conducted by the author across both commercial and community leaders. Among the rich network of youth engagement representatives, led by the LLDC team, the consensus of opinion was that the engagement the games industry has established with the local communities is a great platform for empowering, informing and engaging the local communities. Part of this feasibility report will identify how communities can be given an opportunity to contribute to this discussion and how opportunities are created.

The use of the games industry as a means of connecting with the community is not a new initiative, with a number of projects having already been established. Some of these initiatives are aligned with mayoral strategies for greater social integration, such as LDN UTD's inter-borough esports championship. It is the strategic decision-making that laid the foundations for the Rio Ferdinand Foundation to form a partnership with LDN UTD, which has helped boost the profile of this campaign with the ambitions of "bringing employment to the youth via esports with this partnership".

The youth engagement mechanics that are happening at the moment, as well as planned initiatives for the future, will be a focus for this report. Through assessment of both commercial and non-commercial stakeholders' interests, opportunities for collaboration will be explored as to how best use the existing facilities and resources to further enhance and improve legacy promises and empower and inform local communities.

Finally, we will explore how any initiatives that are focused around the Park can be amplified to showcase the achievements being created as well as using youth community networks such as Catalyst in the Communities and Badu Sports to share these success stories to engage with more members of the youth communities in the four home boroughs of Waltham Forest, Newham, Hackney and Tower Hamlets.

The Games Industry Cluster

“The mere existence of a creative agglomeration is not enough for the benefits of clustering to emerge. The other crucial ingredient is connectivity between firms within a cluster, with collaborators, business partners and sources of innovation elsewhere and, finally, with firms in other sectors that can act as clients and as a source of new and unexpected ideas and knowledge. These layers of connectivity are underpinned by a dense web of informal interactions and networking.”

Nesta, creative clusters and innovation report

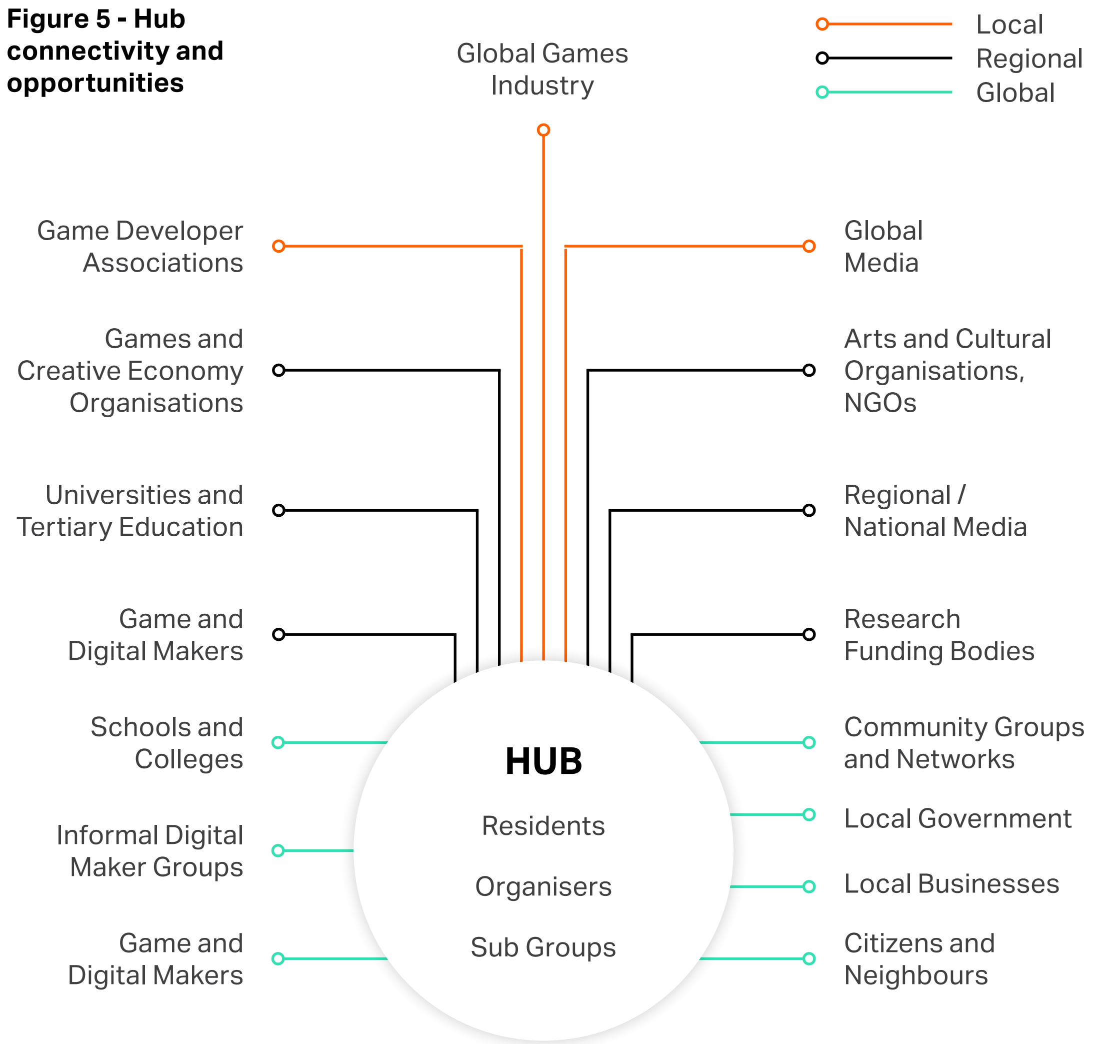
A Global Phenomenon

There seem to be very few countries in the developed world that cannot boast some form of games industry hub or cluster.

The reasons for the development of these areas might stem back decades, for instance, that Tokyo was the birthplace of SEGA, Capcom and Nintendo, or more recent hubs created through the introduction of incentives or super-fast network connectivity such as Malmo in Sweden. While the games industry is a global marketplace, it's production output stems from local talent and the creative process of games production is socially enabled. With its location in London, and access to stakeholder talent (both academic and the wider community groups), the Park seems to have the resources to build out a games industry cluster. As shown in figure 5, a hub can connect a number of different stakeholders and introduce new opportunities locally and further afield.

This section will investigate the benefits of building out a hub both commercially and for the wider community and how this can be achieved.

Figure 5 - Hub connectivity and opportunities



Source: Creative Territories, Good Hubbing Guide

Case Study
European "Incubators"

An incubator has been characterised as "providing support to startups to improve the probability of survival of the portfolio companies and accelerate their development" (Pauwels et al., 2006).

Incubator models include business innovation centres, university incubators, research incubators and independents supporting high potential ventures. The overall objectives of these different models include:

→ Regional ecosystem development

→ Educational and alumni support

→ Investment scouting (focused on scouting and developing startups for investment)

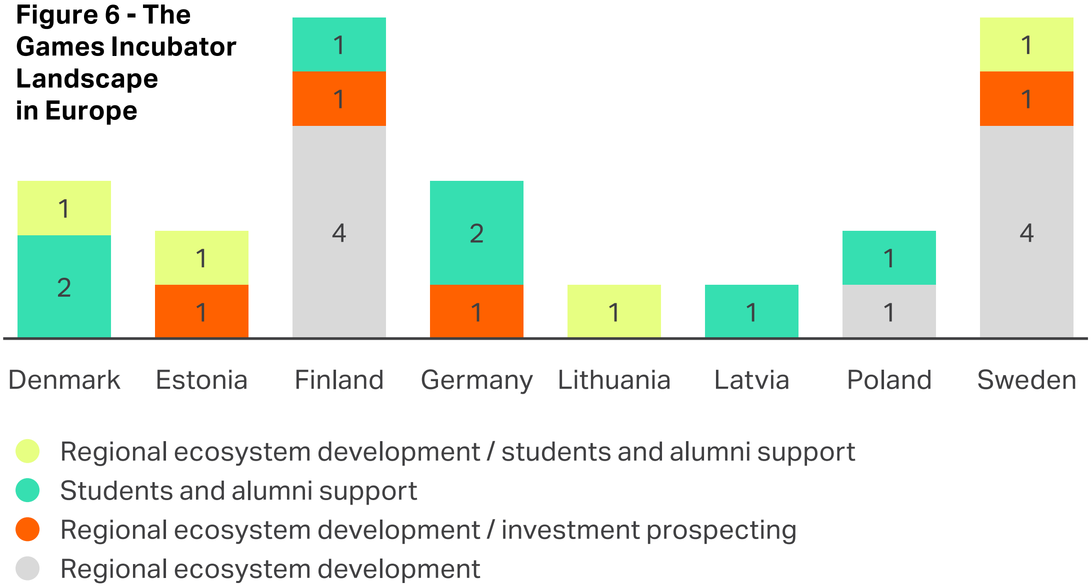
In the Baltic Sea region alone, there are 24 initiatives for games-focused incubators – six in Finland and Sweden, respectively – with most of them focused on supporting regional ecosystem development as well as educational and alumni support. The incubator models of the Baltic Sea region are classified as either for-profit or not-for-profit, with the latter having the objective of creating new jobs and income.

The Dutch Game Garden (DGG) is such an example. It was set up by Taskforce Innovation Utrecht to provide an incubator model for graduates to prepare themselves to run commercially viable game production companies over a short-term mentoring period.

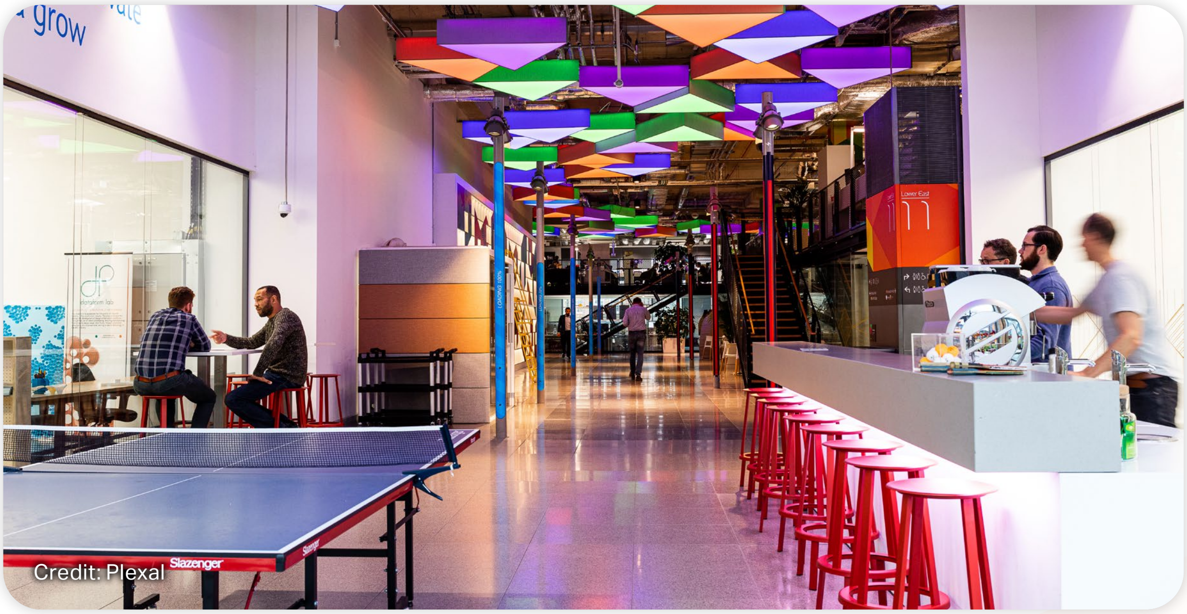
After an acceleration period, a business model and a defined growth model, the companies migrate to an incubator. The outcome of the model is that DGG helps pitch games for investment and negotiates a shared deal.

The issues faced with this model include the time needed for micromanagement of incubator companies as well as the linearity – without a fix entry point, some companies were waiting months until Incubation Day to know if their endeavours had been successful.

Figure 6 - The Games Incubator Landscape in Europe



Source: Zambon


Credit: Plexal

Other incubator models in Europe include “Gamefounders”, a Tallin-based initiative launched in 2011 as a public call for projects to implement a local accelerator.

Operational costs were covered by the Estonian government alongside private investment. Gamefounders engage with different local audiences by organising events for school kids through to university students as well as running a monthly game developer meeting. The initiative resulted in the creation of 50 gaming companies in Estonia, kick-starting the native industry with exponential growth.

There are, of course, limitations to the incubator and accelerator models, including the time commitment, misalignment between programmes and startups’ product.

If incubators can establish a cycle of learning and growth, this can equip entrepreneurs to assess internal productivity based on measurable outcomes. Coupled with finding the right partners that can support with business, production and administration skills, results can be achieved.

But as the success of Plexal has shown, with clearly thought-through collaboration, the Park could provide resources for fostering future talent while supporting UKIE’s ambitions, as well as engaging with the wider stakeholder communities.

As detailed in Appendices A & B, a decision to support the esports sector as a whole can receive governmental and region backing, as the case studies of Katowice in Poland and Copenhagen in Denmark testify. In the case of the latter, the government-devised esports strategy is helping bolster the industry while working with sports associations to create a “healthy and safe framework for the sports, with a focus on community and physical activity”. The Katowice regional development project has supported a wider transformation in the regional economy while developing a world-renowned partnership with ESL to host the annual Intel Extreme Masters (IEM).

Case Study
United Kingdom

Credit: Ubisoft Newcastle

The UK has a rich heritage of game development, with nodal hubs forming in Guildford, Slough, Leamington Spa, Newcastle, Edinburgh, Manchester, Bristol and London.

Elsewhere, Dundee boasts Rockstar North, developers of the Grand Theft Auto games as residents, and Leamington Spa is home to Codemasters and Ubisoft, generating huge revenue for the UK games scene as well as being a significant regional employer.

As to how and why gaming hubs have developed across the UK, the reasons are mixed. When Codemasters' co-founder was asked why he chose Leamington, he stated: "It has great shopping, restaurants and nightlife. Over the years, developers setup their own companies and existing international games companies setup branch offices here so now it is quite a thriving community." (Source: Leamington Spa: At the heart of the UK games industry)

The same seems to be true of Guildford, aka "The Hollywood of video games" with Peter Molyneux (creator of Populous, Black and White, and other "God-like" games) citing the inspiring location as the reason for setting up Bullfrog studios in the early 1980s.

It would seem that the early days of gaming acted as a vacuum, with a smaller talent pool (compared to today) being attracted to opportunities and through natural attrition employees left to form their own studios.

In the context of Ubisoft being located in Newcastle, it is access to talent that Stéphane Catherine, the company's EMEA Customer Management Vice President, cites as the reason for the location, "thanks to the 55,000 students at the city's two universities". (Source: Tech Nation) As gaming companies grow, local educational establishments respond with the development of vocational courses to provide a flow of talent as well as attracting fee-paying students.

It is this close relationship between education providers and games industry employers that is encapsulated in the case study of Dundee City Council's new entertainment centre.

From the heritage of Rockstar North to 4J Studios (the console developer of Mojang's Minecraft), the city of Dundee is producing top games industry talent, particularly through Abertay University, which is renowned as being Europe's top destination to study computer games.

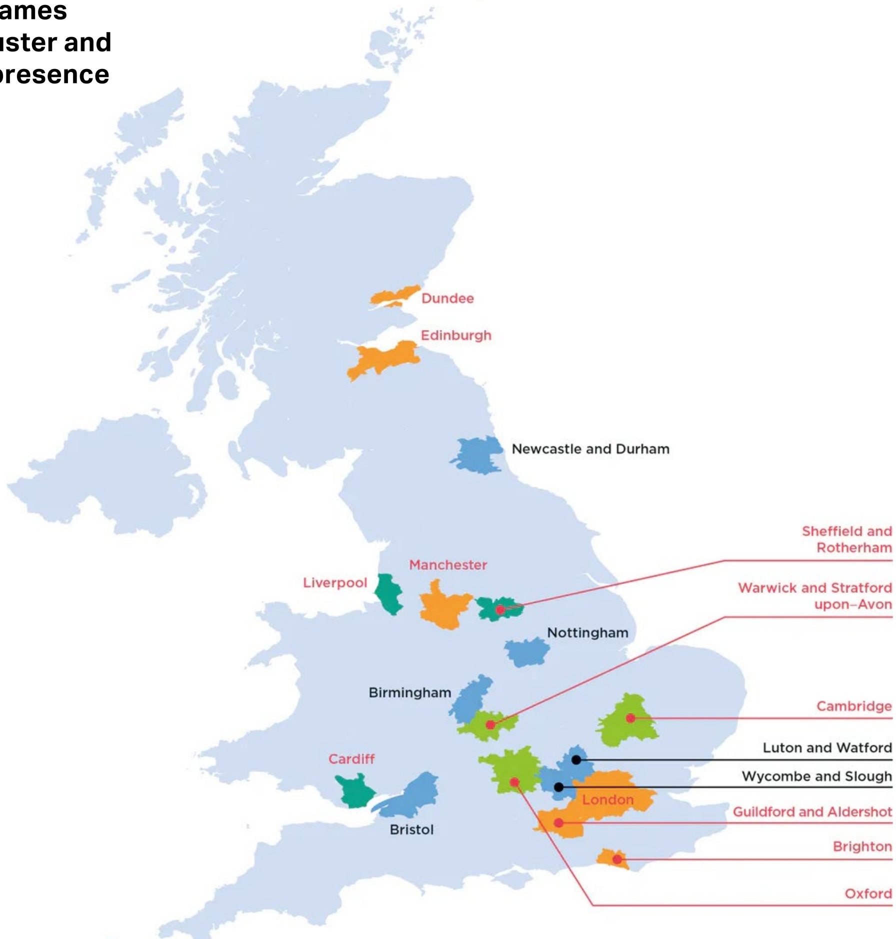
This relationship between the provision of talent and local opportunities is self-perpetuating, the result of which is the City's decision to build a 4,000-seater multi-purpose arena that is "esports ready". This is best encapsulated by Professor Gregor White, Dean of Abertay University's School of Design and Informatics, who stated:

"Bringing forward this exciting partnership-led development for Dundee, which has the potential to make a significant contribution to the future development of Scotland's digital economy, Abertay has an international reputation for excellence in the video games sector and is ideally placed to lead the educational delivery aspects of this project, with a view to opening up a new graduate talent pipeline to the esports industry." (Source: Esports Insider, Sept 2020)

The examples given above of the UK video games cluster or hub development support the notion suggested by Nesta that there are three principal factors influencing hub development in the UK. These are co-location, network connectivity and links with local education providers.

Here East and the wider Park are perfectly placed to continue to forge strong links between education providers (Pearson / Staffordshire University / UCL) and games studios and developers both present in the Park or potential future tenants. This will provide vocational opportunities either through scholarships, graduate programmes or wider community educational campaigns (see further Commercial Stakeholders section for identification of potential educational partnerships).

Figure 7 - Games industry cluster and university presence



Source: Nesta (2014), ONS (IDBR 2013)

Case Study
Tax Incentives

How can government tax incentives be used to foster cluster development on a geographic basis? The author will use international examples to identify where these measures have been put in place and the outcomes.

North America

Various tax incentives schemes exist in both the US and Canada to attract and support the video games industry, ranging from 40% of eligible labour and marketing/distribution costs being offered to games publishers locating in Ontario with a max marketing/distribution credit of $100,000 per project, to tax credits of up to 25% on wages and production costs with a minimum spend of $100,000 (and a $5M cap on credit) for those based in Rhode Island.

As this report has already identified, the development of clusters is not driven purely by financial incentives, with access to talent and inspirational surroundings also being driving factors for the choice of location. As Brendan Sinclair notes: “Puerto Rico’s 40% tax credit on income and production costs tops even Quebec’s incentive offerings, but there’s no comparison between the two talent pools developers would have access to.” (GamesIndustry.Biz) However, the lure to land developers is driving these incentives to boost GDP as well as providing employment opportunities.

United Kingdom

The UK Video Games Tax Relief is available on qualifying UK production expenditure, allowing qualifying developers to claim back up to 20% of certain production costs. The scheme has drawn comment, with some suggesting it promotes tax avoidance for the larger AAA producers, however the scheme has the support of UKIE, with CEO Jo Twist stating “the scheme played an important role in making the UK one of the best places to make games in the world”.

Gyeonggi Province, Korea

This is the metropolitan area surrounding Seoul. Home to the Korean games industry – and one might argue the home of esports – the region generates £4Tn in games industry sales from businesses based in the region and is building two esports training centres for amateur players by 2021. Furthermore, government support of up to £4M is available to companies via the Gyeonggi Game Academy startup program.

Stakeholder Thoughts From The Park

"The more players there are the more beneficial it becomes. Collaboration can work but the success has to be shared."

A commercial stakeholder interviewed

Overview

In undertaking this report, the author interviewed several stakeholders across both commercial and non-commercial categories. We will first look at the comments and thoughts raised by the commercial stakeholders to the questions associated with the potential opportunities that an esports cluster might offer their businesses.

These stakeholders have been categorised into 3 areas:

→ Venues

→ Commercial tenants and educational tenants (including UKIE, BEA & The NUEL)

→ Community Groups (social enterprises / legacy teams)

In assessing the thoughts and opinions of the stakeholders, questions were kept as consistent as possible across these groups and a list of those interviewed can be found in Appendix C. Where possible, similar comments and concerns between these groups were identified as a means of understanding the successes and areas for improvement of past and present initiatives as well as hopes and ambitions for future endeavours.

STAKEHOLDER THOUGHTS FROM THE PARK

Venue

Let us first turn our attention to venues. The key stakeholders identified in this category were as follows:

→ London Stadium

→ LLDC

→ 3 Mills Studios

In collating the keywords from the stakeholders responses, the author produced a word cloud from the output with the frequency of the keywords being reflected in the size of the font. The answers related to what is holding back their businesses from contributing to or being associated with more esports-related business and supporting the notion of an esports cluster at the Park.

The prominent keywords in figure 8 include “individualism” and “ownership”. In order to respect the confidentiality of the stakeholders, the author cannot cite individuals’ comments, but there was a consensus of opinion that venues in the Park are working individually with their own commercial remits and objectives rather than being a collective resource that could form elements of a Park-wide initiative to realise games industry-related business opportunities.

Furthermore, resources within those businesses are at capacity and do not have the scope to dedicate time to Park-wide initiatives unless these were presented to the individual stakeholders with associated action plans.

In the context of certain stakeholders questioned, it was the presence of existing relationships with their own partners that meant the remit for games industry business growth was limited, owing to contractual agreements.

Figure 8 - Venue stakeholder “negative” keywords

STAKEHOLDER THOUGHTS FROM THE PARK

Credit: Copper Box Arena

By contrast, when the same group were asked how they felt about both bringing more esports business to the Park and what it might mean for them, a number of key themes emerged. One of these was the opportunities that such an idea might bring to the Park as well as the chance for greater collaboration between the business stakeholders to realise this potential. Keywords, as can be seen in figure 9, include "(improved) communication", "collaboration" between stakeholders as well as "Park-wide", and "relationships" between the same groups. The notion that the sum of the parts is greater than the individuals was a common theme that the author noted from the interviews with the stakeholders. All the stakeholders shared a mutual interest in knowing more about these opportunities but the communication channel needs to be improved to realise them.

Figure 9 - Venue stakeholder "positive" keywords

Commercial Tenants

When the author spoke to the commercial tenants as to why esports-related opportunities had not been realised, some similar keywords to those of the venue stakeholders emerged.

"Ownership" was cited as a reason why initiatives had not taken off to date and a "central voice" is needed to bring the Park's collective resources together to both communicate their potential and spearhead Park-wide opportunities to host more esports-related business.

While the vast majority of the commercial stakeholders were interested in games industry-related opportunities, their resources are limited in terms of commitment to whatever these opportunities may be (either for commercial gain or community engagement). Two stakeholders referenced six weekly meetings that are chaired by the Park, but if the rigour of commercial interests meant that the commercial stakeholder could not attend then, more frequently than not, they would not send another representative. This meant that, owing to a lack of central ownership of those Park-wide initiatives, the momentum would slow down, making re-engagement six weeks later more problematic and any initiatives would lose appeal.

The central tenet that emerged from speaking to the commercial stakeholders was the need for the Park to provide a dedicated representative who could "own" the remit of realising Park-wide opportunities and champion the collective commercial stakeholders' interests. This would provide definitive accountability to represent the collective voice of the Park's stakeholders.

Figure 10 - Commercial stakeholder "negative" keywords

As is to be expected, there is undeniable support among the commercial stakeholders in the Park to realise fresh business opportunities and wider stakeholder engagement that the development of an esports cluster would offer. As identified previously, the stakeholders questioned realised that developing a Park-wide initiative would need collaboration among the network of business in the Park but, if this was "owned" by an entity, such actions would unite the stakeholder network to create opportunities for the wider communities through education, vocational placements and sharing success stories.

It was agreed that the current facilities at the Park, including the network of businesses, can provide the bedrock for the development of a cluster and if the rationale behind the cluster development was aligned with commercial, educational and wider community initiatives then it would succeed.

One of the key phrases that arose from the interviews summarised the commercial viewpoint on cluster development:

"The more players there are the more beneficial it becomes. Collaboration can work but the success has to be shared". (A commercial stakeholder interviewed)

In addition to this quote, two other quotes were noted by the author as summarising the collective commercial stakeholder thoughts on the development of an esports cluster: "[The cluster concept] needs a vision holder to bring together the collective stakeholders [and] meaningful long-term opportunities need to be affordable and achievable."

Figure 11 - Commercial stakeholder "positive" keywords

Education Sector

With regards to the education sector-related stakeholders, the author interviewed both those that already have a presence at the Park and those that support the esports and video games educational sector while not having a presence at the Park.

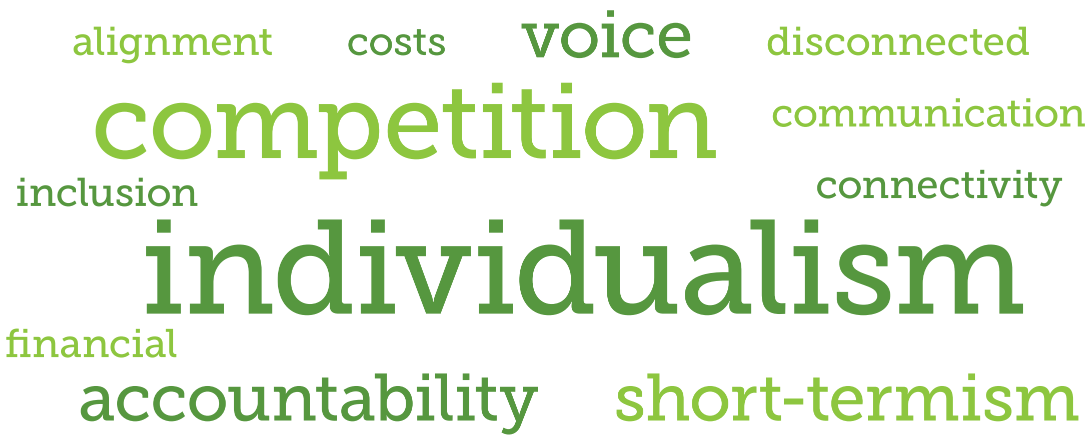
Unsurprisingly those stakeholders who have a presence realised the opportunities for further collaborations that such a cluster would offer but noted that individualism without collective engagement would hamper any aspirations.

Those stakeholders without a presence on the Park supported the notion of further collaboration with the esports industry but noted reasons for not having a presence at the Park were due to a number of factors including the location, existing partnerships with other entities or other locations offering more cost-effective lease options.

The author notes that, while it would be advantageous for key stakeholders to be brought in to the Park on a permanent basis, there was a rationale for a core network at the Park to develop an esports cluster proposition in conjunction with "external" stakeholders who would support the cluster on partnership agreement rather than having a base at the Park.

Figure 12 - Educational stakeholder "postive" keywords

Figure 13 - Educational stakeholder "negative" keywords



Community Action

A strong alignment exists between the games industry and the legacy promises of the London 2012 Olympic and Paralympic Games - both need a strong and engaging relationship with their community. The popularity of gaming and esports is due to both the ease of access for the community to "consume" media online as well as the pleasure that gaming provides to gamers, be they occasional players or aspiring esports professional.

The development of any esports/games cluster at the Park needs to align to a "tripartite" arrangement between commercial interests, academic learning and wider stakeholder inclusion. As the thoughts of those working in the academic sector have indicated, the relationship between businesses and the talent pool being "produced" by local stakeholders such as Staffordshire and Loughborough Universities can be highly mutually beneficial. However, the opportunities that such a relationship can offer is still limited in terms of the appeal to the wider community that is at the heart of legacy promises and fulfilment. A wider question exists as to how the development of an esports or video games cluster can provide opportunities for the youth communities in the four host boroughs of Waltham Forest, Newham, Tower Hamlets and Hackney.

As Appendix D details, the author had the honour of joining the Youth Engagement Network Meeting taking place online on 1 December, 2020. The meeting discussed how the popularity of the games industry could be used to provide opportunities for the youth communities and highlighted the initiatives that the community outreach teams are already running. These include the work of Catalyst in the Communities, the LLDC team as well as Badu Sports and Jonathan Silman at the college of Haringey, Enfield and North East London, among others.

From the conversations with these youth engagement teams, it became apparent that the appeal of engaging with youth communities via gaming exists, but it was agreed that there is a strong need to consider what is being communicated for fear of providing opportunities for select groups and neglecting others. Several initiatives exist that bridge commercial opportunities and wider community engagements, including Badu Sports collaboration with SI Games, Youmeus.tv, run by Catalyst in the Communities, E20's Football Foundation, as well as Here East's own projects, such as Insight Sessions and scholarships in conjunction with commercial partners.

Young people will find the skills they develop here to be applicable to the esports industry of the future, but also transferable to other areas of our local economy."

Sam Read, EM3's Sector Specialist in Games and Immersive Tech

Despite these collective ambitions, a number of challenges emerged when interviewing community focused stakeholders as detailed in Appendix D and highlighted below:

Engagement

One interviewee raised concerns that local schools do want to engage with local companies but do not know how to. Likewise, local boroughs have their own initiatives and there is a lot of replication and disjointed messaging.

Another interviewee suggested that the forums that do exist to engage with C-level stakeholders at the Park have limited engagement.

Funding

Another common concern raised by the stakeholders was funding support and, as with any business, resources need financial (or Value in Kind) support from external sponsors. The success of non-Park led initiatives such as LDN UTD, British Esports Association and the NUEL are reliant upon third-party funding. This can lead to highly successful partnerships aligned with common goals, such as The NUEL's partnership with Amazon for the Amazon University Esports project.

Communication

The first commonality in barriers to success that emerged from the various stakeholder interviews noted that communication between social enterprise initiatives and the Park could be improved, with the suggestion that a better understanding of central community-focused campaigns when they are initiated would allow greater contribution from wider stakeholders.

The second trend addressed communication with community networks as a key area of focus, with the need at times to "package" a message to the youth networks to entice them to the Park for activities such as basketball competitions, after which one-on-one sessions could take place. The suggestion is that youth groups are reluctant to come to the Park or engage with social enterprise organisations owing to a fear of "being lectured", but when an opportunity is "wrapped up" in a more "socially acceptable" proposition, acceptance rates are higher.

In addressing some of these points, reference can be made to existing schemes that are engaging with communities and how they can help understand effective communication strategies. Two such initiatives are Digital Schoolhouse and Into Games. Details of both of these initiatives can be found in Appendix E.

> For a smaller games company, UKIE helps bridge that resource gap. With their network and combined experience, we are able to scale our resources as we need them in a way that we just couldn't do on our own."

Maria Sayans, CEO of ustwo games

Both examples are run by UKIE, the UK Interactive Entertainment Association Limited, who is the UK trade association for the video games business. Two contributing factors to their success are their partner network, including AAA publishers such as Nintendo, SEGA, Riot Games and many others. With such a strong network, coupled with a strong pool of human resources specialising in different but complementary sectors, this provides a robust base to identify opportunities for wider community engagement. Furthermore, as a not-for-profit, their revenue stream is based on a subscription model across three tiers: student, partner and full membership, with members being offered a range of support services that have been carefully identified to realise opportunities.

"For a smaller games company, UKIE helps bridge that resource gap. With their network and combined experience, we are able to scale our resources as we need them in a way that we just couldn't do on our own". Maria Sayans, CEO of ustwo games.

As detailed in the next and final chapter, recommendations and ideas will be considered as to how these barriers can be overcome between Park stakeholders (commercial, education and venue bodies) and the wider communities, to centralise and realise genuine opportunities across education, engagement and employment. If these three broad areas can be aligned with a centralised strategy, then the development of a cluster at the Park has huge potential.

The appetite for engagement does not need to be contained in a standalone project but can be coupled with other initiatives across education, industry and commercial interests, such as Raise the Game and Tech Talent Charter. Both of these are a response by the government to DCMS' Select Committee Report on Immersive and Addictive Technologies, published in June 2020, which identified gender inequalities in the games industry. The pledge of these initiatives includes:

- → to promote and foster diversity and inclusion in the games industry, where everyone belongs and ideas can thrive.
- → to inspire games businesses to champion and foster diversity and inclusion within their organisations.
- → to drive meaningful cultural and behavioural changes that create a more diverse and inclusive games industry.

The details of the Tech Talent Charter include similar pledges to provide greater equality in the games industry workforce.

Finally, as the British Esport Association's collaboration with Pearson Education has indicated, the appetite for learning about the video games and esports industry is ever-growing. No longer is it the privilege of those in higher education to study esports but now those students in further education can learn about what this industry can offer them at the age of 16.

Such opportunities need to be shared with community stakeholders in conjunction with ambassadors who will be well received by youth networks to legitimise such opportunities. If the collective ambitions of these collaborations can provide "light bulb" moments for tomorrow's talent then this can be deemed a success.

Further recommendations and suggestions will be discussed in the next and final chapter.

Recommendations and Next Steps

This report highlights the importance of the relationship that exists between four factors: Commercial, Community, Education and Opportunity (see figure 14). These need to be aligned to ensure there is development of a cluster and continued success. It is through clarity of message and the selection of the right partners to help communicate these opportunities that will determine success and reach among the community.

Internal and External Communication Strategies

There is an opportunity for a collective voice that brings together all of the Park stakeholders individual activities and creates a consistent and amplified narrative. This would help ensure opportunities for all stakeholders reach the broader marketplace as effectively as possible.

To achieve this the following actions will be considered:

- Create a dedicated, specialist individual/team to deliver the "central voice" that can publicly draw attention to specific audiences and champion the shared message.
- Development of a "Park-wide" package/offering as part of a sales and marketing strategy. This can be used to create campaigns that will drive new business opportunities.
- Devising cross-commercial partnerships to "win" business that can support the overall objectives of an esports and video games cluster at the Park. Bringing the Park stakeholders together to collaborate and prevent "siloing of businesses".
- Develop a formalised outward communication strategy to celebrate Park-wide endeavours, achievements, and collective contributions to the overall cluster objectives.

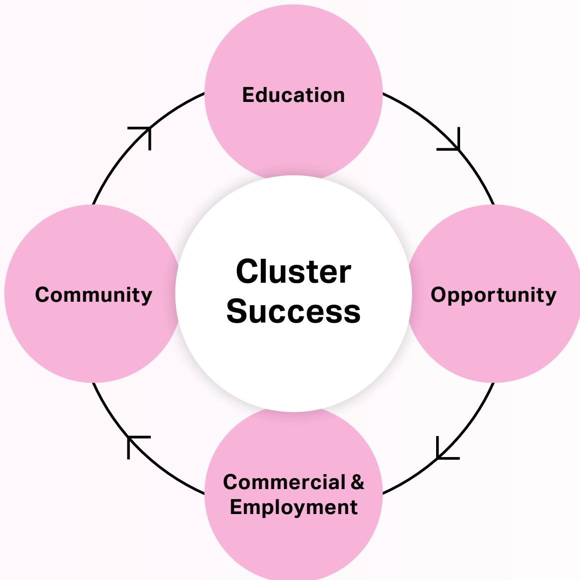


Figure 14 - Attributes for cluster success

Commercial Partnerships Identification and Selection

The Park has a reputation for successfully drawing internationally renowned partners to it and already has businesses within the games industry such as Sports Interactive, Staffordshire University, Pearson College and BT Sports.

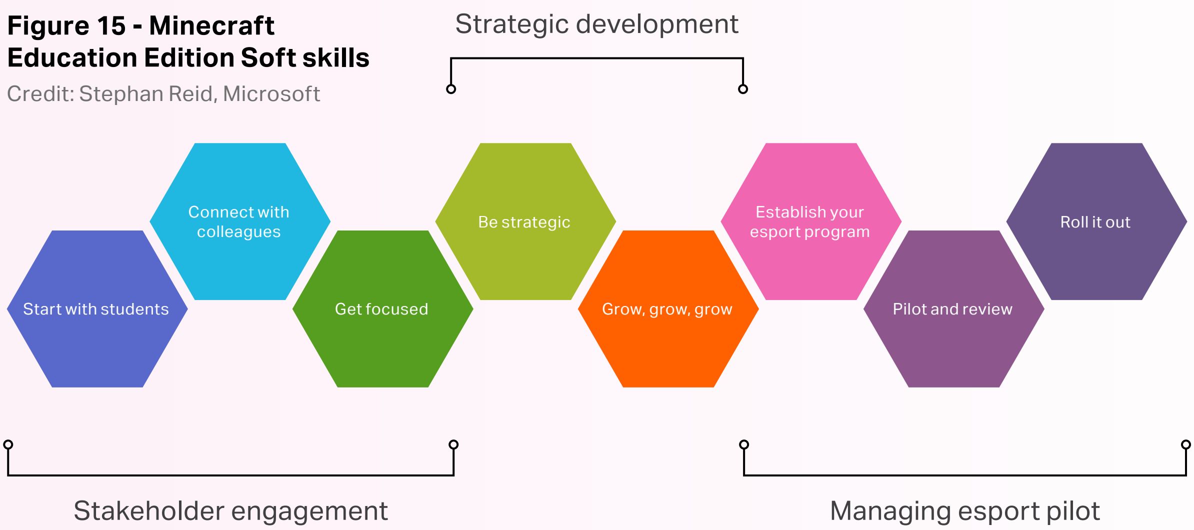
When reviewing the opportunities to identify, engage and grow commercial partnerships there are some key actions that we will consider:

→ Create a dedicated communications team to identify opportunities for bringing external partners to the Park, that will support existing education and engagement initiatives as well as fostering new schemes that may lead to having a presence at the Park.

→ Research and identify partners to align with to deliver Park-wide central initiatives.

→ Create youth engagement partnership opportunities; devising initiatives that can be utilised for external commercial business involvement. See figure 15, Microsoft (Minecraft Education Framework project)

Figure 15 - Minecraft Education Edition Soft skills
Credit: Stephan Reid, Microsoft

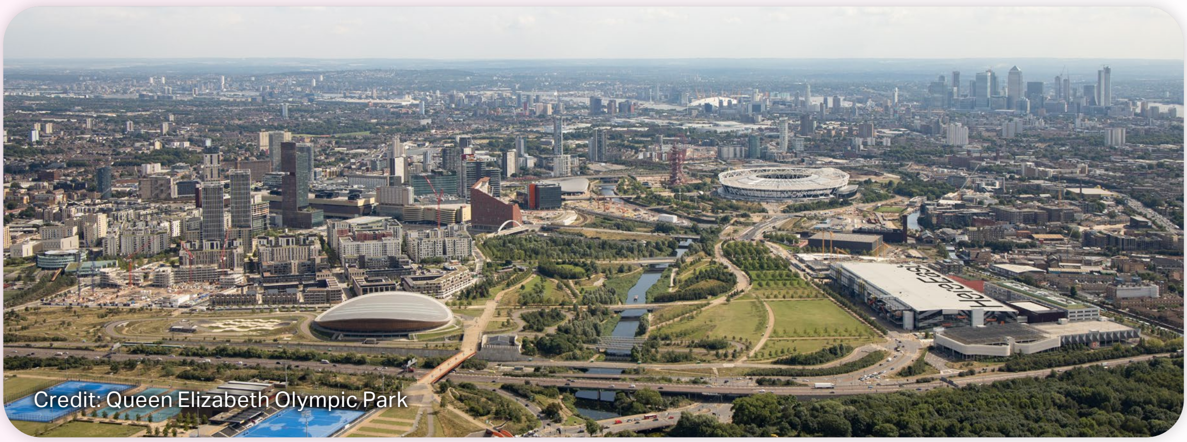


Wider Stakeholder Community Engagement & Opportunity Pathways to Foster Talent

A dedicated esports engagement strategy is needed to maximise the growth potential of this sector and provide opportunities for the Park to engage further with host borough communities on new opportunities emerging through a significant esports cluster. The strategy will address: the relevance of the message, the means of communicating those messages and ease of engagement for the target audience.

This strategy can benefit from use of the existing mechanisms that LLDC, Here East and other Park partners have in place for stakeholder and community engagement. In particular, the existing relationships with youth networks will be a real strength in terms of communication about the games business.

The growth of a "hub" is dependent on local talent. With the collective resources that the Park has, as well as the legacy vision that is at the core of the Park's remit, comes the potential to create pathways for greater learning and development opportunities. By working with commercial partners and using already available resources on the Park, this can facilitate the development of an education and skills programme that showcases 'home-grown' talent and opportunities. This is precisely what the Good Growth Hub sets out to deliver. The LLDC, Here East and other Park partners have developed successful mechanisms for engaging with employers and attracting local young people into other growth sectors located at the Park, including built environment, digital technology and creative business.



Credit: Queen Elizabeth Olympic Park

Credit: Ben Cremin

In developing a community engagement strategy, the following actions will be considered:

- Engage with the existing youth networks and partner relationships already identified either via schools, existing partners (e.g. Badu Sports), or via ambassadors/influencers to gain an understanding of what the community is aware of and what they want to know more about within esports.

- Consider the means of communication, work with known engagement groups to devise a means of reaching out to the community and consider how best to engage - identify where the touch points are. Use milestone community events such as the national Careers Week as a mechanism for engaging with the community. Provide opportunities for their thoughts and opinions to be heard.

- Utilise the Park resources such as the Copper Box Arena, London Stadium and the Podium as platforms for community engagement. Host in-person events (that can also be streamed and recorded) in conjunction with a content programme that informs, engages and inspires a target audience, real pathway opportunities can be showcased

- Develop a programme of events that can inspire and engage the youth community networks. Leverage the relevant connections within the Park's network that can be approached to support this initiative.

- Assess existing initiatives such as those of LDN UTD, Badu Sports, Rio Ferdinand Foundation, Good Growth Hub, East Summer School etc to understand how an engagement strategy at the Park can complement these existing initiatives as well as identifying other pathway opportunities

- Already in action - nine scholarship programmes being delivered at Here East, commercially funded and focused on building key skills in esports.

RECOMMENDATIONS AND NEXT STEPS

Games Industry Incubator

Investment in a community-focused or commercial-focused incubator, in conjunction with an education/awareness programme would provide opportunities for a wider community catchment and further support the development of a games cluster at the Park.

For this opportunity we will consider the following actions:

- Review opportunity and feasibility to develop an esports/games industry accelerator/ incubator at Plexal with a view to encourage partnerships with investors, associations, and be the catalyst for growth.
- The incubator concept could be considered in partnership with either existing Park stakeholders or those imminently arriving.

Credit: Plexal

Methods of Research

Underpinning the entirety of this research is the following question. What would be the commercial and community benefits of developing an esports / games industry cluster at Here East and the wider Queen Elizabeth Olympic Park?

SCR Modelling

In researching this question, the author will undertake both comparative analyses of other hubs as well as collecting empirical data from stakeholder interviews. This paper will draw conclusions from this data collection and document a series of suggestions that could be considered to aid the development of a cluster for commercial gain, as well as greater stakeholder engagement.

A McKinsey framework has been adopted to identify how the suggestions can be adopted around three aspects:

→ Situation (S)

→ Complication (C)

→ Resolution (R)

The use of this model in the context of this research is explained below:

Situation

The collective stakeholders at the Park are attracted to the idea of being more involved with the games industry.

Complication

The commercial stakeholders are time poor and have their own agendas and associated complications that they need to focus on. They are not aware of how the other businesses in the Park are involved with the Games Industry and they feel “siloed”.

Resolution

The introduction of a new resource that is dedicated to understanding the collective ambitions of the various stakeholders in the Park and can provide both an internal communication resource as well as publicise the work externally.

While this is a fairly simple model, the author feels that adopting this framework will provide clarity for recommended next steps, along with associated timelines.

METHODS OF RESEARCH

Stakeholders

The speed at which the games industry and in particular the esports sector is growing is unprecedented, with CAGR expected to reach 10.5% between 2021 and 2026 (Mordor Intelligence). Such growth offers fresh opportunities for those investing in this sector, but drawing comparisons with other business sectors to understand future trends would be inappropriate. This is owing to the phenomenal growth of this new form of digital entertainment and investment from non-endemic entities such as venture capitalists, with reports from Deloitte (Business Insider) of YoY investment from VCs rising to $4.5 billion in 2018 from just $490 million the year before.

Given the above, a decision was made to conduct interviews with “stakeholders” across two categories, namely commercial entities and community representatives. It is the balance of interest between financial success (comparable to “Shareholder Theory”, a term coined by Milton Friedman in the 1960s) and a business considering the wider community (Stakeholder Theory, as defined by Edward Freeman in 1984) that is the central tenet of the London Legacy framework and defines the legacy promises made to the host borough communities in the London 2012 Olympic and Paralympic Games hosting manifesto.

The initial list of stakeholders identified for interviews was compiled between the author and Lauren Archer from Here East and included a broad range of entities across both commercial and community focused groups working with the youth age groups around the four host boroughs. At the heart of those stakeholders selected was their involvement with the games industry, either directly (Sports Interactive/ Staffordshire University, etc) or indirectly (London Stadium / 3 Mills Studios).

The questions devised for each interview were structured around a past, present and future model to help understand what effect being associated with the Park has had on either business operations or community engagement. In posing these questions, it provided the interviewer with a broad understanding of the combined benefits of businesses being located at the Park and what foundations are in place for games industry growth. Besides, the answers provided an insight into how businesses are using the popularity of gaming to engage with local audiences and create opportunities.

In assessing the success of this method of research, the author has to recognise that the research was limited to a relativity small number of interviewees and a lack of engagement with some of the stakeholders selected due to commercial commitments or a reluctance to share their thoughts.

Community Groups

Given the rich heritage of the London Legacy commitments, the author was invited to join the Youth Engagement Network Meeting in early December 2020. This was an opportune moment to engage with several different youth community groups representing a wide variety of organisations including West Ham F.C., Badu Sports, Catalyst in the Communities and a number of local schools and colleges.

BADU SPORTS

BROADEN ADVANCE DEVELOP UNDERSTAND

The general consensus from the call, and subsequent follow up conversations with those attending the meeting, was that the games industry is hugely popular and relevant to the youth communities in the host boroughs. Some stakeholders on the call, including Badu Sports and Catalyst in the Communities, are already using the games industry to engage, inform and enlighten youth community groups on the opportunities that the industry could offer them as a vocation.

While the ambition of some of the groups is evident from both the meetings that the author attended and subsequent calls/meetings, a number of complications were revealed during the research.

Firstly, how are the voices of the youth groups being heard and which groups should be the focal point of engagement? Any “polling” questions need to be carefully devised to not marginalise communities (for example, those that might not have PCs or consoles) and there has to be an incentive for the community groups to share their thoughts.

Secondly, how should the idea of “polling” the community be introduced to these groups? Should this be through targeting groups and “offline” engagement, e.g. group chats or to a wider audience via an online mechanism?

It is the popularity of gaming culture that is driving the world of esports and this is a golden opportunity for engagement with youth networks; recommendations will be made in the following chapters as to how the above questions are addressed.

Clusters

One of the key drivers of this research was to understand the opportunities of creating a games industry/esports cluster/esports hub (or cluster) at the Park. How would this be achieved; what would the benefits be to the immediate community on a permanent basis and visitors on a temporary basis? The idea of attracting specific industries to a designated location has been used across the creative industries and most recently with the UK creatives services tax relief, which has seen several Hollywood blockbusters movies being shot in the UK.

However, are there other benefits and opportunities associated with locating at the Park? In answering this question, several other locations around the world have developed clusters and the report will look at how these clusters first formed and the benefits that they have experienced from being located where they are, as well as the benefits they have offered to the local and wider community.

While no two locations are the same, and a number of factors can affect the success of a business being located in that area, comparisons will be drawn from identifying other locations as well as the complications and resolutions that were experienced in developing such clusters. The report will aim to look at the different reasons for these clusters developing and how the cluster has matured since conceptualisation.

Can these examples provide insight as to how the creation of a cluster can lead to success and what this represents from both a commercial standpoint and the wider community stakeholder opportunities?

The report will focus on a selection of clusters across the globe and these have been selected based on the following types:

- → Incubators
- → Naturally forming
- → Transformative

Because this report needs to be concise and "cherry-pick" cluster examples, a small selection of clusters will be selected across Europe, Asia and North America. These will be representative of the three cluster types listed above.

APPENDICES

Appendix A

Case study
Katowice: transformed economy

Credit: ESL / Maciej Kolek

The city of Katowice in southern Poland was built around the coal industry, which prospered until resources were depleted and the city needed to transform its economy to a new industry. The Katowice Special Economic Zone was created in 1996 to support and accelerate the restructuring of the economy and consists of 2750 ha in 48 municipalities.

With 25,000 students graduating from Katowice's universities each year, access to talent is plentiful and, combined with excellent technical facilities, has meant brands such as Deloitte, Ernst and Young, and IBM have opened offices in the city. The transformation project is known as "The Zone of Culture" and has resulted in 450 business entities currently operating in the zone investing PLN 42 billion (11.35Bn USD) in the area as well as creating 80,000 new jobs.

With a decision to focus on technology as part of the transformation, the city agreed to concentrate on the esports industry, hosting the world-renowned Intel Extreme Masters (IEM) at the Spodek Arena in 2013, run by ESL.

With 11,000 people attending the event, the success can be attributed to a number of different factors including:

→ A central European location with good transportation links to a proven esports fan base (IEM features LoL, CS:GO and StarCraft) all of whom are hugely popular in Eastern Europe.

→ Support from the regional government and local authorities to host the tournament, with Katowice's city council allocating 12.5 million PLN (3.38 million USD) towards IEM Katowice promotion; a state-of-the-art stadium hosting 11,500 people in a city with a reputation for technical innovation.

→ A large student population of 25,000-people with a love of esports.

APPENDICES

Appendix B

Case Study
Blast Pro Series, Danish esports and governmental support

Credit: Blast Pro Series

Blast Premier is a world-renowned esports tournament organiser/broadcaster with its roots firmly planted in Copenhagen, Denmark – the city in which they formed and from which they still operate.

With a close association with two internationally recognised teams, Astralis and North, both of whom compete in the Tier 1 Counter Strike Global Offensive esports world circuit, Blast is in the fortunate position of being able to run tournaments to a homegrown Danish fan base. Such is the popularity of esports in Denmark, as well as the fan base for these two teams, that the Danish government has a vested interest in supporting the esports industry.

So much so, that the previous Danish Minister for Culture, Mette Bock stated: "We must ensure a good framework for the sport. Esports is in fast-paced sporting and economic development, where Danish sportsmen are in the world elite." This support has led to a national strategy for esports, with an emphasis on healthy environments for gameplay, and its success is acclaimed as a driving force for positive growth.

Such is the support for esports from the Danish government that the Prime Minister of the country at the time, Lars Løkke Rasmussen, inaugurated the final day of the Blast Pro Series esports competition in November 2018. He addressed the finalists as follows:

"You have not wasted your time. Your explanation days are over. You're truly sportsmen, following your dreams: e-gaming pioneers! The game has brought people from all continents and religions together. You are the inspiration for the world of tomorrow."

The Prime Minister's thoughts reached a wide audience, with the tournament being broadcast in 17 languages via Twitch, as well as on terrestrial channels to over 120 countries across five continents.

Appendix C

Stakeholder Communication Completed Interviews

LLDC

London Stadium

British Esports Association

Blast

Staffordshire University

3 Mills Studios

NUEL

Plexal

London & Partners

QEOP

Badu Sports

LDN UTD

London Games Week

Singapore Sports Hub

Loughborough University

Here East

UKIE

BT

SI Games

FACEIT

Appendix D

Youth Engagement Network

Meeting 1 December 2020

Unicef

The Yard Theatre

East Village Management

Badu Sports

Stratford Circus

Catalyst in the Communities

We Are Spotlight

We Are Kaizen

Leaders in Community

Ape Media

West Ham

Community Coaching Academy

URW

Newham

The Yard Theatre

Hackney Quest

Newham Music

UCL

E20

Royal Dock

London Legacy

Education

Parents

Education on soft skills that gaming provides

Youth

Career opportunities for young people

Communication of Opportunities

Education

BTEC via BEO degrees via Staffordshire

Aspirational Heroes

Royal Ravens, the Premiership stars

Their Opinions

Let's hear their voice

Local Resources and Ambassadors

LDN UTD

Rio Ferdinand

West Ham FIFA

Copper Box Arena

Here East

Use as a platform for comms / voice

APPENDICES

Appendix D

Key Takeaways From Discussions With Stakeholder Groups

The good news stories

→ SI Games using the community for ideation

→ Here East Strategic Forum

→ Here East Insights where businesses are explaining the opportunities Scholarship Programmes for Here East

→ British Esports Association plans Beyond the Box Initiative offering greater engagement

→ Tenants are made aware of their community engagement roles at the time of discussing tenancy contracts

The issues

→ “Different and separate initiatives”

→ “Limited resources”

→ A collective voice that celebrates success is missing?

→ “Siloed businesses”

→ “Lack of sharing knowledge”

→ “Missing a Park-wide strategy”

→ Finding a platform for engaging with the communities in a collective way

The possibilities

→ A collective voice that can centralise all the Park-wide initiatives

→ An overarching PR / marcomms entity that combines all stakeholder success stories as well as developing Park-wide propositions for short - (events) and longer-term opportunities

→ Using Here East or the CBA for regular community engagement sessions

Appendix E

Community-led Initiatives

Digital Schoolhouse

Digital Schoolhouse is a not-for-profit UKIE initiative, aimed at school children to enable them to realise the creative freedom of video games development. They describe themselves as a not-for-profit programme which enables primary schools to experience free creative computing workshops from their local schoolhouse. Combined with ingenious computing, the programme also engages thousands of students with its pioneering and immersive careers education. Schoolhouses are not charged for their participation in the programme, nor for the support that they receive.

UKIE, in partnership with Nintendo, is "future-proofing" the video games industry by providing engagement and opportunity realisation for the digital talent of the future. This is achieved through three pillars:

Education - providing information about what computing offers through exploration and innovation.

Skills - enabling teachers to use computing to harness their own creativity in the classroom.

Inclusion and diversity - by enabling all students to have the skills to succeed in the video games industry.

Into Games

This not-for-profit organisation describe themselves as: "We are a non-profit that supports people in finding rewarding careers in the games industry. Our projects connect education and industry while providing guidance for learners from primary school upwards. We primarily work with underrepresented groups."

The central objective of the project is to help youth communities get "into games" by providing them with the education, skills and opportunities to open fresh opportunities for seeking a career in the games industry. The scheme offers a number of services, including mentorship programmes from industry professionals and Videogames Ambassadors programmes, which facilitate talks and workshop sessions where ambassadors visit schools and groups to explain more about what a career in the games industry might offer.

The organisation has partnership agreements in place with UKIE, Music Week and collaborate with Activision Blizzard.

APPENDICES

Appendix F

Draft community "polling" questions created by the author and shared with the LLDC

How often do you play video games each week?

What do you play games on? Mobile / console / PC?

Do you own an Xbox / PlayStation?

Do you own a PC that you game on?

If you do game, what games do you play?

Do you watch gaming content online?

What platforms do you watch content on, e.g. YouTube / Twitch / Facebook Live / Instagram, etc?

Have you watched or would you watch non-gaming influencers playing games, e.g. celebrities/musicians/sports personalities?

Are you interested in Artificial Reality and Virtual Reality?

Can you estimate how many different roles and positions contribute to making a video game ready for the public to play, e.g. Fortnite and FIFA 21?

Can you name any games publishers?

Have you ever considered a career in the games industry? If no, is that because a) you are not interested b) you are interested but don't know how to gain the skills needed for a role c) something else? If yes, what role would you be interested in?

If you have considered a career in the games industry, do you know what subjects are needed to pursue a career in the games sector?

Are you aware you can now study a BTEC in the games industry?

Is this something you would be interested in know more about?

Would you like to see more gaming events happening in Stratford for, example previews of new games or interviews with the games publishers about game development?

Are you interested in joining local games tournaments online if all the hardware (consoles or PCs and monitors were available to use?

Would you like to see more career opportunities in the games industry being offered in Stratford?

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Glossary

3 Mills Studios - film studios located next to Queen Elizabeth Olympic Park

Badu Sports - a social enterprise that focuses on education and community development using sports as a tool of engagement

BEA - The British Esports Association

Black and White - a God-like video game produced in 2001 by Lionhead Studios and published by Electronic Arts

Capcom - an international video games publisher known for StreetFighter

Catalyst in the Communities - is an ethical not-for-profit social enterprise working with the host borough communities

CoD - Call of Duty

Codemasters - an international video games publisher

Copper Box Arena - a 3,000-seater arena located at Queen Elizabeth Olympic Park

CS:GO - Counter-Strike Global

Offensive - a PC-based game which is one of the most popular esports titles

CWL - Call of Duty World League

Dutch Game Garden - a games industry incubator

DCMS - Department for Digital, Culture, Media and Sport

EMEA - Europe, Middle East and Africa

Enterprise M3 - a local enterprise partnership covering a region from Newbury to Guildford

Gamefounders - a Tallin based games industry incubator

Guildford - town 35 miles southwest of London with a population of 500,000

HBCU - historically black colleges and universities

LLDC - London Legacy Development Corporation

LDN UTD - London United is a British grassroots esports association

Nintendo - an international video games publisher as well as a console manufacturer. Best known for Super Mario

NSE - National Student Esports - the official body of university esports in the UK

Offline - an event that is broadcast on the internet and is held in front of a live audience

Online - an event that is broadcast on the internet without an audience

Park - Queen Elizabeth Olympic Park

Payload Studios - an independent games studio based in London

Populous - a video game originally produced in 1989 by Electronic Arts and Bullfrog

Rockstar North - a games studio and producer of Grand Theft Auto

UKIE - Association for UK Interactive Entertainment

The NUEL - National University Esports League which is one of the biggest university esports organisers in the UK

SEGA - an international video games publisher known for Sonic the Hedgehog

StarCraft - a military science fiction game owned by Blizzard Entertainment

Twitch - the Amazon-owned platform that has a large market share of video games and esports online viewership

UCL - University College London

ustwo games - a BAFTA award-winning independent game studio

VGTR - Video Games Tax Relief

YoY - Year-on-year