











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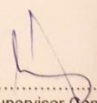
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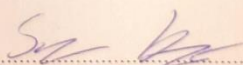
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I declare that the dissertation hereby submitted in partial fulfilment of the requirements for the degree of Bachelor of Arts in Commerce and Marketing at the Budapest Business School has not previously been submitted by me for a degree at this or any other institution. This thesis and the work presented in it are my own and have been elaborated by me as the result of my own original research; it is my work in design and in execution, and that all material contained therein, has been truly acknowledged. I understand that my thesis may be made available to the public.

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BUDAPEST BUSINESS SCHOOL

University of Applied Sciences

Faculty of Commerce, Catering and Tourism

**The effects of the increasing popularity of the E-sports on the
tourism in Hungary**

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Bachelor of Art in Tourism
and Hospitality

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1. Introduction

When people hear the word tourism, at the first place many of them think about a deck chair at the seashore, or a visit at one of the famous attractions of the world. But tourism is way more than that. The depths of tourism are unbelievable many times for those too who are working in this industry. It can be amazing how many different aspects are in tourism each of them with their unique characteristics.

The event tourism nowadays is a truly important area of tourism. The number of events and exhibitions greatly risen in the last decades and the desire to understand the phenomenon is increased accordingly in the tourism industry. People are interested in events and exhibitions, both during a business or a leisure trip. They travel because they want to see something, get new experiences, live the stories they'd like to tell their grandchildren and so on. Compared to the more traditional branches of tourism, events and exhibitions can be a real deal when it comes to business, because the tourist nowadays can be more motivated if they can connect the travelling with some adventure.

The tourism is an old industry in which innovation and new ideas are must if somebody wants to be successful and well-known in this department. In my opinion the e-sports are a potential source of innovation.

The main goal of my dissertation is to present the potential opportunities within the e-sport tourism, and to give the reader a clean view on what e-sport is exactly. However, it is a relatively new phenomenon, I would like to show

- what are the capabilities of e-sports in Hungary,
- why it can be a feasible branch of tourism,
- why the time has come for the e-sports to proceed the status of “child’s play”.

My thesis consists of 6 parts. The first chapter is the introduction, in which I explain the background of the topic and the my personal experiences.

The second chapter deals with the definitions of e-sport and the differences between sports and e-sports.

A general introduction of e-sports will be the third chapter of my thesis. I take a closer look on the history, the future and the market of e-sports in this chapter. In this chapter I would like to demonstrate a depth view of this kind of activity and show an interesting new and a little bit unknown world for the reader. Since the possible future effects of e-sports are discussed also the end of the primary research, I just made a brief mention of the potential in e-sports.

In the fourth chapter, I introduce the present situation of e-sports in Hungary, the most notable events and associations which has the largest influence on the Hungarians e-sport nowadays.

The fifth chapter is a detailed review on the primary research, and the different information collecting methods which I were used during the construction of the thesis. This chapter includes the hypothesis, the interviews, and also the analysis of the questionnaire I created to accumulate the required data on which my thesis is based on.

The sixth chapter is the final one, in which the summary of the research done and the enumeration of potential future actions takes place. And last, but not least in this chapter I give some ideas how could we support this sport and make a well-known and conventional activity in our country.

Although the sources I used during the creation of my dissertation are collected in a detailed form at the end of the thesis, the used resources will be mentioned at the end of each paragraph in which they were used too.

How I get into the world of e-sports? Just like many others. I had the opportunity to spend a portion of my free time playing video games during my childhood. Since I didn't have too many friends in real life, I tried to find a place where I could make new connections with people, find friends and of course, to have fun. It was a hobby for me, but my parents just like the majority of people their age didn't like it. They simply couldn't imagine how can watching a screen and pushing buttons on the keyboard can positively contribute to a healthy lifestyle. But beside that people can create new relations while playing video games, it also has many positive effects on the

health. Playing strategy games can teach somebody how to solve difficult issues and effectively search for solution for different problems, action games help people to give an agile response in dangerous situations and logic games can stimulate logic thinking in every age. Not to mention the decrease in reaction time. Another countable positive effect is the language. Usually in one server there are a lot of people with different nationality. If someone wants to get on well in a ‘battle’, needs to communicate effectively with his or her mates. And the most used language is English.

In my dissertation I would like to examine the tourism potential of e-sport related events and the people visiting this kind of events, the willingness of these people to travel between the borders of Hungary, or even to foreign countries only to attend an e-sport event. At the beginning I will review the literature of the event tourism and e-sports, with the intention of providing an overview on the topic I chose to research. Afterwards I will introduce the interviews and the questionnaire I made, and analyze the accumulated information. The final part will be a summary on the experiences I gain during the creation of this research, and the exposition of conclusion on how my research can be useful for the participants of the e-sport industry.

2. The determination of e-sport

First of all, I would like to give the reader a clear view about the topic I will examine in my thesis. The meaning of some terms are important to be familiar with for the complete understanding of my research. But before I start, some funny things between ‘normal’ and gamer people. The most easier example is the word: LOL. The normal people know this abbreviation as Laughing Out Loud, but in the world of e-sport this means the one of the most famous game. This is why I should start with some description and definition of this topic.

2.1. Definition of E-sport

When people hear the term “e-sport”, the odds of whether they have a clue of it, depends on the age group. If you ask somebody from the younger generations -I mean here the ‘Z generation’ and youngers - they will most probably have a quite good definition about ‘e-sport’. But the older generations tend to label it as simple ‘gaming’. I’d like to make it clear for the reader that e-sports are not just simple gaming. Here are some definitions I found:

Let’s start with a definition from the website of Investopedia. This website is the world’s leading source of financial content on the web, ranging from market news to retirement strategies, and helps us to understand the financial and marketing concepts. Referring this description, it looks clearly that the e-sport is an important new phenomenon which should be recognized.

“ESports turns online gaming into a spectator sport. It mimics the experience of watching a professional sporting event, except instead of watching a physical event, spectators watch video gamers compete against each other. The eSports trend has become so widespread in recent years that games can often be viewed at an organized arena event. As with traditional sports, these games are broken down into competitive leagues and tournaments.” (Investopedia)

When people are looking for the meaning of a term, at first they search in the dictionaries. So this is why I found it important to mention a definition from one of the most recognized dictionary, the Cambridge English Dictionary: “the activity of playing computer games against other people on the internet, often for money, and often watched by other people using the internet, sometimes at special organized events” (Cambridge English Dictionary)

The next definition I found is from BBC. I think I do not need to tell anything about this site: “ ‘eSports’ is simply the short name for electronic sports. Just like football players play football together, eSports players play computer games against each other.” (BBC)

An other definition from an online IT dictionary: “The term "esports" covers significant ground in terms of the digital world and the technologies being developed on consumer markets. Generally, esports can be applied to any type of digital game that is competitive, regardless of specific format and theme.” (Techopedia)

I also got several different answers from the questionnaire. A big proportion of the respondents simply defined e-sport as “electronic sport”, but here were a few who gave a little more extended definition.

- “Every video game which can be played against each other at the same time, and the results of the participants can be ranked from some point of view”
- “Internet sport - playing video games on an outstanding level and the comparison of skill and knowledge on official tournaments.”
- “The e-sport is an organized event, where the participants can compare their experience in previously chosen video games.”
- “The most experienced players of a video game competing at a place where a lot of people can be present - thus are able to cheer just like in any other sport event”

There were also some answers which clearly show that not everyone is completely familiar with the meaning of e-sports:

- “Online games based on real sports. Like Formula 1.
- “Playing with video games on a daily basis”
- “A video game, in which you can control the movement of your character with the motion of your body instead of keyboard or controller.”
- “Nintendo Wii and Xbox games, in which the user can play different ball sports like basketball or football.”

As you can see, there is no strict definition of what e-sport means. I would say that every video game can be viewed as e-sport, which are competitive, have the possibility for multiplayer, and there are tournaments connecting to it. Although there are a lot of different kind of video games nowadays, there are three big genres which I have to highlight. These are

- the RTS: Real-Time Strategy, in which usually you need to build a base, collect resources, create and upgrade units. The most common goal is to destroy the other players base and units, but the exact method varies in each and every game. The player usually views the playground from above. The most played game on tournaments from this genre: StarCraft II.
- the FPS: First Person Shooter, in which you control the hero of the game “from the inside”. The very essence of these games can be determined from the name of the genre: shooting. You need to destroy the enemy with a big variety of guns. The most played game on tournaments from this genre: Counter-Strike: Global Offensive,
- and the MOBA: Multiplayer Online Battle Arena, which is actually a subgenre of RTS. In these type of games you control only one character of your team which has several different abilities. With the help of NPCs -which stands for Non-Player Character- you need to destroy the main base of the enemy. The most played games on tournaments from this genre: Defense of the Ancients 2, League of Legends.

These genres were dominant in the e-sport tournaments in the last few years, but there is a fourth one to mention, which seems to be the next hit in the world of e-sports. This is the Survival aka. Battle Royal. Although it is more likely to be a subgenre of FPS, I have met with Battle Royal in MOBA games too. In Battle Royal several dozen, or even 100 players are fighting at the same time and the same battlefield, everyone against each other, and the last player who survives wins the match. The battlefield is constantly shrinking, this puts an additional pressure on the players.

A question might arise in the mind of the reader, why I only highlighted these four categories, and why all of them are destruction-type genres. The reason for this is that these genres have currently the largest popularity in the world of e-sports. Naturally there are other types also, such as sport games like FIFA, Trading Card Games (TCG) like Hearthstone, or even Massively Multiplayer Online Role-Playing Games (MMORPG) like World of Warcraft, but although there are many people playing with these games around the world, somehow they are not well represented in the world of professional e-sports.

2.2. Sport versus e-sport

A lot of people has a confusion when it comes to e-sports. They are simply unfamiliar with the term itself. Some of them are standing uncomprehendingly, because they have no idea how can sports can be done on the computer. They have no idea how big this industry is, and how many people are interested. It is true that esports are not like the most of the other sports. There is no ball to play with, like in football, rugby, basketball or baseball. There are no huge distances to go like at Tour de France or marathon. There are no injuries like it happens in martial arts or extreme sports. There are no big physical achievements at all. Esport competitors in the most cases are look like a regular person, without any well developed muscles, or anything alike. The e-sports are the sports of the mind. Like chess

and poker. A professional e-sport player can make complex strategies and combinations like a chess master, has great patience like it is required in fishing, able to make moves so precise like in target-shooting. Although unlike chess, the players and the team can compete in different games.

What does it mean “sport” exactly? Let’s see a couple of definitions:

The Cambridge English Dictionary defines sport as “a game, competition, or activity needing physical effort and skill that is played or done according to rules, for enjoyment and/or as a job” or as “all types of physical activity that people do to keep healthy or for enjoyment”. (Cambridge English Dictionary)

As the Council of Europe states in the second article of European Sports Charter, “Sport means all forms of physical activity which, through casual or organised participation, aim at expressing or improving physical fitness and mental well-being, forming social relationships or obtaining results in competition at all levels.” (European Sports Charter 2001).

With definition like those people can easily misjudge e-sports and non-sports, because for first sight, it requires no physical exertion. How can we state that something that seemingly does not meet the requirements of being considered as sport, is in spite of that a sport? The answer is that there are different types of sports. There are sports which are putting emphasis on the physical performance and there are ones which are preferring the achievements of the mind. These are called mind-sports, and e-sport can be considered as one of them. It is true, that the physical sports require also mental concentration but if we take a closer look on the professional e-sport players, we can see countless hours spent practicing, stupendous concentration on the games during a tournament and great dedication to the game they play.

The e-sport are also different from regular sports when it come to the preparation. For example in basketball, the performance on the field comes from the fitness and the power trainings. In e-sports instead of physical trainings they rather do technical, tactical, mental and psychological trainings.

Just as Balázs Bíró, the CEO of esport1.hu said in a book on e-sports, we tend to treat the online world of video games not as serious as we should. The history of the rapid extension of e-sports shows that it is not a child's play anymore, but a competitive sport.

A professional e-sport player, who does e-sports as a profession not only spends many hours a day playing the game, but dedicates its whole life to it. It is not unusual for a professional who plays in a team to move together with his/her teammates.

Let's examine e-sport from the spectators and fans point of view. An e-sport tournament can mobilize just as many people as any other non-mainstream sports. Although from the total number of spectators point of view currently there are no e-sport tournament which can approach such big events like the FIFA World Championship, there are bigger and bigger events organized each year. It is quite astonishing that a new record was set by the Intel Extreme Masters World Championship 2017 in Katowice, Poland for the live attendance. More than 173.000 fans visited the event, which is roughly 2.2 times more than the capacity of the Maracana Stadium in Rio de Janeiro - the location of the 2014 FIFA World Championship finals. According to Forbes, this tournament also generated at least 46 million unique online views.

So I think it is not recklessness to say that nowadays the e-sports are a real branch of sports.

3. E-sport as an industry

As Michele Laraia, an IAE retiree, freelancer consultant on nuclear decommissioning stated in the foreword of his book published online in 2018: “Industrial progress comes gradually, but certain critical steps can be identified. These are the innovations: but industrial innovations do not grow in a vacuum, they do reflect a (sometimes, hidden) growth of underlying science, the development of technical skills on a smaller scale, and social maturity and consensus. First, the machines made easier to do the work our forefathers did manually and painstakingly. Still products were made in isolation and sporadically, or associated with small clusters of crafters. Next, electricity came, which rapidly escalated the production rate and created the conditions of mass production. The third step came up jointly with the appearance of computers and the inception of automation, when robots began to replace humans at work. Internet multiplied the sharing of information, the very backbone of mass industry.” The innovations made possible for the e-sports to become a separate industry. (Laraia, 2018)

When it comes to the industrial side of e-sports, it is both simpler and more difficult to introduce, since it is a quite new branch of industry. There are not too many textbooks, scientific journals and so for this topic, or at least not in a printed form. But the technological achievements of the twentieth and the twenty first century such as the internet made it possible to follow the stations of the development of e-sports, and the factors which contributed to the success of e-sports as a new industry.

3.1. History of e-sport

To really understand the status of e-sports today, and to guess how this branch of sports will grow in the future, first we have to know how it all started. Since it is a relatively new branch of sports, the history is e-sports is quite well documented.

The American Stanford University was the host of the first recorded public video game competition in 1972. The competitors had to fight each other in

the game Spacewar, and the first prize was a year-long subscription to the magazine Rolling Stone.

The 1980s were a decade of arcade games, such as Donkey Kong and Pac-man. The most notable competition was Atari's Space Invaders tournament in New York. There were circa 10,000 competitors, and even the New York Times reported it - bringing widespread attention to the video games. This tournament can be viewed as the predecessor of the e-sports today.

In the 1990s there was a change, with the rise of the internet the arcade game competitions started to give their place to the online multiplayer games, and the number of tournaments started to increase. Some of the largest tournaments to mention: 1990 - Nintendo World Championship, 1994 - Nintendo Powerfest, 1996 - QuakeCon, 1997 - Professional Gamers League.

After the second millennium the technological development made it possible for the e-sports to become a worldwide phenomenon, and caused a huge increase in both the number of e-sport tournaments and the amount of money prize. One of the main factors are the consequences of the 1997 Asian financial crisis, which led to a rise in the unemployment rate and the building of the especially good internet-system in South-Korea. These factors made it possible for the video games to spread as a hobby. Fortunately the Korean Ministry of Culture, Sports and Tourism reacted fast to the change in the economy, and founded the Korean e-Sport Association (KeSPA) in 2000. In the same year in Europe another determinate association, the ESL (formerly Electronic Sports League) was founded. These associations greatly contributed to the shocking rise in the number of tournaments in a relatively short time. There were only 52 e-sport tournaments organized in 2000 (most of them were held in the USA and South-Korea), but after merely 9 years more than 620 events were organized around the world. These numbers did not stop rising since then, according to esportsearnings.com in 2017 more than 4100 e-sport tournaments were held in total.

I have to mention Twitch.tv (which was founded in 2011), the most popular website which broadcasts e-sports in this decade. According to Wall Street Journal, it became the 4th most traffic generating website in the US with 1,8% of the peak internet traffic in 2014. (twitch.tv 2014)

In 2017 more than 73 million viewers followed the League of Legends World Championship on twitch.tv, with 49,5 million hours. This tournament also generated \$5.5 million in ticket revenues. (Newzoo 2018)

These associations contributed greatly to the amazing \$655 million global revenue in 2017. From the roughly 4100 tournaments worldwide, there were 588 major events, and only those generated \$59 million in ticket revenues. (Newzoo 2017)

When it comes to the European situation we can state that Europe is really an important region of global esports. For example one of the key associations, the ESL originates from Germany. Our continent was also responsible for thirty-two percent of the global economy revenue of e-sports and it is also the home of at least 60 million viewers of e-sports. It is important to mark that according to Jurre Pannekeet in 2017 the twenty-six percent of the viewers of the three most popular e-sport games (League of Legends, Counter Strike: Global Offensive and Defense of the Ancients 2) are not the players of these games at all. (Pannekeet, 2017)

In Europe the first legislations of e-sports were made in France 2016, which created the legal framework for the contracts of professional e-sport players, distinguished e-sports from gambling and specified a legitimate rate of the participation fees and the winning prizes. Although this regulation did not involve e-sport under the legal definition of sport, so in France it is not considered as a “new branch of sports”(Kőhídi 2018)

3.2. The future of e-sports

According to Newzoo, the biggest and the most reliable market research company when it comes to e-sports the e-sport industry will continue to continue to grow in the future. The 2018 Global Esports Market Report provides an in-depth look at the esports economy, globally and per region, and a realistic estimate of its future potential in terms of trends, viewers, franchises, and revenue streams. This annual report is one of the most trusted in the world of esports and gives us the best indication of the size and growth of the industry.

Their estimated revenue growth in the global e-sport industry more than 38%, which means a total \$906 million in 2018. According to the calculations of Newzoo the investments from brands will be around \$694 million in the e-sport industry which is roughly 77% of the total market. (Newzoo)

This research states, that the majority of the participants in the tournaments expect that it will take up to five to ten years till the e-sports become a mature business. The research also states that the agencies and the brands expect that it will take five years for the full professionalization of the ecosystem. These conclusions are showing the current market status, those who are inside are looking forward for a slower rate of growth than those who are outside. But both sides have great expectations when it comes to the development of the industry. (Warman 2017)

3.3. Market of e-sports

A report of Newzoo and B2B networking event Esports BAR from 2017 shows that the e-sports are quite popular in Europe. Although there are some countries in the four regions of Europe -the northern, the southern, the westend and the eastern- which are expressly outstanding from this point of view. Let's take a look on the numbers. The online population of the northern region is around 30,6 million, and the number of e-sport enthusiast are more than 1,5 million. It is around 5%, , but the 30% of the northern european e-

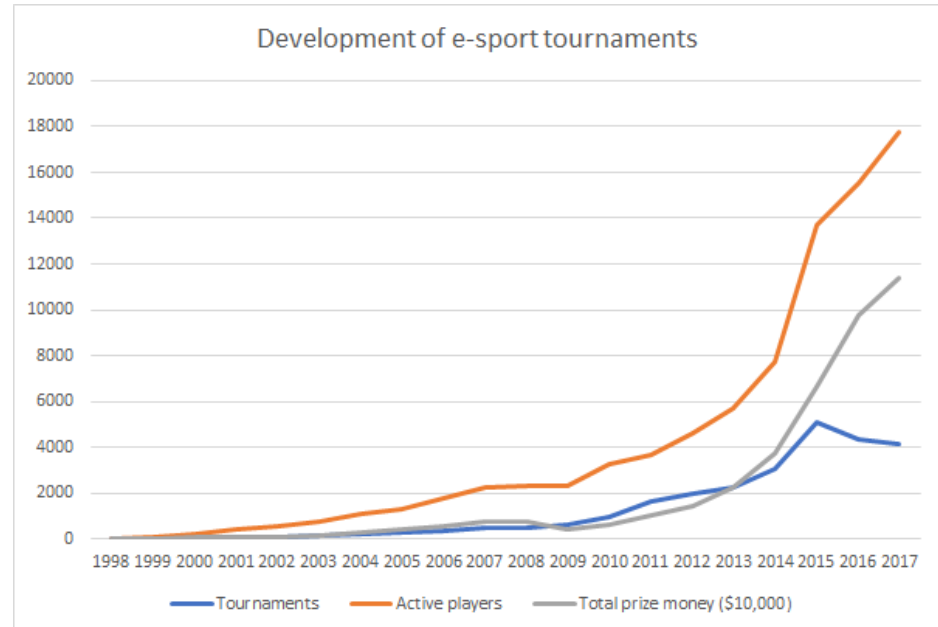
sport fans are from Sweden. In this country alone there are 0,5 million people who are interested in e-sports. The highest current popularity of e-sports are in the southern region of Europe, with 8,4 million e-sport enthusiasts from the 98,7 million online population. The most outstanding e-sport fan country in this region is Spain, with 4,1 million e-sports fans. Over and above, I would like highlight an interesting difference between the mentioned countries, which is the number of the professional e-sport players. While in Sweden there are around 1800 individual who can be considered as professionals, in Spain there are only 687.

In the western part of Europe Germany is the home of the most e-sport fans with roughly 3,4 million, which is 26% of the total number of e-sport enthusiasts in the region. Unfortunately, the popularity of e-sports is the smallest in the eastern side of Europe, with only 10,9 million of the 232,3 million online population. It makes a little bit harder to boost the the number of individuals interested in e-sports compared to the other regions of Europe, but the future rise will be more spectacular. The most dominant country in this region when it comes to the number of e-sport fans in Poland, with more than 2,7 million capita. If we summarize these data regarding to the popularity of e-sports in Europe, we can see that nowadays every twentieth person is interested in e-sports. (Newzoo, 2017)

As Matt Komorowski the PayPal's Senior Director & General Manager of Northern Central Europe & Singapore explained in 2016: in the last years the market of digital products were constantly growing, but the e-sports brought a serious breakthrough in this field. A few years ago we viewed the gamers as members of a small cadre personnel subculture, but by now this field became a blooming, million dollar industry, which grows even faster and faster.

The following diagram shows how the number of tournaments, the active players and the prize pool changed over the years.

Figure 1: Development of e-sport tournaments



Resource: <https://www.esportsearnings.com/> - self made diagram

As you can see the whole industry is rising year by year, both in the number of active players and the prize pool for the tournaments. Although the number of tournaments experienced a slight relapse in the last three years, I would not like to fall into the wrong conclusion, that it is a precursor of the fall of this industry. In my opinion this means that the quality of the tournaments are rising, and the bigger prize pools are attracting more and more competitors, herewith increasing the willingness of the investors to support this industry even more. And since the quality and the size of the tournaments are rising, it means that the number of visitors and online spectators are also growing.

If you take a thorough look on the diagram, you may notice decrease in the total prize money in 2009. It is clearly a consequence of the 2007-2008 global financial crisis. As Tom Van Riper presented in Forbes, during that years every sport branch lost some if their investors and sponsors. Just a few example: the General Motors made a big cut on its sponsorship budget of the

american Super Bowl, the Mercedes Benz did not renewed the sponsorship of the ATP (Association of Tennis Professionals) tennis tour, Whirlpool withdrew its support from the Women's Professional Soccer, and so on... In spite of all these the viewer's' interest and the willingness of players were rising without any reduction in intensity during those years.

It is unquestionable that e-sports have a larger "tradition" in Asia. To corroborate this statement, just take a look on the 2018 Asian Games, where e-sports were officially presented there as a medal sport with the approval of the Olympic Council of Asia.. The idea of bringing the e-sports to the Olympics is connected to Tony Estanguet the co-president of the Paris Olympic Bid Committee, and in late 2017 the participants of the Olympic Summit released an announcement, in which they asked the International Olympic Committee (IOC) and the Global Organisation of international Sport Federations (GAISF) "in a dialogue with the gaming industry and players to explore this area further and to come back to the Olympic Movement stakeholders in due course."

In 2018 with the prelude of this announcement, a e-sport forum was held on the 21st of July, where the participants decided in total agreement to setup the Esports Liaison Group (ELG). The main purpose of ELG is to coordinate the cooperation between the olympic movements and the e-sport associations.

4. E-sport in Hungary

Hungary is a small economic market from many point of view, e-sport are one of those. Unfortunately Hungary was never a determinative member of the international e-sport community. According to esportearnings.com the total prize money won by Hungarian players up to 2018 is enough only for the 54th place of the 130 listed country. (esportearnings.com, 2018)

Although the e-sport is not as accepted and popular in Hungary as it is in other countries, the infrastructural basis is already forming and the competitive video games has a considerable subculture. There are several pub in Budapest specialised on video games where the guests can watch e-sport broadcasts the whole day or organize small events where they can play together in a specific atmosphere. The topic has specialised press which has both online and printed version, there are at least 200 players who are participate in e-sport as a profession, and the e-sports are inherent in the popular video game events like the PlayIT Show.

E-sports are not very well known in the elder generations, I assume that most of the Hungarian residents who are older than 40 years old have never heard the term “e-sport”. When it comes to computer games they just think it is nothing more than playing, avoiding reality, school or work. In my case my parents always said that playing video games are just useless waste of time, and there is no value in it. According to KSH this means 54,60% of the Hungarian population. And those who are interested in e-sports are even less. A questionnaire made by eNET in november 2016 come to a conclusion that the typical e-sport player in Hungary is between 18-24 years old.

In 2016 PayPal introduced a research made in cooperation with SuperData Research about the market of e-sports in different european countries. According to this research, the Hungarian market has the following indicators: the proportion of genders are 87% male and 13% female, the typical Hungarian e-sport player is either between 18-24 years old (32%) or

between 25-34 years old (30%). In 2017 there were roughly 280.000 e-sport viewer in Hungary. (Technokrata, PayPal 2017)

4.1. HUNESZ

In 2018 the Hungarian E-sport Association (Magyar E-sport Szövetség / HUNESZ) was founded with the aim of education, event organization, social intermediation and advocacy. Building international relations is also one of the main goals of HUNESZ, because this way Hungary can join the International Esports Federation thus helping Hungary to access the global bloodstream of e-sports. This will create the opportunity for the Hungarian e-sport players to participate in the largest tournaments.

This association created the professional background for the V4 Future Sports Festival, the first international e-sport tournament of Hungary.

As Balázs Bíró, the chairman of the HUNESZ said: “The V4 Future Sports Festival in march showed us, that there are a huge potential in the Hungarian and in the regional e-sport. With the help of our partners and supporters we are working on the creation of infrastructural basis of this industry, thus giving opportunity and vision for the members of the young generations who are imagining their future in this industry. We believe that Hungary can achieve serious success in the world of e-sports.” (Bíró)

4.2. V4 Future Sports Festival

Until 2018 there were no large scale e-sport events in Hungary. but all changed when the government decided to provide a HUF 1.9 billion support to the Hungarian e-sport community, and to create an regional e-sport tournament. The V4 Future Sports Festival took place in BOK Hall at March 23-25, 2018. This was the first notable e-sport tournament in Hungary, and it most likely put Hungary on the map of international e-sports.

According to esport1.hu there were more than 16,000 visitors present during the three days of the event, and at least 2,2 million unique spectators

were reached through online and television broadcasting. Just for comparison is roughly the same as the combined population of Budapest and Bratislava.

4.3. PlayIT

When it comes to the video game events, the PlayIT is one of the most determinative events in Hungary. It started in 2011, and for today it became a multinational event series, and the most important event in the region.

The first PlayIT took place in the B-building of the Millenáris Park, but in a few years the show grew too big, and it has to move. The organizers contracted with the SYMA Hall, the second largest event center in Hungary to be the host of the show, and for the next two years, it took place there with several stages and significantly more exhibitors than in the beginning.

In the spring of 2014, the show started with only 2 building of the SYMA center, but in autumn, it was necessary to occupy a third one, because the increasing number of programs and visitors required an other building for the comfortable disposition of the participants.

The next year an repeated migration of the show became unavoidable, and the organizers managed to find a new place at the Hungexpo, the largest trade show facility in Hungary. There were also four other PlayIT Show in the countryside besides the PlayIT in Budapest, in spring in Győr and Debrecen, in autumn in Szeged and Pécs.

2016 was a record year for the PlayIT Show series, because in addition to that the show were organized again in the previously mentioned four cities, the number of visitors set a new peak since the beginning of the series. There were 7110 visitors in Győr, 10092 in Debrecen, 6860 in Szeged, 8311 in Pécs and 21681 in the spring in Budapest. The exhibition held in the autumn was also a new record from the visitors point of view, the largest video game event in Hungary reached 25446 unique guest during the two days of the show.

Last year the PlayIT Show become a regional event series, because it managed to visit a foreign country for the first time in the history of the show. It was held in Belgrade on the 27th of May. (playitshow.rs)

If we take a look on the demographic dispersion of the visitors published by the company Meex, the main organizer of the PlayIT Show in 2016, we can see that the majority of the people present are male (63%) and a student between 12 and 25 years (60%). So if we take it as a representative indicator of the Hungarian gamer population - since it is a video game show, so I think we can - we can determine that the future of the e-sports in Hungary depends on the young generations. We can assume that the majority of the almost 80,000 individual who attended the at least one of the PlayIT Shows in 2016 will continue to be interested in video games and e-sports in the future.

But let's take a look on the content of the PlayIT Show. According to Imre (gameday iroda) it all started as an exhibition for the new video games and equipments. In the beginning it's aim was that people can try the newest video games on the market, to give experience of the future of gaming such as the latest gaming computers, and create the possibility for everyone who are interested in the world of video games to take a closer look on it. Visitors of the PlayIT Show were among the first ones in Hungary who had the opportunity test the VR technology and other similar novelties which were too expensive or unattainable in the past for many of them.

In the last years the show started to develop a new program for the visitors, or in other words a new trend started to rise. The organizers of the PlayIT show reacted to the popularity of the video bloggers, and year by year they invited more and more famous video bloggers.

4.4. Esportmilla

The Esportmilla (Egymillióan a Magyar Esportért Egyesület) was founded in the summer of 2013, after the representatives of the Hungarian e-sport communities attended a professional conference. During this collation, the factors -which are responsible for the hindrance of the augmentation and the development of the Hungarian e-sport- were determined.

The attendants of this conference saw the solution for this issue in the collaboration of the prominent representatives of the e-sport communities, so they founded the Esportmilla. In the beginning they used Facebook to unify the supporters, the participants, the organizers and people interested in e-sports, but later on they moved to an institutionalized form.

5. Primary research

As a deep review on the secondary research, the definitions and the aspects of the e-sports was done in the first part of my dissertation, in the upcoming parts I will take a closer look on the attitude of the people in connection with e-sport events. The secondary research was made mostly by analyzing reports and material made in the past and submitted online, because the modernity of the topic made is difficult to find palpable literature. Since there is no printed form of the studies used for the secondary research, I will place the references and sources in a detailed form at the end of the dissertation.

In this chapter there will be an exposition about the research methods used, and a deep analysis on the result of those different data collecting methods. The basis of the primary research is a collection of unique data, and in my case I used two different methods to gather those informations. The aim of the primary research is either to confirm or confute the hypotheses, which will be detailed later. I used both quantitative and qualitative research methods in the form of interviews and online survey. The second part of my dissertation involves my opinion about the topics mentioned by the interviewees, and also the analysis of the data gathered by the questionnaire. During the process of choosing the most appropriate interviewees, I tried to reach the determinative individuals in the Hungarian e-sport industry such as the founders and directors of the e-sport associations in Hungary, but unfortunately I did not completely succeed. I intended to make an interview with one of the organizers of the V4 Future Sports Festival, but unfortunately after several inquiries they were not keen to participate in an interview about the festival.

5.1. Introduction of the hypothesis

As I mentioned before my main goal with this thesis is to break the habits and make place for the e-sport industry in the Hungarian market. I would like to pass round this area and try to find some solution for the present situation. The present situation is that there are no situation. I mean that Hungary is at

the very beginning of this fashion. I think in a very positive way about this topic and I hope that after my research and answers I will be as positive as now. I search the legitimation of the following hypotheses:

- E-sports have a positive effect on the tourism.
- The young generations are boosting the popularity of e-sports.
- The e-sport events have a considerable effect on the tourism in Hungary.
- From the event tourism point of view, the e-sports are a market gap.

5.2. Depth interviews

I managed to interview János Bozsó, the project manager, gaming and e-sport specialist of MEEEX Agent Kft. - one of the essential people when it comes to the organization of PlayIT Show-, and the representative of HUNESZ. I believe that their insight on the field makes them perfect interviewees both professional and experience point of view.

I asked them the following questions, most of them are similar to each other, but I wanted to get some additional information based on the slightly different field they work on.

PlayIT - MEEEX Agent Kft.:

- What kind of future effects can you imagine on the Hungarian tourism from e-sport tourism point of view?
- What is the status of the foreigner visitors at e-sport events in Hungary nowadays?
- What are your plans for the future to attract foreign visitors to PlayIT Show?
- What are the proportion of the active and passive visitors on the PlayIT?
- Do you have any connections with accommodation providers?
- How you imagine the future of e-sports in Hungary?

HUNESZ – Magyar Nemzeti Esport Szövetség:

- What kind of future effects can you imagine on the Hungarian tourism from e-sport tourism point of view?
- What is the status of the foreigner visitors at e-sport events in Hungary nowadays?
- What kind events or tournaments are you planning to organize in the future?
- We could heard about a 2 billion HUF aid from the Hungarian Government this year. How much of it actually reached the e-sport sector? Can we count on a long term support or participation of the government in this industry?
- Are you planning to cooperate with any accommodation providers in the future? Do you have any notion to lodge the visitors of a multi-day event?
- How you imagine the future of e-sports in Hungary?

Before going into the details of the interview, let's take a quick look on the company MEEEX. As they posted it on facebook about themselves, the MEEEX Agent Kft have been organizing juvenile and children events since 2010. Over the years they became one of the largest event organizer companies in Hungary. The PlayIT Show is their most determinative event, and also the largest gaming event in the region. The MineShow is one of the largest Minecraft themed event in the world. The GamerExpo, the PlayIT Ház, the Mozdulj Gamer Mozgalom and the PlayKID Gyermeknap are also created and organized by MEEEX Agent. Their goal is to provide good experiences for everyone, and to draw attention to the importance of social responsibility. With the intermediation of PlayIT Charity, they are continuously supporting social foundations and organizations.

What kind of future effects can you imagine on the Hungarian tourism from e-sport tourism point of view?

PlayIT: I think that there are some outstanding Hungarian players in e-sports, just as in other branches of sports, but unfortunately the industry views Hungary only as a donor country. So my opinion is that there are no

considerable effects on the tourism yet. Nowadays the e-sport culture in Hungary is still in infancy, there is no established cult yet - or if there is, it focuses mostly on the well know commentators, not on the players. I mean the reason they attend on an e-sport event is because of the commentators. The situation is similar in whole europe, opposing the global standards.

HUNESZ: Absolutely positive ones. It can be determined from the international trends, that the noted organizers of e-sport tournaments are relying more and more on the cities and the services provided by them (location, assistance on communication, infrastructure, etc). Also, an e-sport tournament is a major opportunity for the settlements to attract youngsters. A Hungarian example for this was the V4 Future Sports Festival, where a lot of foreign fans arrived to see their favourite teams. Compared to the western cities, Budapest is a quite cheap place, and it has an excellent location (the capitals of several other countries are quite close) so it is certain that the e-sports could provide another push for the Hungarian tourism. It could be also true if reversed for other tournaments in europe, they provide the visitors the price category and programs of a long weekend city tour.

Let's take a look on the well known Hungarian e-sport commentators. I would like to highlight four of them, who all competed for the "E-sportsman of the Year" audience award in the V4 Future Sports Festival.

Békés "Darcigh" Márton: He joined as an analyst commentator to the Hungarian LoL TV in 2015. He also proved his aptitude in international tournaments, and during the years he became one of the most known LoL commentators of Hungary.

Bíró "Hemi" Tamás: Hemi joined the Esport1 as a commentator and editor in 2017. In CS:GO he is one of the most popular commentator of Hungary. The first Hungarian Major broadcast is also connected to him.

Debreceni "Tzeus" Péter: Tzeus show his talent in several different games. He started his career with commenting Dota 2 tournaments, but he became an expert of other sports games, like FIFA or NHL.

Oláh "orobeRto" Róbert : He is a really experienced commentator at Hungarian Esport Television, mostly in the field of CS:GO and Overwatch. He presented the matches of ESL Pro League several times, and he also participate in site-events as an anchorman.

What is the status of the foreigner visitors at e-sport events in Hungary nowadays?

PlayIT: There were e-sport tournament series with competitors from the balkan and the eastern european region in 2015 and the families of the competitors also visited Hungary. But if we take a look on the PlayIT Show, I'd would say that the maximum percent of the foreign visitors is around 10 percent of the total attendants. But most of these visitors speak Hungarian, they just living abroad.

HUNESZ: Unfortunately we cannot say that there are too much foreign visitors nowadays. So far the V4 was the only event where the proportion of the foreigners was measurable, there were roughly 10%.

My experiences show me the same, there are not too many foreign visitors at the e-sport related events held in Hungary nowadays, but I believe that with adequate effort and action it can be changed in the future.

What are your plans for the future to attract foreign visitors to PlayIT Show?

PlayIT: Currently we have no plans for attracting foreign visitors to the show. It would be difficult to make an "english communication only" during the show. We have more plans on making events abroad. We have organized already a one-day event in Serbia. So at first we would like to gain a foothold in the surrounding countries, organize e-sport tournaments there and relocate the finals of those tournaments to Hungary. This can generate some

touristic values, but I don't think it will have much effect on the tourism in Hungary.

Without the proper communication channels, foreign visitors cannot completely understand the experiences offered by the PlayIT Show. The planning of how a multi-language commentary could be put into practice for the programs of the show, would be one of the first steps to attract foreign visitors to the event.

What are the proportion of the active and passive visitors on the PlayIT?

PlayIT: Our event is built on the interactive projects, and fortunately most of them can be viewed as active. They like to participate in the attractions, try the exhibited objects, and collect souvenirs. Our passive visitors are mostly the accompanist (parents), and we see on them that they would like to have more possibilities for entertainment. We are already planning some extra engagements for them.

My experiences confirm this statement, the most significant portion of the visitors on a video game event like the PlayIT Show can be defined as active visitors. Since a significant quality of the show is to create the possibility for the visitors to try out novelties, most of them are going to the exhibition with the purpose of being an active part of it.

Do you have any connections with accommodation providers?

PlayIT: We arrange the accommodation for our VIP guest only (eg foreign performers), and since the PlayIT takes place in the Hungexpo, the most obvious choice is the Expo Congress Hotel. This november we will have some guests from China, and we will organize a sightseeing for them in Budapest.

In the past we tried to negotiate with several hotels and other accommodation providers for some discount from their room price to offer accommodation for those visitors who would like to stay for both days of

PlayIT, but they were not keen to cooperate with us. That's why we did not put much effort in this part of the business.

So you are absolutely count on that the average PlayIT visitor is just coming in the morning, and leaves in the afternoon?

Yes. As far as I know most of our visitors don't book any accomodation in Budapest, just attending only one day of the show.

My opinion is that the cooperation of the accommodation providers and the organizers of PlayIT Show is one of the key points to increase the number of visitors coming from the countryside or foreign countries. Without this collaboration, the goal of increasing the number of visitors staying for more than on day is significantly harder to achieve.

What kind events or tournaments are you planning to organize in the future?

HUNESZ: We set as a goal before the V4 Future Sports Festival to create a tradition with this event, and we are already working on that a similar event could be materialized in the future. Besides, the Hungarian National E-sport Championship is already taking place, as the first multi-game e-sport league of Hungary which will give a recurring opportunity for the teams and unique competitors to compete based on the traditional sport league systems. The qualifiers of this championship will end at the PlayIT Show in november, and the league itself begins in the January of 2019.

The organization of more e-sport tournaments seems to be the most suitable choice for me, and also for the respondents of my questionnaire. It was the most chosen answer for one of the questions in the survey, which were meant to map the habits, the willingness and the needs of the respondents.

We could read about a 2 billion HUF aid from the Hungarian Government this year. How much of it actually reached the e-sport sector? Can we count on a long term support or participation of the government in this industry?

HUNESZ: The “Egymillióan a magyar e-sportért” association got the whole the 2 billion HUF promotion for the organization of the V4 Future Sports Festival. There is also one main activity of HUNESZ: the lobbying. The goal of the Hungarian Government and the HUNESZ is to make Hungary a good example in the eyes of the international community, and to show how a country and the cities can support the local e-sport sector.

As the Magyar Közlöny informed the public about the decree of the Hungarian Government: For the Hungarian e-sports to be recognised as branch of sport, for the subservience of the e-sport world, and for the improvement of the Visegrád Cooperation the Hungarian Government agrees with the organization of a e-sport tournament and conference between the countries of the Visegrád Four. The Hungarian Government called out of turn the prime minister’s Head of Cabinet to arrange the contracting of support with the Egymillióan a Magyar Esportért Egyesület.

Are you planning to cooperate with any accommodation providers in the future? Do you have any notion to lodge the visitors of a multi-day event?

HUNESZ: During the V4 we cooperated with several hotels to host the competitors of the tournament, and we will do the same at any similar events in the future. We have many ideas, and with the synchronization of the those and the needs of foreigners we are doing our best to create the best opportunities not only for the competitors, but also for the visitors coming from abroad.

How you imagine the future of e-sports in Hungary?

PlayIT: We were one of the main organizers of the V4 Future Sports Festival, and we managed to learn a lesson. With the collaboration of several partners, the Hungarian E-sport Association was established, and within the

confines of HUNESZ we founded the MNEB (Hungarian National E-sport Tournament). The finals of this tournament will take place at the PlayIT Show. With the help of the newly founded HUNESZ I hope that everybody who are interested in e-sport can collaborate and work together for the future of Hungarian e-sports.

HUNESZ: This is a really complex question, because there are many way to develop the Hungarian e-sport sector. The purpose of the Hungarian E-sport Association is the development of the infrastructural basis of the sector, the protection of interest, the creation of a database on the local players, the organization of e-sport education, social mediation and the improvement of the international relationships. This is a quite complex job, because actually we are creating a new branch of industry in Hungary.

My view on the future is also quite optimistic, I think the foundation of HUNESZ is a prognostication of a successful future, where very participants of the industry can work together for a common goal, and they can make e-sport more accepted in the eyes of the Hungarian residents.

5.3. Questionnaire

5.3.1. Data collection and sampling

I managed to reach several people with my questionnaire, and 365 unique person filled the survey. Unfortunately there were 14 responses, which I had to exclude due to the possibility of misleading the interpretation. With a detailed observation of the information I got I can certainly determine that these answers are neglecting any seriousness and reliability.

My survey was only accessible in an online form, and it was diffused on several video game related forum. It was created with Google Form, and it could be filled anonymously. The submission of the survey was also voluntary, without any obligation. The forums I put online my questionnaire was both e-sport related forums like League of Legends, Counter-Strike: Global Offensive sites, and non e-sport related forums to get a more comprehensive study on the field video game events. I created the survey to

be fillable by anyone, but the main goal was to know what kind of potential e-sport related event could be created, and what other programs could be attractive for people who are interested in e-sports.

5.3.2. The structure of the survey

My questionnaire was created in Hungarian language, because in my dissertation I analyze mostly the Hungarian e-sport market. Although in the interviews I asked some foreign visitor-related questions, the purpose of those was to retrieve information about whether foreigners can be attracted by Hungarian video game events.

This questionnaire had several questions, most of them were based on the previous ones, and the total number of questions the respondents had to answer depended on their answers for some key questions. A maximum of 17 questions were asked from the ones who filled my survey, and the minimum number of questions was 6.

The larger portion of questions which the respondents had to answer were both multiple choice and yes-no questions, but the questions which I believed to be difficult to answer those ways could be answered with longer sentences.

There were two key questions, which determined how many and what type of questions the respondents had to answer, and there were the following:

- *Do you play video games on PC or any type of video game consoles?*

It was a simple yes or no question, and based on the answer the respondent could get two extra questions with the intention of mapping their video game using habits.

- *Have you ever heard the term “e-sport”?*

It was also a yes or no type question, and if the respondent answered “no”, they were redirected, and got only one more question before they could submit the questionnaire for analysis. I chose not to ask them more questions regarding their event-visiting habits, because I am certain that if somebody did not heard about the term e-sports yet, it is not feasible that they have ever attended a video game related event.

If the members of the sample gave “yes” as an answer for both of these questions, they could go through the whole questionnaire, and provide information about the tourism potential of the e-sport community.

To extract the required information in the best quality possible, the survey was constructed to have 4 larger parts. The first part contained the questions about the demographic characteristics like the gender, the age, the home site location and gaming habits of the submitters. The first key question was also the part of the first part of the survey, since the only extra data I could get depending on the answer is some additional information about the gaming habits of the respondents.

The following questions was asked in the first part:

- *What is your gender?*
- *How old are you?*
- *Do you live in Budapest or in the countryside?*
- *Do you play video games on PC or any type of video game consoles?*
 - o *How often do you play video games?*
 - o *What kind of video games do you play with?*

The second part of the survey was to get an extensive insight on the respondent's familiarity of the topic. This section contained only two questions, and the second key question was one of those. The submitter had to answer in short sentence to the other question, and it was asked regardless of the answer on the key question.

The following questions were asked in the second part:

- *Have you ever heard the term “e-sport”?*
- *Please define what does the term “e-sport” means to you!*

The third part is the most filled with information, since the questions about the e-sport event visiting and travelling habits of the submitters were placed in this section.

The following questions were asked in the third part:

- *Have you ever spectated e-sport event via any channel?*
- *Have you ever participated any e-sport related event?*
- *What kind of e-sport related event would you like to participate?*
- *Would you travel inside your country to participate an e-sport related event?*
- *Would you travel outside your country to participate an e-sport related event?*
- *What type of accommodation would you prefer, if you attend on a multi-day event?*
- *Would you visit the local attractions if you attend on an event far from your home?*
- *Would you prolong your visit at the site of an event for a sightseeing?*

The last part of the survey was about the ideas of the submitters regarding the popularization of e-sport in Hungary. It was only one question, but the large amount of information contained in the answers required to manage it as a separate section. The ideas and desires of the respondents made it possible for me to determine the potentials of the e-sport industry in Hungary.

The following question was asked in the final part.

- *What do you think, what should be done to increase the popularity of e-sports in Hungary?*

In the last part I would like to goad the respondents to think. This was an open-ended question, where they could share their thoughts with me. I was so happy, because I get some great answers. In addition, there were some answers that showed that it is not enough to create good events, we should start to 're-organize' our culture also. All the Hungarians should be more open-minded.

I also made an extraordinary ending of my questionnaire. This was also choosable, naturally, I asked in the end that who want to talk more about this topic, and I got more than 50 positive answers for this part.

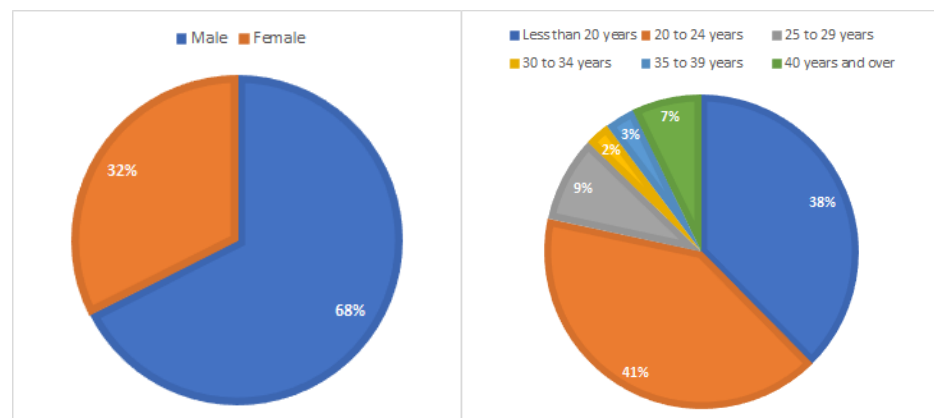
5.3.3. Analysis of the survey

In this chapter I will analyze the answers of the previously mentioned questionnaire. I will dedicate a part in this chapter for each and every question I asked in my survey, and there will be a detailed examination of the results received, and a comparison between the respondents. In the first part the demographical data will be analyzed and compared to other e-sport related surveys, to verify or refute whether the participants of this survey could be actual representative of the total Hungarian e-sport following population. The second part will be an investigation of the knowledge on e-sports within the members of the sample. The third part will be a closer look on the event visiting habits of the respondents, and an examination of the potential participants of e-sport related events. And in the last part an enumeration and comparison between the different ideas of the participants of this survey.

The characteristics of respondents

After the subtraction of the answers which are neglecting any seriousness and reliability, a total of 351 answers left for analyzation. The following charts are showing the various characterising information of the respondents, like the age, gender and place of origin.

Figure 2. - Gender and age distribution



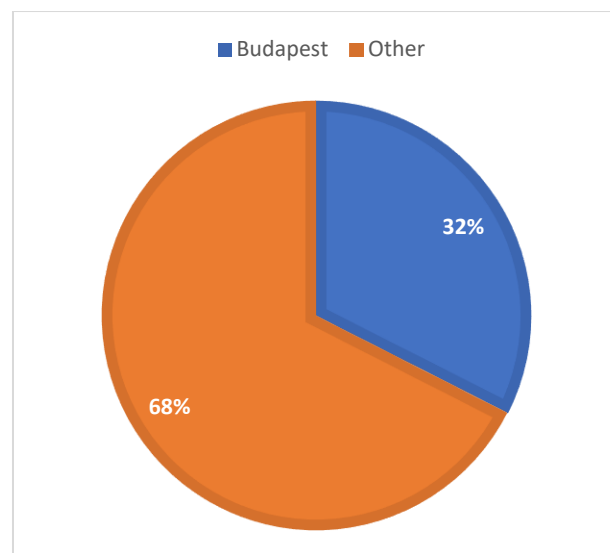
Source: Made from the data gathered through the questionnaire.

Nobody is surprised by the dispersion of genders among the submitter of my questionnaire. It is a well-known fact that video games are more popular among the men than the women. However the presence of women in this

market segment, just like in many others is important for me, nevertheless the fact that they are not the dominant majority in this sector.

As you can see, 68 percent of the submitters were male, which is slightly different from what the survey of PayPal showed in 2016 regarding the Hungarian market of e-sports. The data collected from my questionnaire also shows some common attribution with an other previously mentioned survey made by eNET, as the age distribution of the respondents is similar to that survey. 132 individual, the 38% of the total number of respondents stated that they were born later than 1998, and only 21 more, 41% of those people who answered the questionnaire is between 20 and 24 years old. The remaining 21% -who are at least 25 years old or older- is also similar to the data gathered by eNET as the proportion of people who are interested in e-sports. These numbers corroborate that the people who are likely to do or follow e-sports are the members of the younger generations. So after a few years they will be probably parents, and if the growing tendencies of e-sports will stay the same as nowadays, their children will be born into the world e-sports.

Figure 3: Inhabitation distribution of the participants of the survey

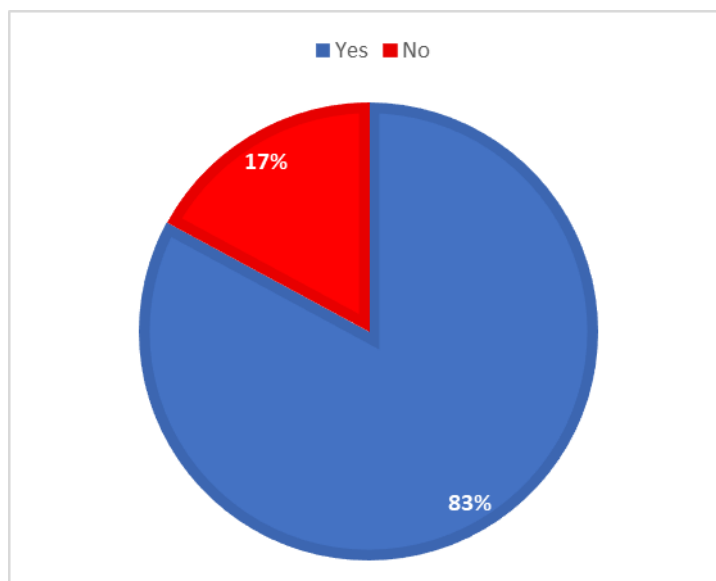


Source: Made from the data gathered through the questionnaire.

Since the main location of the e-sport related events in Hungary is Budapest, I intended to gather some information about the homesite location of the respondents as a part of the demographic questions. As you can

determine from Figure 3, only 32% of the submitters of my questionnaire are living in Budapest which is shows similitude with an other data in the survey, which I will study it in detail later. The proportion of the respondents who are living in Budapest is not surprising -although it is almost twice larger than the number of residents in Budapest compared to the number of residents in Hungary, because the capital is the centrum of the IT sector in Hungary, and in Budapest the quality of internet service is higher than in the economically backward countryside regions. The emphasis is not on the residents of the capital. The majority of the respondents are living in the agglomeration or all around the country, which shows that the e-sports have a much bigger audience. Many companies in the tourism are focusing mainly on Budapest and ignore the people living in other parts of Hungary. It clearly seems that there is a need for development and alteration outside the capital also.

Figure 4: Proportion of gamers among the participants of the survey

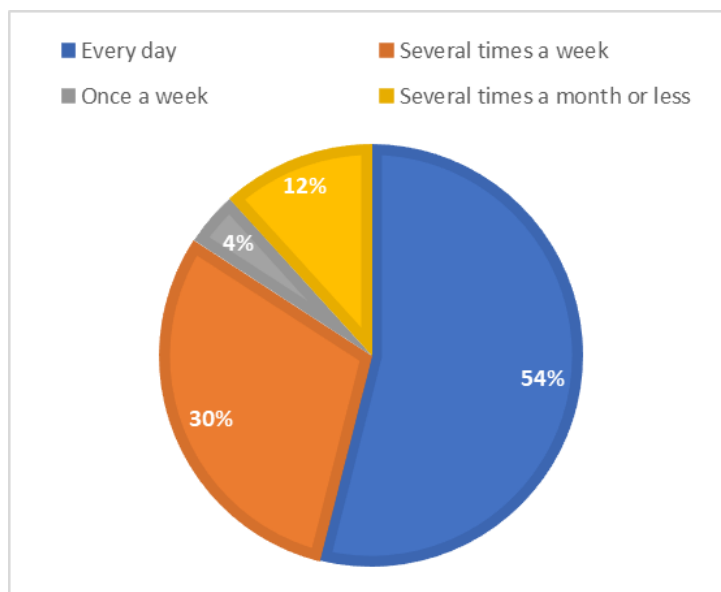


Source: Made from the data gathered through the questionnaire.

As the fourth question, the respondents were asked whether they play video games, or not. This was the first so called 'key' question, because if the submitter answered 'Yes' to this question – and you can see that 83%, 291 people are in this situation -, they had to answer two extra question, with the aim to gather some additional information about their gaming habits. This question was really important, because my questionnaire was not exclusively

diffused in e-sport related forums. This question paired with the one which asked whether the submitter is familiar with the term e-sport, meant to show that e-sports are known even in the non-gamer communities. It is also quite interesting how the age of the respondents connects to whether they are playing video games or not. Although the 25 years old or older respondents are responsible for only 21 % of the total submitters, they add up to the 38% of those who are not playing computer games. So we can conclude that the younger a person is, it is more likely that they play video games.

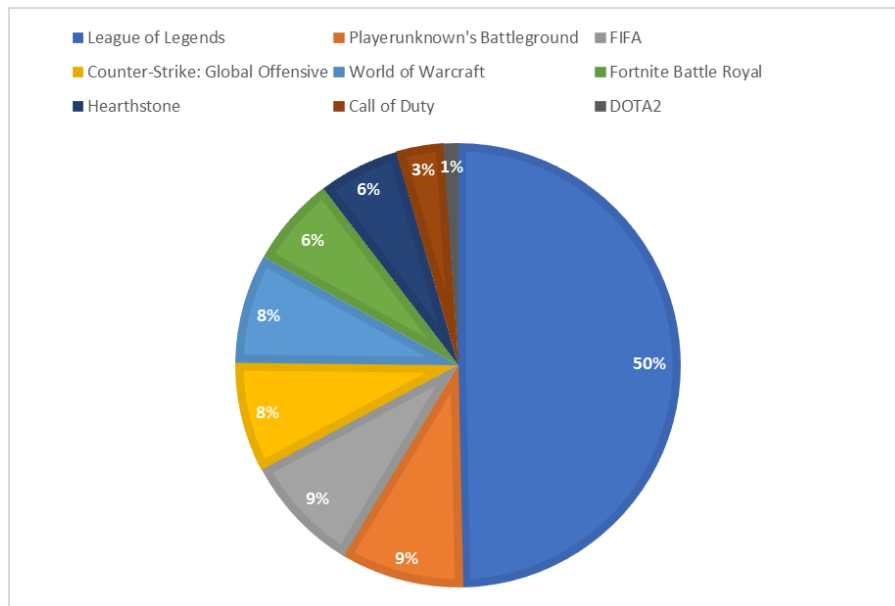
Figure 5: Gaming habits of the participants of the survey



Source: Made from the data gathered through the questionnaire

In Figure 5 and later in Figure 6 you can see the gaming habits of the respondents of the questionnaire. As it is apparent, the majority of those people, 54%, are playing computer games every day. Nonetheless that it is one of the main requirements to play video games on a daily basis, they will not necessary become professional e-sport players. This sector together with those who are playing games several times a week are potential participants of e-sport related events. So this it the target audience which should be accosted to visit an e-sport event. Those who are playing video games once a week or less, are only representing 16% of submitter of my survey, so I think these people are cannot be really considered as potential visitors of an e-sport event.

Figure 6: Gaming habits of the participants of the survey

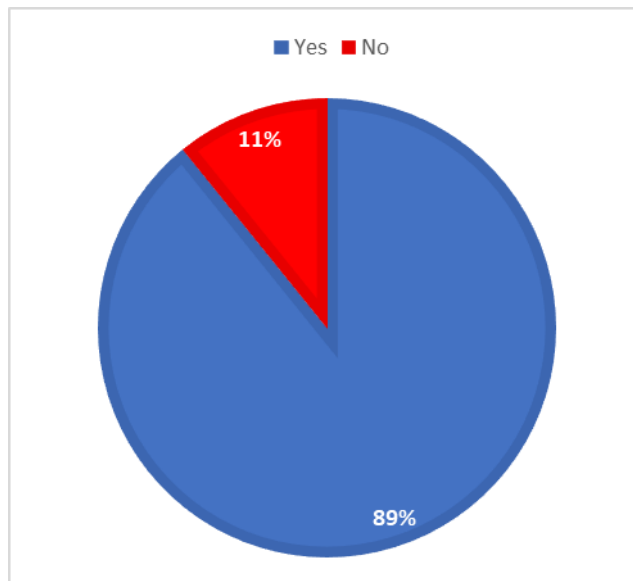


Source: Made from the data gathered through the questionnaire

For the question regarding the video games played by the submitter, they had the opportunity to give multiple answers, there were no premade options. I got 265 answers for this question, and I only examined the games which were mentioned by at least 3 different respondents. As you can see in Figure 6, the most common video game played by the submitters is League of Legends. This game is played by 144 respondents, and was mentioned in almost 50% of the answers. It is quite strange that other games which are significant in the professional world of e-sports like CS:GO and Dota 2 were not mentioned as many times as I expected. The most shocking thing in this, that Dota 2 is considered to be the Top 1 in awarding prize money according to esportsearnings.com, but among the respondents, it is one of the less popular game. It was only mentioned by 3 respondents. Naturally there are other games which did not get enough vote to be presented in Figure 6. Playerunknown's Battleground and FIFA were mentioned 26 and 25 times, CS:GO and World of Warcraft both got 23 votes.

Although the questionnaire was shared in different game related forums, not only League of Legends related ones, it is quite interesting that the majority of the respondents are familiar with this game.

Figure 7: Familiarity with the term ‘e-sport’



Source: Made from the data gathered through the questionnaire

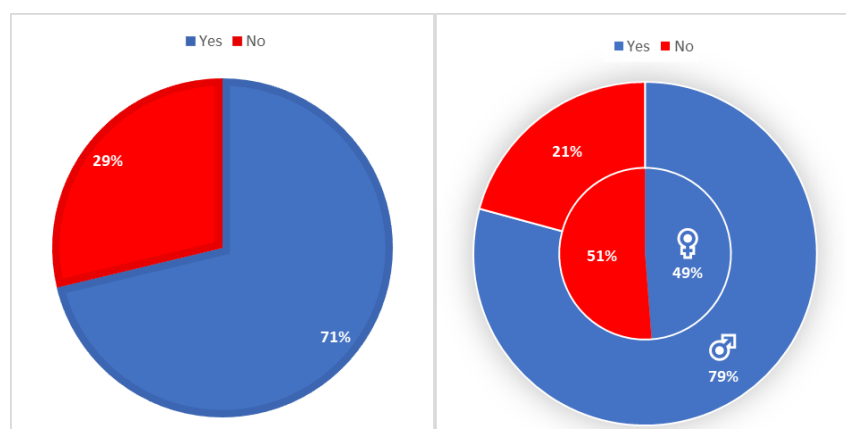
As we reach the second part of the survey, we can see in Figure 7 that from the 351 people who submitted my questionnaire 11% (38 people) have never heard about e-sports at all. As I mentioned before at Figure 4, there are less people among the respondents who are not familiar with the term e-sports than people who are not playing video games. If we take a closer look, we can determine that from the 60 people who are not playing video games there are only 24 who have not heard about e-sports. Which means that almost two third of those people met with this expression in a point of their lives. The age distribution of the people among the non-gamers who did not hear the term e-sports is similar to those non-gamer who did.

Let's examine now those who are playing computer games but not heard about e-sports. The majority (12 out of 15) is at least 25 years old, and remaining ones are between 20-24 years old. There were no submitters who are the part of the youngest generations, play video games, but not familiar with e-sports. To be accurate, there were only 15 people from the 275 who are younger than 25 years old, and have not heard about e-sports at all.

Please define what does the term 'e-sport' means to you!

This is the question or task which was asked from every submitter of my questionnaire. I got 313 answers from those who are familiar with the term, and 38 answers from those who have never heard about it. This was also the last part of the survey for those who are not familiar with it. I already expounded the answers I got for this question in the in a previous chapter about the definitions.

Figure 8: Spectation of any e-sport event



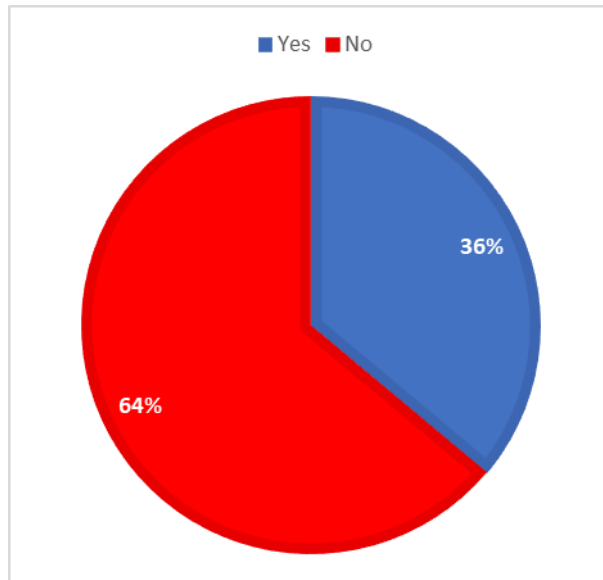
Source: Made from the data gathered through the questionnaire

The upcoming questions will have maximum 313 answers, because after the second part of the questionnaire, every question was asked only from the ones who are already heard about e-sports. The 38 people belonging to the other group -from my point of view- would just distort the data, since if somebody is not familiar with something, it is not likely that they ever encountered an event about that specific subject.

To decide whether a person is a potential visitor of an e-sport event, the first thing we must do is to examine if the person has spectated e-sports at all or not. As you can see in Figure 8 71,2% (223 individual) of the submitters are already followed an e-sport event through different channels, be it television, forum, or anything else. If we take a closer look on the gender distribution of the spectators of e-sport event, we can determine, that men are more eager to follow an e-sport event than women. There are only 40 women who stated that they followed anything e-sport related in the past. When it comes to the age distribution, both options (Yes or No) have quasi similar

attributions. There is no outstanding age group, all of them have commensurate distribution. Solely the 40 years old or older people have a little bit higher proportion of those who did not spectate any e-sport event.

Figure 9: Participation at e-sport related events



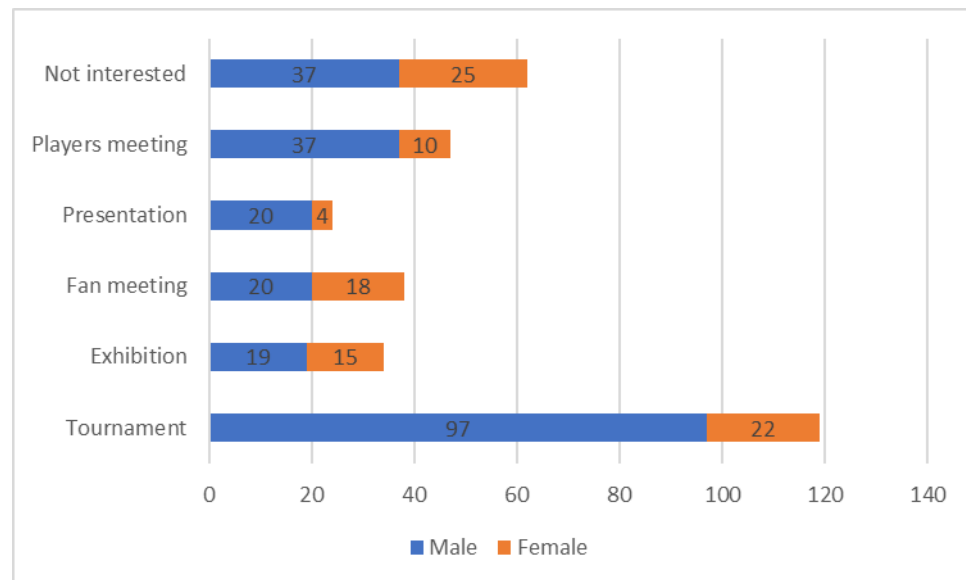
Source: Made from the data gathered through the questionnaire

Figure 9 shows the majority of the respondents of my questionnaire did not yet participated personally on any e-sport related event. The gender distribution of the answers has only slight differences. To find the potential visitors of an e-sport related event nowadays in Hungary, the second step we need to take is to examine whether somebody have already participated or not. 36% answered that they have never been at any e-sport related event, which is just a little bit more than the one-third of the sample. This 113 answers came almost exclusively from those who also stated that they spectated e-sport related events at least once in their lives. There were only 10 individual who have not spectated any e-sport related event via television, internet and so on, but they personally participated in one. I assume that if somebody is interested in e-sports, spectated(ing) it and were keen to participate in an e-sport related event at least once, it is most likely that they are also potential visitors of a future event.

Unfortunately I made a mistake in the questionnaire. I only asked the upcoming question (*What kind of e-sport related event would you like to*

participate?) from those who answered ‘No’ to this question. I should have asked those who said ‘Yes’ the same question. When I created the questionnaire I thought, that the choices of those who did not participate in an e-sport event will be enough to examine the potential types of events, but later I realized that it is also important to re-attract those who have already participated in events. Since the questionnaire was already online and submittable at the time of this realization, and I have already got several answers, I decided not to modify the survey, because it would have caused the distortion of the sample.

Figure 10: Preferred e-sport event



Source: Made from the data gathered through the questionnaire

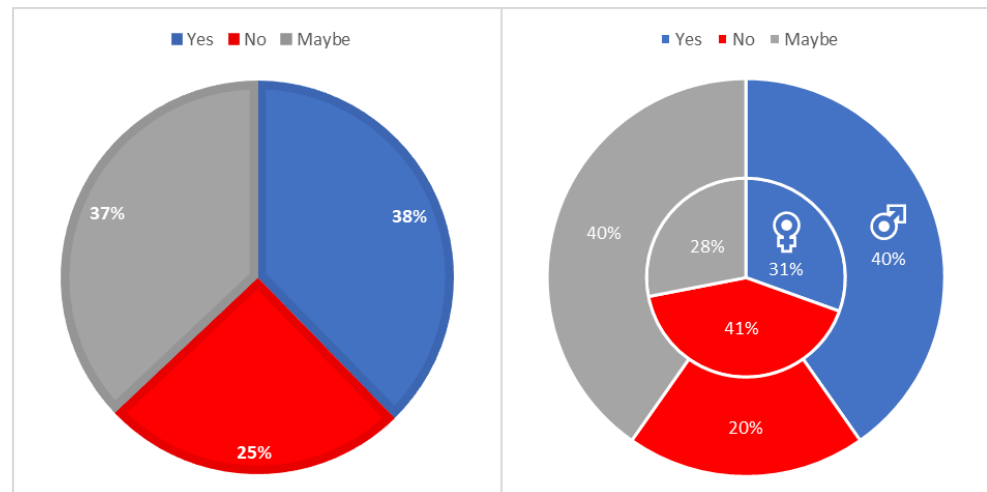
Due to the reasons explained above, in Figure 10 I am forced to take into consideration only the answers of those who answered ‘No’ to the previous question. It means that there are only 200 different answers to investigate. At this question the submitters had the opportunity to choose multiple event types, and to add unique options besides the pre-specified ones, but nobody added extra options in the evaluable sample. It was one of the questions, which helped to distinguish the feasible submissions from those ones which are neglecting any seriousness and reliability.

At first I would like to mention those who are not interested in any future e-sport events. There were 62 people in this group, who made the 31% of the

total responses on this question. 46 from the 62 submitters stated that they did not spectate, did not participate and are not interested in any e-sport related event, so my opinion is that they are not potential visitors of any future e-sport event at all. The attraction of those people would require way too much effort, because the half of them are not even playing video games.

The most popular option is the tournament, which was chosen by the 59,5% (119 people) of the respondents. The other options such as exhibition, fan meeting, presentation, player’s meeting are not reaching the 25% in popularity. So by taking these informations into account, the most remunerative type of event which should be created is the tournament.

Figure 11: Willingness to travel in Hungary



Source: Made from the data gathered through the questionnaire

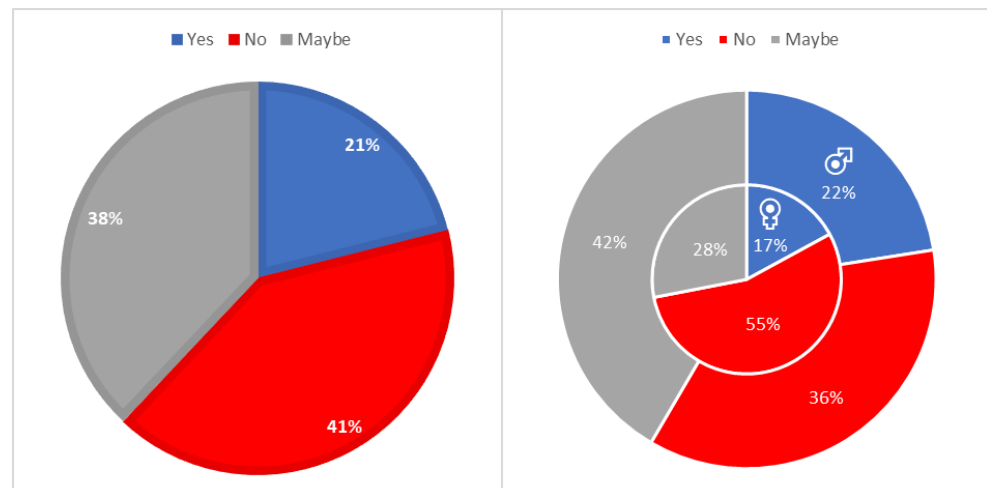
If we want to attract people to an e-sport related event, the next step we need to take is the examination of their willingness to participate in such an event. As we can see in Figure 11, the proportion of those who stated that they are absolutely willing go on a domestic tour with the aim to have a personal experience about an e-sport event. If we take a closer look on those who said that they are willing to travel, and compare their answers on the previous 2 question, we can see that with the exception of 1 person, every individual was either the participant of an e-sport event already, or answered that they would like to visit an e-sport tournament. These people represent a

total 38% (40% of the male, and 31% of the female respondents) of those who are familiar with the term ‘e-sports’.

After the examination of those who answered ‘No’ to this questions from the same point of view as previously, we can see that the majority of those who would not travel to participate an e-sport event are also not interested in any e-sport event at all. This group is fortunately the smallest from the three, including only 25% of the respondents, from which the women are represented in a higher proportion. The proportion of women who are not keen to travel doubles the proportion of men.

Now we need to analyze the third group, to which the indeterminate people are belonging. I would like to view these people also as potential visitors of an e-sport event, because although they are not certain that they would like to travel, they not absolutely reject it. To attract those people all we need to do is to find the most suitable event or event type, and create programs and services which are desirable to them. Just like in the politics nowadays in Hungary. Although I’m not a political scientist, I know that if somebody wants to win the parliamentary elections, they need to convince the uncertain voters. In our case more than one third (37%) of the submitters of the survey belong to this group.

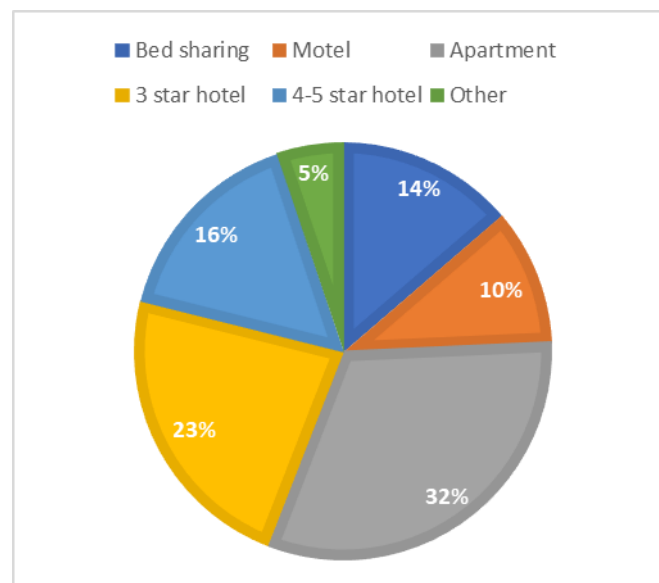
Figure 12: Willingness to travel abroad



Source: Made from the data gathered through the questionnaire

Since my goal with this dissertation is to show the possibilities of e-sport tourism in Hungary, the main reason I asked the submitters about their willingness to travel to a foreign country only to participate an e-sport event, was to get a confirmatory feedback about what is the proportion of those who are really willing to travel among the respondents. The decrease in the percent of those who answered ‘Yes’ and the increase in the number of those who said ‘No’ compared to the previous question was no surprise for me, since I expected that the rejection of travelling grows higher just as the distance increases. However, the stagnating proportion of those who answered ‘Maybe’ to this question got me off guard. I looked forward to a decrease also in this section. I expected that the combination of potential visitors of other countries (just as I mentioned before, I mean those who answered either ‘Yes’ or ‘Maybe’) will be less than 50% of the total respondents of this question.

Figure 13: Preferred accommodation type



Source: Made from the data gathered through the questionnaire

The next question I asked was about the preferred accommodation of the respondents. Some options were premade, but the submitters also had the opportunity to create custom answers for this question. The most popular option -as you can see in Figure 13-, the apartment type holds almost one third of the total votes. There was no limitation mentioned in the question for the financial aspect of the accommodation types. The respondents did not have

to take into consideration their financial background, so they could chose for example the 4-5 star class hotels as an answer, even though they may not afford it.

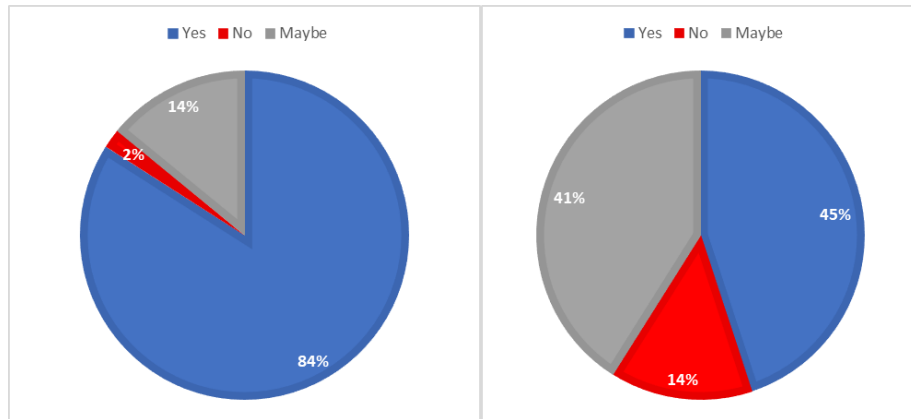
Just for interestingly, I think that there could be 2 possible explanation for this phenomenon. In the first case, the dominance of the apartment type (32%) accommodation shows that the respondents in most cases prefer to feel themselves like at home, even when they are travelling to participate in an e-sport event.

In the second case, the reason why they prefer the cheaper type of accommodations over the top class ones, is that even though the financial affordability was not a requirement, the respondents tend to choose the options which are affordable for them.

If we take a look on the other types of accommodations, we can see that the 3 star class hotel is also a quite popular choice of the submitters, 23% (72 individuals) chose it as the most preferred type of accommodation. Bed sharing and motels, as the financially least burdensome types got only 14% and 10% of the total votes, which indicates that the submitters are willing to pay a little bit more on the accommodation just to get a higher quality service. As I mentioned before, the respondents had the opportunity to add different options, but only 16 individual (5%) chose this option. There answers are not so specific about their preferred accommodation types, but still meaningful. Just a few example: “Something cheap”, “It does not matter to me, just be nice”, “I don’t have any concrete notions, just be comfortable and not too expensive”, “Something I could afford”.

My conclusion about the answers I got from the submitters of the survey, -and taking the age distribution into account since most of the respondents are are younger than 25 years old- is that if we want to convince the people interested in e-sports to travel, and stay overnight at the location of the e-sport event, we should offer them middle-class accommodations, which are comfortable but also affordable for them.

Figure 15 & 16: Willingness of sightseeing and to prolong their stay



Source: Made from the data gathered through the questionnaire

In the questionnaire the submitters were also asked about their attitude towards sightseeing. Figure 15 shows: 84% of the respondents stated that if they were visiting an e-sport event far from their home, they would spend some time to visit the local attractions, and go on a sightseeing. 14% of them stated that they might do the same, but not sure. If we combine those people, we get that 98% of the people who would visit an e-sport event would also potentially spend time (and probably money) to see the local attractions. This is a pronouncedly positive sign, because it shows that there are other tourism potential in the people interested in e-sports besides their event-attendance. Moreover, as we can see in Figure 16, 45% of the submitters of the survey stated that they would even prolong their stay just to visit the local attractions! Although the proportion of the uncertain (41%) and rejective (14%) people is higher when they were asked about their willingness to prolong their stay, I would say that it is regardless impressive that there as so many people who would spend time in a city for an other reason than their original one.

6. Conclusion

During my dissertation I adumbrated a relatively new industry, so called e-sports. From tourism point of view this segment is quite under researched, leastwise it definitely is in Hungary. The focus was on the potential of e-sports as a new branch of tourism, and on the effect it could make on the tourism in our country. I detailed the definitions, the history, the market of it, and took a closer look on the position of e-sports in Hungary. In the dissertation I tried to give the reader a brief overview on e-sports, the potential it holds both as an industry and as a tourism phenomenon, and to do this I set some hypotheses or key sentences, which were used as a lunge line during the creator of this thesis. In the next paragraphs I would like to examine from point to point whether I was successful in the establishment the these statements, or I need reconsider my standpoints about this topic.

My first statement was that *“E-sport have a positive effect on the tourism”*. To investigate whether this statement was right, I made a deep review on the related, and obtainable literature. I analyzed several reports about the effects of e-sports all around the world, I researched the history of e-sports and the growth of this industry in the previous decades. Video games are mostly played at home, but the e-sport tournaments and other events related to e-sports has the potential to mobilize those who are interested in this sector. Several video game and e-sport related events in the past and the present showed that there are many people who can be attracted to participate. Although exact numbers are not available on the tourism side of e-sports unfortunately, the experiences show that the interest in e-sport events is quite high. This leads to a clear conclusion that if there are people who are interested in this type of events, they are likely to travel to visit them and the connecting programs. So to summarize the results of this investigation, I can state that this hypothesis was appropriate, e-sports do have a positive effect on the tourism.

My second statement was that “*The young generations are boosting the popularity of e-sports*”. To determine the pertinence of this statement, all what must be done is to take a look on the general demographic statistics of video game players, and the age distribution of the submitters of my survey. I examined different surveys and statistics made about the age of the video game players both in Hungary, Europe and around the world, and based on those, we can determine that the average person interested in e-sports have 70-85% to be born after 1988. If we take a look on the submitters of my survey, we can see that 79% of the the respondents of my questionnaire are younger than 25 years old which fits into the series of research results. So to summarize the results of the examination, I can state that this hypothesis was also appropriate, the young generations are boosting the popularity of e-sports.

Now let’s see the third statement, which was “*The e-sport events have a considerable effect on the tourism in Hungary*”. Unfortunately during the creation of the secondary research and the interviews, I realized that currently e-sports does not have that much effect as I thought. Although for first sight the number of visitors on the PlayIT Show series, and the V4 Future Sports Festival seems to be great, the popularity of e-sports in Hungary is not significant enough to make a considerable effect on the tourism in Hungary. Video games and e-sports in most cases are still inducing negative reactions in the middle aged and older people. Without wide social support and culture, e-sports cannot become a significant sector in Hungary, and yet these conditions are missing. I see the reason for this in the novelty of this phenomenon, since the elder generations did not have the opportunity and time to get used to and to like it. My opinion is that as the years will pass, the today’s young generations will grow older, but as they have experience with video games and e-sports, they will be more accepting about those. And since they will be more accepting, they will be more likely to let their children to play video games and to get to know e-sports, which means that there will be more and more fans of e-sports in Hungary. But this is the song of the future. There is still many thing to do to achieve this outcome, and this leads us to the last hypothesis.

As a last statement I said that *“From the event tourism point of view, the e-sports are a market gap”*. Since the online characteristics of e-sports make it hard to build a traditional tourism system on it, from tourism point of view the event tourism holds the most potential when it comes to e-sports. There are many events in Hungary and in Budapest, but there are still not so many e-sport related events. As the submitters of the survey apprised to me, there is a potential in e-sport events, and from those the tournaments would be the most visited and successful. But to make the events remunerative, we must first increase the number of people interested in e-sports. How can we do this?

This will be the final part of the chapter, and also the dissertation. I would like to share some ideas how can we attract more people to e-sport related events, and thus increase the proportion of e-sports in the tourism in Hungary. I took inspiration from the responses of the questionnaire, and the creation of these recommendations was the most interesting part in this thesis.

My opinion, Hungarian population needs to get more information about what e-sports are, what are the possibilities in e-sports, it must be shown to them that video games are not just a simple hobby and neither just a waste of time. The representation of e-sport should be higher in the media, the news and in the advertisement industry. Because I think that it is a great hindering effect that nowadays e-sports are really under represented in those sectors. People simply do not hear enough about e-sports in the most popular channels. There are several reports on football, tennis, Formula 1 etc. in the media, in addition to the sport-specific ones. How can e-sports be more advertised? It requires more money of course. The two most potential way to pour more money in the advertisement of e-sports are the governmental assistance and through the sponsors. The Hungarian Government spends an enormous amount of money on sports already, but my opinion is that it is not well distributed. Football or example gets way more money than it can utilize in an economically effective way. But nothing is lost yet, the Hungarian Government just made its first step last year with the ~2 billion HUF support to the e-sport sector. This is a quite good start, and the V4 Future Sports Festival -which was able to be organized because of this support-

increased the reputation of Hungary in the e-sport world, although it was not a world-class tournament, only a regional. There are different ways for the government to support this industry. In addition to the donation for event organizing, the government could help the promotion of e-sports with the support of special courses in schools. Just as the several different already existing sport courses, optional e-sport classes could be created to attract the youngsters to this branch of sport. To acquire more money, the increase in sponsorship is also a possible way to do this. It should be show to the potential sponsors, that e-sport is a constantly growing industry, year by year it becomes more and more popular around the world, so it is a really good sector to invest.

I would say that it will take at least 10-15 years for e-sports to become a generally accepted and popular branch of sport around the globe, and - contrasting the proverbial statement: "Hungary is 50 years behind the rest of the world"- I think that it will not take much longer for e-sports to be a acknowledged sport in Hungary.

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8. Appendixes

Questionnaire

Kutatás az E-sportok hatásairól a magyar turizmusra

Szittyá Dániel vagyok, végzős hallgató a Budapesti Gazdasági Egyetem - Kereskedelmi, Vendéglátóipari és Idegenforgalmi Karán.

Kérlek segítsd a szakdolgozatomat az alábbi kérdőív kitöltésével. A kérdőív kitöltése 3 percnél több időt nem vesz igénybe.

Köszönöm a segítséget!

5/1 – Demográfiai kérdések

Nemed?

- Féri
- Nő

Hány éves vagy?

- < 20
- 20-24
- 25-29
- 30-34
- 35-39
- 40 <

Budapesten élsz?

- Igen
- Nem

Szoktál-e játszani számítógépes illetve konzolos játékkal?ú

- Igen
- Nem

5/1.1 – Demográfiai kérdések (szokások)

Milyen gyakran szoktál játszani?

- Minden nap
- Hetente párszor
- Hetente egyszer
- Havonta párszor vagy ritkábban

Milyen játékkal szoktál játszani?

- _____

5/2 – Témaismeret

Hallottál már az “E-sport” kifejezésről?

- Igen
- Nem

5/3 – E-sport

Határozd meg egy rövid mondatban hogy szerinted mit takarhat az E-sport kifejezés!

- _____

Követted-e bármilyen platformon E-sport eseményt?

- Igen
- Nem

Vettél részt valaha személyesen bármilyen E-sporttal kapcsolatos rendezvényen?

- Igen
- Nem

5/3.1 – E-sport (érdeklődés)

Milyen E-sport eseményre mennél el szívesen?

- Bajnokság
- Kiállítás
- Közönségtalálkozó
- Előadás
- Játékos-találkozó
- Nem érdekel
- Egyéb: _____

5/4 – Utazás

Utaznál-e országod belül hogy részt vehess egy E-sporttal kapcsolatos rendezvényen?

- Igen
- Nem
- Talán

Utaznál-e külföldre hogy részt vehess egy E-sporttal kapcsolatos rendezvényen?

- Igen
- Nem
- Talán

Ha egy többnapos rendezvényen vennél részt az otthonodtól távol, milyen szállást preferálnál?

- Szállásmegosztás (pl. Airbnb)
- Motel
- Apartman
- 3 csillagos hotel
- 4-5 csillagos hotel
- Egyéb: _____

Ha egy otthonodtól távoli rendezvényen vennél részt, megnéznéd-e a helyi látványosságokat?

- Igen
- Nem
- Talán

5/4.1 – Utazás (városnézés)

Meghosszabbítanád-e a tartózkodásodat városnézés miatt?

- Igen
- Nem
- Talán

5/5 – Vélemény

Szerinted mivel lehetne az E-sportok népszerűségét növelni Magyarországon?

○ _____

Köszönöm a kitöltést!

Kérlek oszd meg ezt a kérdőívet másokkal is!

Köszönettel:

Szittyá Dániel

Ha szívesen beszélgetnél a témáról, add meg az e-mail címedet, és felveszem Veled a kapcsolatot!

○ _____