



NZESF

2021

STRATEGIC PLAN



About Us

New Zealand Esports Federation

Our Vision

To unite New Zealanders with each other and the world through Esports.

Our Mission

To lead, support and grow esports in New Zealand.

Core Values

01 Inclusive Participation 

To ensure that all New Zealanders have equal opportunity to participate in esports.

To give a voice for positive change to all stakeholders in the NZ esports ecosystem.

02 Education 

To promote the social, health and educational benefits of esports and video games for youth and the wider community.

To empower youth to reach their full potential using the skills and attributes learned through esports.

03 Integrity 

Advocate for a safe and controlled competitive environment that reinforces the sporting spirit of fair play and integrity.

04 Whakamana 

Empower individuals to pursue esports with confidence across all levels of the industry.

Global Esports Revenue
2021

\$1.08B

Global Esports Audience
2021

474M

Kiwi Gaming Households
2021

1.6M



Strategic Overview

The New Zealand Esports Federation is the solely recognised national sporting organisation for esports in New Zealand. Established to promote and represent esports in New Zealand to increase its level of awareness, improve standards and inspire future talent. The New Zealand Esports Federation was set up with the aim to lead and support kiwis to positively shape the future of esports as the recognised voice of Esports in New Zealand.

✓ Community

For New Zealanders to embrace the benefits of esports and to participate fully and effectively.

✓ Competitive

For New Zealand esports athletes to achieve success in local, national, and international level esports events and embody integrity and the sporting spirit within competitions.

✓ Academic

To enrich and engage students with the core life values of sport and to support parents and educators with guidance to create successful outcomes through esports.

✓ Industry

To contribute to a sustainable national esports industry that creates job opportunities and positive economic and socio-ecological outcomes for all.

Global Market

Benefits of the Digital Economy for New Zealand

Market Analysis

As outlined in the 2019 Interactive New Zealand report a strong digital economy, such as our interactive sector, diversifies New Zealand's economic base and increases our high value exports.

It is a knowledge-based sector with the opportunity to:

- Improve labour productivity
- Grow our scalable, intangible, digital exports
- Retain a greater share of the value chain in New Zealand
- Grow faster than the overall economy
- Pay above average wages

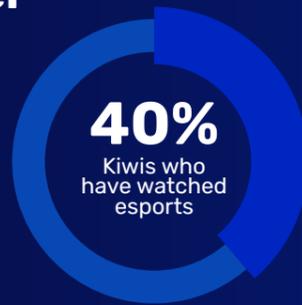
In addition the New Zealand Esports industry can

- Support and promote New Zealand game developers
- Provide additional opportunities for out TV, Film and event industries
- Drive and promote Sport NZ outcomes of active recreation
- Provide new commercial opportunities

The New Zealand Gamer

More New Zealanders game than ever before with the average Kiwi gamer spending 81 minutes a day on their gaming platform of preference.

78% of New Zealand video game players are adults, with an average age of 35 years old. 60% of Kiwi Gamers own a gaming PC. 78% say video games improve mental health, and 67% say video games connect people.



40% Kiwi Viewers

Of these:

- 1/3 watch to improve their own gameplay
- 1/5 watch to follow their Team
- 1/3 enjoy the culture of esports



73% Kiwi Gamers

- 48% of these gamers are Female
- 20% have competed in esports events
- The average age is 35 years
- The #1 reason parents play with kids is connection



• USA

An early investor in the esports scene and home of major global esports brands.

• West Europe

A top performer at international tournaments through its rich talent pool

• Latin America

An emerging market in esports as infrastructure develops. Latin America is estimated to increase esportsing revenue to \$43m by 2023.

• China

The global giant in esports, accounting for almost 1/3 of the global esports revenue.

• Oceania

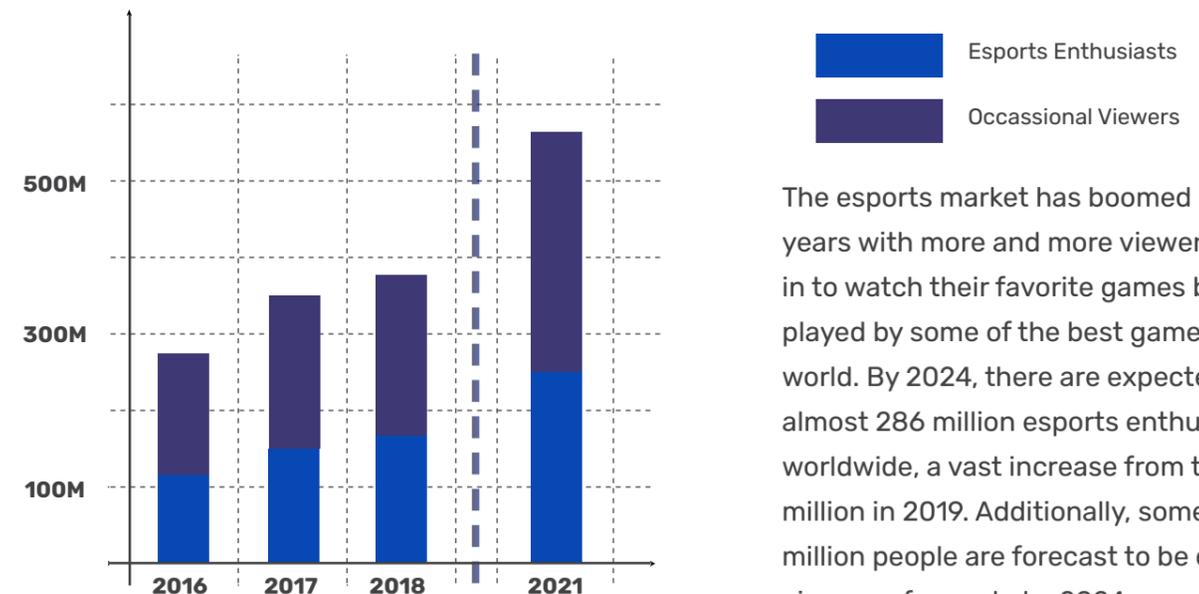
Top talent from Oceania are competing at the highest levels under foreign global teams due to lack of local infrastructure. Huge potential to address.

Global esports revenues have grown to \$1.1 billion in 2020, a year-on-year growth of +15.7%, up from \$950.6 million in 2019.

\$822.4 million in revenues—or three-quarters of the total market—have come from media rights and sponsorship.

This will increase to \$1.2 billion by 2023, making up 76% of total esports revenues

Esports Audience Growth



The esports market has boomed in recent years with more and more viewers tuning in to watch their favorite games being played by some of the best gamers in the world. By 2024, there are expected to be almost 286 million esports enthusiasts worldwide, a vast increase from the 197 million in 2019. Additionally, some 291.6 million people are forecast to be occasional viewers of esports by 2024.



PROJECT OVERVIEW

Project Overview

Grassroot Esports Programme

Strategic Objective

Build a trusted grassroots participation structure in esports through a safe and competitive environment for schools that allows tournament organisers to confidently operate in their region.

Build confidence with parents and guardians that NZESF sanctioned events are safe and trusted. To grow the competitive player base and ensure the next generation of competitive players embody the sporting spirit of fair play, integrity and have a play-life balance approach to esports.

Current State Analysis

Esports in NZ Secondary Schools is currently fragmented and disorganised. Tournament organisers and publishers are operating without guidelines or oversight. Schools and players are unprotected without the knowledge of reasonable expectations or securities for their students. This environment can make it difficult for schools to participate in esports as the barriers to engagement can be too high. This lack of confidence from the schools makes it difficult for tournament organisers to engage and deliver high quality services.

Proposed Solution

Develop the structure for a NZ National Circuit that is run regionally by tournament organisers accredited in appropriate practices by the NZESF. The NZ Secondary School National Circuit could run across multiple titles and crown a national champion (individual or team) near the end of each academic year. Each region could produce a pre-determined number of finalists to compete at the national level giving each regional body a validated pathway and incentive for participants. The NZ National Circuit would inform selectors for potential E Black players to compete at international events.

Expected Outcome

Individuals, Schools and Students can participate in esports with confidence and celebrate their local talent through an established NZ esports school participation structure. Each approved title will have a Regional Champion, and a National 1st/2nd/3rd.

Contributing Values



Participation



Education



Integrity



Whakamana

Project Overview

NZ Best Practice Framework

Strategic Objective

Empower individuals and organisations wishing to participate in the esports ecosystem with purpose and confidence.

Current State Analysis

Individuals and organisations who want to participate in the esports ecosystem are currently required to 'make it up as they go'. This leads to potential damaging interactions between players, schools, publishers, tournament organisers and regulatory bodies as there are no established rules and oversights and mistakes are much more likely.

Proposed Solution

Developing a library of resources and best practice guidelines for all aspects of the NZ Esports Industry using our collective experience and knowledge can give each stakeholder a frame of reference of expectations and safeguard all stakeholders with a basic set of rights and responsibilities.

Expected Outcome

A party interested in esports will be able to use the NZESF guidelines to develop a clear understanding of how they can pursue their goals with confidence and success.

Contributing Values



Participation



Education



Integrity

Project Overview

Play-Life Balance

Strategic Objective

Educate stakeholders on the benefits and risks associated with esports and how esports can promote health and wellbeing.

Promoting the benefits of a health lifestyle and its positive contributions to competitive esports.

Current State Analysis

Although esports has many positive benefits to offer, due to stakeholders having a limited understanding on how to facilitate these benefits, they are often unrealised. Esports, just like any other sport, can have risks which with the right guidance can be managed. In an esports context these risks can be less obvious. Some of these issues exist elsewhere in a digital society but are less understood through the wider community.

Proposed Solution

Develop and distribute resources that will educate stakeholders on the risks associated with esports and provide them with the tools to build healthy and balanced play in their own context.

Expected Outcome

Stakeholders will have the knowledge, skills, and confidence to co-construct spaces in and around esports which promote health, wellness and balance in play and life.

Contributing Values



Project Overview

Esports For All

Strategic Objective

Empower individuals from all walks of life to engage in esports to connect with each other to develop important social bonds and break down physical, economic, and societal barriers.

Current State Analysis

Sport is a way to bond with others. People with physical disabilities or social or emotional limitations or adopt problematic behavioural tendencies are unable to participate with others effectively and can become isolated from social connections, networks, and peers. There are not enough frameworks that currently exist that help overcome these barriers.

Proposed Solution

Develop and distribute the Esports for All campaign. This campaign is to raise awareness for how those who are unable to access traditional sporting models can use esports to level the playing field and compete, interact, and bond with their peers. Work with NZGDA to provide an esports accessibility rating on published games in the NZ Esports ecosystem to incentive developers to ensure accessibility.

Expected Outcome

An inclusive environment that allows more people to overcome traditional barriers to entry with sport to engage with peers and reap the benefits of human connection, teamwork, and competition through esports.

Contributing Values



Participation



Education



Integrity

Project Overview

NZESF Accreditation Framework

Strategic Objective

Create a trusted network of tournament organisers that other stakeholders can engage with confidently with standardised practices.

Current State Analysis

There is currently no recognised set of guidelines that individuals or organisations can turn to for running a successful esports event. This leads to a lack of governance, uncertainty and reduced participation from both players and prospective tournament organisers.

Proposed Solution

Work with relevant government bodies to standardise all events run with special considerations (e.g., Run within schools, using community funds, or for the purpose of wagering) must be run by an accredited provider as a sanctioned event. Equip tournament organisers who are willing to become accredited with the foundational tools they need to deliver safe, fun, and successful events. The accreditation process would require applicants to demonstrate a comprehensive understanding and implementation of accepted best practices as provided by the NZESF. Successful applicants will be awarded use of the NZESF Accredited trademark which they will be able to publicly display.

Expected Outcome

Tournament organisers will have a clear framework of responsibilities and behaviour expectations to create the positive and meaningful experiences for other stakeholders. Tournament organisers engaging in the esports ecosystem in an appropriate way will have a pathway to build strong high levels of confidence and trust through the accreditation process.

Contributing Values



Participation



Education

Project Overview

NZESF Official Regulation and Code of Conduct

Strategic Objective

Standardize the esports industry expectations and establish guidelines for regulatory action

Current State Analysis

Stakeholders currently have no guidance or resource on how they should be operating within the esports industry.

Proposed Solution

Publishing a set of NZESF Official Regulations and Code of Conduct that align with international bodies such as the ESIC, IGEA and IESF. These regulations would recognise and align with related international organisations but also include a set of localised regulations specific to our region.

Expected Outcome

Stakeholders would have an accessible set of guidance and documentation available to ensure they are delivering acceptable service and acting in the best interest of their audience.



Contributing Values



Project Overview

Stakeholder Representation Framework

Strategic Objective

Empower stakeholder groups to provide specific input on issues they face within esports to be addressed by the NZESF

Current State Analysis

Communication channels are problematic or non-existent for many stakeholders. This can cause frustration within various stakeholder groups as they feel they are not and cannot be heard, understood, and considered. It also restricts the quality of decisions that can be made by the NZESF at a strategic level without input from all relevant stakeholders.

Proposed Solution

Assist in establishing stakeholder representation groups using a guidance framework with a focused platform within the NZESF to hear and address concerns. These representation groups could include but are not limited to:

- Education Sub-Committee
- Community Sub-Committee
- Women's Sub-Committee
- I.D.E.A Sub-Committee
- Players' Advisory Panel

Expected Outcome

The establishment of independent representation groups who can lobby for the unique needs of their stakeholder group and have those needs heard, understood, and effectively considered and communicated by the NZESF through appropriate channels.

Contributing Values



Participation



Integrity

Project Overview

High Performance Esports Pathway

Strategic Objective

Establish a clear pathway for talented local players who want to compete at national and international levels.

Current State Analysis

Lack of infrastructure has led to a small talent pool in New Zealand esports. Due to this limited competitive pool, talented NZ esports athletes are forced to join foreign teams or compete in foreign esports scenes to continue their personal development. There is currently very limited opportunity for New Zealand teams or players to thrive internationally.

Proposed Solution

Building partnerships with international tournament organisers to include seeding position for NZ teams and building a competitive infrastructure with the likes of Australia to create consistent international exposure.

Expected Outcome

NZ based team owners will be able to provide clear incentive and competitive pathways for players into the national and international scene.



Contributing Values



Participation



Whakamana

Project Overview

Vocational Academic Framework

Strategic Objective

Establish esports as a viable and accepted career option.

Current State Analysis

Taking the step to become a professional level player comes with high risk in an unregulated environment. Players who do achieve a successful esports career have trouble earning traditional employment once their professional career ends, as it is common for players to enter the pro-scene before tertiary level study.



Proposed Solution

Working with local academic institutes to provide a protected pathway for professional teams and players to access continuous learning and growth throughout their esports career.

Expected Outcome

Professional players will be able to retire with valuable vocational skills that can be applied to other areas of interest.

Contributing Values



Participation



Whakamana

Process Timeline

Operations Plan

Strategic Goals and Objectives

- Establish regulatory framework and communication channels
- Build participation channels for grassroots esports
- Develop benefits and educational resources for wider community
- Strengthen competitive pathways



Phase One - Design

- Regulation Design
- Stakeholder Framework
- Grassroots Planning
- Accreditation Framework
- Web Redesign
- Membership Network Design

Phase Two - Build

- Best Practices Framework
- Representation Framework Recruitment
- School Membership Recruitment
- Wellbeing Deployment
- Grassroots National & Academic Year One

Phase Three - Grow

- Promote AU/NZ competitive pathways
- Grow local participation through events
- Expand membership network
- Ecosystem pathways

Phase Four - Refine

- Organisation evaluation
- Defined strategy for 2024+
- Vocational recognition pathways

Organisation

Structure & Finance



National Sport Organisation

In 2020, Esports was recognised as a Sport in New Zealand following a five year campaign by its founding members. The New Zealand Esports Federation is now recognised as the National Sporting Organisation (NSO) for New Zealand Esports. As a national body, our aims are to support esports, our members and provide expertise and advice. We help to educate parents, teachers, media, councils, policy makers and government around what esports is and what its benefits are.



Sports Betting

As an NSO, the NZESF receive a portion of all betting revenue generated from within New Zealand.



Membership Fees

Establishing attractive membership benefits to grow our annual membership fees



Grants & Funding

As a registered Not-For-Profit organisation, there are a range of grant and funding options available to help us serve the community. These initiatives should be designed by the relevant sub-committee.



Sponsorships

Recognised tournament organisers and events will be encouraged to be sanctioned by the NZESF. This creates an opportunity for us to extend sponsorship opportunities into these events on behalf of the NZESF.

NZESF Sub-Committee Framework

Establishing relevant sub-committee groups designed to seek advice, perspective, and insights from qualified community representatives on relevant issues. These groups could include:



Education

Education representatives from intermediate, secondary, tertiary, and relevant organisers



I.D.E.A

Inclusion, Disabilities, Equality, Accessibility



Industry

Publishers, Game Developers, Commercial Interests



Woman

Female Representation and thought-leaders



Community

Regional representatives and other relevant community stakeholders



NZESF