



ESPORTS WALES

Mapping the Welsh Esports Industry

EXECUTIVE SUMMARY

The aim of this report is to produce a detailed systematic mapping of the esports (competitive video gaming) industry in Wales. It highlights the skills challenges and training needs of industry across Wales, Europe, and the world. This report provides informed insights into an industry that is still in its infancy in Wales.

Wales's esports market has tremendous growth potential with live streaming audiences are predicted to increase by 491.4 million people by the year 2025. With global Esports market increasing to 1.38 billion U.S dollars in 2022 and predicted to increase to 1.86 billion by 2025. (Newzoo, n.d.)

Our research identified nine teams located in Wales with clusters focused on education in Wales. Most of the teams are volunteer-based and have been trading for less than a year. 17 additional teams were in schools, colleges, and universities in Wales. Many of these teams are less than 3 years old.

Wales currently holds a small-scale presence in esports production, but there is considerable potential for growth by building on the skill set from sport and screen-based industries in Wales.

Esports teams actively livestream their matches and regularly disseminate content through social media channels. However, esports goes beyond mere competition; it holds significant cultural value. A prime example of this is its potential to contribute significantly to the growth of the Welsh language, thereby advancing the Welsh Government's ambitious objective of reaching one million Welsh language speakers by 2050. (Government, Cymraeg 2050 - A million Welsh speakers, n.d.)

There is a substantial opportunity for esports talent to use a lot of transferable skills that can be used in sport and other creative industries to make Wales a world leader. Technology driven innovation in other areas such as VR, Metaverse, AI, Crypto and Cyber can't be ignored. The creative and education industries in Wales are now waking up to this. Which has been shown with the uptake of esports throughout Wales.

As stated in the Clwstwr Games Survey Wales 2021 and the Screen Survey Wales 2021 highlights the requirements for virtual production and the clear benefits in developing capacity and skills. This increases the convergence of screen sectors and must be considered when developing future Welsh skills programs across the creative industries. (McElroy, n.d.)

The esports industry lacks public funding support, with volunteer organisations there needs to be further outreach work to ensure that the companies are aware of any funds available.

While there is some infrastructure in place provided by Esports Wales, this needs to be improved if Wales would look to work towards a critical mass of industry knowledge. Improved support and leadership have the potential to create an esports powerhouse and make more of the Welsh culture and language development into the gaming industry.

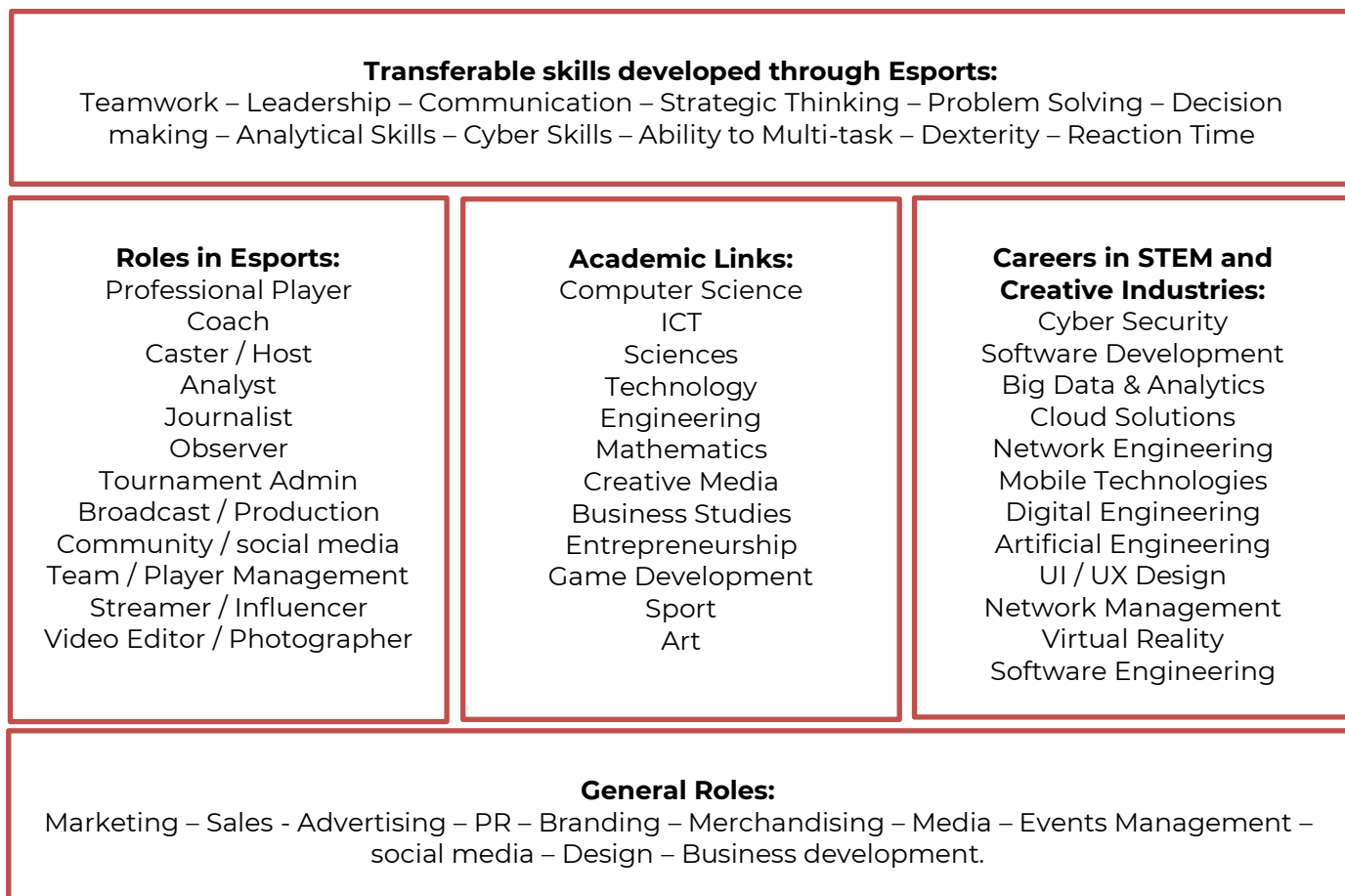


Figure 1 - Pearson BTEC (Pearson, n.d.)

The diagram above shows the various roles within the esports industry and how these transferable skills can also link to a wide range of career paths.

By developing the right support and pathways, the esports future in Wales could be bright.

OUR FINDINGS

These are the findings summarized from the research study conducted in 2023.

Size and Shape

□ Finding 1

The number of esports teams in Wales has increased massively in the last year. The Gaming engagement continues to involve activities beyond playing. 72% of the total viewing of Gen Alpha and Gen Z are watching video game content. 54% of the online population have viewed game content in the last 12 months with 27% of that being esports content.

□ Finding 2

The esports teams and talent are new and in need of support and better regulation. There is Welsh talent within the industry but seems less compared to other nations, some of our research has meant that some talent may be difficult to identify as they may be registered as British/UK and not Welsh on some platforms.

□ Finding 3

Our research shows that esports in education in Wales is still developing, the esports qualifications are mainly being delivered by Colleges in Wales with low uptake in schools and universities.

□ Finding 4

One of the differences between sport and the esports industry, is that the esports industry has a lot of control from the game publishers which means that the scene is unregulated and while tournament licenses are provided to tournament organizers this doesn't include safeguarding, only safety etc. As there is no certification for teams, players, and industry talent to identify key talent within the industry.

Workforce

□ Finding 5

Informal recruitment practices remain dominant in the esports industry with most of the people hiring through word of mouth and social media. The companies in Wales have limited resources with poses significant barriers to building a sustainable talent base across Wales. Having no large esports events in Wales makes it difficult for talent to build up a strong portfolio to allow them to progress in their careers. We found that Hitmaker was the main website for advertising jobs in the gaming industry but requiring a fee, this means the industry in Wales looks less active, and harder for new talent to find work.

Without an agent it's hard to find work in the esports industry and it's left to the individual to network and find job opportunities. (Hitmarker, n.d.)

The only roles found on mainstream job sites in Wales were education based, which would mean that talent would need to travel to gain experience.

□ Finding 6

While the teams in Wales have local links many teams are online based, and work requires any employees/volunteers to work on the online space because they don't have a physical office they use.

Content Development

□ Finding 7

The esports teams in Wales play a wide range of esports titles but predominantly played on PC or console. However, this is an appetitive for mobile phone games and VR esports with ImmtionVR and Active Reality in Cardiff. With the Creative Cluster investment in the area there are large opportunities for growth within the industry. (creativeindustriesclusters, n.d.)

□ Finding 8

Welsh culture and language being incorporated into esports production and commentary seems to be a missed opportunity, as can help support the Welsh Governments aim of reaching 1 million Welsh speakers by 2050 and advertise Wales globally as a tourist destination. According to research by Sports Wales, Welsh speakers are more likely to take part in sports and to volunteer. (Welsh Language Commissioner, n.d.)

□ Finding 9

The main demographic for talent development is that between 16-24 are still in education and obtaining their qualifications. The college education programs are normally 2 – 3 years long. These people don't have accredited certificates to obtain to the upskill quickly.

Skills, Education and Training

□ Finding 10

The esports scene in Wales provides little emphasis on active skills development and continuing professional development. With no large teams or events in Wales, educators need to look to learn from their own experiences. There are no training providers in the UK for esports for CPD, and there is a lack of in-house training for Esports. While there are some international programs that can help, these may differ from national policies and education curriculums.

□ Finding 11

As talent is being developed through the education spaces there needs to be more support to link to show the transferable skills across esports, creative, digital, and business industries. Building closer links between educational providers and industry partners is the key to changing this.

□ Finding 12

There are a lot of transferable skills that can be learnt through esports and work across TV, Film animation, sport but also education, social media, content creation and more.

□ Finding 13

There is no university in Wales currently delivering full degrees in esports qualifications, and talent is required to leave Wales to pursue further education in Esports. Additionally, with the increasing acceptance of remote study and remote working, there's an opportunity to address this gap. While there are sports production courses, creative and technology courses that could align with esports, a dedicated certification program would consolidate the necessary skills and knowledge to create a self-sustaining esports industry within Wales.

□ Finding 14

Several KS3/KS4 courses deliver content such as Game Maker instead of Unreal Engine. Unreal Engine is the industry standard for the game development and virtual production industries. Welsh-based awarding bodies need to align better with future technology and work on adapting quicker to changes

in the industry. Adding esports in the Digital 2030 program and making esports part of the discussions in upcoming course reviews will help.

Incentives and Support

□ Finding 15

There is a lack of public funding to support the esports space in Wales as it falls between Sport and Creative and normally can't gain access to funds. There needs to be additional work for esports be recognized as a sport and with some aspects to fit more into the creative and digital sectors to help with production and esports events.

Workplace and Infrastructure

□ Finding 16

Wales has a poor digital infrastructure and while FTTP is being rolled out in some areas the majority are still left with poor internet speeds. The digital infrastructure not only impacts home users but primary and secondary schools, community hubs and youth service centers.

□ Finding 17

Some council's IT support for the esports industry has been poor with IT support teams not allowing schools access to the games. This is a continue battle between teaching staff and technical staff to try and provide these students with opportunities within their educational institution.

RECOMMENDATIONS

□ Recommendation 1 – Welsh Government and Sport Wales Recognition and Support

Government recognition of esports as a category of sport in Wales can bring about several significant benefits to the esports community, the broader society, and the industry. Official recognition from the government elevates the status of esports, making it a legitimate and acknowledged activity. This recognition can lead to increased support in terms of funding, resources, and facilities. It shows that esports is valued as a legitimate form of competition and entertainment.

Recognition can contribute to changing public perceptions about esports, from being seen as a mere pastime to a respected and valuable pursuit. This can lead to increased interest, involvement, and respect for esports within the wider community.

□ Recommendation 2 – Education Integration

Collaborate with educational institutions to integrate esports-related courses, workshops, and degree programs into curricula. This can provide students with a pathway to professional careers within the esports industry.

Collaborating with educational institutions can lead to the development of structured workshop programs that align with curriculum objectives and industry needs.

Advocacy: Leveraging the alignment with government frameworks can support advocacy efforts for esports education at various levels.

Designing bilingual curriculum and resources can create a more inclusive learning environment and cater to the linguistic needs of the student population which can be shared between organisations.

Industry Partnerships: Building relationships with esports industry stakeholders can facilitate work experience opportunities and provide insights into industry trends.

Professional Development: Offering CPD opportunities for staff ensures the continuous improvement of educational programs.

□ Recommendation 3 – Grassroots Programs

Establish grassroots programs and community nights that encourage youth participation in esports. Develop initiatives in schools and local communities to introduce esports in a structured and healthy manner.

□ Recommendation 4 – Infrastructure Development

Invest in the creation of esports-specific facilities such as gaming arenas, training centers, and production studios. These facilities can serve as hubs for competitions, training, and community engagement. Physical hubs with good transport links and local hotels that allow Welsh based talent to visit for CPD, and development of freelancers. A bookable location that can provide a spot for freelancers to use. This hub can be used as a remote hub to run esports production across the world or for educational events in Wales. This can feed into the Welsh Government net zero targets for 2050.

A need for bilingual events, workshops, or webinars, to cater to participants with different language backgrounds.

□ Recommendations 5 – Infrastructure Development (Internet)

To facilitate content development to support hybrid working, continued improvement on internet speeds and access across the whole of Wales are needed. 5G while slightly higher latency would allow for a faster and cheaper roll out across Wales to allow the whole country to have high speed internet. FTTP should continue to be rolled out with a focus on Schools, Businesses and Community hubs. An improved digital infrastructure will help the esports industry and its freelancers to work smoothly across Wales and international partners.

Better support from IT in Councils to help provide teaching staff and learners with access to the facilities they require to progress in the industry.

□ Recommendation 6 - Infrastructure Development (Transport)

Better public transport links include a train connection between Swansea and Aberystwyth and Porthmadog and Bangor. This would create a circular transport network in Wales. This would create stronger links between north and South Wales opening more opportunities for talent.

Ferry links from Swansea and better connections between the airport and Swansea, Bridgend and Cardiff would better support the travel of people from the region and be more appealing to attract international esports events to Wales.

□ Recommendation 7 – Talent Development

Launch talent development programs, academies, and mentorship initiatives for aspiring esports athletes, casters, producers, and other industry professionals. There are areas of support that incentives are needed aligning to the needs of different parts of the esports industry:

1. **Bespoke talent development.** Ensuring appropriate follow-on initiatives are in place to support their professional development. Barriers to access should be as low as possible with links to agency and networking events.
2. **Continued development** and business development support, potentially through an incubation program. Support freelance talent in Wales by providing includes further development and training, and access to network events and portfolio development.
3. **Targeted growth support for established companies** with an attractive package for Welsh people's development.

□ Recommendation 8 – Diversity and Inclusion

Promote diversity and inclusion within the esports ecosystem. Encourage initiatives that increase female participation, support minority representation, and create an inclusive environment for all.

□ Recommendation 9 – Hardware Access

Players and freelancers should be able to book a location, or gaming/technology hardware at a low cost for events to be able to play at their best or to provide the best service for their clients.

□ Recommendation 10 – Professional Development

There are no apprenticeships offered in Wales for the Esports industry. To gain esports event experience people need to travel to another country to develop their event portfolio.

Develop professional development opportunities for both esports players and industry professionals. This can include workshops, seminars, and certifications to enhance skills and knowledge.

Additional funding is needed to provide scheduled trips need to be arranged for people in Wales to gain access to large-scale esports events across the world. More funding needs to be provided to have more physical events hosted in Wales and give more opportunities for people to gain experience in industry.

□ Recommendation 11 – Networking and Partnerships

Foster partnerships between esports organizations, educational institutions, government bodies, and private sectors to leverage expertise, resources, and opportunities for growth.

□ Recommendation 12 – Welsh Language

Esports is rapidly growing and the attachment to Wales can reach a broad demographic with engaging content. Welsh Government needs to assess the benefits of using esports and video games as a part of Cymraeg 2050 Welsh Language strategy.

Recognizing the language diversity, providing survey materials and research outputs in both Welsh and English can ensure inclusivity and reach a broader audience.

Translating Resources: Translating key resources, reports, and findings into Welsh can enhance accessibility and make your research more relevant to participants with varying language proficiencies.

□ Recommendation 7 – Freelancer Report

The contribution of freelancers to the esports industry in Wales needs to be better appreciated and should frame discussions on skills and training requirements. This should build among the cultural freelancers Wales report.

□ Recommendation 8 – Local Team/League Support

Financial support and strategy are required to enable the esports industry to grow fast enough to support the future talent and teams coming to Wales. Support for more local events such as Welsh Esports League, Welsh master's and other tournaments that allow Welsh based talent to develop.

Industry leadership needs to be provided by Esports Wales to help create better networks and connections and help people collaborating across Wales. Esports Wales should make sure that this is a safe and vibrant place for workforce and networking.

□ Recommendation 9 – Continued Research

Esports Wales needs to facilitate ongoing research to maintain an understanding of the needs of the fast-changing industry. As a central point, there is a need to publicize available jobs in Wales through a job site or create a directory of available talent in Wales. Also give a structure publicizing the support and incentives available in the Welsh esports industry.

□ Recommendations 10 – Media and Coverage

A dedicated role to support the operational tasks in Wales allowing effective organization and delivery of activities to support the esports industry in Wales. The role would include maintaining up to date industry information, job opportunities, and assisting with the running of the esports events. As well as showcasing more of the esports activities happening around Wales and celebrating the success of the College and University teams.

□ Recommendation 11 – Budget Allocation

Advocating for budget allocations specifically for esports education hardware and infrastructure upgrades can address financial constraints in schools or youth centers.

Grant funds for Welsh Esports Teams to develop and upskill.

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INTRODUCTION

This report presents a pioneering analysis of the esports industry in Wales, highlighting its structure and features. It investigates the nature of the work involved, as well as the obstacles and prerequisites for its expansion. The report delves into the existing creative industries and relevant industry resources, while addressing the skill gaps and training requirements within the industry.

Esports Wales, the national body for esports in Wales, is dedicated to advancing the esports industry in the region through competitive gaming, community engagement, and industry development, fostering a vibrant esports ecosystem.

With specialized expertise in local esports, potential access to comprehensive data, established networking connections, direct community engagement, collaborative potential, and alignment with their mission, Esports Wales presents a promising position to conduct this research.

This environment holds the potential to generate impactful insights that can influence policy decisions, industry strategies, and community initiatives, contributing to the growth of Wales's esports landscape. Notably, John Jackson, a seasoned figure in the esports industry, serves as the CEO, bringing two decades of expertise and a history of catalysing competitive gaming growth in Wales. Additionally, Gweirydd Davies, Chair of the board, contributes his extensive experience in digital strategy, content, and technology across various industries to further enhance Esports Wales's endeavors.

The report builds on top of the Clwstwr's Games survey Wales 2021 that gave insight into the skill games for the game development industry in Wales.

□ Research Aims

1. Map the Esports industry in Wales.
2. Map the training and education provision for esports in Wales.
3. Learn from other countries how they have succeeded in developing esports talent.

4. Identify main challenges for the esports industry in Wales.

□ Brief overview of the esports scene in Wales

Esports has evolved significantly from its humble beginnings in arcade gaming, transforming from niche communities into a global phenomenon. Welsh players and enthusiasts have eagerly embraced this dynamic sector of sport, ushering in a new chapter in their cultural landscape.

Globally, the esports industry has burgeoned into a multi-billion-dollar enterprise, captivating millions of fans and garnering the interest of numerous companies worldwide, all vying to secure a stake in its future. With a Market size worth 1.64 Billion. (globaldata, n.d.)

Welsh players and fans are actively contributing to the esports landscape. Esports Wales, a community interest company overseeing grassroots esports and national-level activities, facilitated the formation of a national esports team that participated in the Commonwealth Esports Championships, European Esports Championships and World Championships in Bali.

Against stiff competition from top esports players across the World, Wales entered multiple teams in various categories and achieved a remarkable feat by clinching three medals at the Commonwealth Esports Championships as well as high positions on the world stage. Team Wales secured gold in the Rocket League Open event, silver in the eFootball Women competition, and a bronze in the eFootball Open category.

This impressive performance did not come as a surprise, considering Wales has nurtured several accomplished esports talents, such as Euan 'Tadpole' Ingram, Callum Francis, and Andrew 'Vedius' Day.

In recent years, the Welsh Masters esports tournament was introduced to identify the most exceptional esports talent within Wales and scout players for the national team⁰. The successful Welsh team at the Commonwealth Games emerged from this tournament, signifying its impact. However, the Masters tournament is just the initial step.

The 2023 Grand Turismo Film Was based Jann Mardenborough that was so good at playing a racing video game, he took the step up and became a real-life racing driver - basically the dream of any kid who grew up loving these games and he's a former Radyr Comprehensive from Ely, Cardiff.

Last year, Creative Wales announced a substantial contribution of £25,000 in funding to support Esports Wales in propelling the sector into its next phase of growth. This funding played a pivotal role in enabling Esports Wales to establish the Welsh Esports League, which had its debut in January 2023. The league revolves around tournaments spanning a range of esports titles. While prize funds remain modest in the early stages, Esports Wales envisions continued investment in coaching, staff training, and marketing to further develop the team and league.

Esports has also found its way into the education system in Wales. Several colleges and schools have started recognizing the value of esports by offering esports courses. These programs not only cater to

aspiring players but also to individuals interested in the business and technical aspects of the esports industry. Integrating esports into the education system helps legitimize the industry and provides a structured path for students to pursue their passion. Like traditional sport colleges and schools have Esports teams that compete in the British Esports Champs. Wales has also seen some success in these teams competing in the champs with Gower College Swansea winning the Overwatch 2 tournament. Coleg Sir gar reaching the Valorant finals in 2022, and along with other Welsh teams making playoffs spots. Careers Wales showcases information on esports on the website.

The Universities compete in NSE, and NUEL where teams play each other across the whole of the UK.

In 2023 the Esports Wales Academy was created as we understand that the economy is constantly evolving, and that young people need to be prepared with the right skills to enter the world of esports. Esports Wales launched a range of programs that cater to the changing nature of the job market, providing valuable insights into the new and exciting opportunities available in the modern workplace.

Through our programs, we strive to promote cross-sector collaboration with businesses and enterprises to ensure genuine social mobility for young people. Our focus on building strong partnerships with the industry means that our programs are designed to provide people with the skills they need to succeed in a rapidly growing industry. Esports Wales is in a unique position where there is a cross section of industry academia and sector support for development creating a wholistic industry that uses strengths across all of these areas.

According to a report by ESI the UK esports sector represents 8% of the global market. (Insider, n.d.) London has also slowly become a prominent area for esports facilities global esports tournaments starting to come to the UK, such as League of Legends' MSI and Apex Legends' ALGS.

The Copper Box Arena, operated by Better, highlights the emergence of London's Queen Elizabeth Olympic Park as a premier esports destination in the UK. Hosting major tournaments for popular games such as Apex Legends, League of Legends, Gran Turismo, and Call of Duty, the arena has drawn a global audience of enthusiastic esports fans. Here East, an innovation campus within the park, has become an esports hub, offering education through courses at Staffordshire University London and the College of Esports at Lee Valley VeloPark.

Lessons we can learn include more Inclusive Curriculum Design, Accessibility Considerations, Financial Accessibility, Diversity in Instructors, Cultural Sensitivity, Community Outreach, Feedback and Iteration. (Esports News UK, n.d.)

Despite not being officially recognized as a sport, the UK government has talked positively about esports in the UK. In response to a Department for Digital, Culture, Media and Sport (DCMS) report in 2020, the government stated: "Esports has the potential to develop as an area of real national strength in the UK." (Insider, n.d.) Support for it to be recognized as sport grows as there talks for esports being considered for the Olympic Games and future Commonwealth Championships. (Olympics, n.d.)

METHODOLOGY

A mixed methods approach was adopted with multiple types of research used for the study which included:

Desk Research: Gathering existing literature from the Welsh Government, reports, and studies related to esports and game development, certification programs such as FAW and WRU, and industry development to inform the project's foundation.

Surveys: We conducted surveys among stakeholders, potential participants, and industry experts to gather insights, needs, and preferences related to the talent pathways. These surveys also include on the ground surveys in the Eisteddfod, as well as online surveys for the esports community.

Interviews: Engaging in one-on-one interviews with esports and sports professionals, educators, and industry leaders to gather in-depth qualitative insights into the challenges and opportunities in working the esports sector.

Case Studies: Analysing existing successful certification and pathway programs in sport to draw lessons and best practices that can be applied to the esports talent development.

Data Analysis: Analysing relevant data, such as industry trends, market growth projections, and participation demographics, to substantiate the need for the certification program.

Site Visits: Visited esports events and production studios to learn on what hardware is required for industry standard.

□ Data Sets and Terms

While the esports industry is a broad definition the focus of this research will be around esports talent, this includes roles such as producer, observer, commentary, host, graphics designer, tournament admin and other roles that go into running an esports events and managing teams.

□ Other data sets

Games Industry Wales 2021 Survey Data

New Zoo 2023 PC & Console gaming report

Newzoo's Global Esports & Live Streaming Market Report 2022

How Brands Can Use Data to Be Successful in Games & Esports

The Gaming Playbook

□ Support and Talent Data

Extensive desk research was carried out to identify video support and talent initiatives around the world to provide comparative content for our industry in Wales.

□ Post 16 Educational providers Data

For Secondary courses the data set was obtained but directly contacting the individual school via email and asked for information on clubs or courses being run.

For Further Education (FE) (Level 1-3) courses the data set was obtained directly from the individual college websites, for courses running in the 2023-2024 academic year.

For Higher Education (HE) courses the data set was obtained from UCAS for courses running in the 2023/2024 academic year.



THE CURRENT STATE OF PLAY

The esports scene in Wales has been steadily growing in recent years, establishing itself as a vibrant and promising hub for competitive gaming. The country has witnessed the emergence of numerous esports organizations, over 26 teams, and multiple events, contributing to the development of a strong and passionate community.

Wales boasts a range of esports tournaments and competitions across various popular titles, including League of Legends, Counterstrike, Dota 2, and Overwatch, among others. These events attract both local talent and international participants, creating a diverse and competitive environment for players. The Welsh Esports League now runs for over 6 months of the year with more tournaments running across the year.

In terms of infrastructure, Wales has seen the establishment of dedicated esports structure and tournaments, practice sessions, and community gatherings through Esports Wales. The structure not only helps for player development but industry development.

With a successful 2022 season national season and strong community support. The esports scene in Wales continues to evolve, driven by the enthusiasm and dedication of its community members, and the constant innovation within the global esports industry. With its growing ecosystem, Wales is poised to become an even more prominent player in the global esports landscape.

Gaming has taken a dip this year after covid as people are back in work and education. Even though this is the case the esports industry has continued to grow with esports titles being some of the favorite titles across all the platforms. (report)

The Newzoo 'How brands can use data to be successful in games and esports' Demonstrates how brands/businesses can utilise esports and competitive gaming as an effective means of promotion. The report emphasizes how gaming is an inclusive and diverse community and industry thus possessing ample market segmentation for effective advertising and promotion. Like traditional sport, different games and genres provide access to a different demographic/ target market.

□ Understanding the Audience

Global Esports Live Streaming Market Report 2022 shows that Esports is relying on sponsorship revenue. Increasing streams of revenue through merchandising which is described as "direct to fan". The report shows the Opportunities for non-endemic marketing (expanding target audience by attracting/gaining a new customer base. It shows that supporters spend more on merchandise at esports events than the normal supporter and there is a push to develop in-person events to increase participation and interaction within the community as well as enhance revenue through merchandising.

While the report shows that the Women in esports is increasing, it also shows that 44% percent of gamers fall into the high-income bracket and shows there is a link with the access to hardware and esports.

Esports is in the top 10 games across all the platforms.

PC	Xbox	PlayStation	Nintendo Switch
Roblox	Fortnite	Fortnite	Pokemon
Call of Duty Warzone	Call of Duty Warzone	Call of Duty Warzone	Fortnite
Fortnite	Grand Theft Auto	Grand Theft Auto V	Fall Guys
Minecraft	Minecraft	Call of Duty	Mario Kart

Apex Legends	Call of Duty	Apex Legends	Minecraft
Call of Duty MW	High on Life	NBA 2K23	Pokemon Legends
The Sim 4	Roblox	NBA 2K22	Rocket League
Overwatch	Apex Legends	God of War	Animal Crossing
Valorant	Fall Guys	Minecraft	Nintendo Switch Sports
Counter Strike	NBA 2K22	Call of Duty	Splatoon 3

Figure 2 - Newzoo Game Performance 2022

Top viewed games on Twitch in 2022

1	Grand Theft Auto V	6	Fortnite
2	League of Legends	7	Counter Strike
3	Valorant	8	Dota 2
4	Minecraft	9	Call of Duty
5	Apex Legends	10	Mobile Legends

Figure 3 - Newzoo Game Performance 2022

Viewership is focused on PC gaming with 4 out of the 10 games being viewed are PC-only.

Viewership is driven by competitive esports games such as League of Legends, Apex, Call of Duty and Fortnite.

Esports games are among the top viewed games on Twitch are majority are Esports titles with only Grand Theft Auto and Minecraft not being esports titles.

Demographics

Base: Total Players; Total PC and/or console players

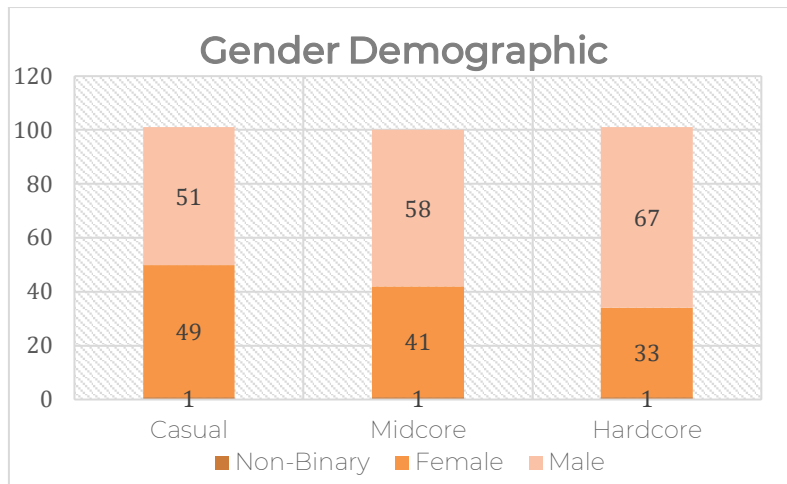


Figure 4 – Newzoo 2023 PC and Console

In 2022 Female gamers now represent around 40% of the PC and Console market. Shows esports needs to be marketed as more appealing for females. Esports Wales are currently working towards this goal through creating women-only events and highlighting and showcasing female esports talent to show future talent that participating in esports is achievable for them.

This can be achieved by having a female esports representative visiting schools and colleges which will show future talent that there is space for them within the esports scene in Wales.

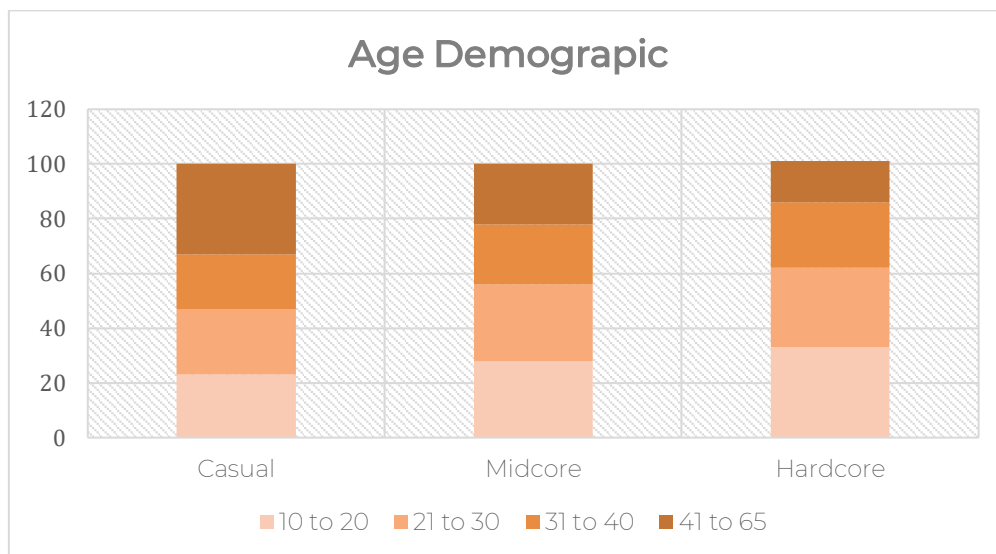


Figure 5 - Newzoo 2023 PC and Console

The esports demographic is changing with the gaming industry aging it is becoming more casual with nearly the same number of gamers playing at age 41-65 to 10-20.

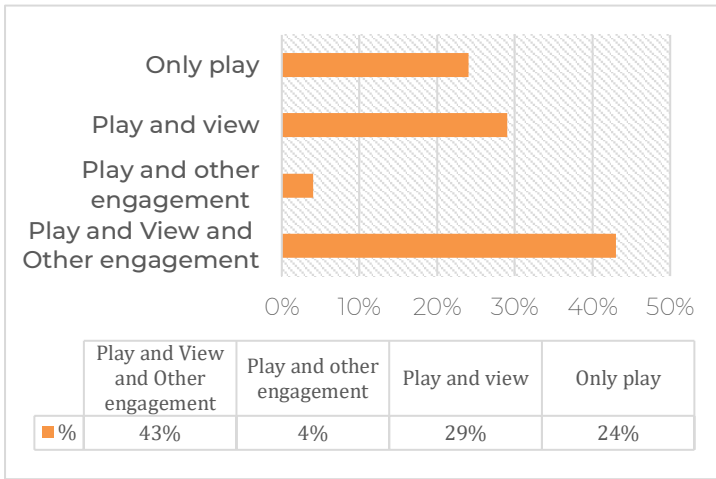


Figure 6 - Newzoo 2023 PC and Console

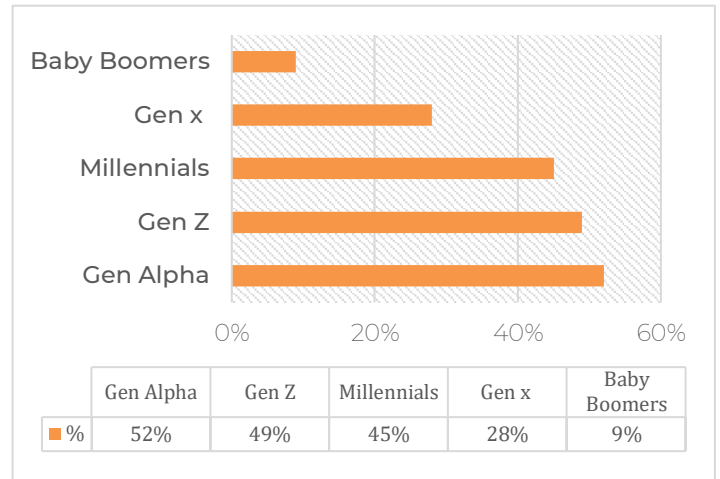


Figure 7 - Breakdown of Play and View Stats

Gaming is an inclusive activity for all ages. Setting up community afternoons for this age bracket can get them involved in playing games and viewing esports. However, lack of facilities in Wales makes this harder to achieve and showcase these games to those age groups.

Age demographic spread across Wales.

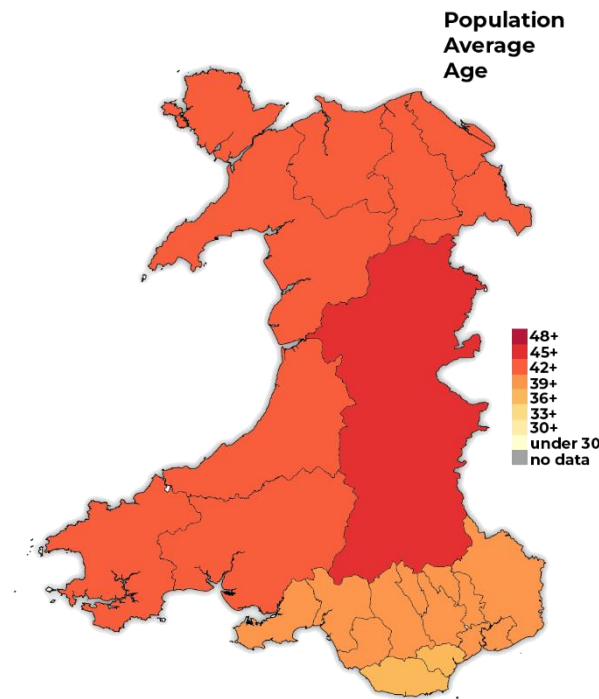


Figure 8 - Population Average Age Map (Wales population statistics, n.d.)

Looking at the population across Wales, Majority of the areas have an older population and if Esports is to succeed in Wales there needs to be support from all areas. As you can see from the map shows that Cardiff area has the lower age demographic which would fit into the standard esports demographic.

To get a sense of esports' reach, consider this: worldwide, a Gen Z is more likely to watch esports tournaments than they are to watch the NBA, the UEFA Champions League, or Formula 1. Expanding across multiple genres and franchises, esports is as accessible as regular gaming. Esports societies at

colleges are getting more attention, while hardcore esports athletes compete for record-breaking prize pools now attracting millions of viewers online.

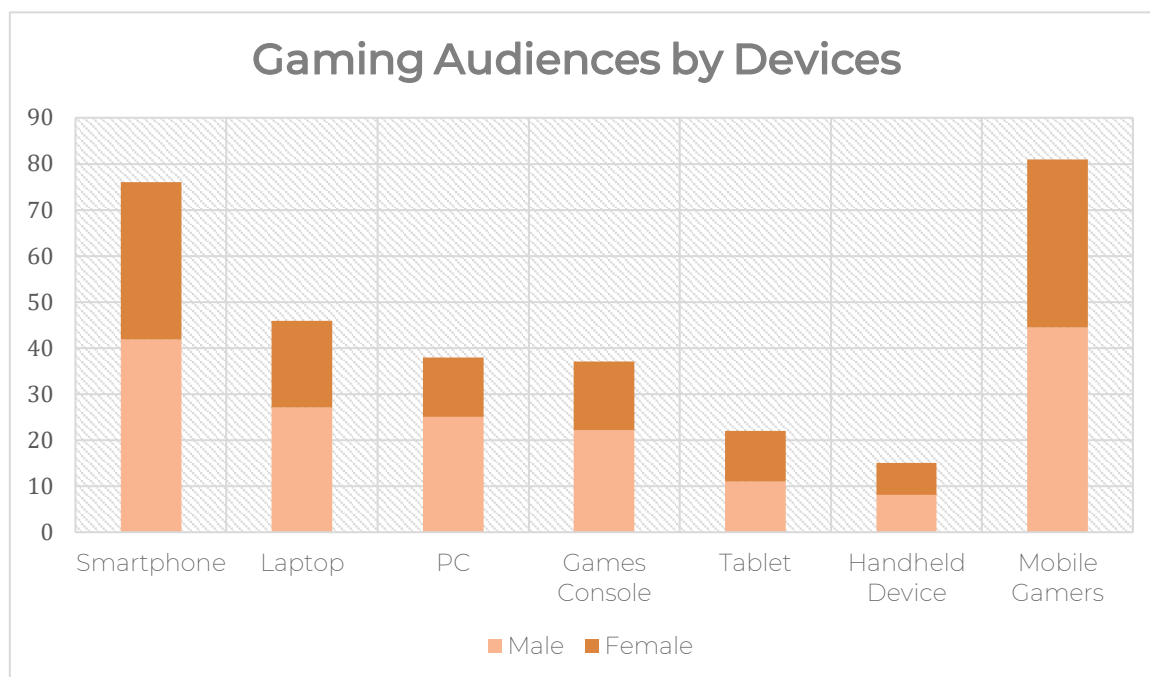


Figure 9 – The Gaming Playbook

In the gaming industry Multi console ownership is not uncommon, with people having a main device for their gaming but also playing or viewing games on other devices. Esports Players mainly use Twitch, YouTube, Twitter, Reddit and Discord for gaming info and content.

As the Esports mobile scene grows it will reduce the barrier to entry and more of the population own smart phones than gaming PC's. The transition to mobile esports or VR esports in the next decade needs to be thought about in creating an infrastructure that can accommodate these new digital spaces. This would include how to produce and showcase these games to supporters.

As Esports is developing it is aligning with traditional sport following trends such as podcasts, talk shows and in-depth analytics that feed into the production. Like traditional sport esports is moving into the virtual production. Esports is well equipped to work with virtual production as the games being played in the Virtual space.

The Welsh Language has very little involvement in the esports world with only Esports Wales and Yn Chwarae running Welsh esports production.

Geographic Distribution

Geographic Distribution of esports players registered on the Esports Wales Hub.



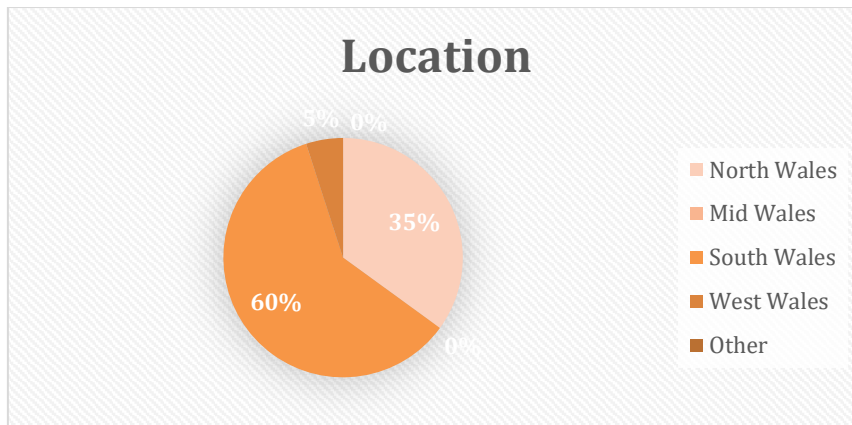
Figure 10 – Distribution of Esports Wales Players/Managers

While most of the players are split around south and north Wales you can see that players are spread across the whole of the UK. This shows that international benefits that Esports can provide to advise Wales across the world and support the Welsh 2050 policy. Due to the spread of players and viewers there are missed opportunities from Welsh businesses and visit Wales to showcase tourism in Wales.

□ Eisteddfod Survey Findings

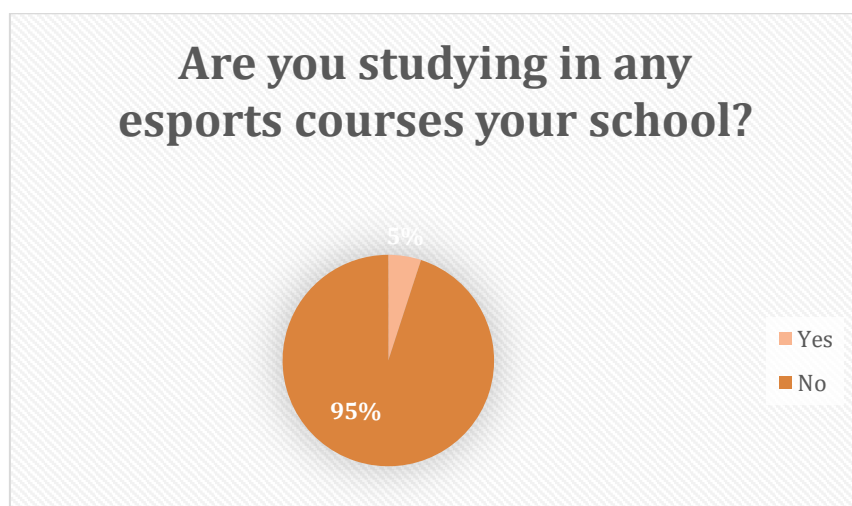
Most of the attendees were under the post 16 and unable to complete the survey, while the majority of these were gamers who were not aware of the pathways into the esports industry and the potential opportunities there are to play for Wales.

The survey collected responses from the Urdd Eisteddfod. It was provided in Welsh and English language versions. There is a total of 26.



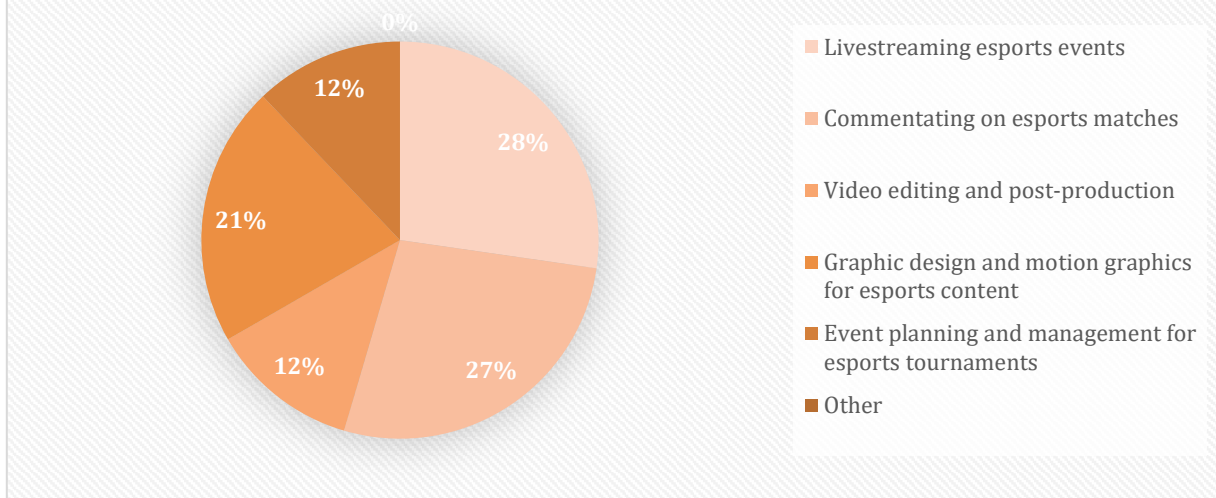
The survey results indicating that most respondents are based in South Wales, with smaller numbers in North and West Wales, while no responses were received from individuals in Mid Wales, raise interesting points about the geographical distribution of esports interest and participation within Wales. This distribution could be influenced by a variety of factors, some of which may include:

- **Population Centers:** South Wales tends to be more densely populated compared to other regions, making it likely to have a higher concentration of individuals interested in esports.
- **Urbanization:** Larger urban centers, often found in South Wales, tend to have better access to infrastructure like high-speed internet, gaming venues, and esports events, potentially attracting more participants.
- **Education and Awareness:** Educational institutions in certain regions might be more engaged in promoting esports, leading to a higher concentration of participants.
- **Cultural and Economic Factors:** The presence of tech hubs, job opportunities in the gaming industry, and a general culture of gaming and technology could impact the distribution of respondents.



The survey results indicating that only 5% of respondents are currently studying or involved in any esports courses or programs at their school suggest that there is room for growth and further integration of esports education within the academic landscape in Wales.

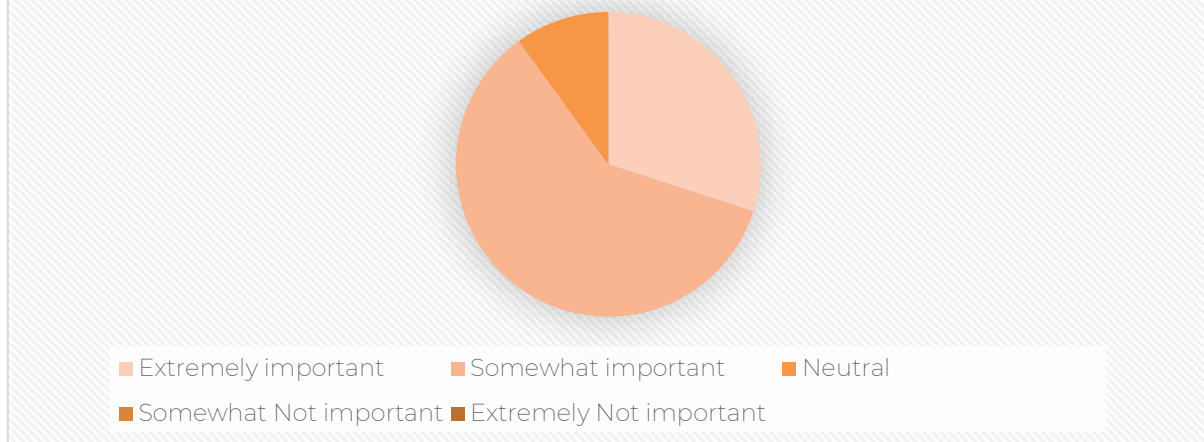
Which aspects of esports interest you the most?



The survey results provide valuable insights into the specific aspects of esports that interest respondents the most. These preferences shed light on the diverse roles and responsibilities within the esports ecosystem and can guide educational and professional development efforts. Here's an analysis of the responses:

- **Live Streaming:** The highest percentage of respondents expressed an interest in live streaming. This could indicate a growing fascination with content creation and engagement with audiences in real-time. This aligns with the global trend of live streaming platforms gaining prominence for broadcasting esports events, player streams, and related content.
- **Commentating on Esports Matches:** Nearly as popular as live streaming, commentating holds significant appeal. This suggests a keen interest in providing analysis, insights, and play-by-play commentary during esports matches, adding to the overall viewer experience.
- **Graphics:** Graphics encompass a range of visual elements such as overlays, animations, and designs that enhance the visual appeal of esports broadcasts. The interest in graphics could indicate a desire to contribute to the visual identity of esports events and content.
- **Video Editing:** Video editing is crucial for creating highlights, recaps, and promotional content. The interest in video editing could reflect a desire to craft compelling narratives and showcase the best moments in esports.
- **Events Management:** Events management involves organizing and coordinating esports tournaments, conventions, and other gatherings. The interest in this aspect might suggest an aspiration to contribute to the logistics and behind-the-scenes organization of esports events.

How important do you think it is to have a dedicated production pipeline for esports in Wales?



The survey results clearly emphasize the significance of having a dedicated production pipeline for esports in Wales. The majority of respondents perceive it as important, with 30% considering it extremely important and 60% stating that it is somewhat important. These findings underscore the value that the esports community places on establishing a well-structured and efficient production ecosystem. Here's an analysis of Importance of a Dedicated Production Pipeline:

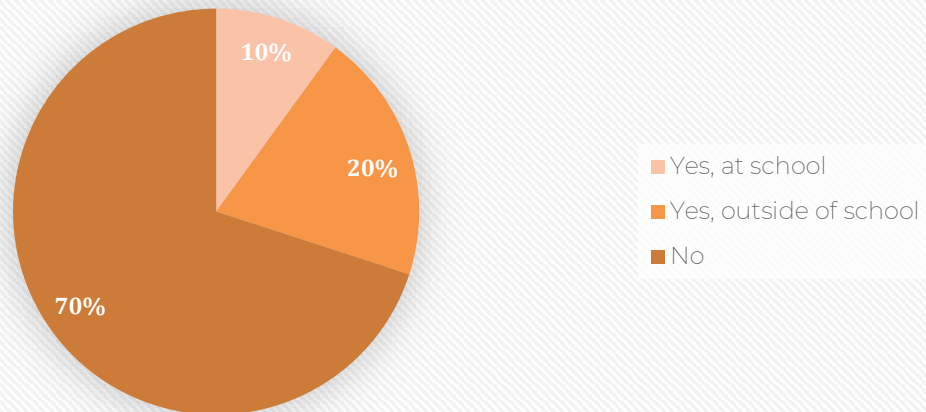
Recognition and Growth: The high percentage of respondents who consider a dedicated production pipeline extremely or somewhat important indicates that the esports community in Wales recognizes the potential for growth and development in the production sector.

Quality and Professionalism: A dedicated production pipeline can significantly enhance the quality and professionalism of esports events, broadcasts, and content. This, in turn, can attract larger audiences and foster a positive reputation for Welsh esports.

Talent Development: A structured production pipeline provides opportunities for individuals to specialize in various production roles, such as casting, production design, graphics, and more. This can lead to the development of a skilled and diverse talent pool in Wales.

Economic Impact: A robust production pipeline can contribute to the local economy by creating job opportunities, attracting investment, and generating revenue through esports events and broadcasts.

Have you participated in any esports production activities or events?



The survey results indicating that 70% of respondents have not participated in any esports production activities or events suggest that there is an untapped potential for engagement and involvement within the esports production sphere in Wales. These findings provide valuable insights into the current level of participation and highlight opportunities for growth and inclusivity. Here's an analysis of the responses:

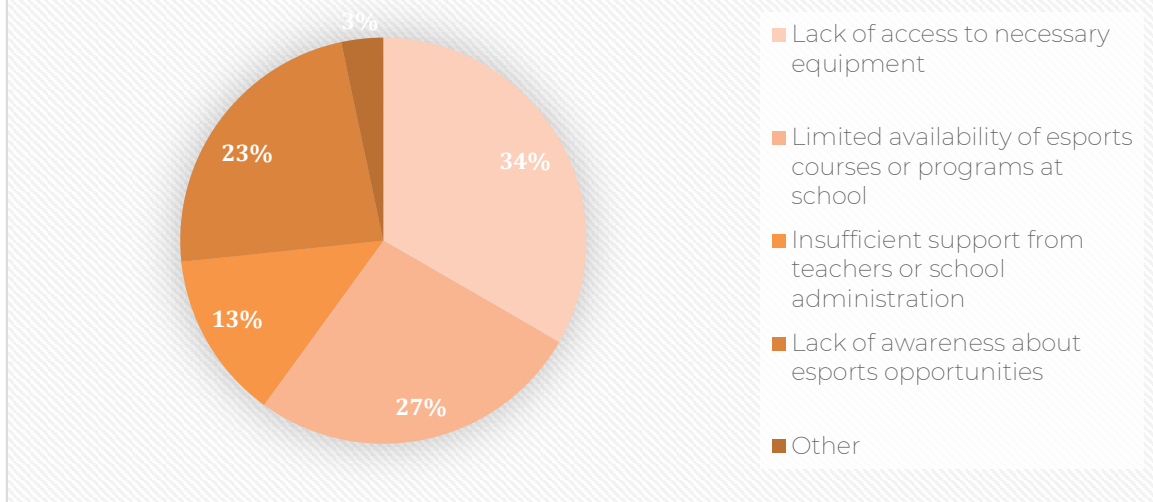
Potential reasons for Limited Participation:

Awareness: The high percentage of respondents who have not participated could be indicative of a lack of awareness about available opportunities for involvement in esports production.

Entry Barriers: Some respondents might be interested in participating but could be facing barriers such as a lack of information, skills, or access to relevant platforms and resources.

Newcomer Engagement: The results highlight the potential for reaching out to individuals who have not yet participated in esports production and encouraging them to explore this facet of the esports ecosystem.

What barriers, if any, have you faced in pursuing your interest in esports?



The survey results provide valuable insights into the barriers that individuals have faced in pursuing their interest in esports. Understanding these barriers is crucial for devising strategies to address them and create a more inclusive and supportive environment for aspiring esports enthusiasts. Here's an analysis of the responses:

Key Barriers Identified:

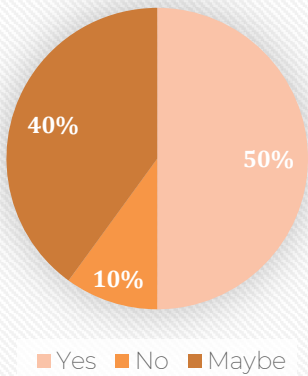
Lack of Access to Necessary Equipment: This barrier highlights the importance of having access to gaming hardware, high-speed internet, and related equipment. Limited access to these resources can hinder individuals from fully participating in esports activities.

Limited Availability of Esports Courses or Programs at School: The lack of esports-related educational offerings in schools suggests a potential gap in the formal education system. This barrier could prevent students from receiving structured training in esports-related fields.

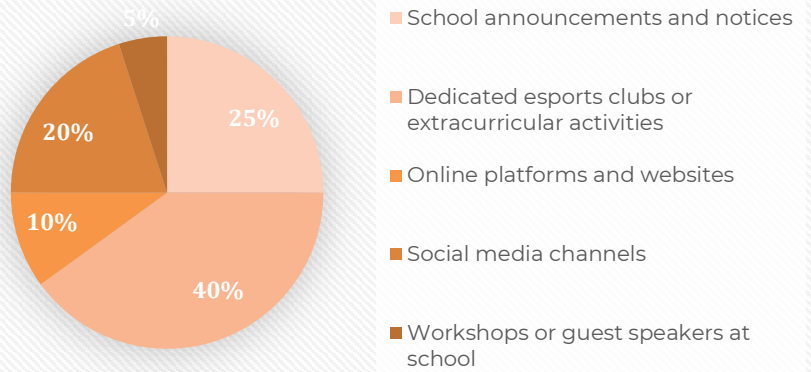
Insufficient Support from Teachers or School Administration: The role of educators and school administration is crucial in fostering a supportive environment for students interested in esports. Insufficient support might be due to a lack of understanding or recognition of the potential benefits of esports.

Lack of Awareness about Esports Opportunities: Many individuals might not be aware of the various opportunities available within the esports ecosystem, ranging from playing competitively to pursuing careers in production, management, and more.

Would you be interested in workshops?



How would you prefer to learn about esports opportunities and resources?



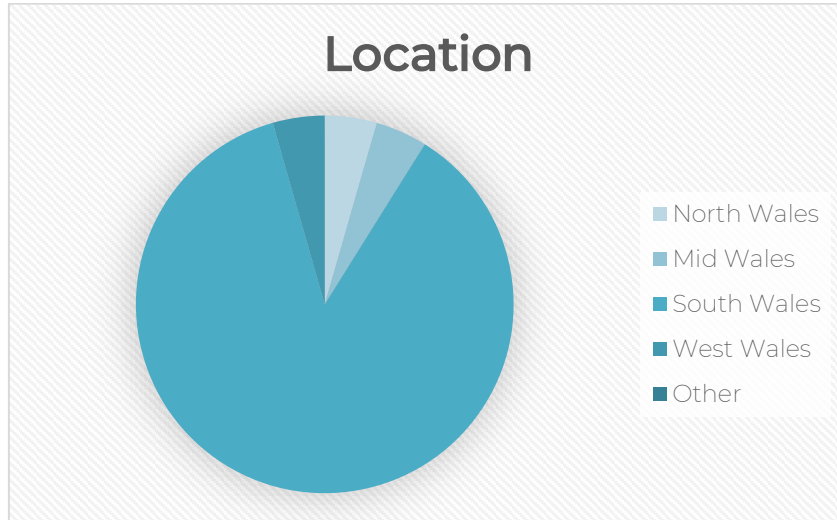
The survey results indicating a positive interest in esports workshops and a preference for learning about opportunities and resources through dedicated esports clubs or extracurricular activities reflect a strong desire for practical engagement and hands-on learning within the esports community. These findings offer valuable insights into the preferences of respondents and provide a clear direction for potential initiatives. Here's an analysis of the responses:

The survey provides an insight to show that young adults are interested in aspects such as livestreaming and commentating on esports titles.

The feedback with from the young people was the main barriers stopping from them getting involved in Esports was a of access to the necessary equipment, and limited availability of esports courses or program across the country.

□ The Esports Community Survey

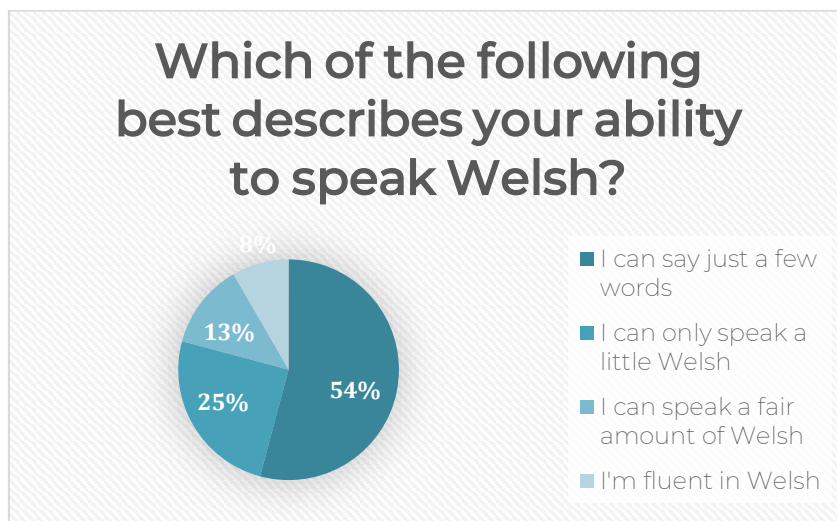
The results highlight the concentration of esports enthusiasts in South Wales, along with smaller representation from North, Mid, and West Wales. This information can be valuable in understanding the regional dynamics of the esports scene and tailoring initiatives to cater to the needs of different areas. Here's an analysis of the findings:



Geographical Distribution:

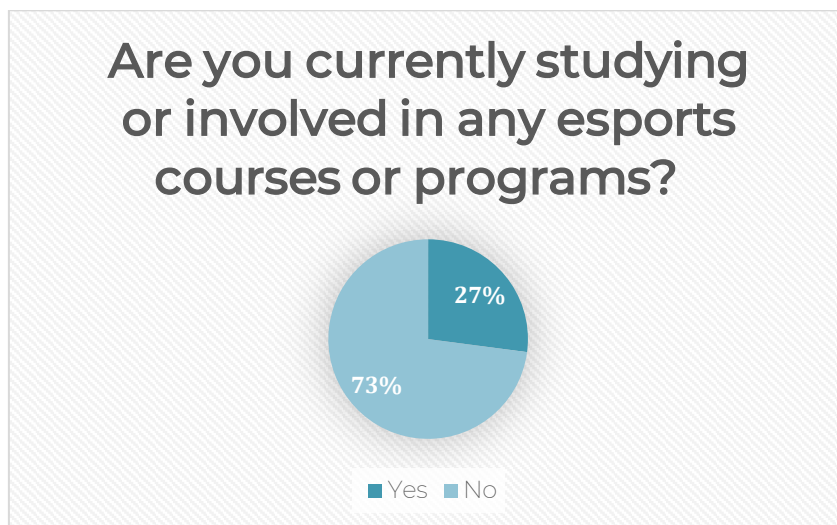
South Wales (Majority): The fact that most respondents are based in South Wales suggests that this region has a strong presence within the esports community. This could be attributed to factors such as population density, urbanization, and access to infrastructure.

North, Mid, and West Wales (Minority): While the representation from these regions is smaller, it still indicates that there is interest in esports across various parts of Wales. It's worth exploring the reasons for the lower representation and identifying strategies to engage and involve individuals from these regions.

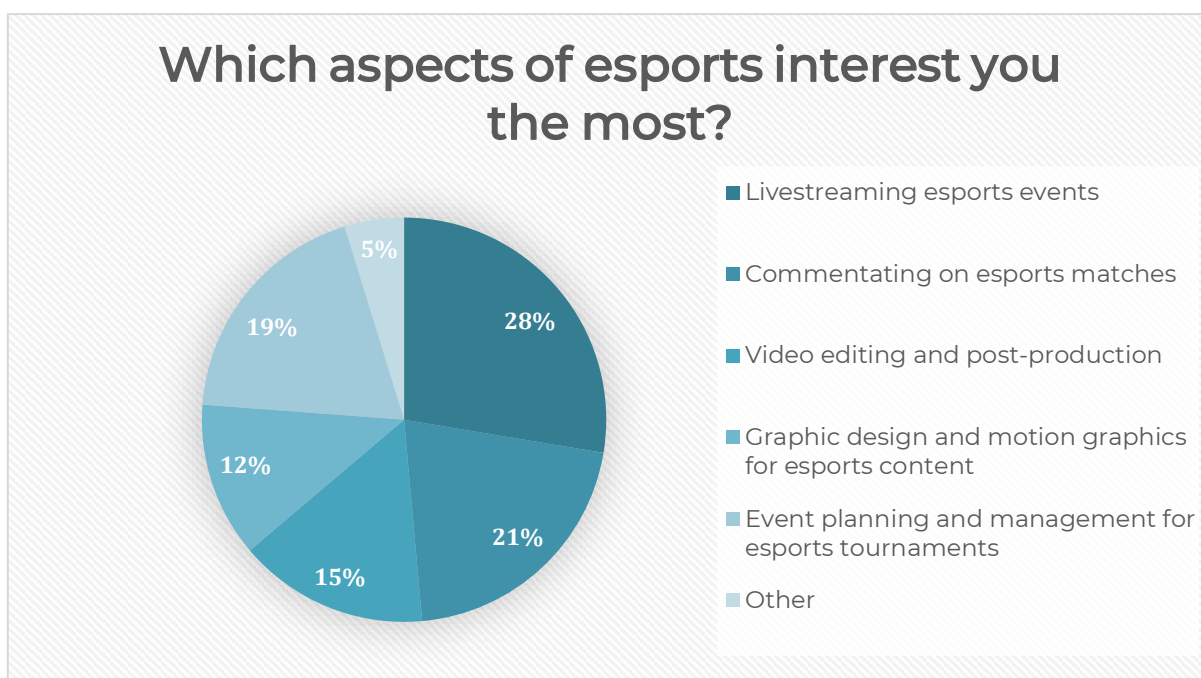


Language Proficiency Spectrum:

Limited Proficiency (Few Words): Participants who have limited proficiency in Welsh might face challenges in expressing themselves fully, particularly when discussing complex or nuanced topics. This can affect their ability to provide detailed insights in Welsh.



The breakdown of responses from the survey regarding the production aspects of esports that interest participants provides valuable insights into the preferences and aspirations of the esports community in Wales. Here's an analysis of the distribution:



Interest in Production Aspects:

Live Streaming: Live streaming emerges as a significant interest, indicating a strong desire to engage with audiences in real-time and create content that is dynamic and interactive.

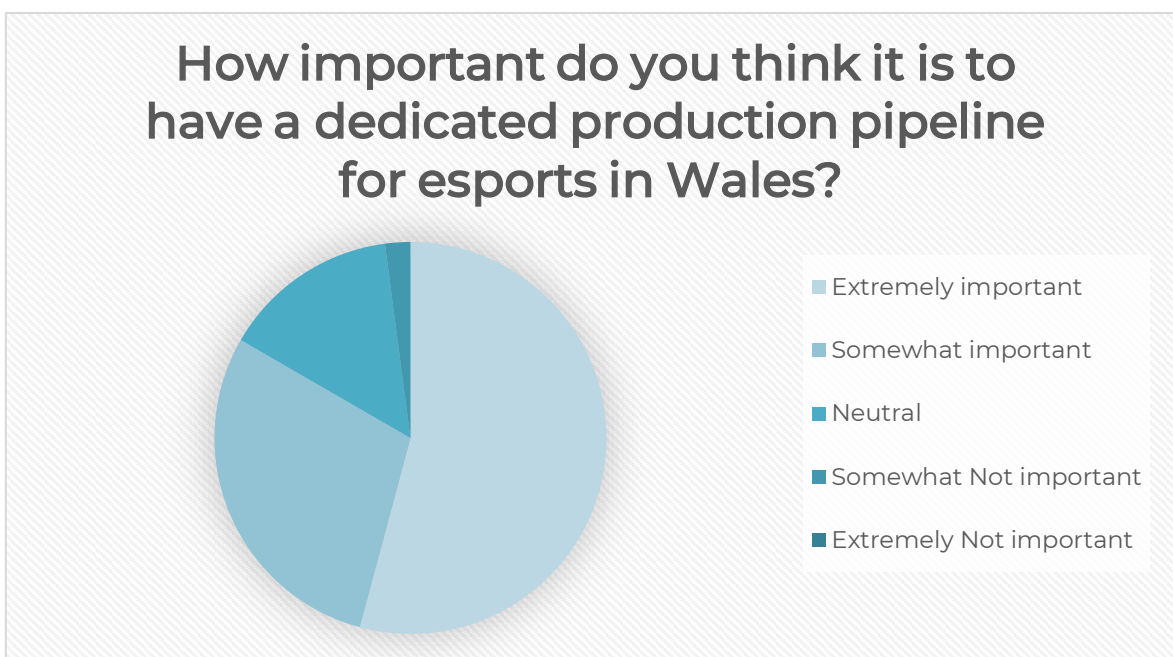
Commentating on Esports Matches: Commentating is also popular, reflecting an interest in providing analysis, insights, and narrative during esports events to enhance the viewing experience.

Graphics: The interest in graphics suggests an inclination towards enhancing the visual appeal of esports broadcasts through elements like overlays, animations, and designs.

Video Editing: Video editing holds an attraction for individuals who enjoy creating highlights, recaps, and engaging content that captures the essence of esports matches and events.

Events Management: The interest in events management highlights the significance of organizing and coordinating esports tournaments and gatherings, suggesting an aspiration to contribute behind the scenes.

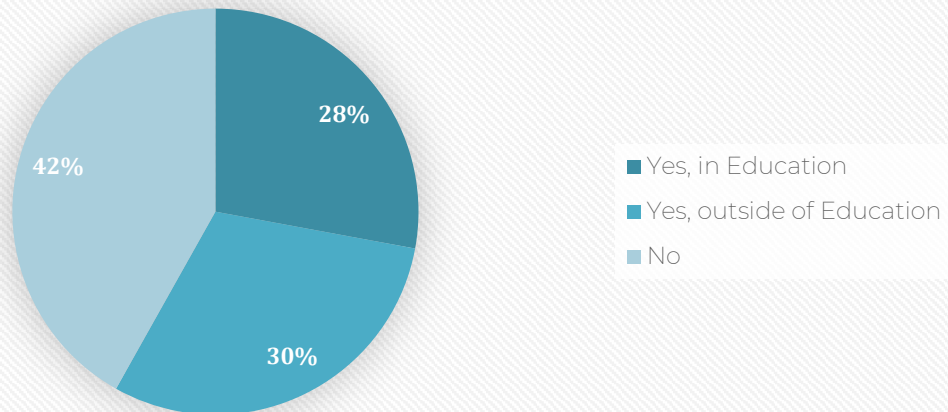
Other: The "Other" category represents a small percentage and might encompass diverse production aspects that participants find interesting but aren't covered in the provided options.



The survey results highlighting the perceived importance of having a dedicated production pipeline for esports in Wales demonstrate a strong consensus among participants. The majority of respondents value the establishment of a well-structured and efficient production ecosystem to support the growth of the esports industry in the region. Here's an analysis of the responses:

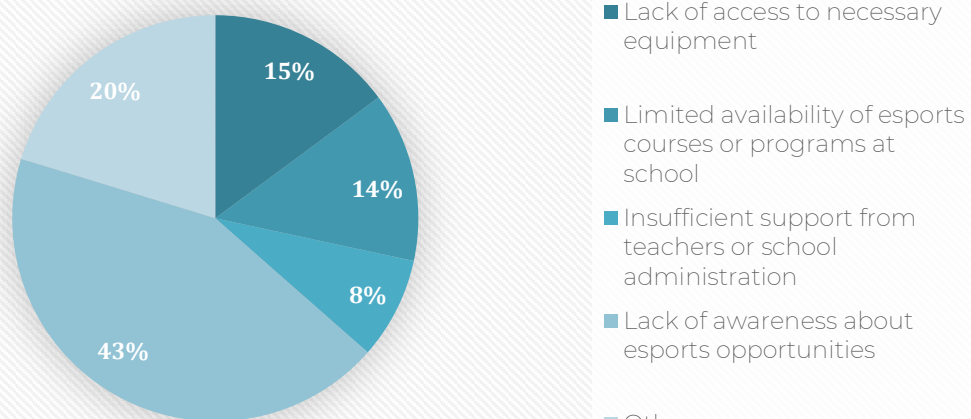
The fact that over half of the participants consider a dedicated production pipeline extremely important reflects a clear understanding of the role that production plays in enhancing the quality, professionalism, and growth of esports events and content.

Have you participated in any esports production activities or events?



The finding that 58% of the esports community in Wales have participated in some form of esports production activities is significant and highlights the active engagement of a substantial portion of the community in this aspect. This level of participation indicates a strong interest in contributing to the production side of the esports ecosystem.

What barriers, if any, have you faced in pursuing your interest in esports?



The survey results outlining the barriers faced by individuals in pursuing their interest in esports provide valuable insights into the challenges that need to be addressed to create a more inclusive and supportive environment for esports enthusiasts in Wales. Here's an analysis of the responses:

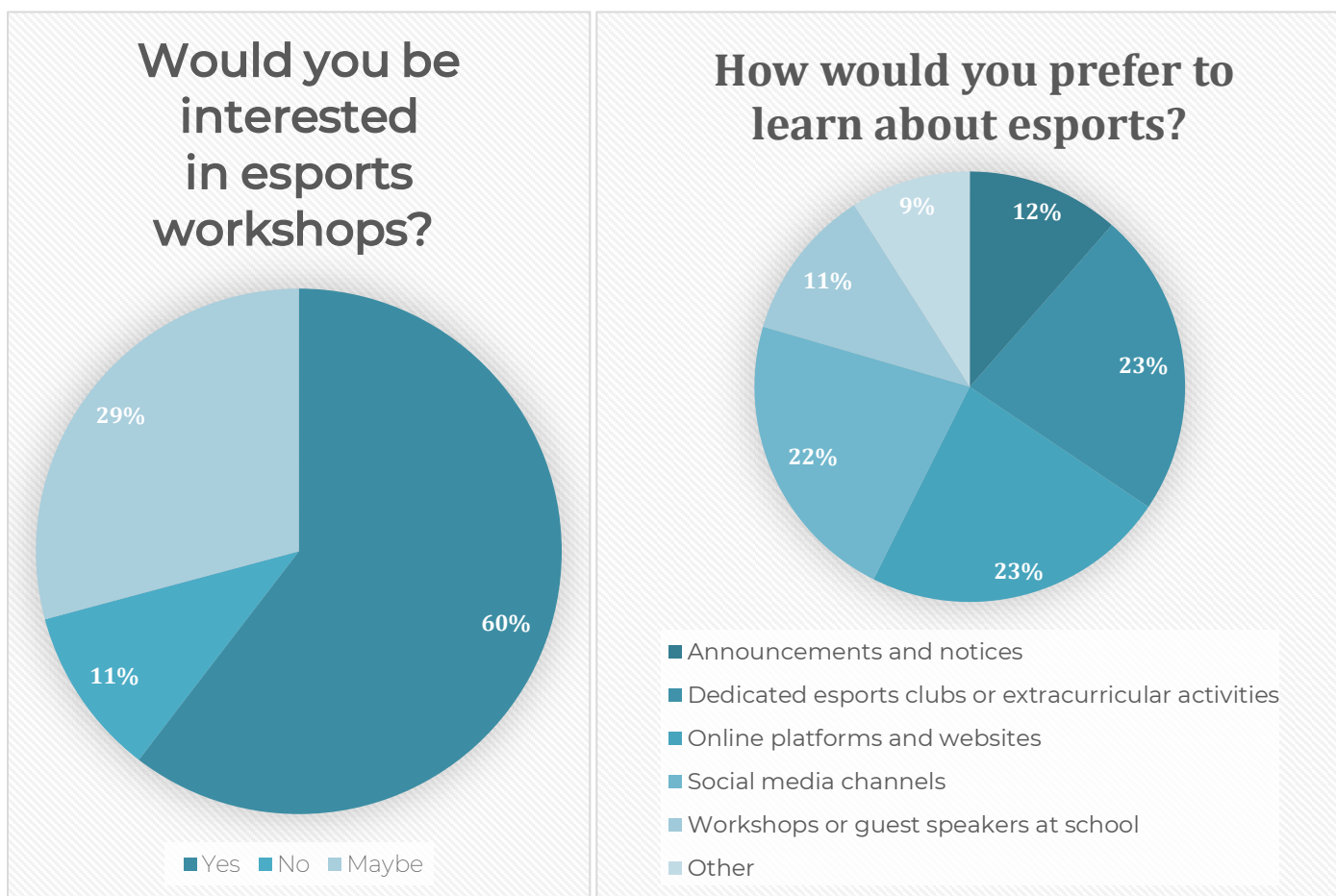
Lack of Access to Necessary Equipment: The barrier of limited access to essential gaming equipment and technology can hinder individuals from fully participating in esports activities, whether it's gaming, content creation, or production.

Limited Availability of Esports Courses or Programs at School: The lack of esports-related educational offerings in schools' points to a potential gap in formal education opportunities related to esports, which could impact the development of skills and knowledge in the field.

Insufficient Support from Teachers or School Administration: The importance of educator support in fostering a nurturing environment for esports enthusiasts is underscored by this barrier. Lack of support could stem from a lack of understanding or recognition of the value of esports.

Lack of Awareness about Esports Opportunities: The barrier of lack of awareness about esports opportunities suggests that many individuals might not be fully informed about the potential paths for involvement in the esports ecosystem, including both playing and non-playing roles.

Other: The "Other" category represents a significant portion of respondents who face unique or unspecified barriers. This could include factors not covered in the provided options.



The high interest in workshops and the varied preferences for learning about production opportunities among the community indicate a strong appetite for engagement, learning, and growth within the esports ecosystem in Wales. Most respondents expressing interest in participating in workshops signifies a strong desire for hands-on learning experiences and skill development.

The community's interest in learning through a diverse range of channels reflects the importance of offering accessible and tailored approaches for different learning styles and preferences.

Following the survey, we asked What career would they like to go into? Here are the answers
Content Creation, Pro Player, Esports Mental Health and Performance Specialist, Commentary, AI
Engineering / General Esports Work, Esports Player, Analyst/Observer/Shout caster, Production, ICT,
Caster, Community Management, Education, Marketing, Pro Player, Design, Video Editing, Music,
Coding and social media, Rugby, social media, Technology Related. Events Planning, Live Streamer,
Politics, Business, Physiotherapy, Dog Handler, Graphic Design, Football, Aerospace Engineering,
Streaming.

As you can see the wide range of roles that all can have strong links to Esports.



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WORLD ESPORTS CHAMPIONSHIP 2022

WORLD ESPORTS CHAMPIONSHIP 2022

EDUCATION

□ Type of courses

There are many types of courses in the video games industry. The research only focused on courses with Esports in the title.

□ Pre-16 video games education in Wales

There are several programs that look to engage young people to get involved in coding or lead in to digital or stem-based careers. Other than the Esports Wales Academy there were no other courses found for Key Stage 3 or below to engage young people in these aspects.

Dell and Intel have recently conducted a study which surveyed a sample of 700 UK children aged 11 to 17 via parents in May 2023. The report showed that Over half of UK students believe an esports qualification would be as useful to them as a traditional subject like math's, according to a report by Dr Eliza Filby

According to the report, 78% of UK school students aged 11-17 now game with many saying that their passion had driven other interests like content creation.

Esports also topped the list of preferred extra-curricular activities, beating out traditional pursuits like dance, drama, and art.

41% indicated they would opt to take an esports qualification if it were available, and many believe it would help them with critical thinking, new skill acquisition, and communication ability.

Following on from the study Dr Eliza Filby stated "Whilst there are other things that Gen Alpha will need to thrive in the future - from engagement with the natural world to face to face communication - we need to understand that gaming is one of those core experiences which will help them prepare for the 21st century.

Wales needs to align education programs to allow young people to progress easily through these pathways. One finding from reviewing the current course content from exam boards for game development showed that many of the schools teach game maker instead of Unreal Engine. Unreal Engine is the industry standard for game design and virtual production. By starting young people on the correct software would be able to develop quickly in the industry and be more attractive for game development and virtual production companies to be based in Wales.

□ Post-16 video games education in Wales

This section focuses on post-16 education providers in Wales. A course search was undertaken for any courses with esports in the course title. Courses with games development in the title have not been included.

Our study found that only 2 of the secondary schools deliver courses or clubs within Esports. Our review showed that 9 out of the 15 FE providers in Wales were delivering Esports and 0 of the HE institutes in Wales were offering courses in Esports.

The colleges have been the quickest to adapt to the new trend in esports within Wales, perfectly suited for the esports' main demographic and having the budgets to be able to install and manage their own IT infrastructure.

□ Graphic distribution of Esports in Wales.

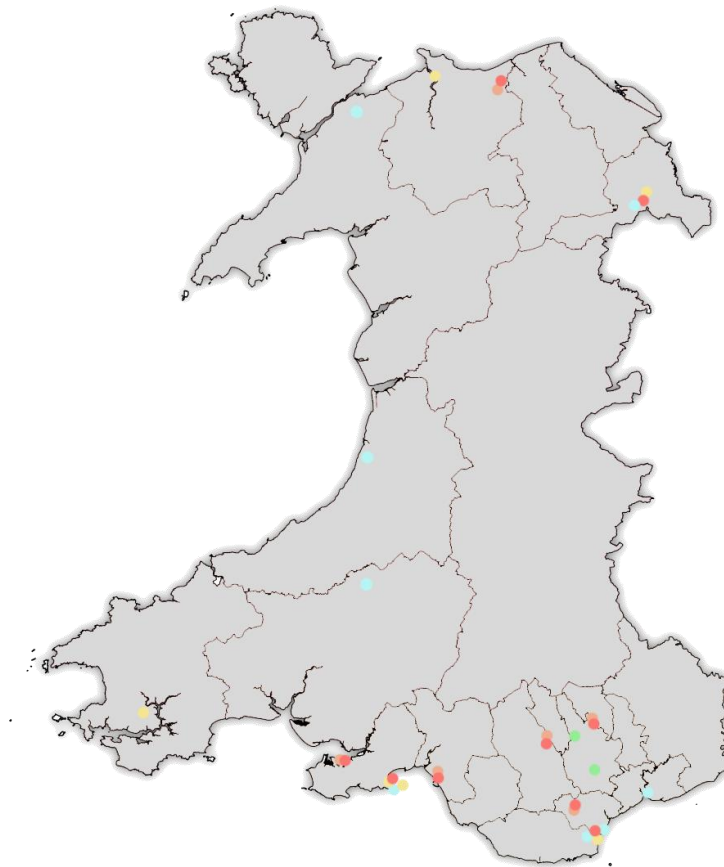


Figure 11

Green are Schools Delivering the Courses
Red are Secondary Esports courses
Light Orange is College Teams
Light Blue is University Society Teams
Yellow are Semi Professional Esports Teams

❑ Correlation of Esports Team Location

Clusters of teams are frequently seen near education providers. Analyzing the correlation of esports team locations with colleges and universities can provide valuable insights into the relationship between higher education institutions and the esports community. This correlation might impact the esports scene:

Proximity to Resources: Colleges and universities often provide resources such as infrastructure (computer labs, gaming rooms), expertise (faculty members), and potential funding. The proximity of esports teams to these institutions can enhance their access to these resources.

Talent Pool: Higher education institutions can serve as talent pools for esports teams, offering a diverse array of students with different skills, including players, production professionals, marketers, and managers.

Academic Integration: Proximity to colleges and universities can foster collaborations for academic research, esports courses, and programs that cater to various aspects of the industry.

Networking Opportunities: Being located near educational institutions can facilitate networking and partnership opportunities between esports teams and students who are interested in the industry.

Student Engagement: Colleges and universities can serve as platforms for promoting esports events, competitions, and club activities, allowing teams to engage with a passionate and knowledgeable student community.

Recruitment: Esports teams might scout and recruit potential players and talent directly from campuses, creating a pipeline of skilled individuals.

Fan Base: The presence of colleges and universities can contribute to a local fan base that is eager to support esports events and teams.

Media and Promotion: Educational institutions offer channels for media coverage, promotion, and engagement through student publications, campus events, and social media.

Cultural Impact: The collaboration between esports teams and educational institutions can contribute to the cultural integration of esports within academic circles and society.

Long-Term Development: Collaboration with educational institutions can support the long-term development of the esports scene by nurturing talent and fostering partnerships.

In your research, you can identify and analyze the geographical distribution of esports teams in relation to colleges and universities. This analysis can help you understand the extent of the correlation, its impact on the teams, and the potential opportunities for collaboration and growth. Additionally, gathering insights from both the teams and the educational institutions can provide a comprehensive understanding of how they interact and mutually benefit from their proximity.

Establishing links between esports orgs and educational institutions will ensure a stronger pipeline fit and faster for the industry.

□ Interview with Post 16 College Educator

Aim of the Interview: The aim of these interviews was to gather insights into the challenges and opportunities within esports education in Wales.

What They Said: Based on the interviews, the following key feedback points were identified:

- **Lack of Real-Life Experience:** Learners face a challenge in gaining real-life experience due to the absence of a full production facility available for use in the college.
- **Language Diversity:** None of the students in the program currently speak Welsh alongside their studies, indicating a potential gap in bilingual education.
- **Gender Imbalance:** In a class of 20 students, all are male, signaling a lack of female talent entering the field.
- **Post-Course Opportunities:** Students find it challenging to secure professional development opportunities in esports after completing their courses or to gain work experience in the industry.
- **Professional Development for Staff:** Staff members lack opportunities for Continuous Professional Development (CPD), which could enhance their teaching and industry knowledge.
- **Industry Pathways:** There is a need for clearer pathways for students to transition from education to the esports industry.
- **Alignment with Government Framework:** Esports education aligns with the Welsh Government's digital 2023 framework for post-16 learning in Wales, offering a range of transferable skills.

Deductions/Insights: Analyzing these feedback points, several key deductions and insights can be made:

- **Real-Life Experience Gap:** Addressing the lack of real-life experience through the establishment or enhancement of production facilities can better prepare learners for practical challenges in the esports industry.
- **Language Diversity Promotion:** Initiatives to encourage bilingualism and Welsh language integration in esports education can foster language diversity among learners.
- **Gender Diversity and Inclusion:** Promoting diversity and inclusion is vital to attract and retain female talent in esports education. Creating a welcoming and inclusive environment can help bridge the gender gap.
- **Post-Course Transition Support:** Providing pathways for students to continue their professional development and gain work experience after their courses are crucial for the long-term sustainability of the esports talent pool.
- **Staff Development:** Offering CPD opportunities for staff can improve the quality of education and better equip educators to prepare students for the esports industry.

- **Clear Industry Pathways:** Creating well-defined pathways for students to transition from education to industry can bridge the gap between academic learning and practical application.
- **Government Framework Alignment:** Recognizing esports education as aligned with the Welsh Government's digital framework for post-16 learning underscores its relevance and potential impact on the digital landscape and the future workforce in Wales.

□ Interview with Post 16 School Educator

Aim of the Interview: The objective of these interviews was to gain insights into the challenges and opportunities within esports education, particularly regarding linguistic diversity, gender balance, professional development, technology accessibility, and budget constraints in Wales.

What They Said: Based on the interviews, the following key feedback points were highlighted:

- **Linguistic Uniformity:** All students currently being taught in esports education programs speak Welsh, indicating linguistic uniformity among the student body.
- **Gender Imbalance:** Within a majority-male class, there is a noticeable absence of female talent entering the field.
- **Post-Course Development and Work Experience:** Students face challenges in continuing their professional development in esports after completing their courses and finding work experience opportunities within the industry in Wales.
- **Staff Development in Welsh Language:** Staff members expressed the absence of opportunities for esports Continuous Professional Development (CPD) conducted in the Welsh language.
- **Technology Challenges:** There are difficulties related to game installation and updates, internet speed, and the high cost of esports hardware. Schools often lack the budgets required for hardware upgrades.

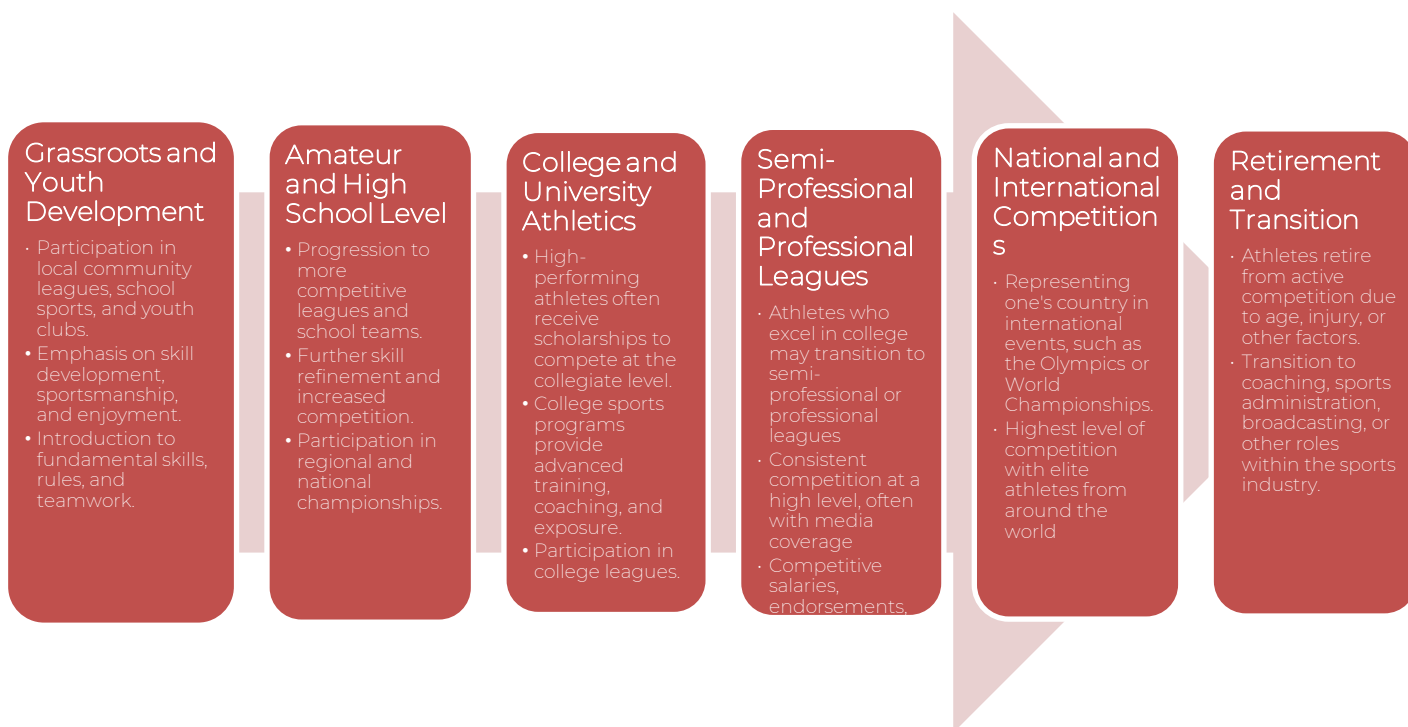
Deductions/Insights: Analyzing these feedback points, several key deductions and insights can be made:

- **Bilingual Education Significance:** The presence of Welsh-speaking students underscores the importance of considering bilingual education approaches that cater to the linguistic diversity of the student population.
- **Gender Diversity Promotion:** Addressing the gender imbalance issue should be a priority. Fostering an inclusive and supportive environment can encourage greater participation of female students in esports education, contributing to gender diversity and equity.
- **Post-Course Transition Challenges:** Challenges related to post-course professional development and work experience opportunities indicate the need for closer collaboration between educational institutions and the esports industry in Wales.
- **CPD in Welsh Language:** Offering esports CPD opportunities conducted in the Welsh language can enhance staff development and support the delivery of esports education.

- **Technology Infrastructure:** Difficulties in game installation, slow internet speeds, and the high cost of hardware highlight the need for investments in technology infrastructure. Ensuring seamless access to technology resources can significantly improve the educational experience.
- **Budget Constraints:** Schools facing budget constraints in upgrading esports hardware may benefit from exploring alternative funding sources or partnerships to support technology upgrades.

In conclusion, addressing these feedback points can contribute to the enhancement of esports education in Wales by promoting linguistic diversity, gender balance, professional development opportunities, and technology accessibility while managing budget constraints effectively.

□ The pipeline for traditional sports



Comparing the pipelines in traditional sports to those in esports highlights both similarities and differences in how talent is nurtured and developed in these two domains. Here's a comparison between the two:

Grassroots and Youth Development:

Similar: Both traditional sports and esports start with grassroots participation, where individuals engage in basic skill development and enjoyment.

Different: Grassroots esports might involve playing games casually or participating in local tournaments, while traditional sports often involve physical activity and structured leagues.

Amateur and High School Level:

Similar: Both traditional sports and esports progress to more competitive levels at schools, emphasizing skill improvement and friendly competition.

Different: Esports can have a more accessible entry point, as many individuals can play games on their personal computers or consoles and don't have the options to play in school.

College and University Involvement:

Similar: Collegiate sports and collegiate esports programs provide advanced training and competitive opportunities.

Different: Collegiate esports is rapidly growing, offering courses and organized leagues in games like League of Legends and Overwatch.

Semi-Professional and Professional Leagues:

Similar: Both domains have semi-professional and professional levels of competition with players earning salaries and sponsorships.

Different: Esports professionals often start at younger ages, and competitive video gaming doesn't require the same level of physical fitness as traditional sports.

National and International Competitions:

Similar: Both traditional sports and esports have national and international events, where elite athletes compete on the global stage.

Different: Esports events can be purely online or played on a global stage with no physical presence, while traditional sports require physical venues.

Retirement and Transition:

Similar: Both domains involve athletes transitioning to roles like coaching, broadcasting, or team management.

Different: In traditional sports, physical limitations like age or injuries often drive retirement. Esports professionals can continue competing at a high level for longer.

Challenges and Opportunities:

Traditional sports have a long history, established infrastructure, and recognition. Esports is newer but rapidly evolving, which can create both opportunities and challenges. Esports has a strong digital presence, allowing players to stream, create content, and engage with fans directly. The global nature of esports allows for diverse international representation in competitions.

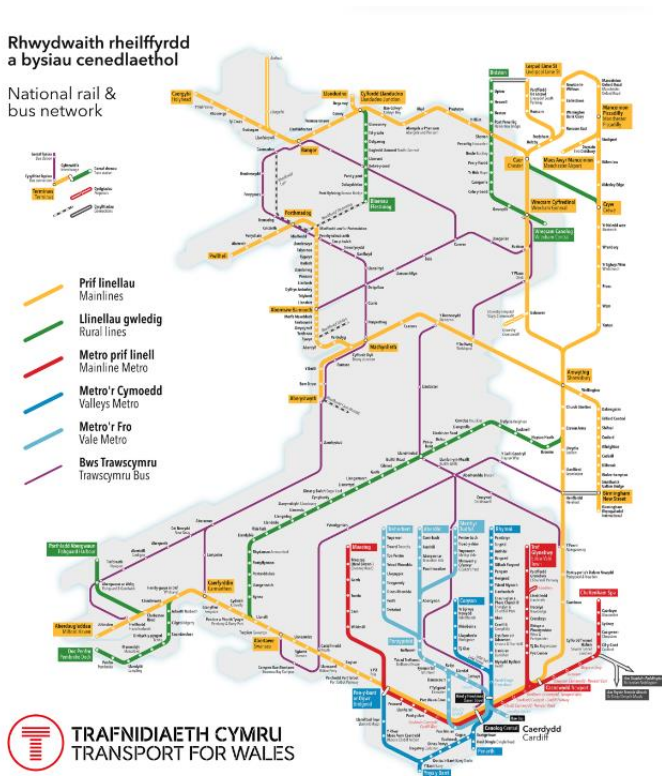
TRANSPORT

These are the National Transport Delivery Plan 2027 Priorities

- **Priority 1:** bring services to people to reduce the need to travel.
- **Priority 2:** allow people and goods to move easily from door to door by accessible, sustainable, and efficient transport services and infrastructure.
- **Priority 3:** encourage people to make the change to more sustainable transport. (Government, n.d.)

Wales has a combination of transport links such as Walking and Cycling, Road Transport, Buses, Rail, Air Travel and Sea Travel. With the carbon emissions policies Walking and Cycling is the main priority of the Welsh Government over the next 5 years.

The priorities do not directly help the Creative or Digital industries sector and can create a barrier to bring people together for national and international events and training sessions. This must be considered for further development of the esports industry in Wales and more focus on online activities and remote learning to support everyone in Wales. Local hubs would be the best way to support access to hardware, and physical activities.



There is a lack of train connections between Swansea to Aberystwyth or Bangor to Porthmadog. This leads to having to travel long distances using public transport and promotes more freelancers having to use cars to travel across the country. Due to the age demographic of the esports community many would not have cars to travel. (Statista - Car Ownership by Age, n.d.)

Following the State of Wales report shows that there are multiple large settlements that aren't directly served by a railway station with Traws Cymru bus network trying to fill the gaps.

The State of Wales report also shares information that with a few tweaks could make rail travel more efficient than the road network by removing

multiple stations that are less than a mile apart and underutilized. This is demonstrated across the whole of Wales. (Gaps, n.d.)

The Rhose Cardiff International Airport has poor connections to Cardiff City Centre and Swansea City. Unlike most major airports, the travel between Cardiff Airport and the international train station is a 40-minute walk, increasing the journey times of the international flights to the events in or outside of Wales.

The State of Play report shows that connections between the North and NW England are good. This could potentially create opportunities for Wrexham to expand as an Esports Hub.

The State of Play report also shows the missed opportunities in having better South Wales Ferry links from Swansea and with better links to Cardiff Airport could expand international tourism to Wales and have more opportunities for an esports center in Swansea, utilizing the new Swansea Arena for global esports events.

ACCESS TO HARDWARE

□ Interview with staff in education

Procurement of the hardware can be difficult as some of the industry standard hardware is not on the required frameworks that schools need to use. There are also issues down to the limited budget available to schools and difficulty sourcing the hardware.

There are several issues with the internet speeds in Schools and Community Hubs, this is not only down to access but also added costs for the organizations.

There are also barriers with local councils in providing secure access for several of the games, preventing students from being able to be able to play in school tournaments, or in nationwide events.

□ Mapping the state of internet speeds across Wales.



Figure 12 – Overview of voice and data coverage across the UK. (ISP Preview, n.d.)

The above graphic demonstrates that Wales has the worst performing internet speeds across the whole of the UK.

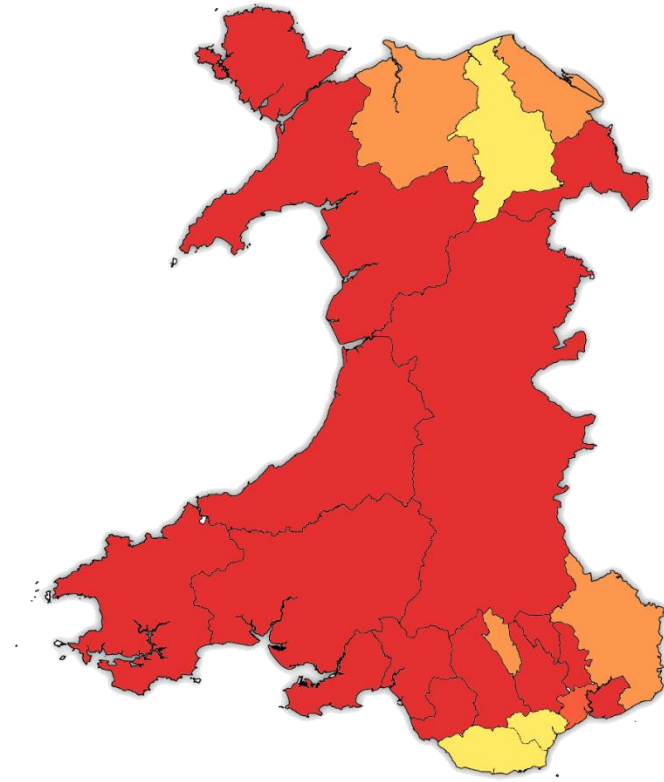


Figure 13 – Average Internet Speeds in Wales

On this scale you can see that the average internet speeds across Wales, showing that Cardiff and Vale, and parts of Denbighshire and Flintshire are seen to have the best average speeds across Wales. While these areas provide average speeds there are still lots of places in Wales that are unable to get more than 10Mbps meaning they are unable to compete or work in esports production.

There are roll out plans for FTTP and 5G within Wales. FTTP has a life span of 30 years, where 5G is recommended to be replaced one every 10 years.

In the short term 5g roll out is more cost effective due to not having to dig up roads or fields. The 5g infrastructure will also be able to be upgraded to 6g in 2030 and support more smart cities.

SKILLS REQUIREMENTS

The esports industry is currently experiencing rapid expansion, reflecting the remarkable growth seen in the creative sector. In this dynamic landscape, Wales stands at a pivotal juncture, entrusted with the task of nurturing the next generation of individuals who will play crucial roles in driving various industries forward. These encompass not only the thriving Gaming Development sector but also the broader array of screen-based industries within Wales.

Moreover, as technology continues to push boundaries, Wales finds itself in a unique position to spearhead the evolution of groundbreaking concepts such as Virtual Production, Virtual Reality (VR), and the emerging Metaverse concept. Embracing these technological advancements can position Wales as a leader in the esports industry while also fueling innovation, particularly in esports production.

By cultivating expertise in virtual production techniques and harnessing VR technology, Wales has the potential to elevate the quality of esports broadcasts, delivering immersive and captivating viewing experiences to a global audience. This aligns with the industry's broader trend towards interactive and visually stunning content. Wales can take an active role in shaping the future of esports entertainment through these cutting-edge technologies, ensuring a prominent and influential presence in the ever-expanding world of esports.

The imperative for Wales to foster a new generation of talents is underscored by several key factors. The surge in esports and gaming not only presents recreational opportunities but also opens an avenue for lucrative careers encompassing areas such as competitive gaming, content creation, production, event management, and game development. By cultivating these talents, Wales can harness the potential of the gaming industry's economic impact, job creation, and cultural influence. With support from Creative Wales and Welsh Sports Association it allows for a perfect combination to support the grow of esports in Wales.

Moreover, the rapid advancements in technology, particularly within the realm of Virtual Production, VR, and the Metaverse, beckon for skilled individuals who can navigate these transformative domains. These technologies have the potential to revolutionize storytelling, entertainment, education, and even collaborative workspaces. Wales, with its historical resonance for innovation, can position itself at the forefront of these developments, provided it actively nurtures the skill sets necessary for their implementation.

To achieve these goals, fostering an environment that encourages learning, innovation, and collaboration is essential. This can involve establishing educational pathways, workshops, and mentorship programs that empower individuals to explore, experiment, and excel. By equipping the next generation with a comprehensive skill set that span from gaming to advanced technologies, Wales can ensure that it not only embraces the present but also paves the way for a prosperous and pioneering future in the realms

of esports, gaming, and beyond. The goal in Wales is to create an environment that promotes learning, innovation, and collaboration. This involves initiatives like educational programs, workshops, and mentorships, aimed at empowering individuals in areas spanning from gaming to advanced technologies. The aim is to equip the next generation with a diverse skill set, ensuring that Wales not only embraces the present but also prepares for a prosperous future in esports, gaming, and related industries.

□ Interviews conducted with traditional sport production

Aim of the Interview: The aim of this interview was to gather insights on the production aspects of traditional sports and how they relate to esports in Wales.

What They Said: During the interview, several key points were discussed:

- **Traditional Sports Production vs. Esports:** Traditional sports production in Wales has historically been conducted using mobile vans or remote sites. Esports production, on the other hand, tends to follow the USA production model.
- **Shift to Remote Solutions During Lockdown:** The COVID-19 lockdown brought about a significant change in the way broadcasts were conducted. Both traditional sports and esports shifted toward more remote production solutions.
- **Shared Production Technology:** It was noted that both sports and esports use similar production technologies, including tools like VMix, Mirror for Reply, and Expression.
- **Abundance of Welsh Talent:** There is a wealth of Welsh talent in the field of production, cultivated over the years. This talent pool includes Welsh-speaking individuals who are frequently employed, especially by S4C. Typically, 20-30 people are utilized across different sports broadcasts. Commentators are easier to find than individuals skilled in a particular sport who can also provide commentary.
- **Sport Production Degrees in Wales:** Wales offers sport production degrees, with institutions like Cardiff Met and Swansea University offering programs that help develop future sports production talent.
- **Lack of Esports Production Firms:** Notably, there are currently no esports production firms based in Wales. Consequently, event organizers must either hire external production firms or encourage existing production companies to upskill to handle esports events.

Deductions/Insights: From this interview, several deductions and insights emerge:

- **Convergence of Technologies:** The shared use of production technologies between traditional sports and esports indicates a convergence in the methods of content creation, reflecting the adaptability of the production industry.
- **Resourceful Talent Pool:** Wales boasts a resourceful talent pool for both sports and esports production, with a particular emphasis on bilingual capabilities for Welsh-speaking broadcasts.
- **Educational Opportunities:** The presence of sport production degrees in Wales suggests a proactive approach to nurturing future talent and meeting the industry's evolving needs.

- **Opportunity for Esports Production Growth:** The absence of dedicated esports production firms in Wales presents an opportunity for investment and growth in the esports production sector, with the potential for local companies to expand their expertise in this dynamic field.

□ Interview conducted with esports production talent.

Aim of the Interview: The aim of this interview was to explore the challenges faced by aspiring casters and production talent in Wales when seeking opportunities in the esports industry.

What They Said: During the interview, several key points were raised:

- **Challenges for Aspiring Casters:** New talent often struggles to secure opportunities in an industry that tends to favor established individuals season after season. Aspiring casters must not only excel in their abilities but also find compelling reasons to replace existing talent.
- **Networking and Industry Connections:** Job opportunities for talent in Wales frequently rely on networking connections formed during social events. Unfortunately, such events typically take place outside of Wales, making it challenging for individuals to connect with industry professionals due to geographical distances, especially when aiming to enter casting events that aren't exclusively for female participants.
- **Equipment and Investment:** While personal equipment is sufficient for production needs, the desire to upgrade equipment exists. However, this often depends on funding or confirmed work opportunities that would justify the investment.
- **Lack of Prior Experience with Welsh Talent:** There is a noticeable lack of prior experience with Welsh talent or production teams in the esports industry. Limited Welsh talents are registered on platforms like Liquipedia. Moreover, there is a growing need for more inclusive production, particularly for larger events like ESL, and the creation of a welcoming environment for female talent.
- **Supportive Workshops and Networking:** Interviewees expressed the importance of organizing workshops featuring accomplished female talent from similar esports fields. Such initiatives could provide networking opportunities and establish a supportive community for aspiring female talent.
- **Student Participation and Practical Learning:** The recent observation of students showcasing their live production skills at the British Champ finals held at Confetti X Arena was commended. This highlights the tangible benefits of putting classroom learning into practice, allowing students studying esports production to gain valuable experience and skills.

Deductions/Insights: From this interview, several deductions and insights can be made:

- **Networking Barriers:** The absence of local industry events in Wales and the geographical distance to major esports hubs pose significant challenges for aspiring talent in building crucial networking connections.

- **Diversity and Inclusivity:** The industry appears to face diversity and inclusivity challenges, particularly concerning female talent. Creating a more welcoming environment and providing opportunities for female casters and production professionals is a recognized need.
- **Investment and Opportunities:** The decision to invest in upgraded equipment often hinges on the presence of confirmed work opportunities. This suggests that securing initial opportunities is a crucial step for aspiring talent in justifying equipment investments.
- **Student Engagement:** The involvement of students in live production showcases indicates a positive trend of practical learning. Such opportunities benefit students by offering hands-on experience and preparing them for careers in esports production.

In conclusion, aspiring casters and production talent in Wales face challenges related to networking, inclusivity, equipment investment, and opportunities. Addressing these challenges and fostering a supportive environment can contribute to the growth of esports talent in the region.

□ Interview with national federations

Aim of the Interview: The aim of the interview with multiple esports federations was to gather insights into the development and production aspects of esports, with a particular focus on talent development and production strategies within national federations.

What They Said: Key points emerged from the interviews with esports federations:

- **Esports Development Pathways:** Only some federations currently offer esports development pathways. This highlights an opportunity for Wales to not only address this gap domestically but also potentially make an impact on an international scale.
- **Production Needs:** National federations express a need for various production services, including esports video production, postproduction editing, and live commentary, indicating the significance of these components in the industry.
- **Importance of Pipelines:** National federations emphasize the importance of having a pipeline for talent development as it plays a crucial role in the growth of esports within their respective countries.
- **Language Considerations:** Some countries, like Iceland, prioritize using their home language (in this case, Icelandic) for esports production, highlighting the significance of catering to local audiences.
- **Portfolio-Based Hiring:** Talent is typically hired based on their portfolios, with interviews and demos being common practices. This underscores the importance for aspiring talent to build strong portfolios to secure opportunities in other countries.
- **Season-Long Commitments:** National federations often book talent for entire seasons, emphasizing the value of making a positive first impression in securing long-term engagements.
- **Studios and Low-Budget Content:** Iceland's approach of having its own studio has enabled the production of low-budget content and provided opportunities for interested individuals to gain experience in esports production.

- **Segment Opportunities:** There is an emphasis on offering opportunities for individuals to work on various segments of esports production, contributing to skill development and industry growth.
- **Challenges in Talent Selection:** Some federations have faced challenges when selecting individuals with low skills or ambition, which has hindered talent development efforts.
- **Female Talent Development:** Developing female talent has proven challenging due to the absence of role models and limited visibility of female figures in the esports industry.

Deductions/Insights: From these interviews, several deductions and insights can be made:

- **International Opportunity:** The absence of esports development pathways in some countries suggests an opportunity for Wales to not only establish these pathways domestically but also potentially contribute to international talent development efforts.
- **Production is Paramount:** Production elements such as video production, editing, and commentary are recognized as critical components for the success of esports federations.
- **Talent Pipeline:** The establishment of a talent pipeline is crucial for nurturing esports talent and fostering its growth within national federations.
- **Cultural Considerations:** Language and cultural factors play a role in esports production, emphasizing the importance of catering to local audiences.
- **Portfolio Building:** Aspiring talent should prioritize building strong portfolios, as they are often the basis for talent recruitment processes.
- **Long-Term Commitments:** Building lasting relationships with talent is common practice, underlining the importance of a positive first impression.
- **Low-Budget Production:** Establishing in-house studios can facilitate cost-effective content production and create opportunities for newcomers in the industry.
- **Diverse Segment Opportunities:** Offering a variety of roles in esports production contributes to skill development and industry growth.
- **Talent Selection Challenges:** The careful selection of talent is essential to avoid hindrances caused by low skill or ambition.
- **Female Talent Support:** The esports industry should work toward increasing opportunities and visibility for female talent to address the existing gender disparity in the field.

INTERNATIONAL COMPARISON

Country	Population	Fixed Broadband	Mobile Connection	Language
Wales	3,136,000	94.41	48.10	English / Welsh
Denmark	5,910,913	178.89	105.65	Danish / English
New Zealand	5,228,100	130.54	49.49	English / Māori
Macedonia	2,085,679	49.33	64.23	Macedonian / English
Iceland	375,318			Icelandic / English
Ireland	5,056,935	124.82	30.16	English / Gaelic
Poland	41,026,067	130.98	40.14	Polish / English
Hungary	10,156,239	174.58	41.32	Hungarian / English
Sweden	10,612,086	158.33	73.61	Swedish / English

(WorldOMeters, n.d.) (Internet Connection Speeds, n.d.)

□ Denmark

Denmark has emerged as a trailblazer in the realm of esports, marked by a range of strategic initiatives that set it apart on the global stage. Its esports scene garners mainstream media attention, underscoring the industry's significance. The presence of well-supported professional teams showcases a mature ecosystem, while official recognition as a sport highlights Denmark's commitment to equity between traditional and electronic sports. The nation's dedication to education, underscored by the provision of free education and the integration of esports school programs, fosters a pipeline of young talent. With a remarkable 95% computer penetration rate, the foundation for esports participation is robust. Moreover, Denmark's government actively supports the industry, providing both financial backing and direct involvement in esports events. This multifaceted approach has solidified Denmark's stature as a global esports leader, offering a compelling model for the cultivation of a thriving, respected, and culturally significant esports landscape. (The Score, n.d.) (Esports Insider Denmark, n.d.)

□ Macedonia

North Macedonia, with a population of 2,085,679, has achieved international competitiveness in esports. The country's formal recognition of esports as an official sport is a milestone celebrated by the Macedonian Esports Federation (MESF). This recognition, endorsed by the Agency of Youth and Sport, is a testament to the MESF's adherence to national sports standards and internal structure adjustments. The recognition makes North Macedonia the 66th country to acknowledge esports as a sport. Naumche Mojsovski, Director of the Agency for Youth and Sport, lauded the MESF's efforts and highlighted the government's ongoing support for all sports. This development marks a significant step forward for esports in North Macedonia. (Macedonia Esports Federation, n.d.) (Inside the Games, n.d.)

□ Iceland

Iceland, a remote island in the Atlantic, boasts a remarkably mature esports ecosystem driven by grassroots efforts led by the Icelandic Esports Association and local government collaboration. This development is influenced by Iceland's strong traditional sports infrastructure, resulting in sports clubs creating esports divisions with professional coaches. While excelling in traditional sports achievements, Iceland is nurturing its esports scene primarily at the grassroots level, featuring notable professionals like Overwatch's Finnbjörn 'Finnsi' Jónasson and others. (Iceland Federation, n.d.)

Iceland's strategic position led to it hosting pivotal LAN events in 2021 after global restrictions. The capital, Reykjavík, is integral to this growth, with city officials supporting esports departments and facilities within sports clubs. The Icelandic Esports Association collaborates with local clubs to provide structured training sessions for youth, aiming to offer a holistic framework for esports engagement.

The country's unique blend of grassroots development, collaboration between government and local entities, hosting significant events, and dedicated youth programs showcases Iceland's remarkable rise in the esports landscape. (Esports Insider - Iceland, n.d.)

□ Ireland

Ireland is a vibrant hub for both gamers and major gaming publishers, housing studios for Electronic Arts, Riot Games, and Activision/Blizzard. While the country has a strong consumer gaming market, its competitive esports scene has been slower to develop compared to leaders like the United States and South Korea. However, recent efforts have been made to bolster the esports landscape.

Trevor Keane, co-founder of Epic Global Agency, notes that Ireland's esports market is growing, with teams like Munster Rugby Gaming and Nativz participating in League of Legends competitions. Infrastructure for nurturing talent remains a challenge, but initiatives are emerging to create pathways for Irish gamers. The country boasts around two million gamers, with approximately 700,000 esports enthusiasts.

Despite the progress, Keane highlights the need for more media coverage of esports and the establishment of academic pathways akin to those in the UK. While traditional sports have academy systems, Esports is also seeking structures to cultivate young talent. Notably, Enda Lynch, head of enterprise at Munster Rugby, established an Esports team to expand the Munster brand, focusing on League of Legends. (Breaking News - Esports Ireland, n.d.)

The team's goal is not just immediate success, but to build a sustainable foundation. They participate in the Northern League of Legends Championship, demonstrating steady organic growth. MRG has emphasized proper player development, employing an esports psychologist to address the mental component of competitive gaming.

Their approach aligns with a family-friendly ethos, favoring non-toxic games and players who resonate with their values. With a diverse team representing various nationalities, Ireland's emerging esports scene not only aims for competitive success but also lays the groundwork for future Irish esports triumphs. (Esports Ireland, n.d.)

Sweden

Sweden boasts a rich history in esports, driven by a passionate community despite lacking official sport recognition. The country hosts renowned tournaments like DreamHack Winter and Summer, offering a backdrop to championships across various game titles. The world's largest LAN party, DreamHack, originated in Sweden, evolving from enthusiast gatherings to professional esports events. Internationally acclaimed esports organizations like Ninjas In Pyjamas and Alliance, along with top talent and earners, contribute to Sweden's esports prominence.

Notable players such as 'GeT_RiGhT' and 'f0rest' from the Swedish Ninjas in Pyjamas dominated early Counterstrike, while figures like Julia 'juliano' Kiran have made their mark. Despite the government's absence of an official stance, the Swedish Esports Association's admission into the National Sports Confederation signals growing recognition and eligibility for government funding.

Swedish esports education is evident with two schools offering full-time esports degrees, while Sverok, a non-profit organization, supports gaming as a hobby and establishes conduct guidelines. Sweden's enduring esports legacy, iconic tournaments, flourishing organizations, and emerging educational opportunities underscore its influential role in the global esports landscape. (Esports Insider - Sweden , n.d.)

New Zealand

The New Zealand Esports Federation was recognized as the official National Sports Organization for Esports by Sport NZ in 2020. This acknowledgment places the federation in a role to provide strategic direction, represent the sport, and create international participation opportunities. (Esports New Zealand, n.d.)

The federation aims to promote esports participation, advocate for its recognition as an indoor sport and inclusion in the Olympics, highlight its social and health benefits, and act as a regulatory body for events in New Zealand.

The country's gaming landscape involves popular casual games like Grand Theft Auto V and Minecraft. With 67% of New Zealanders participating in gaming, the country's casual scene is robust. Popular titles include FIFA for multiplayer and Minecraft, while notable esports pros are involved in games like Fortnite, CS:GO, Rocket League, and World of Warcraft.

Notable esports personalities include Cameron "Kamii" Ingram and Sean "Gratisfaction" Kaiwai, who have earned significant earnings in games like Rocket League and CS:GO.

The country's well-regulated gambling laws have facilitated the growth of the esports gambling industry. New Zealanders have access to various betting sites, with esports sponsors investing in kiwi players and events. The government has also established regulatory bodies like the New Zealand Esports Federation to ensure fair competition. As esports and its adjacent industries continue to grow, New Zealand's influence in the esports ecosystem is expected to expand. (Win.gg - New Zealand, n.d.)

Poland

Poland, situated in central Europe, has stealthily risen as an esports powerhouse with a thriving ecosystem. The country is renowned for hosting IEM Katowice, a prominent Counter-Strike tournament that transformed the city of Katowice, formerly known for mining, into an esports hub. Poland boasts influential players such as 'pasha' and 'Nisha' in CS: GO and Dota 2, while the LEC features notable Polish talent like 'Jankos.'

The Ultraliga, Poland's League of Legends league, holds its place in the EU master's circuit, with AGO ROGUE clinching victory in 2020. Poland's esports history shines, particularly in CS:GO, with significant organizations like AGO Esports and Illuminar Gaming. While Team Kinguin has shifted its focus, the iconic 'Golden Five' CS: GO roster under Virtus.Pro's banner dominated the scene, claiming the ESL One Katowice Major in 2014.

Poland's esports landscape extends to pioneering companies like Kinguin, Frenzy, and InSTREAMLY, enriching the industry with performance centers, production prowess, and streamer management. The country's strong gaming culture includes government recognition of esports as a sport, integrating it into the education system, and boasting renowned game developers like CD Projekt Red.

Notably, Esport Poland engages youths through tournaments, while Kinguin and Devils.one collaborated with a university to introduce Poland's first bachelor's degree in Esports. Poland's rapid ascent showcases its dedication to fostering a vibrant esports culture and community. (Esports Insider - Poland, n.d.)

Hungary

Hungary, situated in the heart of Europe, showcases its innovation spirit in both technology and esports. Despite its small population, Hungary has a history of iconic innovators, from Ernő Rubik's Rubik's Cube to János Neumann's early computer. The country's esports journey dates to the early 2000s, with notable achievements and milestones.

In its early years, Balázs 'KODIAK' Török made his mark by competing in the World Cyber Games, notably in Counterstrike. The local esports scene flourished around titles like Counterstrike, with events such as the Budapest Esport Cup and the PGCC driving growth. A significant breakthrough came in 2014 when Tamás 'Vizicsacsi' Kiss became the first Hungarian LoL player to join the European League of Legends circuit.

The V4 Future Sports Festival, supported by the Hungarian government, marked a pivotal moment. With a €1 million prize pool, the event showcased Hungary on the global esports stage and triggered a surge of opportunities. This momentum led to the integration of esports into universities, high schools, TV programming, and the National Lottery Company.

Despite not yet having official recognition, Hungary's government sees potential in esports. Initiatives like the University of Corvinus' esports course and SAS Budapest's high school esports program offer pathways to professional careers in the industry. The country's evolving esports landscape, backed by innovation and government support, hints at a promising future for Hungarian esports enthusiasts and professionals.

ABOUT THE AUTHORS

John Jackson is Chief Executive Officer for Esports Wales. While playing Esports titles for over 20 years, John has a previous background in Network Management and Security and has worked in the Education sector for over 14 years.

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