

EsportsTravel[®] **SUMMIT**

Chat:

The Esports Ecosystem: Opportunities for the Travel Industry

Presenters:

Michael Brooks / NACE

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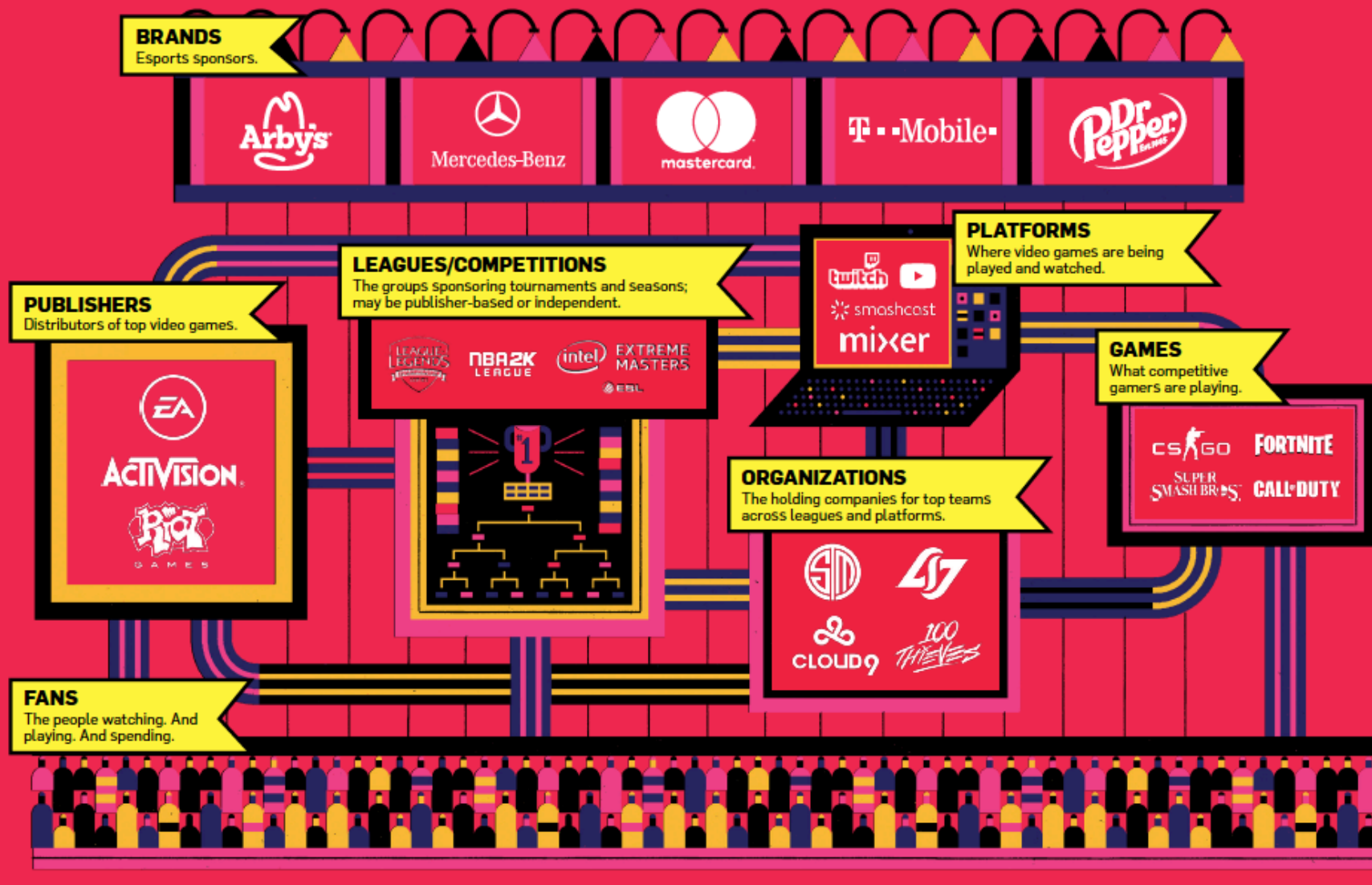
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#EsportsTravelSummit

THE ESPORTS ECOSYSTEM

There are many groups involved in esports that can help brands align with the surging fan base. Here's a quick reference of who's who.



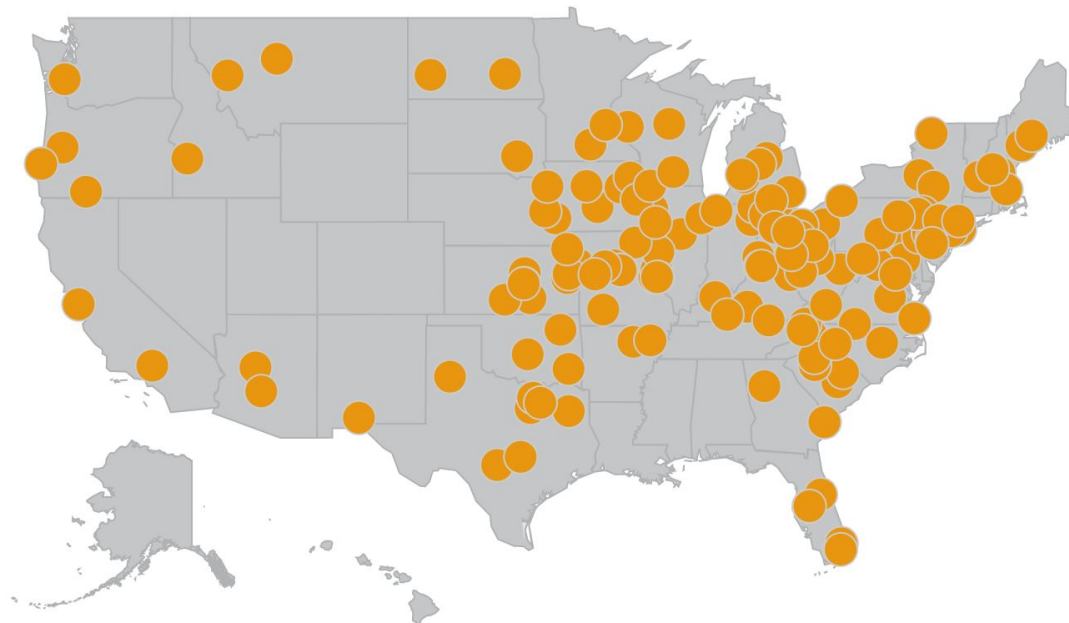
ABOUT NACE



The National Association of Collegiate Esports

NACE officially formed on July 28, 2016 at the first ever Collegiate Esports Summit held in Kansas City, MO. At that time six of the seven colleges and universities with varsity esports programs formed the charter of NACE. Since then a rapidly growing number of institutions have launched varsity programming, with a current count of 157 institutions.

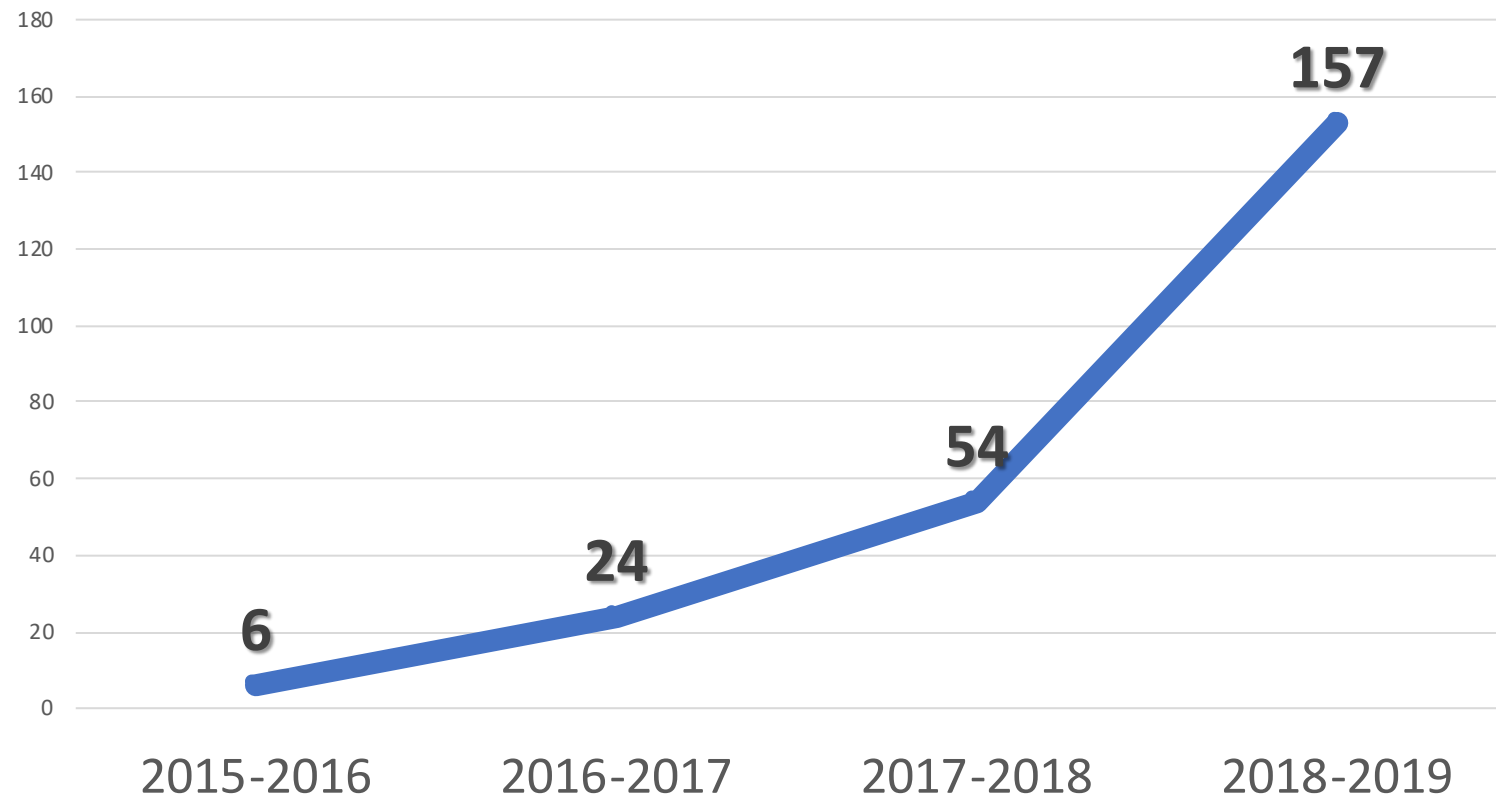
Over 92% of all varsity esports programs in the U.S. and Canada are members of NACE with an ever increasing number of schools exploring esports.



ABOUT NACE



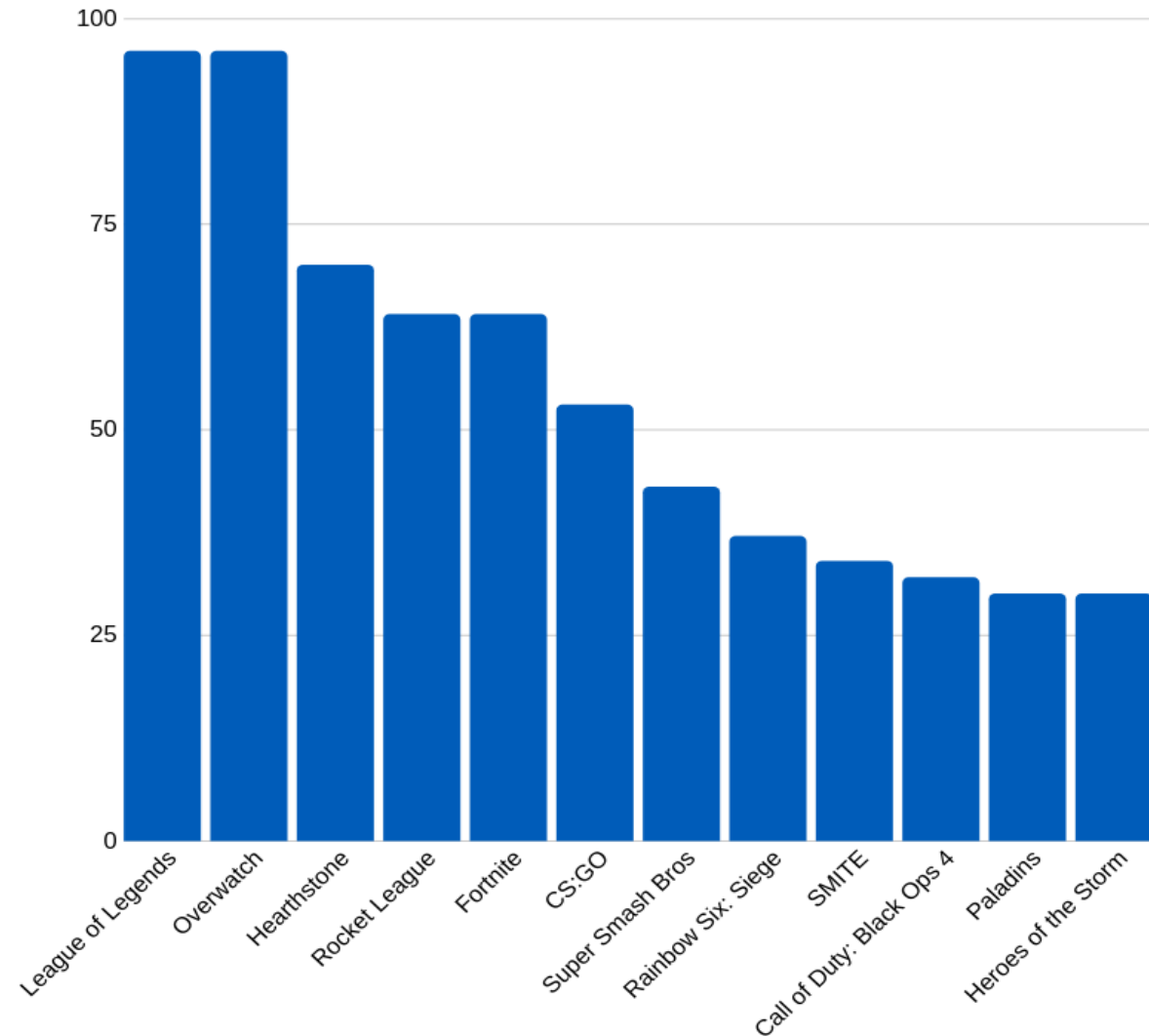
Member Institutions



PROGRAM BREAKDOWN



Percentage of member schools who are projected to have each game by the end of the 2019-2020 school year:



THE COMPETITION





Esports Event Impacts on Hotels

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Benchmarking
↑ your world



International (Dota 2) Championship

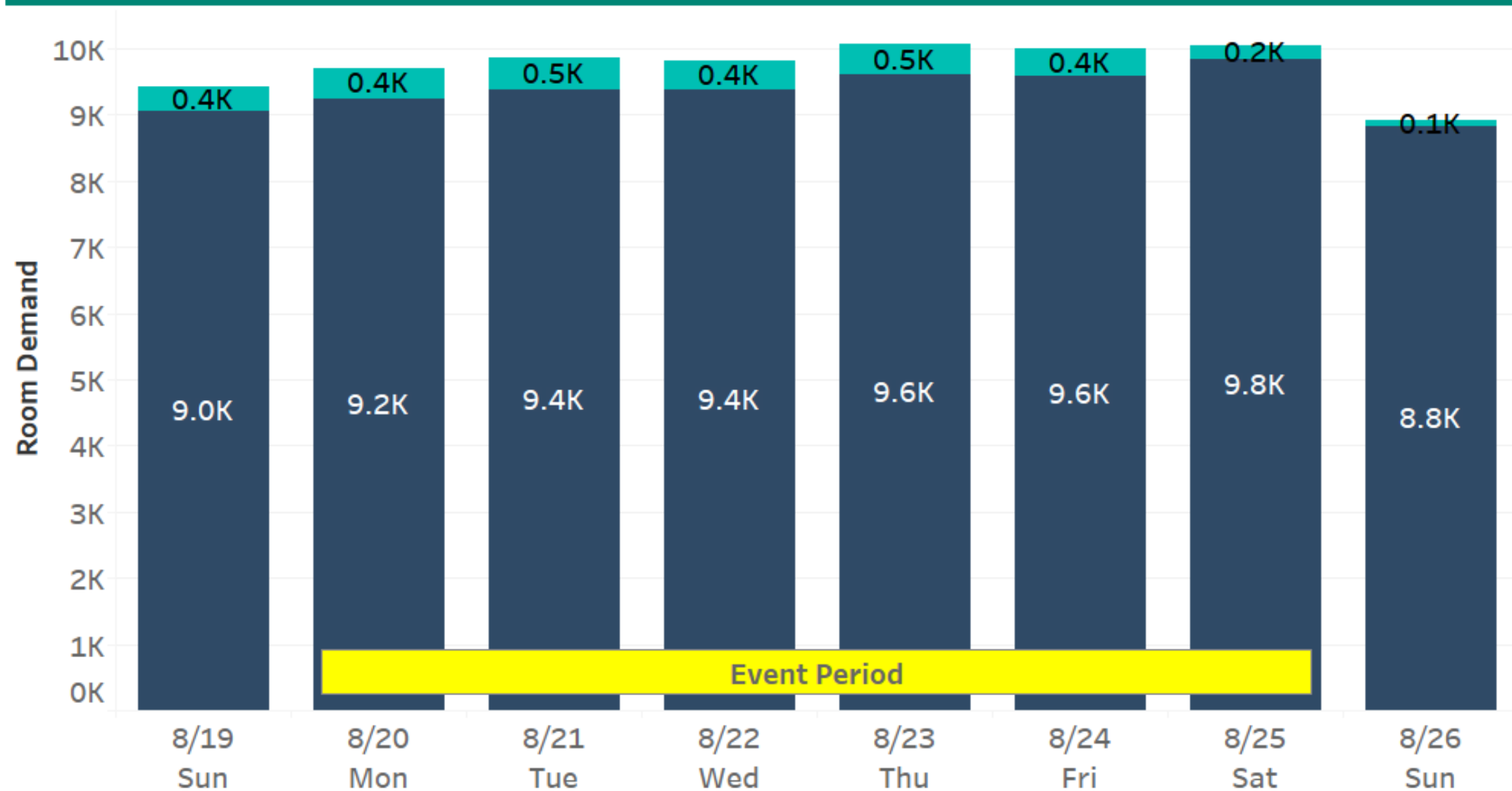
Rogers Arena – Vancouver, BC

August 20-25, 2018

Vancouver Downtown, BC Submarket – 12,850 rooms

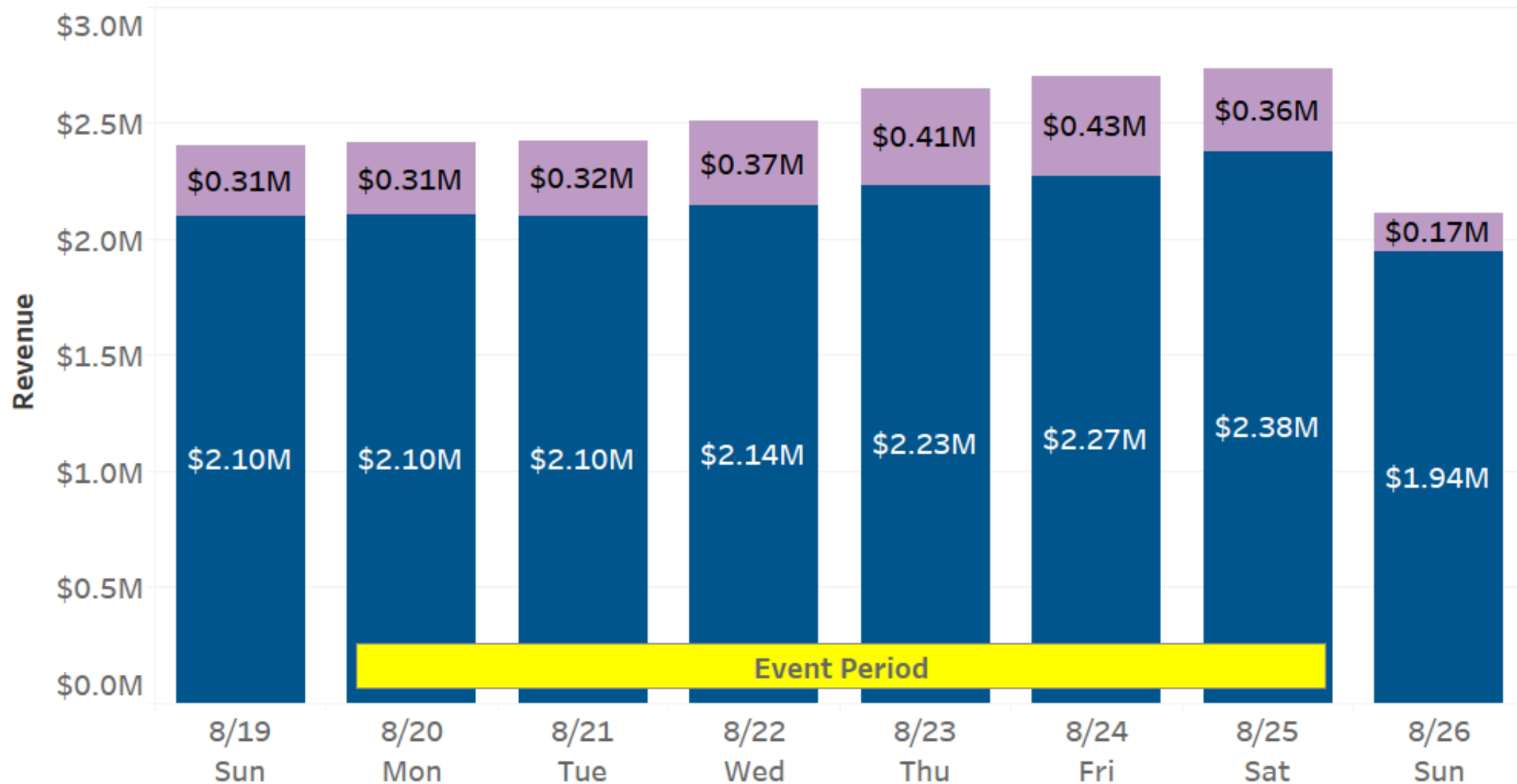
International (Dota 2) Championship, 2018 - Daily Demand (Vancouver Downtown Submarket, August 20-25, 2018)

Demand Premium
Normal Demand



International (Dota 2) Championship, 2018 - Daily Revenue (Vancouver Downtown Submarket, August 20-25, 2018)

Revenue Premium
Normal Revenue



Group and Transient Mix

Day of Event	Group Rates	Transient Rates	Group Occupancy	Transient Occupancy	Total Occupancy
Day Before	\$220	\$267	17.8	69.9	91.2
Aug. 20 (Mon)	\$214	\$260	16.8	73.4	93.8
Aug. 21 (Tues)	\$209	\$257	17.1	74.8	95.3
Aug. 22 (Wed)	\$221	\$267	15.7	75.4	95.1
Aug. 23 (Thurs)	\$215	\$279	18.5	75.3	97.5
Aug. 24 (Fri)	\$207	\$299	25.8	67	96.7
Aug. 25 (Sat)	\$223	\$294	22.1	71	97.3
Day After	\$215	\$248	22	60.8	86.3

Group/Transient ADR (\$USD) and Occupancy for Vancouver Downtown, BC Submarket – Aug. 19-26, 2018



TwitchCon

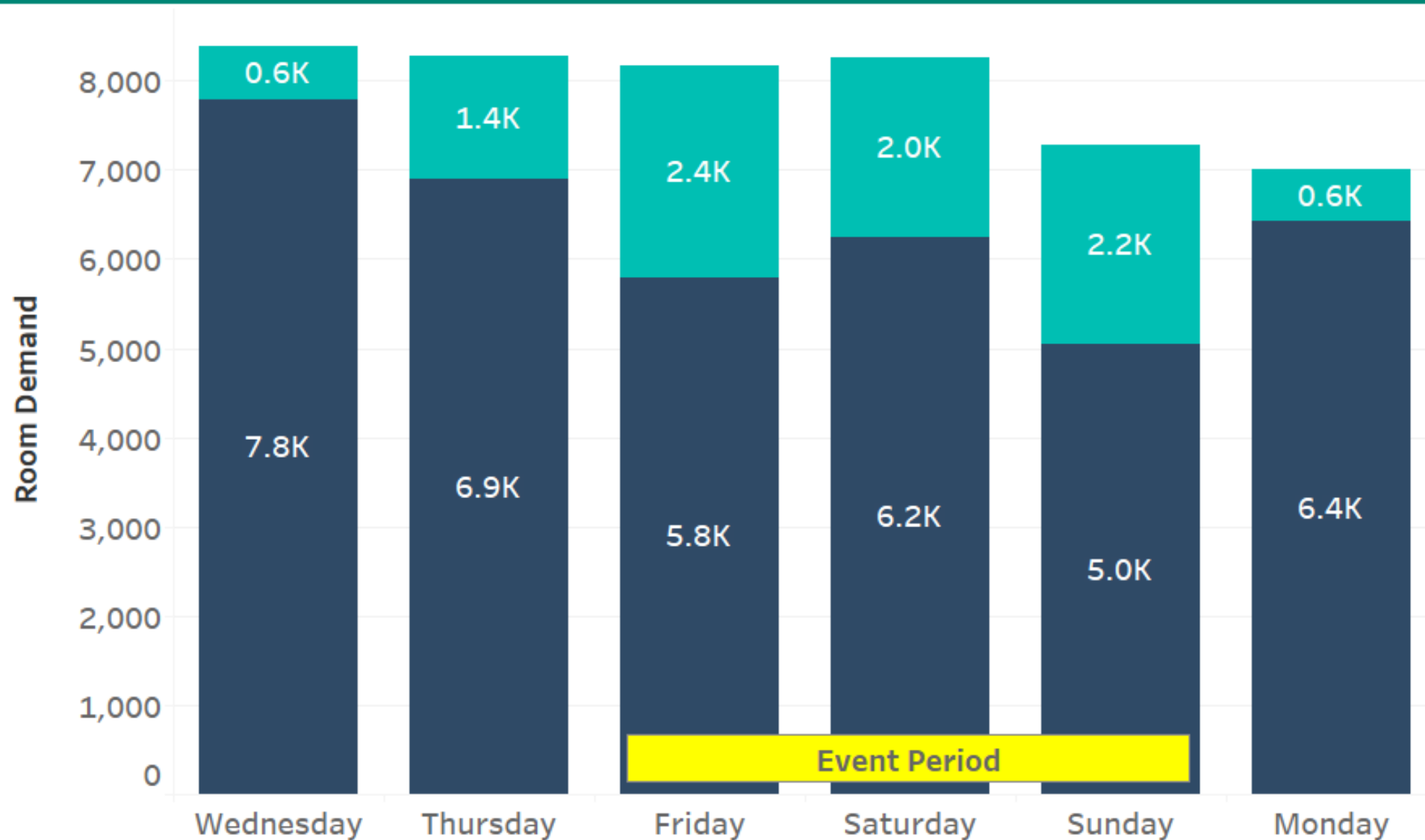
San Jose McEnery Convention Center – San Jose, CA

October 26-28, 2018

TwitchCon 2018 - Daily Room Demand

(San Jose/Campbell, CA Submarket - October 26-28, 2018)

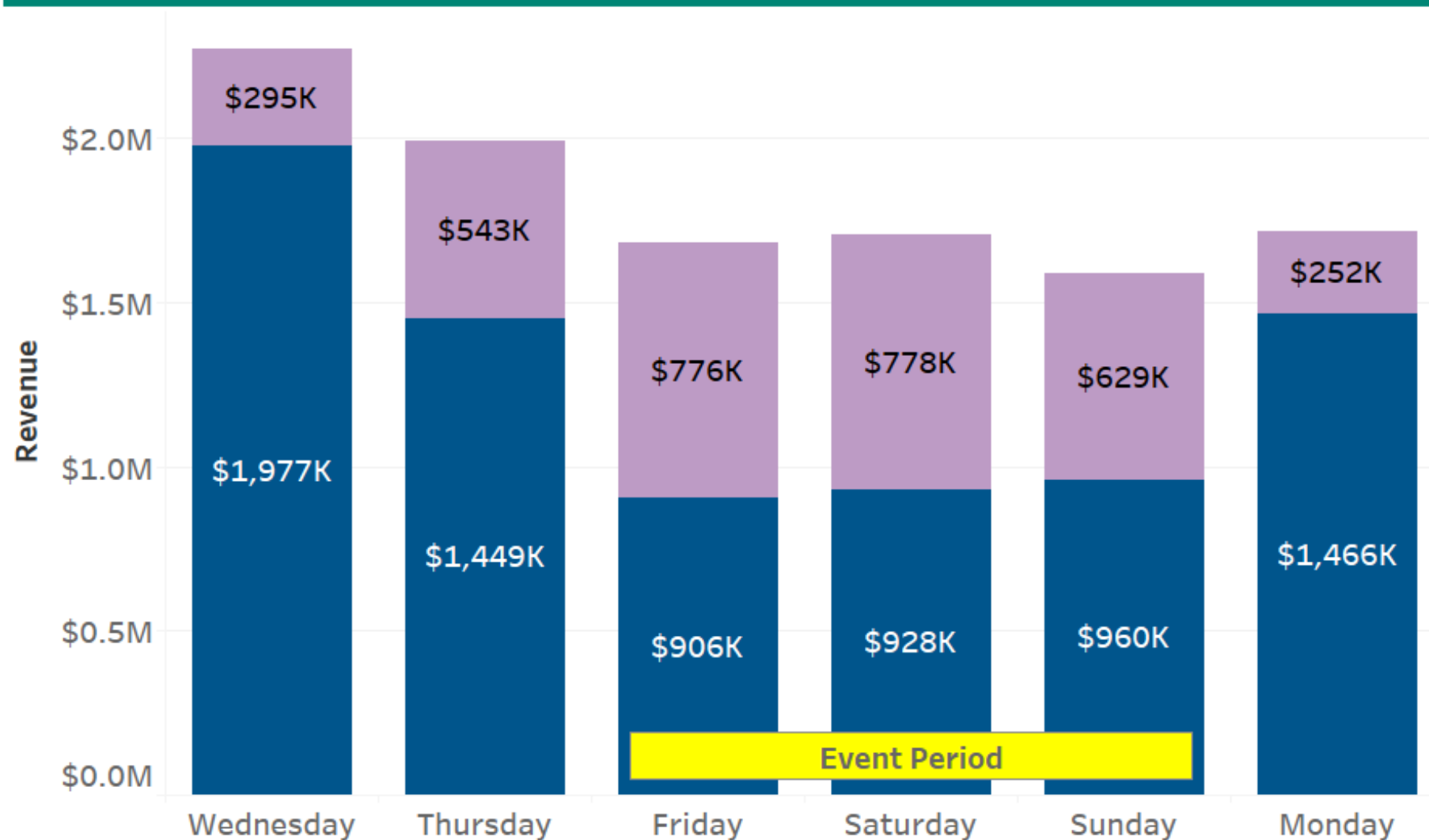
Demand Premium
Normal Demand



TwitchCon 2018 - Daily Revenue

(San Jose/Campbell, CA Submarket - October 26-28, 2018)

Revenue Premium
Normal Revenue

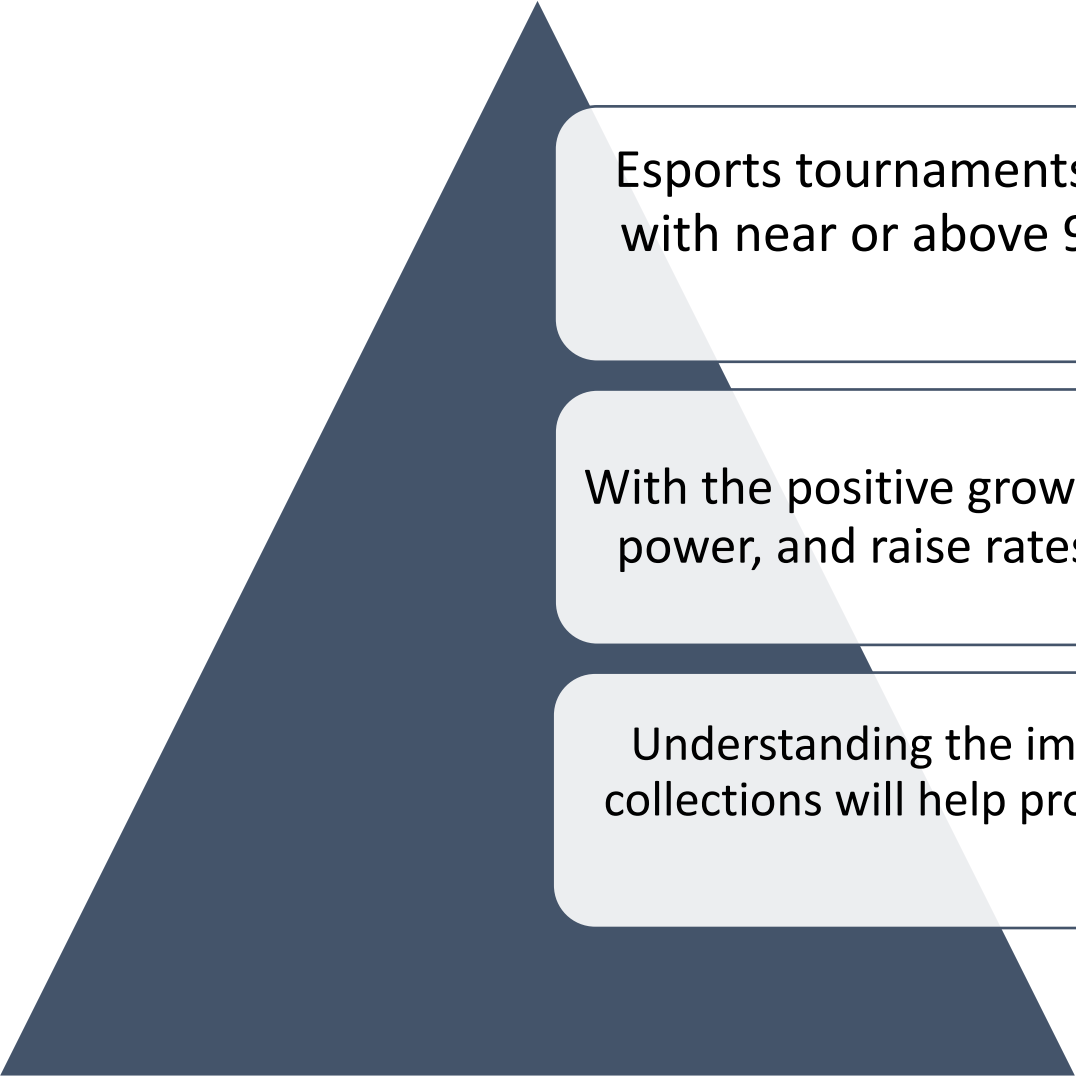


Group and Transient Rates for TwitchCon

Day of Event	Group Rates	Transient Rates	Group Occupancy	Transient Occupancy	Total Occupancy
Day Before	\$200	\$297	52.4	37.5	96.8
Friday	\$179	\$237	52.3	38	95.4
Saturday	\$182	\$233	51.2	40.8	96.6
Sunday	\$201	\$229	41.6	39.4	85.1
Day After	\$260	\$232	26.1	51.7	81.8

Group/Transient ADR for San Jose/Campbell, CA Submarket – Oct. 25-29, 2018

The Esports Effect

A large, dark blue triangle graphic is positioned on the left side of the slide, pointing upwards. It serves as a background for the three text boxes.

Esports tournaments and events push compression nights, with near or above 90% occupancy in host markets during event days.

With the positive growth in occupancy, hotels have more pricing power, and raise rates for both group and transient bookings.

Understanding the impact of esports on hotels and tax revenue collections will help propel the future growth of the esports event industry.