

LEVEL UP

Toronto Esports Strategy 2023-2027



Project Funders and Stakeholders

City of Toronto, Economic Development and Culture
Destination Toronto
Ontario Creates*

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Indigenous Acknowledgement

This Esports Strategy is built on the understanding and recognition that the City of Toronto is situated on the traditional territory of many nations including the Mississaugas of the Credit, the Anishnabeg, the Chippewa, the Haudenosaunee, and the Wendat peoples, and is now home to many diverse First Nations, Inuit, and Métis peoples. Toronto is covered by Treaty 13 signed with the Mississaugas of the Credit, and the Williams Treaty signed with multiple Mississaugas and Chippewa bands.

As long as there have been humans there have been creativity, technology, and innovation. We tend to think of these as modern tendencies but from ancient navigation techniques and boat building, to the development of tools and agriculture, humans have created technology. As we have become more aware each year, technology can have a profound effect on societies, our environment, and our economies.

As we develop this Esports Strategy to support the Creative Technology sector in Toronto we will reflect on the wealth of knowledge held by generations of creative, innovative Indigenous peoples who have lived on this land, and developed technologies here, for thousands of years and look at the effect these decisions will have on future generations.

In order to play a role in the advancement of truth and reconciliation, the recommendations and actions developed will be guided by the following practices:

- Indigenous projects should continue to be characterized by self-determination and decolonization of practices. This means that Indigenous communities and creators must be at the centre of the decision-making process for any Indigenous-focused projects initiated by the City of Toronto.
- Creative Technology working groups or committees should have appropriate Indigenous representation. Committees for initiatives that are not specifically Indigenous should endeavor to include Indigenous representation wherever possible.
- The development of Creative Technology strategies, projects, and processes, including workforce development or other opportunities, will be developed so that opportunities are available, and accessible, to Indigenous people.

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EXECUTIVE SUMMARY

Toronto is poised to be a premier Canadian and North American hub for esports.

Interest in esports is soaring globally with many cities looking to develop and grow the sector. Toronto starts from a position of strength as it already has a strong grassroots community, along with a growing esports business and investment community. Toronto has a proven track record of hosting world-class events and producing globally renowned players, influencers, and content creators. Mix this with Toronto's video game development and production, traditional sports, and strong tourism infrastructure and you have a city that is ready to level up and compete globally.

Esports are on the rise globally.

Globally esports generated \$1.52B, with China accounting for nearly a third of worldwide esports revenues. In 2022, the global esports audience grew +8.7% year on year to reach 532 million. Esports enthusiasts—those who watch esports content more than once a month—will account for just over 261 million. The number of esports enthusiasts will grow to 318 million in 2025, with a compound annual growth rate (CAGR) of +8.1% (2020-2025). In 2025, the total audience will surpass 640 million. Europe and the Americas have been taking notice, with high levels of investment from both industry and local governments (2).

Esports will benefit Toronto.

Tourism: As an event-based sector, esports bring vibrancy to cities through ongoing community events and activities, as well as larger events that drive tourism from both local and out-of-city esports enthusiasts. This youth-led sector has a track record of attending several events per year and traveling for many of these events with a reported average of 70% of event attendees from out-of-market. Because of its strong travel component, Destination Toronto is prioritizing esports as a sector to support recovery and growth for local tourism.

Business Development and a Skilled Labour Force: Esports provides opportunities for new businesses and to develop a skilled labour force that has cross-sectoral skills.

Education and Skills Training: Educational opportunities are on the rise as many post-secondary institutions are now offering esports scholarships, varsity teams, and esports-directed degrees and diplomas focusing on a variety of elements including marketing, broadcasting, business affairs, content creation, and rights management.

Community and Social Connection: Along with technical skills, with more than 70% of gamers playing with friends, video games and esports are social activities that help strengthen social skills. This is seen in the wide variety of in-person events hosted by the sector from small weekly events to larger commercial activities.

Global Reputation: Toronto is well known for its video game, film/tv, and technology sectors. The addition of a strong esports industry will enhance that reputation to a new generation across the world.

Toronto is Leveling Up

Toronto is ready to be a major esports hub.

Toronto's Key Features

- World-class event and tourism infrastructure, including small, medium, and large venues equipped for esports events
- A sports and entertainment production hub that can provide skilled workers, training, and cutting-edge technology
- Esports entrepreneurs are growing new and successful businesses
- Investment and sponsorship in esports
- Internationally renowned influencers, content creators, players, and teams
- High-speed internet and a strong digital infrastructure
- High per capita of game-related jobs
- Esports educational opportunities at high school and post-secondary levels
- Strong and supportive esports community

Key Insights

- There is a content creator brain drain. Many of Toronto's top players and influencers have moved to the US.
- TV production and broadcasting are closely linked to esports. Cities with strong production sectors such as Toronto create fertile ground for the esports industry.
- Toronto loves events. The community loves hosting, attending, playing at, events both big and small. They are willing to travel and do so often.
- There is a professionalization of esports careers, which is being seen through the rise of many esports post-secondary programs in the region.
- Toronto has all the elements to develop a strong esports industry.
- Esports is still relatively unknown beyond the esports community, even in cities like Toronto with a high number of gamers.
- The esports industry and government don't know each other very well yet, but that is changing both municipally and provincially.
- Esports is a global industry that requires global policies to be developed by local, provincial, and federal governments.
- An engaged tourism and hospitality community is one of Toronto's biggest assets for growing the esports sector.
- The local esports ecosystem, grassroots and industrial, does not reflect the diversity Toronto.

Recommendations

The following recommendations were developed through industry consultation interviews and research to help support the growth of the esports ecosystem in Toronto.

<p>Recommendation 1</p> <p>Develop Regional Esports Industry Consortium</p> <p>Convening a Regional Esports Consortium will provide opportunities for partners to promote and support esports across the region, nationally, and globally, develop reports and other strategic documents and activities that support the growth of the esports industry; and to ensure equity and inclusion are actively integrated into all aspects of the esports sector.</p>	<p>Recommendation 2</p> <p>Promote Toronto as a Destination for Major Esports Events</p> <p>Toronto will be promoted throughout Canada, and globally, as a key destination for esports events, which will enhance tourism and help grow the local industry.</p>
<p>Recommendation 3</p> <p>Reverse the Content Creator Brain Drain</p> <p>Toronto will build on its strengths to develop an environment that is economically viable and creator-friendly, to enable local talent to build successful careers.</p>	<p>Recommendation 4</p> <p>Develop Skills Based Training</p> <p>As a nascent sector with a young demographic, providing skills-based training will help to create a strong local industry now and into the future.</p>
<p>Recommendation 5</p> <p>Knowledge Sharing Regarding Esports for All Levels of Government</p> <p>Education about esports will help prepare governments for this growing sector and its specific needs.</p>	<p>Recommendation 6</p> <p>Support Access to Space for Esports</p> <p>Support access to event spaces for small, medium, and large events. Esports is built on events and supporting this access will help to build a strong community and to provide opportunities for esports tourism.</p>
<p>Recommendation 7</p> <p>Support Diversity, Equity, and Inclusion Within the Esports Sector</p> <p>Supporting initiatives that advance equity and inclusion will help ensure the esports sector reflects the City of Toronto and embraces the diversity that is the city's greatest strength.</p>	<p>Recommendation 8</p> <p>Develop a Strong Global Reputation to Support Esports Business Development</p> <p>Canada, specifically Toronto, is poised to be the next great esports hub. Building a regional esports reputation will help attract business development to the region.</p>
<p>Recommendation 9</p> <p>Support the Development of Esports Businesses and Initiatives</p> <p>Support the growth of esports businesses by facilitating access to training, networking, knowledge sharing, promotion, and other supports.</p>	



CREDIT: Raptors Uprising / MLSE

INTRODUCTION

Toronto is ready to lead the national charge as Canada's leading esports hub.

Toronto is well positioned to become a leading jurisdiction for esports activity, with a strong foundation of esports community participants, leading esports businesses, internationally successful content creators, engaging productions and shows, world-class esports event attraction and deployment, and esports-ready venues.

The esports sector builds on Toronto's renowned media production, broadcasting, and events sectors, including major sports and entertainment industries, including a talented workforce with transferrable skills. Toronto's video game, tourism, and tech sectors also provide an ecosystem that is ripe for the quick growth of the local esports industry. Combined, these features create uniquely advantageous conditions for Toronto to become a major esports hub.

The growth of the esports ecosystem provides substantial benefits for Toronto including opportunities for the development of new businesses, skills training transferrable across creative technology and entertainment industries, job opportunities across varied segments, and increased tourism with the direct and indirect economic and employment impacts this brings.

This strategy provides a framework to support the growth of Toronto's esports ecosystem.



“If we provide people with opportunities to communicate and places to be, and we will see growth in esports” – Zander Fraser



CREDIT: Toronto Ultra

WHAT IS ESPORTS?

Esports is competitive, multiplayer video gaming.

The origin of esports can be traced back to the early days of arcade machines in the 1970s. Esports is a direct product of the \$250.7B global video game development market (3). Despite its overlap with today's games industry, esports' competitive sporting characteristics distinguish it as a standalone industry with unique needs.

Esports can be played in local neighbourhood pick-up games and tournaments, to professional leagues culminating in high production value finals played in stadiums packed with tens of thousands of fans and watched online by millions more. The grassroots community and the professional leagues are highly connected and supportive of each other. Usually, regions with strong esports industries also have strong grassroots esports communities.

Not all video games become esports. While any multiplayer game with competitive elements and a strong fanbase has the potential to become an esport, those that succeed share three fundamental values: competition, compelling content, and a connected community.

There are a limited number of games that are usually played, and it is difficult for new titles to become embedded in the esports culture. There are about ten games popularly played. Two of these game series were originally released in the late 1980s and several from the early 1990s including Street Fighter, Smash Brothers, and Counter Strike.

The past decade has seen esports break into mainstream interest and coverage: traditional sports broadcasting channels are now running esports programming, and sports teams and associations like the National Basketball Association (NBA) and Major League Soccer (MLS) have begun to conduct their own esports events and some also own major franchised teams.

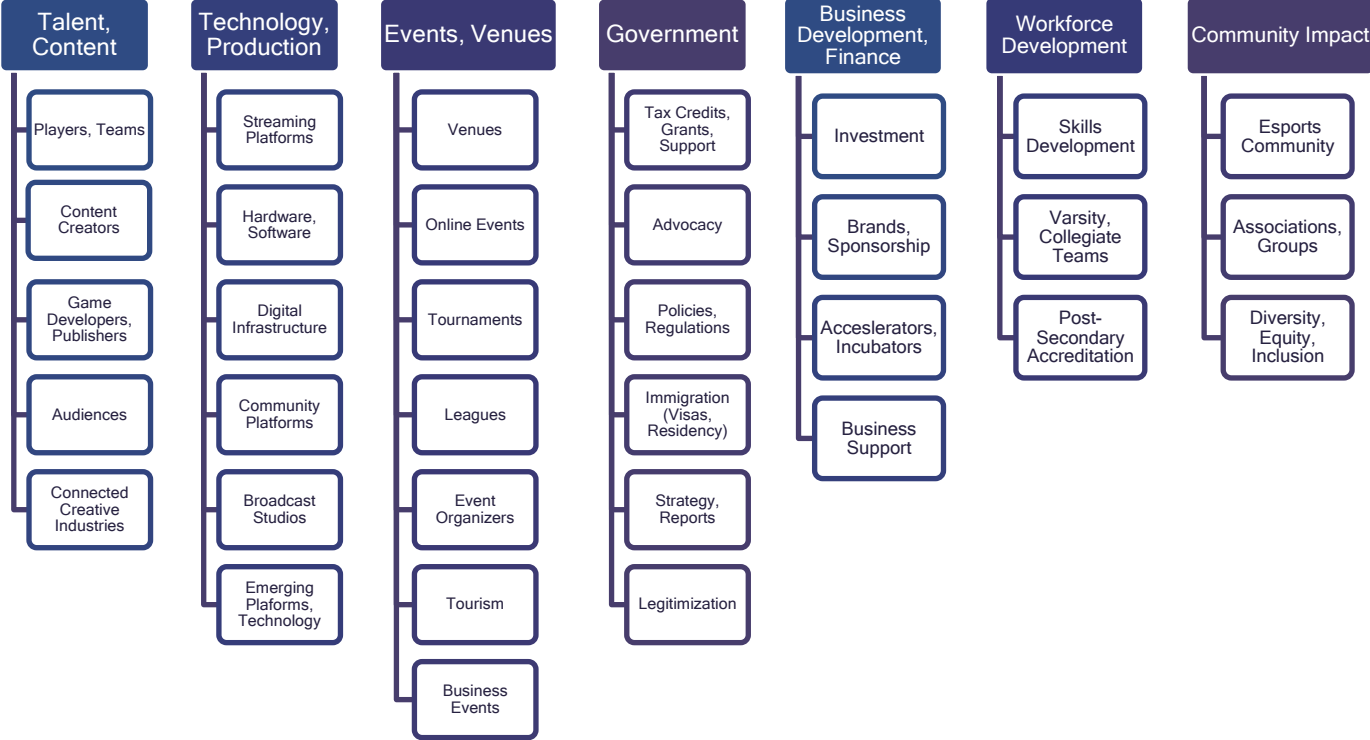
WHAT IS THE VALUE OF ESPORTS?

As a growing sector, the value of esports is multifaceted and includes business, community, and social impacts.

Growing Market	Expanding Audience	Return on Local Investment	Educational and R&D Rewards	Esports Tourism	Social Impacts
The top three esports markets in terms of audience and revenue: Asia-Pacific North America Europe	380 million people attended esports events in 2022, rooting for champions in games like Fortnite, Dota 2, and League of Legends (5).	North America is set to hit \$300M in esports revenue in 2022, while Europe is expected to reach \$138M estimates (7).	On average, esports players score higher than other athletes on the math section of college admissions tests, and they tend to pursue degrees in science, technology, engineering, and math, the so-called STEM tracks (10).	Riot Games reported that in 2019 the LEC Spring Finals in Rotterdam contributed \$3.4M to the local economy. 87.13% were non-local visitors (13).	In Rio De Janeiro the digital divide is deep. Organizations such as AfroGames are looking to help by creating a project where traditionally marginalized gamers in favelas had access to cutting-edge gaming equipment (14).
In 2022 the esports industry had an estimated year-end global revenue of \$1.52B (2). By 2025 projections are \$3.7B (3).	The online audience for esports, according to Goldman Sachs, is larger than HBO, Netflix, and ESPN combined (6).	In Georgia, the esports capital of the US, digital entertainment is a \$550M industry in the state, responsible for more than 12,000 direct and indirect jobs. A tax credit is extended to esports companies (8).	Esports and AI are combining forces to enhance innovation in traditional sports, including Formula 1 racing (11)	For Canadian cities, events have proven to sell out stadium crowds. In 2017 the North American League of Legends Championship sold out the Rogers Centre within a day of announcing the event.	Studies have shown that video game use can reduce depression by reducing rumination and increasing cognition (15)
In 2022 the ten most valuable esports companies are worth a combined \$3.5B, up 46% from the last edition of this list, in December 2020 (4).	In 2022 the global esports audience grew +8.7% year on year to reach 532 million (2).	Money flows into esports through media rights, live event ticket sales, merchandise sales, and in-game purchases, but most of the revenue (69%) comes from sponsorships and advertising (9).	In Georgia, technical colleges have graduated more than 5,000 students with cyber or gaming majors (12).	As the esports industry shifts towards a post-pandemic situation, events are readily coming back to live and in-person.	With more than 70% of gamers playing with friends, video games, and esports are social activities that help to strengthen social skills (16).

ESPORTS ECOSYSTEM

Esports has a unique ecosystem that combines elements of gaming, technology, traditional sports, events, and entertainment, alongside business, investment, government, and education. As a relatively new industry, it is important to understand the ecosystem to grow and support its development.





CREDIT: *Waveform*

CONTEXT

To understand the role that Toronto can play in the esports sector it is important to understand external factors that may impact the growth of the local industry.

Global Context

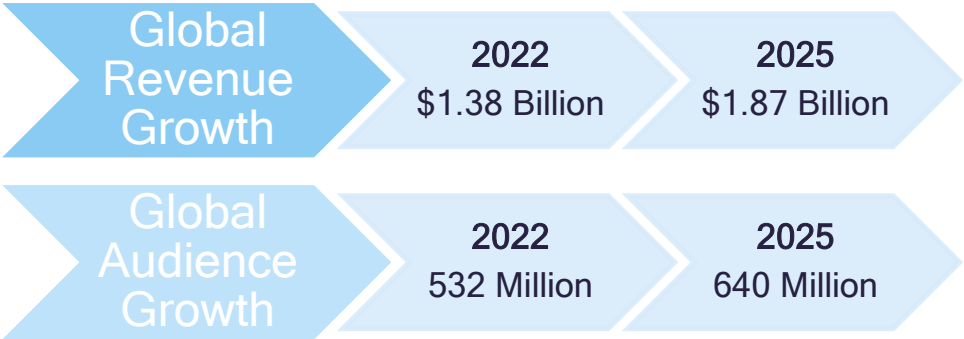
Esports holds a unique position in the global digital economy. The global esports audience is estimated to grow by +8.7% year over year (22). This presents a huge opportunity for audience development, and recognition of this fact is demonstrated through increased levels of investment and other types of support for the industry.

While nascent outside of Asia, esports has had a strong ecosystem for many decades in countries such as South Korea and China. In recent years cities such as Los Angeles, San Francisco, and Seattle have been developing as esports leaders with large-scale events, prestigious esports organizations, and esports publishers/developers having key offices in these cities.

Canadian Context

Many Canadian cities and provinces have longstanding esports communities that are in the process of developing into more formal industrial sectors. Strategies, such as this one, have been developed in British Columbia, and other cities such as Calgary and Montreal are looking for ways to support their burgeoning esports industries. Across Canada, investments and acquisitions have been flourishing, particularly in Vancouver and Toronto.

The attraction of major events, the development of venues, connecting scholastic and post-secondary esports with career-building, and inclusion initiatives are frequent topics of conversation within the national esports space. There has never been a better time for cities to grow awareness and support the growth of the esports industry as it continues to develop worldwide.



Revenue of the global esports market 2020-2025, Statistica 2023

Esports Trends

Talent and Content

Co-Streaming

Democratizing esports broadcasts and allowing co-streaming, when a streamer is granted permission to officially stream a tournament on their own channel, has become extremely popular. This builds trust and exponentially grows audiences. This can look like tournament organizers allowing content creators to rebroadcast parts of major tournaments (23).

Increase in Platform Interactivity

Opportunities for audience members to interact on the platforms, with players and AI are on the rise (24).

Technology and Production

Accessible Production

Production tools are becoming increasingly accessible. Tools like Open Broadcaster Software are available as an open-source tool, with 100 contributors and over 5,000 project forks as of January 2022 (27).

AI and Esports

AI is integrated into many parts of esports including as a coaching tool, platform interactivity with AI-controlled contestants, improving predictions, and match analysis (28).

Mobile Mobile Mobile

With its low barrier to entry and the proliferation of mobile devices worldwide, mobile gaming is quickly growing the market beyond the traditional console or PC games. The rise of 5G networks will create more stable internet connections, which will further advance mobile esports (29).

Events and Venues

Rise of International Tournaments

As global audiences rise in new markets, tournaments are expanding their reach into regions, such as Canada, that have not previously had large-scale tournaments. These tournaments create opportunities for local, national, and international tourism as attendees will travel long distances to attend.

Workforce Development and Education

Workforce Growth and Legitimization

The esports workforce is growing rapidly, with various schools throughout the ecosystem growing esports programs and accreditation. As of 2021, there are 80 esports bachelor's degree, master's degree, technical degree (i.e., diploma), certificate, or undergraduate minor programs delivered by 62 different higher education institutions globally, primarily located in North America and Europe (26). These degrees include Esports Business and Marketing, Esports Management, Esports Degree (incl. Sport Psychology, Game Design), Broadcasting and Production, Event Management, and more.

Community Impact

Awareness of Accessibility and Inclusion

Grassroots groups are forming to address issues around accessibility and inclusion in esports. These groups are advocating for a variety of voices including BIPOC, the disability community, 2sLGBTQi, women-identifying, and more.

Business Development and Finance

Blockchain and NFTs

As esports businesses are looking to diversify they see NFTs and blockchain as opportunities for monetizing audience engagement. Esports audiences tend to be young digital natives with disposable incomes and are used to shopping in virtual worlds (30).

Diversification

Esports publishers are showing an increased desire to make their esports divisions more than just a marketing machine. Companies such as Riot Games are growing large-scale international events like the League of Legends Champion Series and partnering with Netflix for the League of Legends spin off show Arcane (31).

Sponsorship - Esports and Traditional Sports

Lines between these sectors will continue to blur as both esports and traditional sports test out each others' markets. Content creators are partnering across industries, and an esports team has recently started a basketball team (25).

Government and Governmental Organizations

Strategy, Grants, and Policy Support

Governments are growing their support through a variety of programs, policies, and grants.

Canada at a Glance

Talent and Content

Canada has produced many popular influencers and content creators including Shroud, Disguised Toast, Pokimane, and XqC. Many content creators have relocated to the US for better career opportunities.

Technology and Production

GINX is Canada's first esports television content network and broadcast the first telecom esports finals in Canada.

Many esports start-ups specialize in broadcast, production, and events including Waveform (Toronto), The Gaming Stadium (Vancouver), and Northern Arena (Toronto/Montreal).

Events and Venues

Esports events are on the rise with large global tournaments starting to host events in Canada, specifically in Vancouver, Montreal, and Toronto. Toronto has an advantage for large events with the Scotiabank Arena, Metro Toronto Convention Centre, Mattamy Athletic Centre, Toronto Congress Centre, and multiple other venues.

Business and Workforce Development

Currently, there is a lot of activity in esports investment across Canada. This includes Gaming Station acquisitions in BC, major investments in Enthusiast Gaming, and OverActive Media's investment in a new esports arena in Toronto.

Workforce Development and Education

Across Canada, many post-secondary institutions are developing esports academic and varsity programs, mainly teaching business and production skills for the esports industry. Esports labs are also being developed such as the North Vancouver School District Business and Gaming Entrepreneurship Lab, or the Toronto Metropolitan University Gaming Hub and Competitive Club programs.

Community Associations and Groups

There are many esports associations across Canada. Many are community associations, but some are developing into more formal associations including Canadian Esports Association for Canada, Alberta Esports Association and Montreal Esports Association.

Government and Governmental Organizations

Governments across Canada are preparing for the growth of the esports industry. Vancouver was the first to commission a strategy in 2021. Edmonton and Calgary are working on strategies. Edmonton Screen Industries Office, Edmonton Global, Calgary Economic Development & Alberta Esports Association have begun to collaborate on creating an esports strategy for the two cities and the province of Alberta.

Engagement in Esports

According to The Entertainment Software Association of Canada, 35% of adults and 29% of kids and teens engaged with esports in 2020.

Pandemic Impacts

The impacts of the pandemic on the esports sector were, to say the least, varied. The sector showed a great deal of resilience and growth in online activities. With audiences at home, and online, there has been a surge in live-streaming activities such as major tournaments. This online activity, along with more mobile gaming, and better global digital infrastructure, has dramatically increased the number of people engaging in streaming and other online esports activities.

On the other hand, in-person events have seen a decline as many countries have had restrictions on live events and travel. This affected sponsorships revenue, the main source of funding for esports.

Attendance at live events is expected to recover as tourism returns to pre-pandemic levels, bringing back both crowds and sponsorship dollars.

Growth

- In 2021, the esports industry grew 14.5% from 2020, with a year-end global revenue of \$1.14B. In 2022 the esports industry had an estimated year-end global revenue of \$1.52B. (2) By 2025 projections are \$3.7B. (3)
- With so many people at home, the pandemic accelerated the adoption of live streaming with an increase of audiences to 809.6 million in 2021. It is expected that growth rates will return to natural growth rates by 2024. (3)
- Visibility, mobile, and infrastructure development boosted audience numbers during the pandemic.

Negative Impacts

Delays for AAA releases and ongoing supply shortages for new gaming hardware impacted growth and audience experience.

- Due to fewer real-world events, revenues from tickets and merchandise have remained low throughout the pandemic generating only \$66.6M in 2021 (37), however, it is projected that the future of the esports industry will likely be powered by mobile, which will further reduce barriers to entry and allow even more gamers and fans to pour in. The mobile gaming segment is set to make up 45% of the total global games market this year. (17)
- In the GTA, many of the esports venues shuttered their doors including Waves Gaming and The Hive.



CREDITS: [Torey DeFiant](#) / OverActive Media

JURISDICTIONAL SCAN

To understand the role that Toronto can play in the sector it is important to understand the strengths of other cities, nationally and globally.

For this review, eight cities from four continents were selected. Each city is a leader in various areas of esports development. These cities include the North American comparisons of Los Angeles, Vancouver, Montreal, and Chicago; Seoul and Chongqing from Asia, Katowice representing Europe; and Rio De Janeiro representing South America.

Assessment Methodology

Each of these esports cities was selected based on their strengths and relative comparative nature to Toronto. Cities were also selected based on their connectivity to Toronto, and a theorized ability for these partner cities to accelerate international esports connectivity by leveraging existing relationships. By selecting cities that fell into one of these two categories, it would then be possible to achieve one of two things;

- Understand what similarly sized, equipped, or positioned cities have done that was successful, and;
- Understand the opportunities that may be available by collaborating regionally and nationally to build esports capacity.

(Associated Documents - Appendix F - Jurisdictional Scan at a Glance)

Canada

VANCOUVER

- Vancouver Economic Development released an esports strategy in 2021.
- Vancouver's Esports ecosystem is heavily focused on business development, investment, and skills development.
- With its history of numerous esports startups and businesses that serve many of the industry verticals, it is seeing increased local and foreign investment and acquisition activity during recent years.
- Talent development is a critical component of the Vancouver esports strategy and talent development and esports programs are being approved for students in high school and post-secondary.

What Can Toronto Learn from Vancouver

Tourism and sport are highly connected to esports

- Vancouver's OverWatch pro team, in addition to pro Call of Duty teams in Seattle, was recently bought by the Vancouver Canucks in a move expected to be replicated as traditional sports businesses increasingly see the value of esports (38).
- In Vancouver the 2018 Dota 2 Championships were held at the Rogers Arena and injected roughly \$7.8M into the local economy.

Governments and associations can support sector growth through the development of strategic plans

- Vancouver / BC developed an esports strategy, driven by the Vancouver Economic Commission, to support the growth of the esports sector. Canada's Federal Government has supported esports from a development perspective, pledging \$100,000 CAD towards a provincial esports strategy.

Local organizations and associations are key to a healthy esports community

- Faster-paced governance - local and provincial esports associations are plentiful, mixed with scholastic associations, collegiate associations, and regional associations. This makes things easier to organize; easier to see where everyone fits; connectivity with other esports cities in BC is set, to effectively build a Pacific Northwest hub for esports.

MONTREAL

- Montreal is well-positioned globally from a production angle as they are a city with a strong game developer population and are known for locally made esports titles such as Rainbow Six Siege.
- Montreal has a strong community ecosystem that is supported through the academic development of esports skills and localized esports venues.
- Montreal's video game sector is generously funded through a variety of tax credits and grants from the Quebec Government.

What Can Toronto Learn from Montreal?

Bringing in globally recognized events is one way to grow

- Montreal hosts the Canadian location for DreamHack, a global event produced through ESL Gaming, where 30,000 video games and esports fans gather. Dedicated players compete for \$150,000 in prize money.

Esports education goes beyond just playing video games

- Montreal has launched The Montreal Esports Academy. They offer programs and activities using the passion of esports as a vector for learning and skills development for players.
- Montreal produced the first-ever esports school-based curriculum in Canada, in collaboration with école secondaire Édouard-Montpetit in the Commission Scolaire de Montréal (Montreal's French-language school board) (41).

USA

LOS ANGELES

- Los Angeles has strong entertainment, content creation, sports, tourism, and technology industries. This infrastructure enables esports to grow at a quick pace as it can leverage these existing sectors.
- Los Angeles has a history of brand and sponsorship support, along with a large venture capital market with a history of investments in entertainment, sports, content creation, and technology ventures.
- Los Angeles' infrastructure, investments, influencer culture, and quality of life are a big draw for esports teams, businesses, and content creators.
- Los Angeles has a high number of pro esports teams including: Cloud9, Counter Logic Gaming, Gen.G, Gladiators Legion, Immortals, Los Angeles Gladiators, Los Angeles Guerrillas, Los Angeles Thieves, Los Angeles Valiant, Sentinels, Team Dragon Knights, 100 Thieves, Team Liquid, Evil Geniuses, and more.
- Many key esports publishers are based in LA including: Riot Games and Blizzard Entertainment.

What Can Toronto Learn from Los Angeles

Leveraging existing industries is a great way to grow the esports industry

- Los Angeles benefits from its location and existing infrastructure and is one of the strongest esports markets in North America.
- The city also has a long history of brand and sponsorship, and other types of investments in entertainment, sports, and technology ventures. With esports' high growth potential, financial investment has been high in this sector.

A vibrant city, with many opportunities, helps to attract and retain talent

- Los Angeles is a draw for content creators as the city has a high number of publishers, talent agencies, entertainment hubs, and key video platform decision-makers, including Twitch and YouTube, the dominant platforms in this space.
- Platforms Twitch and YouTube brought in \$3.46 B and \$9.4B in 2022, respectively (21, 22), with their top content creators enjoying massive payouts from these sites.
- Many content creators are drawn to the city as they can make a living working in the sector and be around like-minded creators.
- Toronto-born influencers such as Pokimane (Imane Anys), Shroud (Michael Grzesiek), and Disguised Toast (Jeremy Wang) are now based in LA.

CHICAGO

- Chicago's Robert Morris University was the first in the US to offer an esports scholarship (45).
- This investment has seen mixed results. The city has developed pro players through its educational programs that have left the city. There was one pro team that will soon leave Chicago for Dallas. Some big events have been held here.
- In 2022, Chicago City Council approved a new \$38.6M (CAD) esports and virtual reality arena.

What Can Toronto Learn from Chicago

The esports sector growth takes long-term commitment and will develop different strengths in each city. Deep investment does not always bring about long-term stability. Cities should be prepared for sector fluctuations and long-term growth rather than 'quick wins'.

- Chicago has had a focus on the educational side of esports, along with strong backing from City Council. Chicago is most well known for having the first esports scholarships in the US at Robert Morris University. This has developed into a variety of varsity programs, as well as high school-level programs that serve as a pipeline into the university. These programs provide opportunities for students to receive scholarships of up to 50% tuition and 50% room and board and compete for \$100,000 in scholarship money.
- Outside of the educational realm, Chicago has seen mixed results in terms of local uptake of esports. The city has seen several pro players develop, and then leave the city. As well, the city has one pro team, OpTic Chicago, that has recently merged with Dallas Empire. The newly merged team will become OpTic Dallas in 2022. The city has hosted major events such as ESL's 2019 Intel Extreme Masters for Counterstrike: Global Offensive and the League of Legends 2016 World Championship Quarter Finals. As the industry finds its footing, mergers, layoffs, and movement of teams will happen at national levels with OpTic as an example of a company that was in acquisition mode in 2022 but laying off staff in 2023. (22)
- However, there is strong municipal government support, with a \$38.6M (CAD) esports and virtual reality arena being approved by Chicago City Council in February 2022. This 100,000 sq ft arena will be able to host over 1000 people (46).
- Building a broad ecosystem will allow for the growth of esports as certain areas are established, such as education and venues, while other areas change based on outside interests, such as pro-teams and franchises.

International

SEOUL, SOUTH KOREA

- South Korea pushed esports to the mainstream 20 years ago. The KeSPA (Korean Esports Association) was created in 2000, a partnership between the Ministry of Culture, Sports, and Tourism. It manages twenty-five of Korea's major esports games.
- The two key triggers for South Korea's rise were widespread broadband and the rise of LAN cafes, where one can use a computer connected over a LAN to other computers, primarily for the purpose of playing multiplayer computer games.
- As with any other type of technology, the best gaming systems in the world won't function and connect as expected if the infrastructure that supports them can't keep up. Cities that have strong esports industries also have strong digital backbones.

What Can Toronto Learn from South Korea

Supporting esports education and skills training can be a key part of the talent pipeline, and help grow the sector

- YouTube has developed training programs for both esports and non-esports content creators as South Korea has many creators in the region.
- Seoul's Eunpyeong High School has a dedicated esports department with multiple gaming classrooms and even teaches from government-approved textbooks about esports. Esports is now the fifth-most popular future job among South Korean students, after athletes, doctors, teachers, and digital content creators, according to a survey by the Education Ministry last year. It will soon be a part of the Asian Games in 2022.
- Many post-secondary institutions have esports federations or varsity programs.

Legitimization in esports comes from official opportunities in established competitions

- Esports will be part of the Asian Games in 2022.
- South Korea's Ministry of Culture, Sports and Tourism established the Korea Esports Association (KeSPA), to support and regulate esports development, which has led to the Korean Olympic Committee recognizing esports as a sport. This provides increased legitimization through the inclusion alongside traditional sports increasing reputation, funding, and other opportunities.

Infrastructure and investment can help build a healthy and economically viable esports industry

- SKT1 is a South Korean esports organization operated by T1 Entertainment & Sports, backed by major telecoms including Telecom and Comcast Spectator.

- Asian cities like Seoul and Chongqing (China) have developed venues and infrastructure dedicated specifically to esports, which seat thousands of spectators.
- Chongqing has the largest esports arena in the world - Three Gorges Esports Arena – with 6,000 indoor seating and 13,000 more outdoors.
- About 46 million people in South Korea (or 95.1% of the population) use the Internet. The country has the world's fastest average internet connection speed.

If supported, esports can grow into a major competitive entertainment juggernaut

- South Korea League of Legends World Championship finals, held in South Korea and hosted by the game's publisher, Riot Games, showed that almost 100 million unique viewers tuned in to the event online.
- In Korea, Overwatch is the most popular esports game, which is played by pro teams located there. This one game is represented by 63 teams that have won \$3.5M (CAD) in prize money. For individuals, StarCraft: Brood War is the most played game. There are 559 pro players of this game.

KATOWICE, POLAND

- Katowice's esports sector was initiated by a large, multi-year investment by the city government to bring a major esports tournament to the city, making the city a major global esports hub.
- Katowice has a high broadband penetration where 90% of households have access to the internet, most with a fixed broadband connection.
- Esports are now a major part of the city's identity, with many of the city's citizens becoming engaged in various activities associated with esports.
- The Polish Government recognizes esports as a sport. The Polish Act on Sport was updated in 2017 to declare that "any form of competition based on intellectual activity, which aims to achieve a sports result" should be treated as a sport.

What Can Toronto Learn from Katowice

Public Private Partnerships can work well to develop a viable, long-term esports ecosystem that is both financially and culturally successful

- ESL, a major global esports tournament, has developed Katowice into an extremely successful esports centre. It is currently the headquarters for ESL's Intel Extreme Masters series. This has brought with it all of ESL's sponsors and partners, supporting initiatives such as infrastructure development, hardware investments, and more to ensure that the city is capable of hosting major events and esports programming for subsequent years.
- Cities such as Katowice are outliers. Despite its small population, it has developed key events that attract major brands and sponsors. These include IEM Katowice, a Counter Strike tournament, and the ESL Pro Tour finals, the Intel Extreme Masters, which are held in Katowice and Cologne every year.
- Katowice Gaming house hosts a linkage for training the next gen esports players for their higher-level esports development.
- Katowice's city council voted in 2018 in favour of a motion to co-organize and promote the Intel Extreme Masters (IEM) World Championship. The city signed a deal with the tournament organizer to (initially) host from 2014-2019 and allocated \$3.92M (CAD) towards IEM Katowice promotion. The 2023 event, the first in-person event in three years, was completely sold out.
- Katowice developed a gaming culture after a major esports event was moved to this location. Esports are now a major part of the city's identity, with many of the city's citizens becoming engaged in various activities associated with esports. This grassroots community, a key feature in successful esports markets, was developed after municipal funding was put in place.

RIO DE JANEIRO, BRAZIL

- Esports is gaining momentum in Latin America, specifically in Brazil with over 1,200 active eSports competition players in 2021. Driven by activity in Rio De Janeiro, Brazil is number 3 in audience for esports, second only to China and the US (40).
- Rio De Janeiro has hosted major events such as IEM Rio Major 2022 (Counter-Strike: Global Offensive Major Championship) and will be a host for the Global Esports Tour in 2023, 2024 and 2025.
- Rio De Janeiro is also an outlier in many ways as its esports story also includes a grassroots community coming out of low-income favelas, with low internet connectivity and not a lot of technology.
- Rio De Janeiro produces many Free Fire pro players, as this game can be played on mobile phones, is free to play, and does not require broadband internet infrastructure.
- Not-for-profits have been set up to train and professionalize young people from the favelas to work in esports and make money. An upcoming 5G spectrum auction and with future broadband investments becoming a priority, it will help to enable esports to be an income source for people in these neighbourhoods.
- Women are the majority here, totaling 51.5% of the gaming population.

What Can Toronto Learn from Rio De Janeiro

Mobile gaming and access to the internet can open up both social and monetary opportunities to traditionally underserved communities

- Their esports associations have been developed to reduce toxicity, specifically online behaviors that are rude, aggressive, and degrading, and develop digital citizens.
- In Rio De Janeiro the non-profit organization AfroGames set up the first training centre located in a community in Rio, more precisely in Vigário Geral. The goal is to train and professionalize young people from the favela to work in esports.

Big tech, gaming, and event businesses are attracted to the growing markets

- Rio De Janeiro is growing esports through its existing communities, such as the rise of mobile gaming in favelas and other high-density population areas; this population alone has attracted major esports event companies such as ESL.

Governments need to be careful with policy as it can both open up some opportunities but also shut down other possibilities

- Brazil's government has been enacting laws to regulate esports activity. While this would open up the possibility of awarding government grants to athletes and allow confederations to seek public funding, the laws would have the potential to mandate that any video game competition must be authorized by a recognized confederation.



CREDIT: Waveform

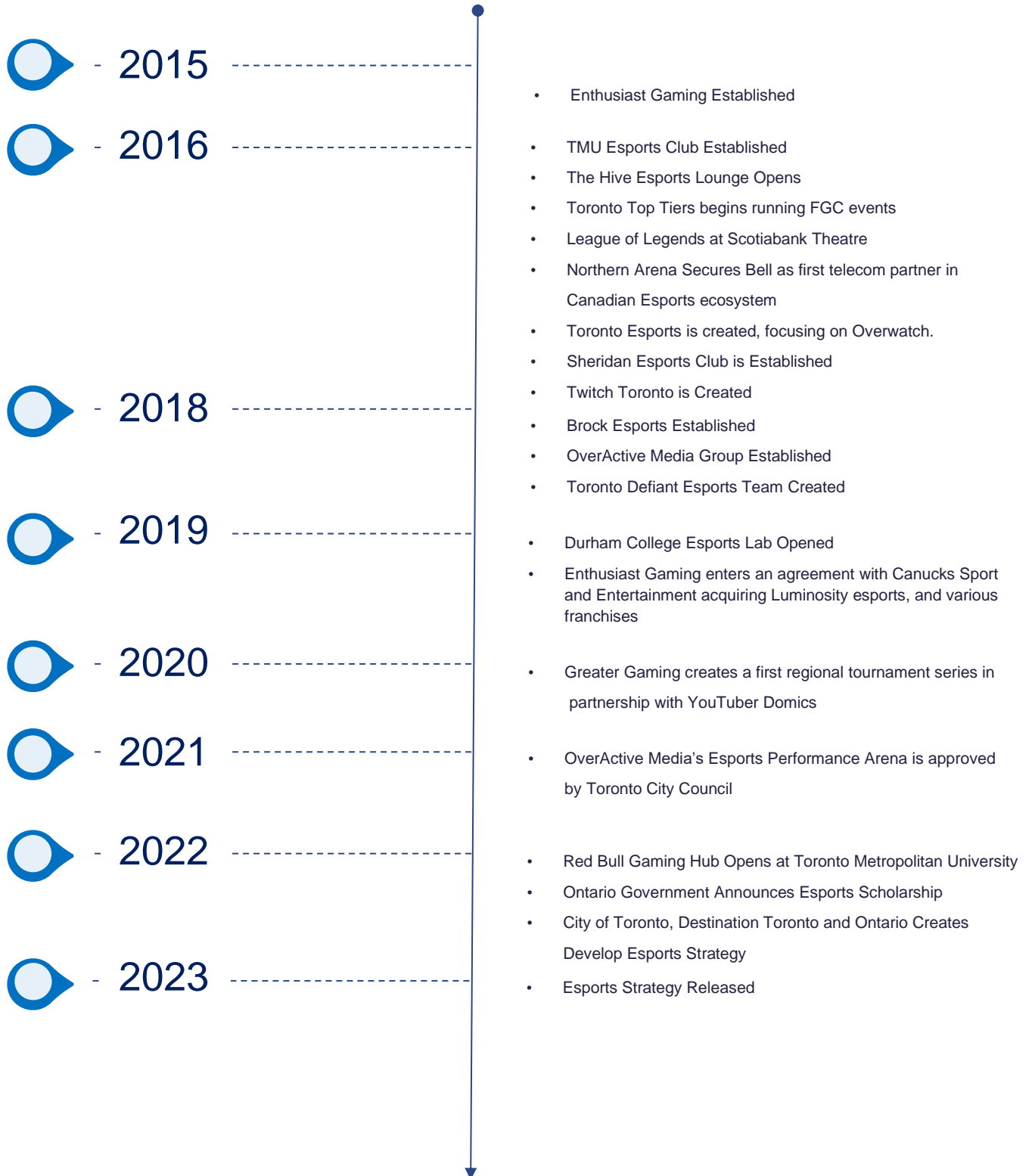
TORONTO ESPORTS ECOSYSTEM

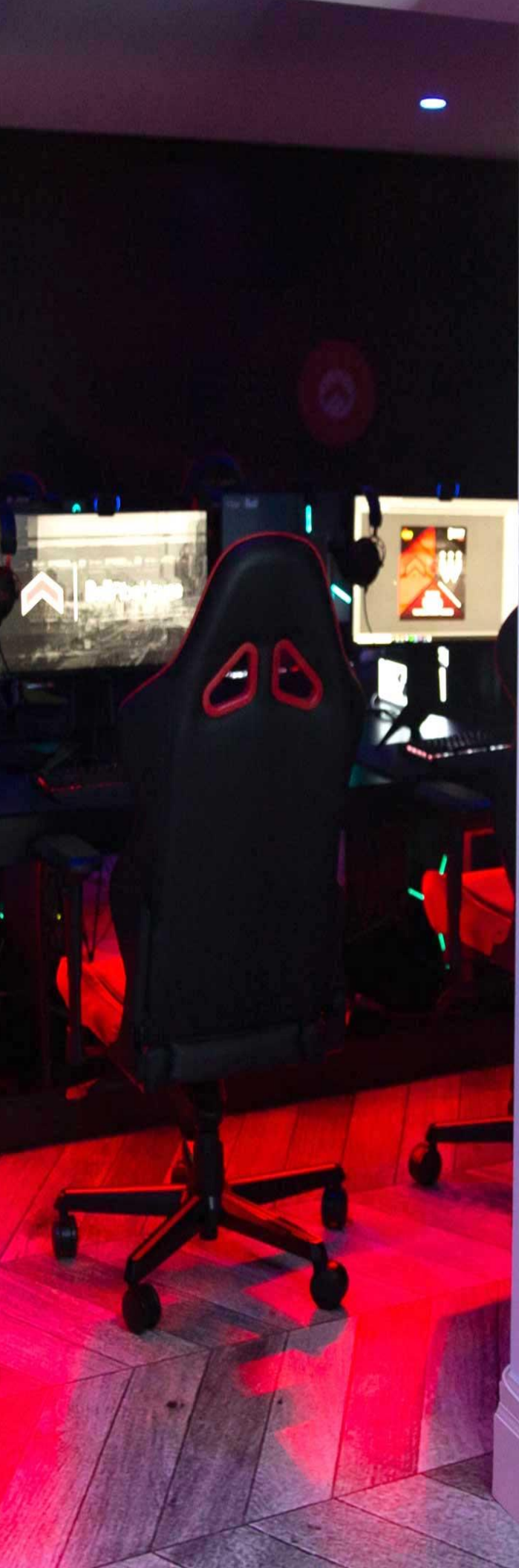
Toronto has the potential to become a major North American esports hub with a strong, and growing, esports ecosystem built on a long-standing grassroots community. The city's proximity to multiple games studios, universities, and the entertainment and sports industries make it a natural fit to host small, medium, and large tournaments, to develop high-quality talent, and to grow esports businesses.

The city has a rapidly expanding esports sector with a variety of businesses, teams, players, influencers, venues, and educational programs focused on the esports industry. Toronto's strengths as an esports focal point include:

- World-class production companies. This includes esports endemic companies, along with Toronto's talent in this area crossing from entertainment to sports.
- Adaptable facilities that can scale to any size event from large global tournaments, to conferences, to mid- and small-scale events, and community gatherings. Esports-specific venues are also part of the ecosystem with community spaces such the Red Bull Gaming Hub, and soon to be developed, OverActive's Esports Arena.
- Tourism infrastructure that supports local, regional, and international travel for business and for pleasure. This includes two international airports, extensive regional transportation, and local transit; a wide range of hotels and other services for tourists; and support networks through Destination Toronto, and Destination Ontario. World-class events such as League of Legends Semi-Finals and LCS Worlds 2022 event, while hosting events like EGLX, SuperSmash Con, and Get On My Level.
- Strong workforce development opportunities through local post-secondary institutions, a variety of video game companies that support teams and publish esports titles, and a diverse and talented labour force. Almost every post-secondary school has an active esports club, either at a small, virtual scale or an established school varsity organization.
- Potential for major sponsorships and investments.
- A traditional sports ecosystem that is looking to esports to enhance their current offerings.
- A large, diverse, and enthusiastic audience. Events small and large are attended by a large local crowd that is willing to travel within the region for a variety of events and activities.
- All of this is underscored by a strong, collaborative, passionate esports community. This community is the main force that is growing the sector.

TORONTO ESPORTS TIMELINE





CREDIT: Raptors Uprising / MLSE

INSIGHTS

During the course of this strategy, insights were gained through a series of industry consultations.

This included interviews, roundtables, and a survey, as well as through extensive research and expertise from Caldera Industries and the City of Toronto teams. Information gathered from these sources has been integrated throughout the strategy and some key insights were developed through the process.

Talent and Content

There is a content creator brain drain.

Canada has produced many popular influencers and content creators including Shroud, Disguised Toast, Pokimane, and XqC. Many content creators have relocated to the US for better career opportunities, to be in close proximity to their peers, and to gain access to the well-established, and lucrative, sponsorships.

Technology and Production

TV production and broadcasting and esports are closely linked. Cities with strong production sectors create fertile ground for the esports industry.

Los Angeles' leading esports sector can be attributed to its successful screen industries sector. With studios, streamers, and major independent companies headquartered in LA, it has become the home of major online esports broadcast platforms and studio offices, such as Twitch and YouTube. This production environment attracts content creators and influencers, as well as high-end event producers.

Events and Venues

Toronto loves events. The community loves hosting, attending, and playing at events both big and small. They are willing to travel and do so often.

Toronto has an opportunity to build a reputation as *the* place in Canada and Eastern North America for major esports events that draw tourists and locals. Toronto has the infrastructure to host major international events and conferences, including large venues, strong digital infrastructure, travel is easy with good transit and two international airports, and lots of hotels and events happening here. Locally, community events happen often and create a strong and cohesive grassroots base.

Workforce Development and Education

There is a professionalization of esports careers.

As the industry matures, and with the development of accredited programs from colleges and universities that focus on esports, esports careers are becoming professionalized. The most in-demand skills are currently event production and business development expertise. Other related skills include hardware development, team trainers (from skills development to nutritionists and physiotherapists), marketing and sponsorship, and educators.

While post-secondary programs are on the rise, the workforce development pipeline still needs development to connect scholastic esports (clubs, teams, etc), skills training, accreditation, esports hubs, on-the-job experience, and industry partners.

Business Development

Toronto has all the elements to develop a strong esports industry.

The region has a highly skilled and technical workforce in a variety of areas including broadcasting; sports, business & event management; large-scale event production; business skills such as entrepreneurship, finance, and sponsorship; educational programs; digital entertainment including gaming, VFX, and other digital entertainment. It is an area with a strong pre-existing tourism draw, including world-class facilities, along with a large, diverse, and engaged local population.

Esports is still relatively unknown beyond the esports community.

This effects start-ups and grassroots associations as it is difficult to raise funds, borrow money or bring in sponsorship dollars. One of the issues highlighted was the fact that sponsors and other potential partners are unaware of esports developments within Toronto, from events to content creator networks. When it comes to smaller scale events, activations, and initiatives, brands seemed to be surprised when informed of frequency and engagement in Toronto. This massive esports awareness gap is not effective and leads to the assumption that esports activations will not be as effective in Toronto as in established markets in the US. This curtails the funding and support that could help businesses and events grow in Toronto and expand the local ecosystem.

Government and Governmental Organizations

The esports industry and government don't know each other very well yet.

Many esports companies, particularly smaller companies, were not aware of government programs such as funding, business development support, tax credits, and other programs and supports. Many government agencies are either unaware or still learning about esports leaving gaps in funding, policy, immigration, work visas, and other programs and support needed by the industry. When asked, the local esports industry listed advocacy as the most desired form of support from the local government; the second highest priorities included access to labour market information, subsidized event spaces or workspaces, and access to funding/support for production technologies.

Esports is a global industry that requires global policies.

Esports is a global industry that has multi-national businesses with international employees, teams that travel across the globe, and events that take place in many countries. Issues around work visas for players and event staff and immigration visas for staff currently have long wait times and other complications that hinder events and activities.

Grassroots and Community

Toronto's engaged community is one of its biggest assets.

Local community fuels the industry because of its large talent pool developed through a high number of events and activities that hone homegrown skills. The key to greater success is to develop stronger communication and greater cohesion in all aspects of the ecosystem.

The local esports ecosystem, grassroots and industrial, does not reflect the diversity of Toronto.

Women, 2SLGBTQI, people who are Indigenous, and people living with disabilities are not well represented. This is common globally and is not a Toronto-specific issue but, because of the diversity of the city, there is an opportunity to address this issue locally and become a leader in this area.

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ReadySetBen
He/Him

CREDIT: Waveform

RECOMMENDATIONS

During the course of this strategy, insights were gained through a series of industry consultations.

<p>Recommendation 1</p> <p>Develop Regional Esports Industry Consortium</p> <p>Convening a Regional Esports Consortium will provide opportunities for partners to promote and support esports across the region, nationally, and globally, develop reports and other strategic documents and activities that support the growth of the esports industry; and to ensure equity and inclusion are actively integrated into all aspects of the esports sector.</p>	<p>Recommendation 2</p> <p>Promote Toronto as a Destination for Major Esports Events</p> <p>Toronto will be promoted throughout Canada, and globally, as a key destination for esports events, which will enhance tourism and help grow the local industry.</p>
<p>Recommendation 3</p> <p>Reverse the Content Creator Brain Drain</p> <p>Toronto will build on its strengths to develop an environment that is economically viable and creator-friendly, to enable local talent to build successful careers.</p>	<p>Recommendation 4</p> <p>Develop Skills Based Training</p> <p>As a nascent sector with a young demographic, providing skills-based training will help to create a strong local industry now and into the future.</p>
<p>Recommendation 5</p> <p>Knowledge Sharing Regarding Esports for All Levels of Government</p> <p>Education about esports will help prepare governments for this growing sector and its specific needs.</p>	<p>Recommendation 6</p> <p>Support Access to Space for Esports</p> <p>Support access to event spaces for small, medium, and large events. Esports is built on events and supporting this access will help to build a strong community and to provide opportunities for esports tourism.</p>
<p>Recommendation 7</p> <p>Support Diversity, Equity, and Inclusion Within the Esports Sector</p> <p>Supporting initiatives that advance equity and inclusion will help ensure the esports sector reflects the City of Toronto and embraces the diversity that is the city's greatest strength.</p>	<p>Recommendation 8</p> <p>Develop a Strong Global Reputation to Support Esports Business Development</p> <p>Canada, specifically Toronto, is poised to be the next great esports hub. Building a regional esports reputation will help attract business development to the region.</p>
<p>Recommendation 9</p> <p>Support the Development of Esports Businesses and Initiatives</p> <p>Support the growth of esports businesses by facilitating access to training, networking, knowledge sharing, promotion, and other supports.</p>	



CREDIT: Red Bull / OverActive Media

APPENDIX A - Strategy Development Method

During the course of this study over 90 experts from across Toronto and the surrounding region esports ecosystem were consulted to collect local insights to develop the Toronto Esports Strategy. Industry experts were veterans within the esports and content creation spaces, including, but not limited to focuses on event organizers, professional players, production staff, educators, post-secondary program leaders, business owners, publishers/developers, esports association leaders, and business owners.

A number of methods were employed including facilitated roundtable discussions, one on one interviews, surveys, and research.

Roundtable topics covered included education, sponsorships & partnerships, investment, infrastructure, and community. These roundtables provided an opportunity to gather qualitative insights that were used to shape one-on-one interviews with industry experts.

The interviews provided an opportunity to dive deeper into the topics discussed at the roundtables, as well as additional topics such as the esports economy, events, tourism, venues, publishing, software and hardware development, entrepreneurship, and investment. Also collected were additional insights on current local successes, pain points in the sector, and opportunities for growth.

Simultaneously, surveys were deployed in order to gather quantitative demographic, habitual and predictive data. These surveys were distributed directly to the esports community and did not encompass the broader gaming community so data collected using this tool will be reflective of Toronto & region's esports community specifically.

This strategy was further contextualized through research. These documents are listed in the appendix.

Survey Responses

53 Responses

41 number Community responses

12 number esports related organizations

Interviews and Roundtables 15 interviews

30 roundtable participants

APPENDIX B - Glossary

Battle royale (BR) – Battle royales are video game genres where players compete against each other in large groups, either as teams or in free-for-all settings, where survival is the overarching goal; only one team or player may stand at the end.

Class (roles, characters) – For esports, classes are a categorization method for playable characters in a game, based on their role, strengths, and weaknesses; class categorization depends on the game being played. Examples include Damage, Defence, and Support classes.

Esports – Competitive video gaming, also known as electronic sports.

Esports genre – Esports titles are categorized into different genres based on mechanics, gameplay aspects, goals, and multiplayer dynamics.

Fighting games (FG) – Esports genre where players face off to bring the other opponent's health down, or increase their damage, usually in arena-styled combat. A winner is declared when a life, stock, or health bar is completely diminished. Combos, stage control, positioning, and creativity are essential.

First-person shooter (FPS) – First-person shooter games are a genre of video game revolving around the mechanics of gun- and other weapons-based combat from a first-person perspective (i.e., the player character or protagonist).

Localized marketplace – Refers to customers and products located and localized within the region the product or service is produced or made available, and to the facilitation of local investment and sales.

Major (event) – A large-scale esports event that spans multiple days, with attendance in the thousands. Usually, majors focus on multiple esports genres, titles, and competition titles.

Multiplayer online battle arena (MOBA) – Genre of team-based strategy video games where each player controls a single character while competing against another team of players, usually on an arena-style map. Different characters have specific roles, such as damage, defense, support, etc.

Sports – Game genres where gameplay is based on traditional “physical” sports, such as basketball, hockey, and football. Notable examples include FIFA, NHL, and Madden’s game series.

Racing – Game genres where gameplay includes simulated racing and driving of a vehicle in various racing environments. Examples include Forza, Formula 1, and the Need for Speed game series.

Real-Time Strategy (RTS) – A genre of games where players compete against each other in real-time, compared to turn-based strategy games (like chess). Resource management, unit management, and strategic engagement are key to victory.

Scholastic esports – Esports competitions, events, learning, and other activities that take place in the context of a school or learning environment. Shoutcasters/casters – Individuals who broadcast esports gameplay and comment on gaming in real-time.

Streamer/Content creator – An individual who creates digital content for esports and gaming.

Support industry – An upstream or downstream sector or industry whose activities play a role in improving innovation, success, and resilience of the overall business ecosystem.

Esports support industries, for instance, refer to esports-adjacent industries such as the tech, events management, games design, and development sectors.

Third-person shooter (TPS) – Third-person shooter games are similar to FPS, except the camera is situated in the third-person perspective, usually behind the player character. TO – Abbreviation of the tournament organizer.

[Vancouver-Esports-Strategy-2021-Desktop-Spreads.pdf (vancouvereconomic.com)]

APPENDIX C – Esports Games

Call of Duty (COD) – Published by Activision Blizzard, COD is a modern-day FPS made for multiple platforms.

CounterStrike – Valve’s Tactical FPS, where teams of five compete for control over various objectives.

Dota 2 – Made by Valve, Dota 2 is the sequel to a community-made mod for Warcraft 3 (Dota stands for “Defence of the Ancients”). Teams of five players compete against each other to attack and destroy the enemy base and assets.

Fortnite – Epic Games’ breakout battle royale TPS game, where groups of up to 50 players compete, gather resources, build structures, and survive to win.

Gears of War – Made by the Coalition, Gears of War is a sci-fi third-person shooter game made exclusively for Xbox and PC markets.

HALO – Originally published by Bungie Studios, and now published by 343 Studios and Microsoft, HALO is a science-fiction FPS made exclusively for the Xbox series of consoles and PCs.

League of Legends (LOL) – Made by Riot Games, League of Legends is a MOBA where teams of up to five people face off in various map styles.

Overwatch – Activision Blizzard’s class-based FPS, Overwatch incorporates aspects of games such as Team Fortress 2, with various mission types. **PUBG** – A critically acclaimed FPS battle royale game, where up to 100 players drop into an island, fight for resources and fight to be the last one standing.

Street Fighter – Originally from the ‘80s, Street Fighter is Capcom’s flagship traditional fighting game, meaning gameplay occurs within a controlled, arena-like stage, where the objective is to bring the opponent’s health bars down to zero with kicks, punches and combination attacks.

Super Smash Bros. is a crossover fighting game series published by Nintendo and primarily features characters from various Nintendo franchises. The gameplay objective differs from that of traditional fighters in that the aim is to increase damage counters and knock opponents off the stage instead of depleting life bars.

Racing – Game genres where gameplay includes simulated racing and driving of a vehicle in various racing environments. Examples include Forza, Formula 1, and the Need for Speed game series.

Real-Time Strategy (RTS) – A genre of games where players compete against each other in real-time, compared to turn-based strategy games (like chess). Resource management, unit management, and strategic engagement are key to victory.

Valorant – Riot's Tactical FPS, where teams of five face off for control over various objectives.

APPENDIX D – Toronto Pro Esports Teams

Team	Division	Associated
APEX Legends	APEX Legends Global Series	Lazarus Esports
eMLS	FIFA	MLSE
Lazarus Esports	Pokemon Shield / Sword	Lazarus Esports
Lazarus Esports	NHL22	Lazarus Esports
Lazarus Esports	Gran Turismo	Lazarus Esports
Lazarus Esports	Crossfire	Lazarus Esports
Lazarus FGC	Fighting Games (Various)	Lazarus Esports
MAD Lions (Spain)	Counter Strike: Global Offensive; League of Legends	OverActive Media
PUBG Mobile	PUBG Mobile	Lazarus Esports
Raptors Uprising GC	NBA2K	MLSE
TEAM BH	Fortnite	Intema Solutions
Team Serenity	Valorant	Toronto Serenity
Toronto Defiant	Overwatch League	OverActive Media
Toronto Ultra	Call of Duty League	OverActive Media

APPENDIX E – Educational Programs

Academic Programs

School	Program
Seneca College	Esports Marketing Management
Red Bull Gaming Hub, Toronto Metropolitan University	Video Game Design
	The Future of Content Dissemination
	Esports Broadcasting
York University	Tourism and Leisure Marketing (Esports)
George Brown College	Esports Management Program (Post Graduate)

Varsity, Leagues, or Student Groups

School	Type
OCADU	Student Group
UTM	Student Group
UofT	Student Group
	Varsity, League
Toronto Metropolitan University	Varsity, League
York University	Student Group
	Varsity, League

APPENDIX F – Jurisdictional Scan at a Glance

	International				North America		National		Local
	Seoul	Chongqing	Katowice	Rio De Janeiro	Chicago	Los Angeles	Vancouver	Montreal	Toronto/GTHA
	Talent Content								
	<i>Players and Teams</i>								
Pro Players	X	X			X	X	X		X
Pro Teams	X	X			X	X	X	X	X
	<i>Content Creation & Live Streaming</i>								
Pro Content Creators	X				X	X		X	X
Broadcast Studios	X		X			X	X		
Audiences	X	X	X	X	X	X	X	X	X
	<i>Game Development & Creative</i>								
Game Developers & Publishers	X	X			X	X	X	X	X
Connected Creative Industries	X	X				X			
	Events & Venues								
	<i>Events & Tourism</i>								
Tourism	X	X	X	X	X	X	X	X	X
Tournaments	X		X			X			
Leagues	X	X	X	X	X	X	X	X	X
Business Events	X	X	X	X	X	X	X	X	X
Online Events	X	X	X	X	X	X	X	X	X
Event Organizers	X	X	X	X	X	X	X	X	X

	International				North America		National		Local
	Seoul	Chongqing	Katowice	Rio De Janeiro	Chicago	Los Angeles	Vancouver	Montreal	Toronto/GTHA
	<i>Infrastructure / Venues</i>								
LAN Centres	X	X	X	X	X	X	X	X	X
Dedicated Esports Venues	X	X	X		X	X	X	X	X
Major Arenas	X	X	X	X	X	X	X	X	X
Esports Innovation Hubs	X	X	X			X	X		X
Broadcast Components									X
	Technology & Production								
Streaming Platforms	X	X				X			
Hardware & Software	X	X	X		X	X	X	X	X
Digital Infrastructure	X	X	X	X	X	X	X	X	X
Community Platforms		X			X	X			
Broadcast Studios		X			X	X	X		
Emerging Platforms	X	X	X	X	X	X	X	X	X
	Workforce Development & Education								
Workforce Development	X	X	X		X	X	X	X	X
Education & Talent Development	X	X	X	X	X	X	X	X	X
Post Secondary Training	X	X	X		X	X	X		X
Varsity & Collegiate Teams	X	X	X	X	X	X	X	X	X

	International				North America		National		Local
	Seoul	Chongqing	Katowice	Rio De Janeiro	Chicago	Los Angeles	Vancouver	Montreal	Toronto/GTHA
	Business Development								
	<i>Brands and Sponsorship</i>								
Brand Involvement	X	X	X	X	X	X	X	X	X
Naming Rights	X	X	X		X	X			
Sponsorship Deals	X	X	X	X	X	X	X	X	X
	<i>Business Development & Investment</i>								
Esports Investments	X		X		X	X	X		X
Brand Sponsorships	X	X	X	X	X	X			
Esports Businesses	X		X		X	X	X	X	X
	Government & Governmental Organizations								
Grants, Subsidies	X	X	X			X			
Tax Credits	X	X							
Advocacy	X			X	X	X	X		X
Facilities	X	X	X	X	X	X	X	X	X
Strategic Documents	X		X			X	X		
Policies, Regulations	X	X	X		X	X			
	Community Impact								
Communities	X	X	X	X	X	X	X	X	X
Diversity & Equity Initiatives	X			X	X	X	X	X	X
Associations	X	X	X	X	X	X	X	X	X

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