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ESPORT BAR IN FINLAND

– a feasibility study

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Since their first appearance in 1958, videogames have been a growing phenomenon, their latest expression being competitive gaming, or eSport. From the first tournament in 1972, gaming has become more and more a recognized and widespread activity, and eSport Bars represent the next step of this evolution. The purpose of this research is to determine the characteristics defining this business, the activities needed to enact them, and the value these constitute.

This study covers the history, the current state, and the foreseeable future and growth of the eSport phenomenon. The research offers notions of abstract business modelling, with emphasis on elements of the business model canvas. Furthermore , it provides an overview over observation-based data gathering with its distinctive methodologies. It covers a case study pertaining Finnish eSport-related businesses, as well as foreign realities, and pertinent environmental factors. Through this process, a set of defining and competitive features is listed, and later analyzed with the aid of pertinent elements of the business model canvas.

KEYWORDS:

Esport, Bar, Finland, Feasibility, Potential

CONTENT

FIGURES

PICTURES

TABLES

1 INTRODUCTION

1.1 Overview

In the past few decades, the world witnessed the appearance of computers, consoles, and mobile devices. Together with them, Video Games made their first appearance in 1958 (Sullivan 1994; Wolf 2012, 218). As the scope and capabilities of hardware and software improved, so did the Video Games industry, with the result of becoming increasingly popular throughout the years. (Desjardins 2017.) Later on, part of the gamers started to compete against each other, some on a professional level. Better video-streaming technology and faster internet connections allowed fans to follow tournaments and their favourite players online. Competitive gaming, also called as electronic sport or eSport, is becoming an accepted way of sport. (Heaven 2014.) Oxford Dictionaries (2018) defines eSport as "a multiplayer video game played competitively for spectators, typically by professional gamers".

One of the core aspects of Video Games is the sense of competition, where the human player pursues an increasingly difficult objective. This objective can be contrasted by a set of rules and game-mechanics (such as a progressively higher speed), programmed NPCs (non-player characters coded to emulate human intelligence), by another human player (in the case of multiplayer games), or by a combination of these elements. Moreover, the element of social competition which characterize multiplayer games, provides a higher motivating and rewarding factor for the enjoinment of the user's experience. (Vorderer et al. 2003.) A study conducted by Lee & Schoenstedt (2011, 43) recognizes the pivotal importance of competition as one of the most important driving factors of competitive gaming and eSports, stating that this aspect needs be continuously cultivated and optimized in eSports. Similarly to competitive sports, competitive gaming is characterized by the presence of an opponent, and just like in other sports, the highest form of this competition takes place in tournaments, where the best players of a given discipline challenge each other's.

It is perhaps for this reason that, starting from 1972, the first Video Game tournament appeared, which consisted in a "Spacewar!" competition, held at the Stanford University, where the player setting the higher score would receive one year of free subscription for the magazine Rolling Stones, as reward (Baker 2016). The first local multiplayer games were connected through Ethernet LAN, and therefore required physical proximity. With the advent of domestic Internet in 1989 (Couldry 2012, 2), Video Game producers became able to bring the social competitive element into play and users from different locations could either team up or stand alone, and cooperate or challenge each other through online multiplayer matches and tournaments (Lombardi 1992).

Following the 90', competitive gaming grew exponentially, especially In South Korea, where the high unemployment rate provided the citizens with a lot of spare time. Following this trend, in the year 2000 the South Korean government established the Korean eSport Association, the first of its kind, which is member of the Korean Olympic Committee as well as the International e-Sport Federation. Tournaments of competitive gaming were broadcasted on TV, and live events attracted masses of attendants reaching the number of 100,000 individuals among spectators and fans. This laid the capstone of eSport as we intend it today. (Mozur 2014)

1.2 The current state of eSport

Nowadays, eSport is a worldwide fast-growing phenomenon, whose estimated revenues amounted to 696.3 million dollars in 2017 (Statista 2017), and are expected to reach 1.617.7 million dollars in year 2024; (Statista 2022). The general audience, which encompasses a public varying from hardcore fans and those focusing only on the biggest events or matches, reached the amount of 747 million for the year 2021, and is expected to reach 942 million by 2024 (Newzoo 2021).

Figure 1. Game Live Streaming Audience Growth (Newzoo 2021).

The eSport marked worldwide revenues amounted to 1.084.1 million dollars in 2021, and are estimated to reach 1.617.7 million dollars in 2024 (Statista 2022). Moreover, the betting system is expected to more than double its worth from 7758.6 millions in 2019 to 18499.0 million dollars by 2026 (@PinnacleSports 2017). In Europe, eSports generated revenues for an amount of 60.4 million euros during the year 2016 (Statista 2016) and 187.1 in 2021 (Statista 2022b). Electronic sports broadcasting grew independently from mainstream media coverage, spreading through online streaming services instead, such as Twitch and YouTube, and with a potential audience surpassing a hundred million of spectators (Hern 2015). According to a study conducted at the University of Tampere, the aspects that make eSport so entertaining to the viewers are: escapism, acquiring knowledge about the played game, novelty, and the aggressiveness showed by the players (Hamari & Sjöblom 2017).

Until the present day, eSport have been computer-centric due to the offered ease in uploading and streaming, as well as superior performance margins and the possibility to be upgraded component by component. Mobiles have the

advantage of being, together with PCs, essential devices for the average user; and while lacking the power of a computer or console, the low entry barrier (for example free games) constitutes a significant asset for competitive players. Consoles, though offering nowadays streaming services and channels, lack the capability to display multiple screens, as well as edit and upload videos on social platforms. (Newzoo 2016, 7–8.)

On a global scale, there were about 2.2 billion gamers in 2017, the 47% of which spent money while playing (Newzoo, 2017). This number reached 2.96 billion players in 2021, generating 175.8 billion dollars in revenues. Furthermore, the global number of players is expected to grow to 3.09 billion of gamers in 2022, and 3.32 in 2021, where is expected to generate revenues for a total of 218.7 billion dollars (Newzoo, 2021b). Money is usually spent to purchase titles and/or monthly subscriptions, additional content in form of Season Pass or downloadable content, microtransactions to obtain in-game items or features, and collector editions or addons featuring game-related material such as soundtrack, art, novellas etc. (Newzoo, 2017.)

In Finland, the eSport organizations are brought together by The Finnish Esports Federation (SEUL), whose mission is "to improve and promote electronic sports and the activities of our members". The federation was established in 2010 and it represents Finland in the International Esports Federation (IESF). (SEUL 2017) The International e-Sports Federation pursues "to promote eSport as a true sport beyond language, race and cultural barriers". The federation has 48-member nations, and it hosts international tournaments, arranges Esports Summits and establishes standards for referees, players, certifications, titles and competitions. (IeSF, 2017.)

In 2017 Finland recognized eSport players as athletes, and the following year Finland was ranked the 5th biggest eSport playing country. 80% of Finnish people gamble, and nowadays Finnish casinos incorporate eSport betting in their system. Another aspect of the Finnish eSport awareness is reflected in the Nordic eSports Academy Bootcamp at KAMP: a government raised 4 weeks-long event where eSport enthusiasts and athletes can challenge each other refining their

skill, and deepen their understanding of eSport industry, history, and future development through a number of classes (gameplay couching, physical wellness couching, eSport business couching, mental wellness couching, advanced player testing and analysis). (Web Desk, 2020.) It's worth mentioning that an eSport Business degree have been introduced as a collaboration between KAMK (Kajaanin ammattikorkeakoulu) and KOVA (a Finnish eSport organizer), which underlines the Finnish awareness and leading role of the eSport development and phenomena (KAMK, 2021).

1.3 Thesis objectives

The purpose of this thesis is to determine the potential of an eSport bar concept in Finland. In order to fulfil this thesis objective, the following research questions will be answered.

1. What are the characteristics and elements to be considered for a feasible eSport Bar?

> Undertake case study on existing realities to determine the best elements for a competitive eSport Bar.

2. How could such place achieve its goals?

> Realize a business model canvas highlighting the key activities and value proposition.

1.4 Research structure

The following chapters offer notions of abstract business modelling and illustrate the business model canvas. Subsequentially, an overview of four pertinent Finnish business activities related to eSport is presented, and complemented with a focused view over three Swedish enterprises operating in the same sector. This data is gathered with the nonparticipant observer methodology. Afterwards, a benchmark of these companies' offerings and endeavors is stipulated to answer the first research question.

As the data obtained regarding the businesses' offerings can be used to partially uncover the *value proposition* aspect of an eSport Bar, further insight is provided to unfold this business' structure within the business model canvas. This provides an introducing overview regarding the main entries of each canvas section, related to eSport Bars. Thereafter, the knowledge gathered through this study is analyzed with focus on *key activities* and *value proposition* elements of the business model canvas, in way to answer the second research question. Lastly, observations, findings, and suggestions for future researches are listed as a conclusion of the writing.

2 BUSINESS MODELS

2.1 Abstract business modelling

Osterwalder, which is recognized as a main contributor in abstract business modelling, described it as: *«A business model is a conceptual tool that contains a set of elements and their relationships and allows expressing a company's logic of earning money. It is a description of the value a company offers to one or several segments of customers and the architecture of the firm and its network of partners for creating, marketing and delivering this value and relationship capital, in order to generate profitable and sustainable revenue streams. ».*

A business model is an abstract, conceptualized representation of the business' fabric and its strategies aimed to turn a profit, which may be used as a layer between strategy and related processes. Its purpose is to offer an ontological, streamlined visual representation of the logic of an enterprise; what is the offer, what is the market, and how to unify this gap. Henceforth, developing a business model can help a company to plan, pan, and adapt its business logic. This is made possible through understanding and sharing, analysing, managing, and prospecting the entrepreneurial logic of a company, which will be disclosed below in greater detail. (Ostenwalder 2004, 14–22)

Business models can ease both the comprehension and sharing of the business logic integrated by an enterprise. These models help to capture, visualize, understand, communicate, and share the business logic. The capturing phase acts like a language aimed to communicate the business logic, in way to enable a shared perspective and unscathed understanding among stakeholders. Visualizing allows the translation of complex processes and amounts of information into a digestible format. Understanding is needed to identify and assimilate the intrarelationships between a specific field and the elements pertaining it, which is further supported by the visualization. This obtained

understanding, together with its precedent steps, fosters an unaltered and clearer communication and sharing of the business model between stakeholders. (Ostenwalder 2004, 20)

Business modelling allows an analysis of the business logic, in way to measure, observe, and compare an enterprise' endeavours. Measuring enables an efficient prospecting of the areas needing monitoring. Observing highlights the adaptations needed in the business logic due to environmental pressure, including competitive forces, technological advancements, shifting customer demands, as well as social or legal changes. Comparing the employed business model to the competition, regardless its industrial field, may help gaining new insight and hence promote business model innovation. (Ostenwalder 2004, 18–20)

Designing, planning, changing, and implementing business models can contribute to improve the management of the entrepreneurial logic of a company, as well as its reactive aligning and organization. Designing a structured business model ontology covering the main aspects of a business logic, together with their interrelationships, fosters the design of a sustainable model which accounts for all its elements. Capturing and visualizing a business model helps showcasing its changes over time, which in returns improves its planning and highlights the adjustments needed in its implementational mechanics. By mapping the shifting competitive scenarios, it is possible to implement quick and appropriate reactions to these external pressuring forces. Business models may serve as a mediator to align business strategy together with organization and technology. These phases enhance the understanding and communicating of the business logic, thus yielding an improved awareness for decision-making. (Ostenwalder 2004, 21)

Prospecting a business model fosters innovativeness and readiness through the realization of portfolios and simulations, which may also lead to patenting. Stipulating a set of elements and structural blocks inherent to a business model may be used, much alike a Lego playbox, to facilitate innovative thinking and generate pioneering models. Assorting a portfolio of different business models enacts future readiness in the face of unexpected changes in the industrial

scenario. Although simulations and tests do not predict the future, they represent a risk-free form of experimentation valuable to prepare the enterprise with options and manoeuvres for possible future changes, as needed. Lastly, it is advisable to patent business models in way to protect the enterprise practices from legal retortions. (Ostenwalder 2004, 20)

2.2 Elements of the Business Canvas

A business model canvas is a visual tool developed to highlight and communicate the pivotal points of an enterprise (as shown in table 1), which are identified with customers, offering, infrastructure, and financial viability. Specifically, it focuses on nine aspects of a business model, namely: customer segments, value propositions, channels, customer relationships, revenue streams, key resources, key activities, key partnerships, and cost structure. *Customer segments* is the terminology adopted to identify a cluster of customers sharing common characteristics relevant to the enterprise. *Value propositions* is the enterprise's offering, being a product or service. *Channels* are the logistics implemented to reach and deliver value to potential customers. *Customer relationships* encompasses the methodologies implemented to acquire and retain clientele, as well as improve the customer's experience. *Revenue streams* is the term to identify those fixed or dynamic returns of investment, which may be both one-timed and recurring. *Key resources* refer to those physical, financial, intellectual, and human assets needed to provide the product or service. *Key activities* groups those crucial tasks needed to operate successfully. *Key partnerships* are those competitive or cooperative relationships aimed to the company's benefit and progress. *Cost structure* considers operative expenses, and the strategy leading to cost- or value-driven operative implementations. (Black & Bright, 2019)

According "Critically assessing the strengths and limitations of the business model canvas" master thesis, two main strengths and one limitation can be recognized within the business model canvas framework. The first strength is an underlying focus in the construction and delivery of value, represented by the

efficacy of this tool to mediate ideas with stakeholders. The second strong point is the tool's capability to encompass the general elements of a business model. A limiting factor within the business model canvas is the absence of strategic manoeuvring needed to overcome competition or other outer factors, and its inflexibility towards business ideas not reliant on revenues. (Coes 2014, 83–84)

Key partners	Key activities	Value propositions	Customer relationships	Customer segments
	Key resources		Channels	
Cost structure		Revenue streams		

Table 1. The Business model canvas (Project Wizards, 2022)

3 RESEARCH DESIGN AND ANALYSIS

The modus operandi employed by this study consists of a benchmark of the Key Activities and Value Proposition aspects of the business model canvas, in relation and across multiple eSport bars. The pertinent data is collected and implemented through the nonparticipant observational methodology. The entrepreneurial image emerging from this extrapolation could be helpful in highlighting the main characteristics, and potential endeavor, of Finnish eSport Bars. What follows is a brief overview of the various observation roles, and a presentation of the selected business activities.

3.1 Nonparticipant observation and other methodologies

The observational methodology is useful to view, descript, analyze, and interpretate elements on a given setting. There are two main aspects, or dynamics, concerning the role of an observative researcher. One pertains the level of involvement within the observed environment, which may range from participative to observative. The second aspect pertains whether the observative process is revealed or concealed from the environment in which it takes place. There are six defined observer roles, and each of them is differentiated by its deterministic configuration in relation to the aforementioned dynamics. These roles are: *Collaborative observer*, *Participant as observer*, *Complete participant*, *Observer as participant*, *Complete observer*, and *Nonparticipant observer*. (Saunders et al. 2019, 378–388)

In the *Complete participant* role, the observative process happens from the inside, such as a member of a group or organization; this role is not disclosed to the environment. Likewise, the *Participant as observer* role takes integral or active part within the group or organization, and it manifests the undergoing of its observative process, which is achieved as a team member or an involved outsider, respectively. *Observer as participant* involves none to moderate participation to the environment if necessary, the observing process is disclosed.

A *Complete observer* role does not present interactivity with the environment and its role is concealed; it focuses on observation from a neutral standpoint. The *Nonparticipant observer* role does not rely on direct contact with the observed environment, can be performed remotely, and is not disclosed. *Collaborative observer* is a role which actively implements the aid of informants within the research, which may provide a multifaceted and complementary gathering and interpretation of the data. (Saunders et al. 2019, 378–388)

The nonparticipant observational role is elected due to its characteristic of independency from physical or virtual contiguity from the source of the observed material or environment. Such approach is oftentimes made possible by technological advancements allowing the observer to gather a variety of data remotely and at different times, for example through an internet–based research. Observing the output of selected businesses over a defined amount of time, may provide sufficient data to analyze and compare endeavor and results of these companies. A limitation of this methodology may be presented by the difficulty for an outsider to discern all observable elements. This can be linked to factors such as the pertinency of the observer skillset, its familiarity with the setting, and the time frame allowed for this familiarization. (Saunders et al. 2019, 386–389)

3.2 Case study

A preliminary screening highlighted the following enterprises: Savefile Bar, Arkade Bar, Lategame Bar, and Shelter Gameroom. The key words used for the research are "eSport, Bar, Finland", and the Finnish equivalent "eSport, Baari, Suomi. From the produced list of results, a selection was made based on the amount of observable online data, both on websites and social media. This led to a selection of three eSport bars and one gaming room presenting eSport bar elements. These businesses have been observed with focus on the last six months in the period from December 2021 to May 2022, which is when the data was gathered. The observation included the website of these activities, their

Facebook, Instagram, and Twitter accounts. Finder.fi and direct contact were employed to find pricelists and economic data, when possible.

3.2.1 Foreword on socioeconomic factors

It is important to mention that two of these commercial activities were opened in 2018, and two in 2019. Furthermore, the economic data available and presented is inherent to the year 2020, during which COVID19 reached Finland, affecting its population and businesses (Yle, 2020). The author of this study cannot estimate the magnitude of the impact that affected these public exercises due to pandemic and resulting restrictions. Nevertheless, the outcoming inhibition within the Finnish social environment, and the notion that the businesses were founded by no more than one and two years, is to be considered when digesting the figures presented in this chapter. On a national scale, during the year 2020 liquor sales in restaurants decreased by 40.7%, and the sector turnover decreased by 570 million euro; 22.000 employees operating in the sector lost their job, and 30% of the related activities closed (Eduskunta, 2021).

3.2.2 Savefile Oy

Savefile is an eSport bar registered as restaurant and operating in Tampere since 2019. Generally opened from 16.00 to 23.30, its offer encompasses bar service, computers, consoles, a retro gaming station, as well as board games. The gaming offer is shared across six reservable booths with different hardware including three PlayStation 4, two Playstation 4 Pro, and a booth with a PlayStation 3 and a PlayStation 2. Other activities include videogaming quizzes of Fridays, and occasional gaming tournaments. While the pricelist of the gaming booths was not available the enterprise's website, direct contact with the activity through Facebook revealed a fixed fee of 3 euro to access a booth; and a lack of the hourly pricing methodology which characterizes the other business activities described below. (Savefile, 2022)

Savefile is present on Twitter with 131 followers, 907 on Instagram, and 1.540 on Facebook, where it's rated with five stars based on 27 reviews. During the year 2020 it had a turnover of 159.000 euros, resulting in the financial year closing at -11.000 euros. During this year Net sales decreased of the 15%, and the operating profit margin of -5.4%. The activity had three employees, same as the previous year. (Finder, 2022a)

Picture 1 (left). Savefile Instagram

Picture 2 (right). Savefile Instagram

3.2.3 Arkade Nights Oy

Arkade is another eSport bar founded in Helsinki during 2018. Usually open from 16.00 to 1.30, it offers regular bar service, consoles, computers as well as board games and roleplaying games. It boosts a hundred seats, twenty PCs, four PlayStation 4 consoles, and some retro videogames. Activities include weekly gaming tournaments, and gatherings of Helsinki Board Game Club; Twitch streaming of eSport events, such as Counter-Strike: Global Offensive or other hosted tournaments, are common. Computer and consoles reservation are priced 5 euro per hour, board games 3 euro (with a maximum of 10 euro per group), and 3 euro for retro gaming. It offers a DayPass for 24 euro, and "Arkade Key", which is a monthly pass, for 75 euro. (Arkade, 2021)

Arkade Bar is present on Twitter with 61 followers, on Instagram with 739 followers, and on Facebook, where is rated 5 stars based on 8 reviews. The year 2020 closed with a turnover of 128.000 euro, resulting in -11.000 euro, and its operating profit margin was of -2%. It incorporated three employees, like the previous year. (Finder, 2022b)

Picture 3(left). Arcade Bar Instagram
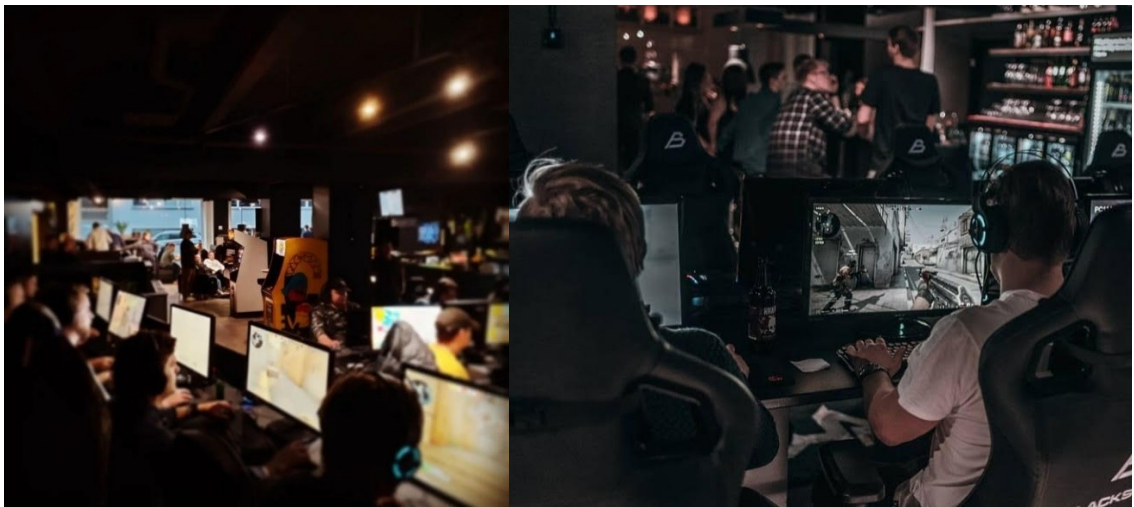
Picture 4 (right). Arcade Bar Instagram

3.2.4 Bar & Cafe Lategame

Lategame is an eSport Bar and Café founded in Tampere during 2019. Generally open from 12.00 to 23.00, with longer opening hours for the weekend, it offers bar and café services including snacks and food, consoles, computers, board games and roleplaying games. It is possible to play videogames on computer, PlayStation, PlayStation 2, PlayStation 3, PlayStation 4, Nintendo Wii, Nintendo Classic, Xbox, Xbox 360, as well as Twister, Beerpong, and a custom vintage gaming system for arcade titles. Events include eSport streamings on Wednesdays, gaming tournaments every two/ three weeks, birthday parties, bachelor and bachelorette parties, cosplay events, LAN parties, and other private

gatherings. Furthermore, the business offers collaborations with local service providers such as escape room, restaurant reservations, and hairdresser. A student discount for 1 euro per hour on Thursdays completes the package. The regular computer gaming price is 3 euro per hour, including retro PC, consoles, and dance mats. Board games, and a sound-proof room for board– and roleplaying games are reservable for free. (Lategame, 2022)

Lategame is present on Instagram with 1.075 followers, and on Facebook where is rated 5 stars based on 26 reviews. The financial data of this business activity was not disclosed to the public.

Picture 5 (left). Lategame Website
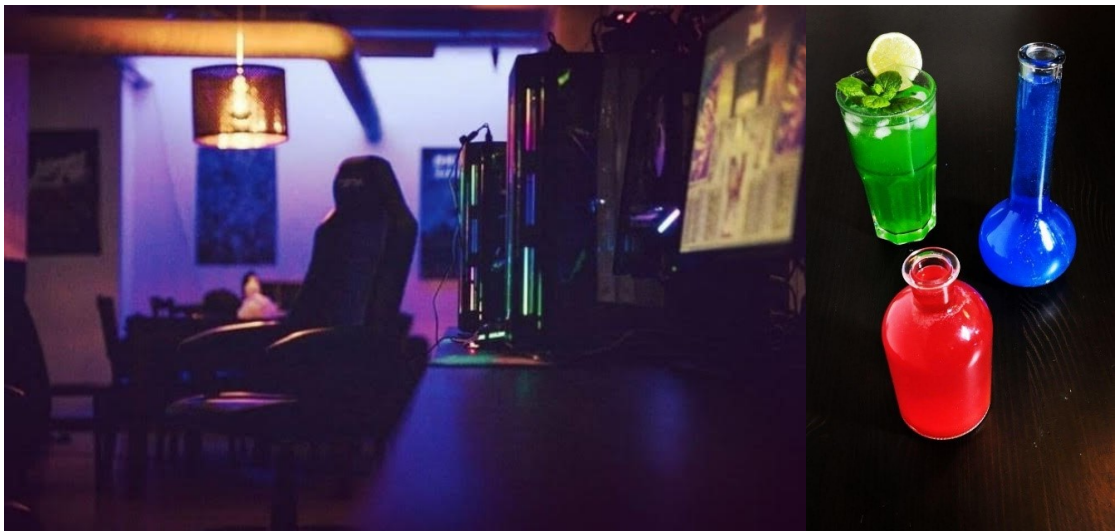
Picture 6 (right). Lategame Website

3.2.5 Shelter Gameroom Oy

As its name suggests, *Shelter* is a gaming room featuring some elements resembling those of an eSport Bar, and it was brought to this list to provide perspective and alternative as another eSport– related business. The gaming room was founded in Helsinki during 2018 and is registered as *experience*

services. At the time of writing this study, the enterprise presented two gaming rooms, both in Helsinki, and is planning to open a third one in Turku during the year 2022. Shelter's offer is based on console and computer gaming, boosting 60 gaming PCs, an unspecified amount of PlayStation 4 and 5 consoles shared on sofas with room for ten, and private rooms with enough hardware for a team of six or ten players, and a streamer room. Events include the occasional tournament, Rax pizzabuffet collaborations on Fridays, student game nights, and packages for birthdays and other private gatherings. Lastly, it organizes a summer gaming camp for kids between 9 and 16 years of age. Playing on PC and consoles is priced 5 euro per hour, and there is an elite membership for 99 euro a month. There is an offer for one or five hours of playtime plus a Red Bull for 7 and 22 euro. The private rooms price point is of 200 euro for two hours, birthdays reservations cost 249 euro for two hours, plus 24.90 fee per person. Lastly, a professional streaming studio is priced 15 euro per hour, and 49 euro for six hours. (Shelter, 2022)

Shelter is present on Twitter with 1.728 followers, on Instagram with 2.263 followers, and on Facebook, where is rated 5 stars based on 11 reviews. The year 2020 generated a turnover of 105.000 euro, resulting in -39.000 euro for the financial year. The operating profit margin was -24.4%, and the number of employees was reduced from three to two. (Finder, 2022c).

Picture 7 (left). Shelter Instagram

Picture 8 (right). Shelter Instagram

3.2.6 Supplementary data on foreign activities

To offer a complementary perspective related to the drawing force of the eSport-related businesses growing trend, a quick overview on similar activities to those enounced above, but operating in Sweden, is henceforth provided. This data is gathered in a similar fashion to the modus operandi described at the beginning of this chapter, albeit in this case the focus is primarily relegated to economic figures. The purpose of such approach is to observe both the economic growth and the socioeconomic impact of the pandemic on older activities than those presented in the case study. The emerging picture may be useful to compare the endeavor of Finnish eSport Bars development with other similar realities. The selected Swedish eSport bars are: Inferno Online, GG Bar, and Kappa Bar.

Inferno Online AB was opened in 1995 in Odengatan, Stockholm, and is present in five locations: Odengatan, Södermalm, Täby, Red Bull Gaming Sphere, and

Malmö (Inferno Online, 2021). For the Odengatan venue, in 2018 its revenues were 22.878 Swedish krona, in 2019 were 23.902 krona, and in 2020 were 19.630 krona; seven employees were present throughout these years (Hitta.se, 2022a). The Södermalm venue opened in 2012, and its revenues for the year 2018 amounted to 5.440 krona, lowering to 4.832 krona in 2019, and 3.692 during 2020; three employees were retained for these years (Hitta.se, 2022b). The Täby venue opened in 2018, its revenue amounted to 350 krona during the opening year, and 1.880 krona in 2020, with two employees (Hitta.se, 2022c). The Red Bull Gaming Sphere was inaugurated in Surbrunnsgatan in 2018, and its revenues were 1.950 for the year 2019, and 3.360 during 2020; with a workforce of two employees (Hitta.se, 2022d). Lastly, the Malmö venue was opened in Södergatan during 2021, and its key figures were not available online at the time of this writing (Hitta.se, 2022e).

GG Bar was opened in Göteborg during 2016 (GG Bar, 2021). While its economic data is not available online, the venue kept its doors open for six years, which would suggest its status as feasible business.

Kappa Bar is an eSport Bar franchise covering eight locations, and firstly opened during 2016 in Gothenburg. Other venues include Stockholm since 2017, Jönköping from the year 2018, Malmö from 2019, Linköping during 2020, and Örebro in 2021, which is the same year as the Uppsala venue was opened. Helsingbor is scheduled for a grand opening during 2022. The Gothenburg venue generated revenues amounting to 1.880 krona in 2018, raising to 2.416 krona in 2019, and reaching 2.884 krona in 2020; during which it retained its employee (Hitta.se, 2022f). The Stockholm venue generated 4.394 krona during the year 2018, 4.116 krona during 2019, and reached 3.109 krona in 2020; the number of employees was reduced from five to four during the year 2019 (Hitta.se, 2022g). At the time of this study, revenue stream data is not yet available for the remaining venues.

3.3 Key findings – Case Study

As highlighted in the Table 3 below, there are a number of features shared across the four observed eSport -related businesses. Firstly, all selected activities offer drinks, computers, consoles, streamings (inbound and/ or outbound) and organize tournaments, which could signify that these features constitute the essence of an eSport Bar offering. While all activities include gaming on computers and consoles, three implemented it in a hourly priced fashion; as opposed to a fixed fee for unlimited time per booking, alike Savefile. Secondly, most activities incorporate private rooms, a retro gaming setup, private events, board games, role playing games, and premium membership into their proposals. The predominance of these elements would suggest their complementary role within an eSport bar offering, either as expected or desirable components. Thirdly, snacks and students' discounts appear to be present in two out of four companies, although their lack on online exposure could be an inadvertent omission. Lastly, each browsed enterprise presents at least one distinctive feature, generally classifiable as special event; and two of the companies incorporate ongoing collaborations with other nearby businesses into their proposals. In the opinion of the writer these features are part of the expression of the identity for each given brand. It is worth restating that all of these eSport activities were opened within a two years of time frame.

Another observable phenomenon is the expansionistic rate of growth of the sector pertaining all the presented enterprises, notwithstanding the economic impact of the aforementioned recent socioeconomic challenges (section 3.2.1). Of the four Finnish activities presented, one opened a second venue in 2021, and is planning a third venue for the year 2022. Conversely, of the three Swedish companies presented, two opened new venues. Inferno Online expanded in four more sites, and Kappa Bar inaugurated six new franchising venues, with a seventh coming in 2022. Nine of the fourteen Swedish venues mentioned were opened from 2018 to 2022, which are the years encompassing both the recent pandemic and the birth of the presented Finnish businesses. This stern growth through economic hardship may be symptomatic of the exponential increase in demand, and

general interest, towards eSport -related activities; as postulated in chapter 1, section 2.

	Savefile	Arkade	Lategame	Shelter
Bar service	X	X	X	Soft drinks only
Snacks		X	X	
Computers	X	X	X	X
Consoles	X	X	X	X
Private booths/ rooms	X		RPGs, board games	X
Retro setup	X	X	X	
Tournaments	X	X	X	X
Streams	X	X	X	Outbound only
Private events		X	X	X
Board games	X	X	X	
Role playing games		X	X	X
Membership/ loyalty card	X	X		X
Student discounts			X	X
Other distinctive features	No time limit on booth usage, quizzes, occasional game thrift shop	Board game club gatherings	Dance mats, Beerpong, Twister, LAN parties, collaboration with restaurant, escape room, hairdresser	Gaming camp, streamer studio, collaboration with pizza buffet

Table 2. Features of eSport businesses (Castellin, 2022)

3.4 Business model of an eSport Bar

To analyze the key activities and value proposition aspects of an eSport Bar, an introductory canvas representing the main elements of this business model was designed, as seen in Table 3. Its purpose is to provide a clear, ontological overview over its pivotal points, as expressed through Chapter 2. This canvas was realized during an informal interview with Kalle Koskela (managing director) and Niklas Von Schöneman (marketing & PR manager) from Grail Group Oy, which is a company operating in the eSport sector with whom the author of this study had a collaboration with. At the time of this research, Grail Group Oy is specialized as a media & marketing agency focusing on Twitch exposure (Grail Group, 2022). The following paragraphs unfold the contents of this business model canvas, and presented through its *Key partners*, *Key activities*, *Value propositions*, *Customer relationships*, *Customer segments*, *Key resources*, *Channels*, *Cost structures*, and *Revenue streams* categories.

Key partners encompass the relationships aimed to a company's wellbeing, presenting the following entries: leasing machines partners, leasing space partners, consumables providers, content providers, sponsors, software licenses, marketing and game-industry partners. Leasing machines partners are those entities providing the necessary equipment, such as computer hardware. Leasing space partners are those entities providing the physical space needed to exercise the business primary activities, as well as secondary, such as outsourced space for events. Consumables providers are those entities providing consumable products or services, such as prepackaged snacks and drinks. Content providers are those entities supplying activity -related components, such as streamers of event organizers. Sponsors are entities offering goods and services, as well as revenues, in return for gained exposure. Software licenses are legal requirements to utilize or allow the utilization of a software, such as Windows or video game. Marketing encompasses those entities employed by the business to gain exposure. Lastly, game-industry partners are stakeholders, or entities in partnership whose competences complement the list of services or activities offered by the business, usually for the mutual benefit of both.

Key activities are constituted by those tasks needed to operate, encompassing the following elements: streams, games, tournaments, beverages and food consumption, exposure events for sponsors, game-training courses, and private events. Furthermore, eSport Bar chain can promote multi-staged events and tournaments, and open venue (community organized) events. Streams, games, and tournaments together with beverages and food or snacks are some of the main features linking eSport aspects to a bar setting, as seen through Chapter 3. Exposure events for sponsors are a way to cater interest from investors and partners. Game-training courses, such as a gaming camp, are a way to reach eSport enthusiasts of different age groups, as well as aspiring or professional teams. This is exemplified in KAMP bootcamp and Shelter gaming camp, as shown in the Chapters 1.2 and 3.2.5 respectively. Private events are a common and expected feature, and allow a business to sell its products and services through a fixed fee, as seen in Chapter 3. An eSport Bar chain can promote multi-staged events and tournaments across its locations (provided it owns multiple), which is a way to retain competitive advantage throughout the event' course. Lastly, open venue and community organized events are a way to interact and cater to different segments of the potential clientele.

Value proposition comprises the enterprise's offerings, which includes entertainment, social environment, exposure for sponsors, spectate and/ or play, flexible schedule due to high and varied availability of content, (i.e. streams), and novel combination of experiences. Furthermore, the minimum viable product can be an eSport night in an existing bar. Entertainment is the main service of a bar setting, usually supported by a social environment. Exposure for sponsors constitute as secondary way to obtain liquidity or items needed for business' activities, and appeal to the sponsor' fanbase. Spectate and/ or play represents the core characteristic associated with an eSport Bar, where the client can either play video games or watch them being played. Flexible schedule due to high and varied availability of content, (i.e. streams of different games) allows to gather audience with diverse preferences. Novel combination of experiences emphasizes the novelty factor of the eSport Bar phenomenon. Lastly, the minimum viable product can be an eSport night in an existing bar, which would

allow the activity to increase its offering, and survey the level of interest and potential of the eSport appeal within a bar setting.

Customer relationships are a way to acquire and retain customers. These are shared in two main phases: Phase 1 is characterized by customer acquisition, phase 2 is characterized by customer retention and catering to occasional visitors. It also mentions private events booking business clients, and the intrarelationship with sponsors and partners. During phase 1, customers are introduced and registered to the proprietary online platform (if present), this is considered a first step towards brand fidelity. Second living room phase refers to the status of acquaintance, associating the customer with the business' infrastructure. Phase 2 provides events and matches for eSport enthusiasts, an entertaining environment for casual players, dedicated space for teams and groups, and bar-only area for occasional visitors, as seen through Chapter 3.2–3.3. Private events booking business clients widens base customer dealings to include relationships and retention with other businesses. Sponsors and partners represent a pivotal point in the company relationships necessary to the company's sustainability.

Customer segments are groups sharing characteristics relevant to the business. Here they have been divided into end-user consumers and business customers. End-user consumers are: eSport enthusiasts, gamers, millennials and young adults, as shown in Chapter 1.2. Business customers are: event organizers, private event booking clientele or companies, sponsors and partners.

Key resources cover elements needed to provide the product or service (which can be linked to key partners), those being: licenses, personnel, machinery, franchising, and partnerships. Location refers to the strategic placement of the business infrastructure.

Channels highlights logistics to the deliver value. Word of mouth, influencers input, the partners owned channels (used to advertise), sponsors exposure and self-organized events, press and media, and ads through online services and platforms are ways to reach the potential customer.

Cost structure consists of operative expenses and related optimizing strategies. Here the fixed costs include venue rental and restaurant infrastructure, alcohol, food, TVs, gaming streaming licenses, consumable products (food and drinks), service products (consoles, PCs), and personnel. Other costs include user acquisition marketing, such as ways to reach new customers, and content production, such as financing a set of tournaments.

Revenue streams are the elements granting return of investment. In the case of an eSport Bar, revenues are generated through bar service, food, gaming bookings, private events and business rental, as shown through Chapter 3. Furthermore, other revenue streams may be generated through sponsors and partners collaborations, as well as online platforms, for instance, a set fee to participate a tournament.

Key partners	Key activities	Value propositions	Customer relationships	Customer segments
Leasing machines partners	Streams, games, tournaments	Entertainment	Phase 1, acquisition:	End-user consumers:
Leasing space partners	Beverages and food consumption	Social environment	Customers are introduced and	eSport enthusiasts
Consumables providers	Exposure events for sponsors	Exposure for sponsors	registered to the online platform	Gamers
Content providers	Game-training courses	Spectate and/ or play	Second living room phase	Millennials
Sponsors	Private events	Flexible schedule due to high and		Young adults
Software licenses	eSport bar chain can promote	varied availability of content (i.e.	Phase 2, retention:	
Marketing	multi-staged events and	streams)	Events and matches for eSport	Business customers:
Game-industry partners	tournaments	Novel combination of experiences	enthusiasts	Event organizers
	Open venue (community	Minimum viable product can be an	Entertaining environment for	Private bookings
	organized events)	eSport night in an existing bar	casual players	Sponsors/ partners
			Dedicated space for teams and	
			groups	
			Bar-only area for occasional	
			visitors	
			Private events booking business	
			clients	
			Sponsors/ partners	
	Key resources		**Channels**	
	Licences		Word of mouth and influencers	
	Personnel		Partners own channels (used to	
	Machinery		advertise)	
	Franchising		Sponsors and self-organized	
	Location		events	
	Partnerships		Press and media	
			Ads through online services and	
			platforms	

Cost structure		Revenue streams	
Venue rental and restaurant infrastructure		Bar	
Alcohol, food, TV, gaming streaming licences		Food	
Consumable products (food and drinks)		Gaming	
Service products (consoles, PCs)		Private events/ rental	
Personnel			
		Sponsors/ partners	
User acquisition marketing		Online platform revenues	
Content production			

Table 3. Esport bar elements in the business canvas model (Castellin et al. 2022)

3.5 Key findings – Value Proposition and Key Activities

The sets of features constituting the offering of an eSport Bar business have been benchmarked with the Key Activities and Value Proposition segments of the business model canvas. The goal of such approach is to depict how a given feature can be enacted, and what value it may hold to a potential customer; thus Table 4 was realized. These features, which have been disclosed through Chapter 3 to 3.3, have been structured to form four clusters, those being: *core features* (present in all the four observed businesses), *common features* (present in three out of four of the observed businesses), *uncommon features* (present in

two out of four of the observed businesses), and *other distinctive features* (present in one out of four of the observed businesses).

Core features are: bar service, computers and consoles, tournaments, and streams. The Key Activities associated with these features are: streams, videogames, tournaments, beverages consumption, exposure events for sponsors, game training courses, and multi-staged events. The Value Proposition of these activities cover: entertainment, social environment, exposure for sponsors, spectate and/ or play, flexible schedule due to varied availability of content, and eSport night as an event. These combined features generate the novel combination of experiences commonly associated with an eSport Bar offering.

Common features' cluster includes: retro gaming setup, private booths or rooms, private events, board- and role playing games, and premium membership loyalty card. The Key Activities tied with these features are: streams, videogames, tournaments, beverages and food consumption, private events, multi-staged events, and open venue community driven events. The Value Proposition related to these features encompass: entertainment, social environment, exposure for sponsors, spectate and/ or play, and themed night (board/ RPG games or videogames) as an event. Premium membership loyalty card is linked to Customer Relationships, which is showcased in Table 3, Chapter 3.4.

Uncommon features' group is constituted by snacks and student discounts. The Key Activity covering snacks is food consumption, and the Value Proposition related to this includes both entertainment and exposure for sponsors. Student discount is tied to Customer Relationships, which is incorporated in Table 3.

Other distinctive features is composed by diverse and possibly innovative activities. These are: no time limit on booth usage, quizzes, occasional game thrift shop, board game club gatherings, dance mats, beer pong, Twister, LAN parties, collaborations with restaurants and/ or other services, and a gaming camp. The Key Activities related to these offerings are: streams, games, tournaments, beverages and food consumption, exposure events for sponsors, game-training

courses, private events, multi-staged events and tournaments, and open venue community driven events. The Value Proposition pertaining these features include the following elements: entertainment, social environment, exposure for sponsors, spectate and/ or play, novel combination of experiences, and the concept of the minimum viable product as a themed night, within an existing bar.
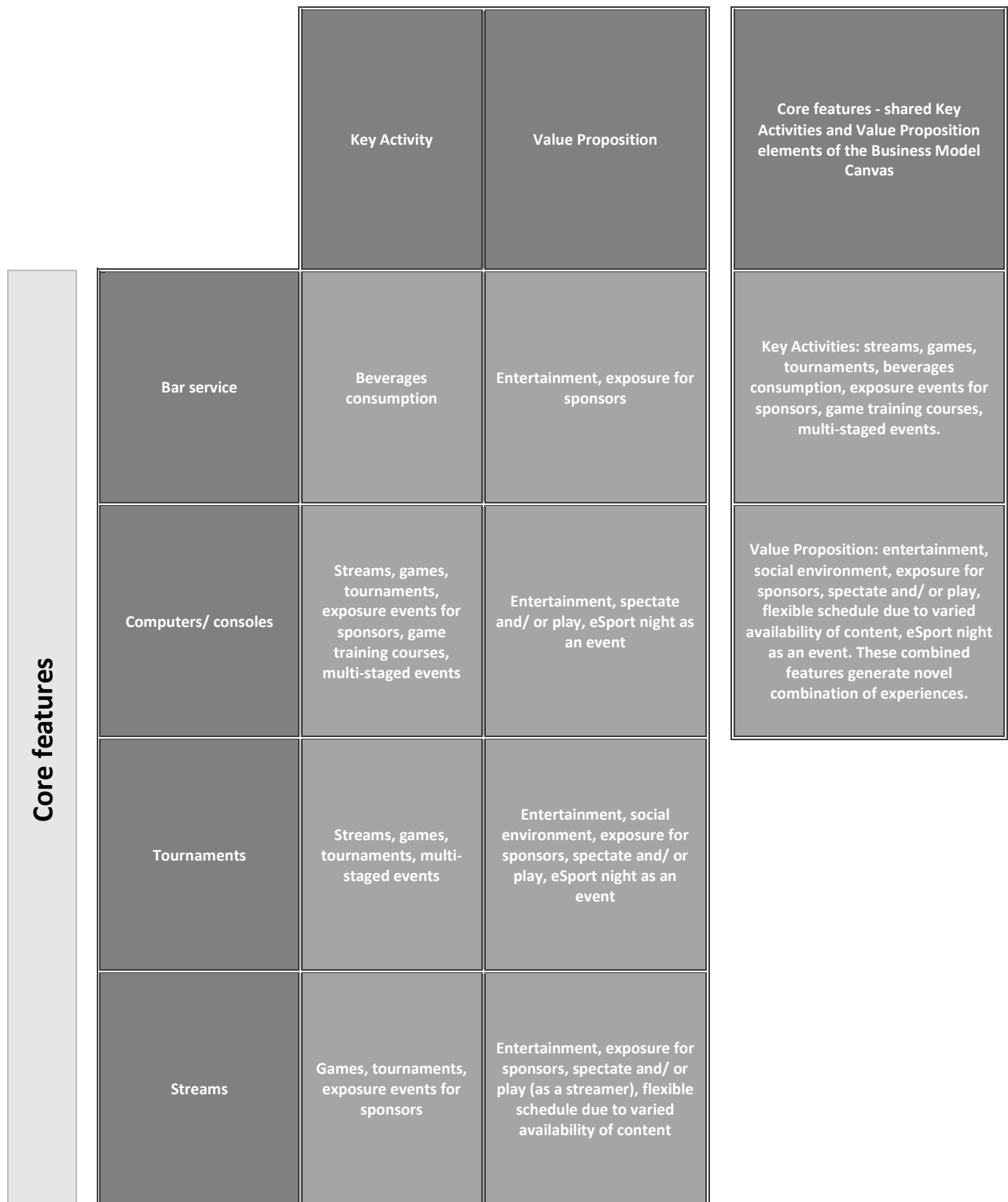
Core features		Key Activity	Value Proposition	Core features - shared Key Activities and Value Proposition elements of the Business Model Canvas
	Bar service	Beverages consumption	Entertainment, exposure for sponsors	Key Activities: streams, games, tournaments, beverages consumption, exposure events for sponsors, game training courses, multi-staged events.
	Computers/ consoles	Streams, games, tournaments, exposure events for sponsors, game training courses, multi-staged events	Entertainment, spectate and/ or play, eSport night as an event	Value Proposition: entertainment, social environment, exposure for sponsors, spectate and/ or play, flexible schedule due to varied availability of content, eSport night as an event. These combined features generate novel combination of experiences.
	Tournaments	Streams, games, tournaments, multi-staged events	Entertainment, social environment, exposure for sponsors, spectate and/ or play, eSport night as an event	
	Streams	Games, tournaments, exposure events for sponsors	Entertainment, exposure for sponsors, spectate and/ or play (as a streamer), flexible schedule due to varied availability of content	

	Key Activity	Value Proposition	Common features - shared Key Activities and Value Proposition elements of the Business Model Canvas
Retro setup	Streams, games, tournaments	Entertainment, spectate and/ or play, eSport night as an event	**Key Activities:** streams, games, tournaments, beverages and food consumption, private events, multi-staged events, open venue
Private booths/ rooms	Streams, games, tournaments, private events	Entertainment, social environment, spectate and/ or play	**Value Proposition:** entertainment, social environment, exposure for sponsors, spectate and/ or play, themed night as an event
Private events	Streams, games, tournaments, beverages and food consumption	Entertainment, social environment, exposure for sponsors, spectate and/ or play	
Board/ RPG games	Games, tournaments, beverages and food consumption, multi-staged events, open venue	Entertainment, social environment, exposure for sponsors, spectate and/ or play, board/ RPG night as an event	
Membership/ loyalty card	*Tied to customer relationships (Table 3)*	*Tied to customer relationships (Table 3)*	

Common features (vertical label)

	Key Activity	Value Proposition	Uncommon features - shared Key Activities and Value Proposition elements of the Business Model Canvas
Snacks	Food consumption	Entertainment, exposure for sponsors	**Key Activities:** food consumption
Student discount	*Tied to customer relationships (Table 3)*	*Tied to customer relationships (Table 3)*	**Value Proposition:** entertainment, exposure for sponsors

Uncommon features (vertical label)

	Key Activity	Value Proposition	Other distinctive features - shared Key Activities and Value Proposition elements of the Business Model Canvas
No time limit on booth usage	Streams, games, tournaments, beverages and food consumption	Entertainment, social environment, exposure for sponsors, spectate and/ or play. *Tied to customer relationships (Table 3)*	**Key Activities: streams, games, tournaments, beverages and food consumption, exposure events for sponsors, game-training courses, private events, multi-staged events and tournaments, open venue**
Quizzes	Games, tournaments, beverages and food consumption, multi-staged events, open venue	Entertainment, social environment, exposure for sponsors, spectate and/ or play, quiz night as an event	**Value Proposition: entertainment, social environment, exposure for sponsors, spectate and/ or play, novel combination of experiences, minimum viable product can be a themed night in an existing bar**
Occasional game thrift shop	Beverages and food consumption, open venue (community organized events)	Entertainment, social environment, exposure for sponsors, novel combination of experiences	
Board game club gatherings	Games, tournaments, beverages and food consumption, multi-staged events, open venue	Entertainment, social environment, exposure for sponsors, spectate and/ or play, board game night as an event	
Dance mats	Games, tournaments	Entertainment, social environment, spectate and/ or play, novel combination of experiences	
Beer pong	Tournaments, beverages consumption	Entertainment, social environment	
Twister	Games, tournaments	Entertainment, social environment, spectate and/ or play, novel combination of experiences	
LAN parties	Streams, games, tournaments, beverages and food consumption, exposure events for sponsors	Entertainment, social environment, exposure for sponsors, spectate and/ or play, eSport night as an event	
Collaborations with restaurants/ other services	Beverages and food consumption, exposure events for sponsors, private events	Exposure for sponsors, novel combination of experiences	
Gaming camp	Streams, games, tournaments, exposure events for sponsors, game training courses	Entertainment, social environment, exposure for sponsors, spectate and/ or play	

Other distinctive features (vertical label on left side)

Table 4. Features of eSport Bars through Key Activity and Value Proposition (Castellin, 2022)

4 CONCLUSIONS

This study was undertaken to answer the following research questions:

1. What are the characteristics and elements to be considered for a feasible eSport Bar?

> Undertake case study on existing realities to determine the best elements for a competitive eSport Bar.

2. How could such place achieve its goals?

> Realize a business model canvas highlighting the key activities and value proposition.

4.1 First research question – findings

To answer the research question "What are the characteristics and elements to be considered for a feasible eSport Bar?" A case study covering four Finnish eSport related businesses (three eSport Bars and one Gaming Room) was performed. The data was gathered with the nonpartecipant observer methodology. This was supplemented with economic data pertaining three Swedish eSport Bars operating in Sweden.

The data gathered from the Finnish companies highlighted drinks, gaming computers, consoles, streams, and tournaments as key elements defining the businesses. The gaming aspects are ususaly presented with a hourly booking system. Other prevalent elements are private rooms, private events, a retro gaming setup, as well as board- and role-playing games to complete the main business offer. Premium membership is usually offered as an option. Snacks and student discount are less commonly advertised, although this is not necessarily symphomatic of an inhibited offering. Interestingly, each of the four browsed eSport -related companies incorporated at least one distinctive feature within their

business model, generally classifiable as event or activity (such as a community -driven thrift shop), or as ongoing collaboration (such as a restaurant) with other nearby businesses. These features are innovative efforts potentially contributing to the identity of the related business, and generally bringing value to areas out of the business' formula.

The data collected from the Swedish enterprises displayed espansionistic efforts. Two activities out of three opened new venues, for a total of eleven new locations, and nine out of the fourteen existing venues were opened from 2018 to 2022. Comparatively, one out of the four observed Finnish businesses, whose were registered between 2018 and 2019, opened a second extra venue, with a third scheduled during 2022. It is the opinion of the writer that, considering the pandemic impacting this type of businesses during the years 2019–2022, a strong demand for eSport -related products and services is to be attributed as a reason behind these businesses growth.

4.2 Second research question – findings

To answer the research question "How could such (eSport Bar) place achieve its goals?" a business model canvas depcting the elements of an eSport Bar was realized with the help of experts operating in the sector. Subsequentially, a benchmark was generated, with the purpose of revealing the Key Activities and Value Proposition tied with each of the competitive elements defining an eSport Bar offering. These elements were obtained through the Case Study in Chapter 3, and are enounced in Section 4.2 of this chapter.

To define the role of the features offered by an eSport Bar, four clusters were postulated, whose names are Core Features, Common Features, Uncommon Features, and Other Distinctive Features. Core Features stems from those activities presented in each browsed eSport Bar. They include bar service, computers and consoles, tournaments, and streams. Their Value Proposition is entertainment, social environment, exposure for sponsors, spectate and/ or play, flexible schedule due to varied availability of content, and eSport night as an

event. The Key Activities associated to these entries are streams, videogames, tournaments, beverages consumption, exposure events for sponsors, game training courses, and multi-staged events.

Common Features encapsulate retro gaming setup, private booths or rooms, private events, board- and role playing games. The related Value Proposition covers entertainment, social environment, exposure for sponsors, spectate and/ or play, and themed night (being board/ RPG games or videogames) as an event. The Key Activities pertaining these elements are streams, videogames, tournaments, beverages and food consumption, private events, multi-staged events, and open venue community driven events. Snacks are less commonly mentioned, although this does not necessarily imply a shortage of offering.

Other Distinctive Features provides diverse elements, and can be a way to cover less developed areas of a business, or provide value in the form of competitive innovations. The browsed features include a lack of time-limit per fee on gaming booths bookings, quizzes, occasional game thrift shop, board game club gatherings, dance mats, beer pong, Twister, LAN parties, collaborations with restaurants and/ or other services, and a gaming camps. The Value Proposition of those features is related to entertainment, social environment, exposure for sponsors, spectate and/ or play, novel combination of experiences, and the concept of the minimum viable product as a themed night, within an existing bar. The Key Activities necessary to provide these features are streams, games, tournaments, beverages and food consumption, exposure events for sponsors, game-training courses, private events, multi-staged events and tournaments, and open venue community driven events.

In other words, the data gathered suggests, in the writer's opinion, that an eSport Bar has to offer drinks, video games, tournaments, and streams, as its core elements. Snacks, private spaces, and a possibility to play table games complement the base offer. Other diverse features constitute a way to improve on this offering or to appeal to a wider audience.

4.3 Limitations and suggestions for further researches

The presented study has been affected by a number of limitations, and as such, further data may elevate the significance and depth of the presented elements and findings. Data unfolding the eSport Bar phenomenon growth throughout the pandemic could be gathered and used to provide further analysis depth and postulate possible upcoming developments within the sector. More data could be gathered pertaining the entirety of an eSport Bar activity within the business model canvas. Furthermore, more qualitative or quantitative research may be employed to provide more empyrical data supporting or criticizing the presented findings.

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