

The Rise of eSports

A Discussion on the Industry and its Potential
Impacts on Gaming

Presented by:





Topic Information

The fast-growing eSports industry can no longer be ignored. Industry estimates indicate that the industry generated total revenue of \$325 million in 2015, representing year-over-year growth of over 67% from 2014. Industry experts estimate this figure will surpass \$1 billion in 2019. On top of this, estimates indicate that the eSports betting market was roughly \$2 billion in 2015 and is estimated to exceed \$23 billion by 2020.

With the strong growth eSports has (and is expected to) achieved, there have been numerous ancillary products and services launched over the years. From eSports arenas to streaming services dedicated to eSports and even fantasy sports leagues, the industry has been a popular outlet for innovation and expansion.

Emerging Leaders of Gaming™ intends to provide valuable information on the emerging industry for both eSports newcomers and experts. Our well-versed panelists will provide a high-level overview of the industry's history, discuss key issues the industry currently faces, offer their opinions on the future of eSports, and discuss eSports opportunities to both gaming and betting operators.

Moderators



Mike Vanaskie, Senior Analyst
The Innovation Group

A dynamic professional who has in-depth experience conducting strategic and financial analysis in a variety of industries, Michael is a valuable asset for The Innovation Group. Michael joined the company in April of 2015 and currently serves as a Senior Analyst. Prior to joining the company, Michael worked primarily in the investment management industry, where he held a variety of research-oriented roles.

Based in The Innovation Group's Denver office, Michael's work covers a diverse array of scopes, clients, and geographies; ranging from full support for an operator's preliminary gaming license bid to an Asian government, to a feasibility study for a hotel expansion in Southern California. While Michael has worked with both domestic and international clients, he maintains a focus on the Asian-Pacific markets.



Chris Irwin, Senior Analyst
The Innovation Group

Chris Irwin has developed and expanded on many of his research and analytical skills since joining The Innovation Group in January of 2013.

As a senior analyst based out of the firm's Denver office, Chris has established a thorough understanding of the Native American sector through working with dozens of tribes and first nations in both the U.S. and Canada, expanding their presence not only in the gaming industry but in other hospitality and leisure ventures, as well. He continues to provide top notch consulting services that include feasibility and market assessments for casinos, hotels, meeting and entertainment venues, convenience stores, and more, his specialty for The Innovation Group being golf course market assessments.

Panelists

Brett Abarbanel – Head, Social & Recreational Gambling Research, *UCLA*



Brett Abarbanel, Ph.D., is Head of Social and Recreational Gambling at the UCLA Gambling Studies Program. Dr. Abarbanel's expertise is in global gambling and social science applications, with research including Internet gambling policy, eSports, and responsible gambling. Dr. Abarbanel serves as co-Executive Editor of the *UNLV Gaming Research & Review Journal* and has been interviewed as a gambling expert for the New York Times, Wall Street Journal, and the Discovery Channel.

She was recently honored by The Innovation Group with their 2015 Emerging Leaders Award, and named in the 2016 Global Gaming Business "40 Under 40" list. Dr. Abarbanel completed her B.S. in Statistics at Brown University and her M.S. and Ph.D. at University of Nevada, Las Vegas.

Seth Schorr – Chairman, *Downtown Grand Las Vegas*



Seth Schorr is Chairman of Downtown Grand. Schorr and his partner, Jeffrey Fine, own and operate Fifth Street Gaming and its affiliate, Lucky Silver Management, which owns and operates three casinos in North Las Vegas. In early 2015, Schorr was introduced to the world of eSports and led the effort of developing the first fully integrated eSports program in a casino resort at The Downtown Grand.

Schorr is a graduate of the University of Pennsylvania with a major in Chinese Studies. He has received numerous awards and accolades including being recognized by *VEGAS Inc.* as a member of the elite "40 Under 40," as well as "The Vegas Dozen."

Hai Ng - Partner, *Neomancer*



Co-founding partner at Neomancer, a technology strategy and management group, Hai has over three decades of experience in Technology, and over a decade in Gaming. His breadth and depth of experience fuels solutions that thrive at the intersection between industries. His current focus includes eSports/Gaming, VR/Gaming/eSports/Media, and cultivating innovation in Gaming.

Hai's work has not only been featured by the Museum of Modern Art in New York and major publications, but has led to successful acquisitions, global expansions, groundbreaking campaigns, and general euphoric co-existence with technology.



Panelist Questions



How do you describe eSports and its history to industry outsiders?

What have been the most important milestones for the industry to date?



With the rapid growth in the industry, annual competitive events and prize pools have been nearly doubling every year since 2012. How has eSports evolved over the past several years?



How have social media and streaming platforms, such as Twitch, contributed to the growth of eSports?



Just as the industry has grown, eSports betting has increased rapidly as well. How has eSports betting evolved?

What areas of eSports betting are most concerning?



What has been done to regulate the eSports betting industry? How do you think recent regulations will change eSports betting?

Does more still need to be done to ensure a safe betting experience?



Is a global governing body necessary for eSports?

Will this give the industry and the sport more
legitimacy?



What types of opportunities does eSports offer to the gaming industry, both domestically and abroad?

How can gaming companies best take advantage of these opportunities?



Will gaming properties with eSports experiences attract millennial patrons?

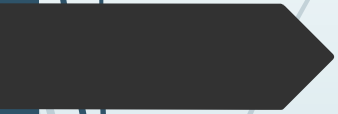
If so, what is the likelihood that these properties could convert eSports patrons into gaming patrons?




How do you see the industry evolving over the next 5 to 10 years?



Where can attendees find more information on the industry?



Audience Q&A



To obtain reports and articles on the
eSports industry authored by Brett
Abarbanel, please email Brett at
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