



South Africa: Esports in Education

RESEARCH REPORT
RGB GAMING

Confidentiality Agreement

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Date
07-2024

South Africa is home to 26.5m gamers.

53% of gamers are male with 46% female.

Table of Contents

About the study	04
Study Overview	05
Awareness	06
Interest and Support	07
Career and Skills	08
Key Influences	09
Report Summary	11
Conclusion	12
Appendix A:	13
Appendix B:	16

Introduction

About the study



HP is a renowned global technology company and a leading provider of a wide range of technology products, solutions, and services. The company's portfolio includes personal computers, printers, and related supplies, as well as software, services, and IT infrastructure. HP has a strong commitment to innovation, with a focus on research and development to drive technological advancements.

RGB Gaming has its roots in EdTec and education, part of a group of EdTec companies with a history of over 20 years in the education space. Based on what we have learned, we offer specific key functions in the esports and gaming field, all while staying aligned to the greater EdTec vision and goals.

The research study, commissioned by HP applied various methods. A total of **2563** responses were confirmed submitted versus a target response of **1500** submissions.

The report below provides detailed segmentation and analytics on the submitted responses.

Overview

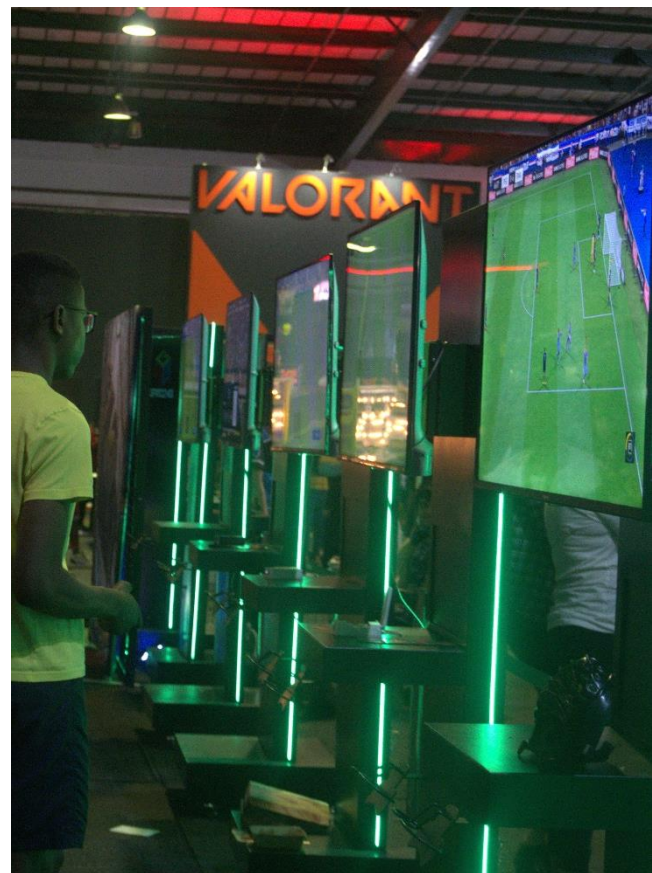
Data analytics

2563 responses

The research, commissioned by HP applied various methods including “Open Anonymous Surveys”, Group Surveys, and Individual Surveys.

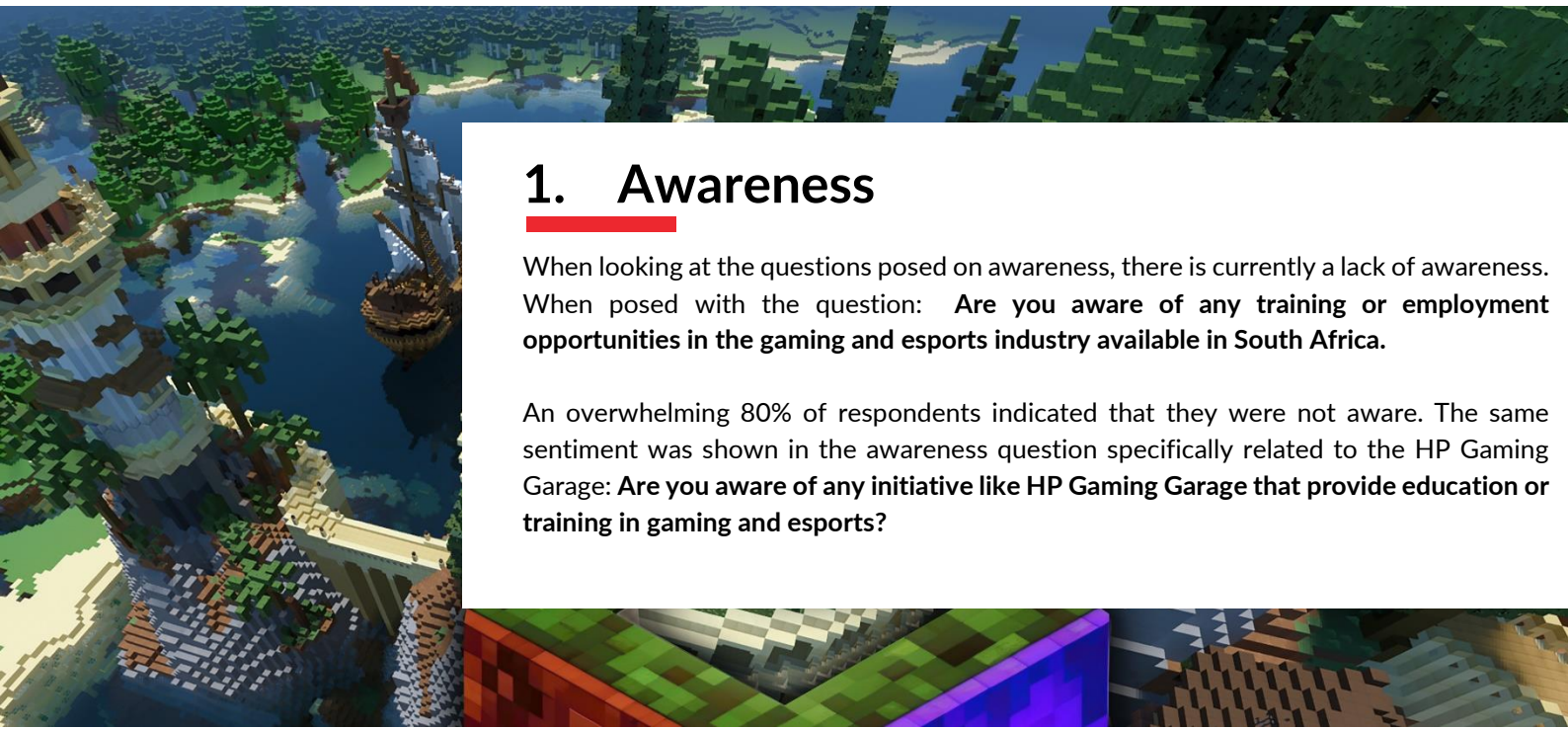
The distribution for this research was done into four categories: Private Higher Education, Focused Higher Education (Academic Fields and TVET), the Public and Private Schooling system, open database of industry experts and careers in the technology sector and ranged across students, lecturers and private individuals.

A total of **2563** responses were confirmed submitted versus a target response of 1500 submissions.



For analysis, we have opted to group the responses to the pre-determined questions listed in **Appendix 1** into 4 main categories:

Awareness	1
Interest and Support	2
Career and Skills	3
Key Influencers	4



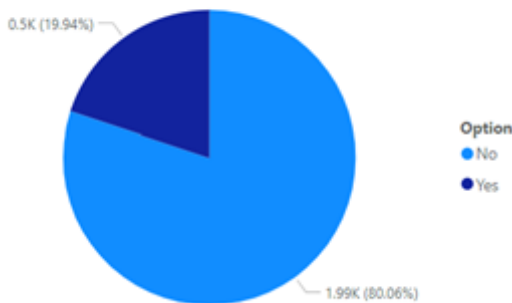
1. Awareness

When looking at the questions posed on awareness, there is currently a lack of awareness. When posed with the question: **Are you aware of any training or employment opportunities in the gaming and esports industry available in South Africa.**

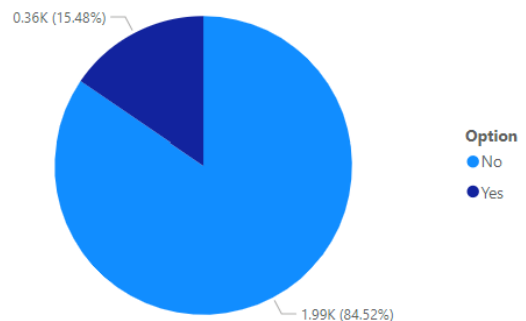
An overwhelming 80% of respondents indicated that they were not aware. The same sentiment was shown in the awareness question specifically related to the HP Gaming Garage: **Are you aware of any initiative like HP Gaming Garage that provide education or training in gaming and esports?**

Analysis

➔ Are you aware of any training or employment opportunities in the gaming and e-sports industry available in South Africa?

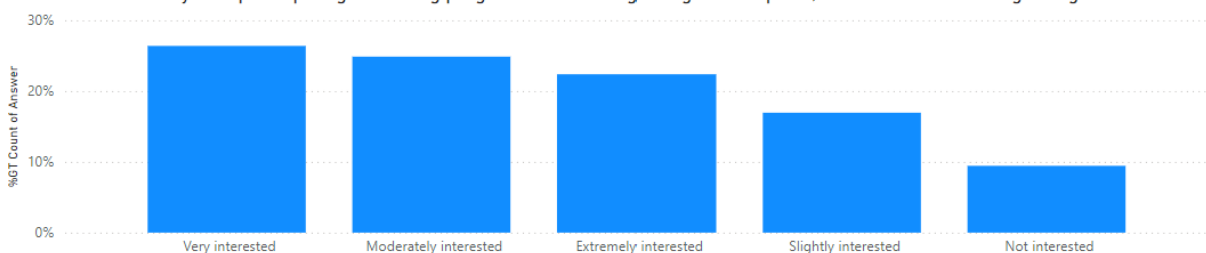


➔ Are you aware of HP's Gaming Garage as a training program for those wanting to enter the e-sports and gaming industry?



➔ It must be noted that even though awareness was indicated as low, the interest in having programs like HP Gaming Garage was high, with more than 70% of participants indicating an average or above interest level and of that more than 40% indicating a high interest level in participation.

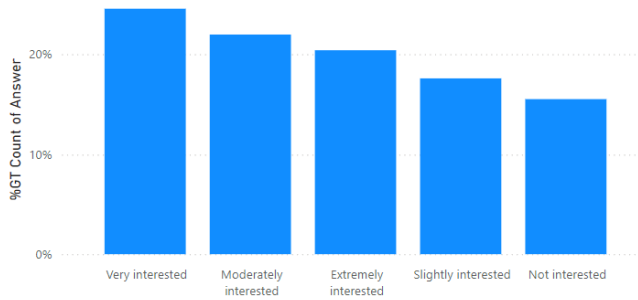
How interested are you in participating in training programs related to gaming and e-sports, such as the HP Gaming Garage



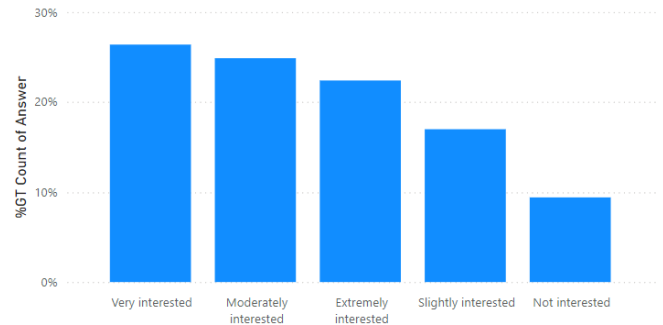
2. Interest and Support

Questions raised to respondents with a focus on careers in esports and gaming mostly indicated positive responses toward the questions, with only 30% of respondents on average indicate a below average interest toward a career option on the two leading career focused questions. This indicates that respondents perceive a career in esports or gaming as an option or opportunity.

➔ How interested are you in being a game developer (i.e. developing your own game and releasing to the market)?



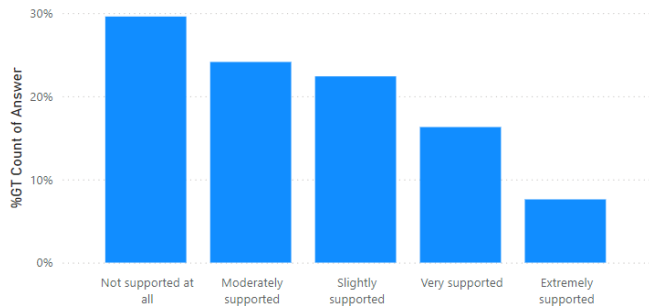
➔ How interested are you in pursuing a career in the gaming and e-sports industry



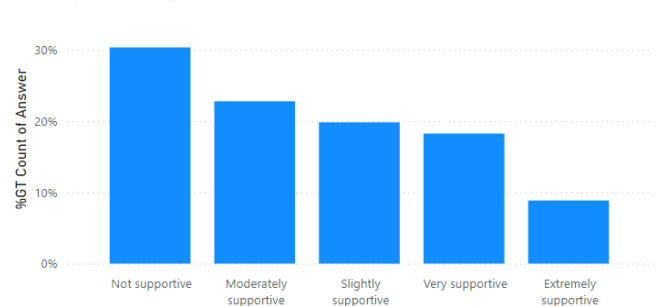
There is, however, a significant indicator of the perceived lack of support. Respondents indicated a low level to complete lack of support for both areas questioned. The one being a formalized environment like an educational institution and the other a less formal environment like the household/parent or guardian.

The above could be an indicator of the traditional market view and readiness to the consideration of a career in esports or gaming.

➔ How supported do you feel by your educational institution in pursuing a career in the gaming and e-sports industry

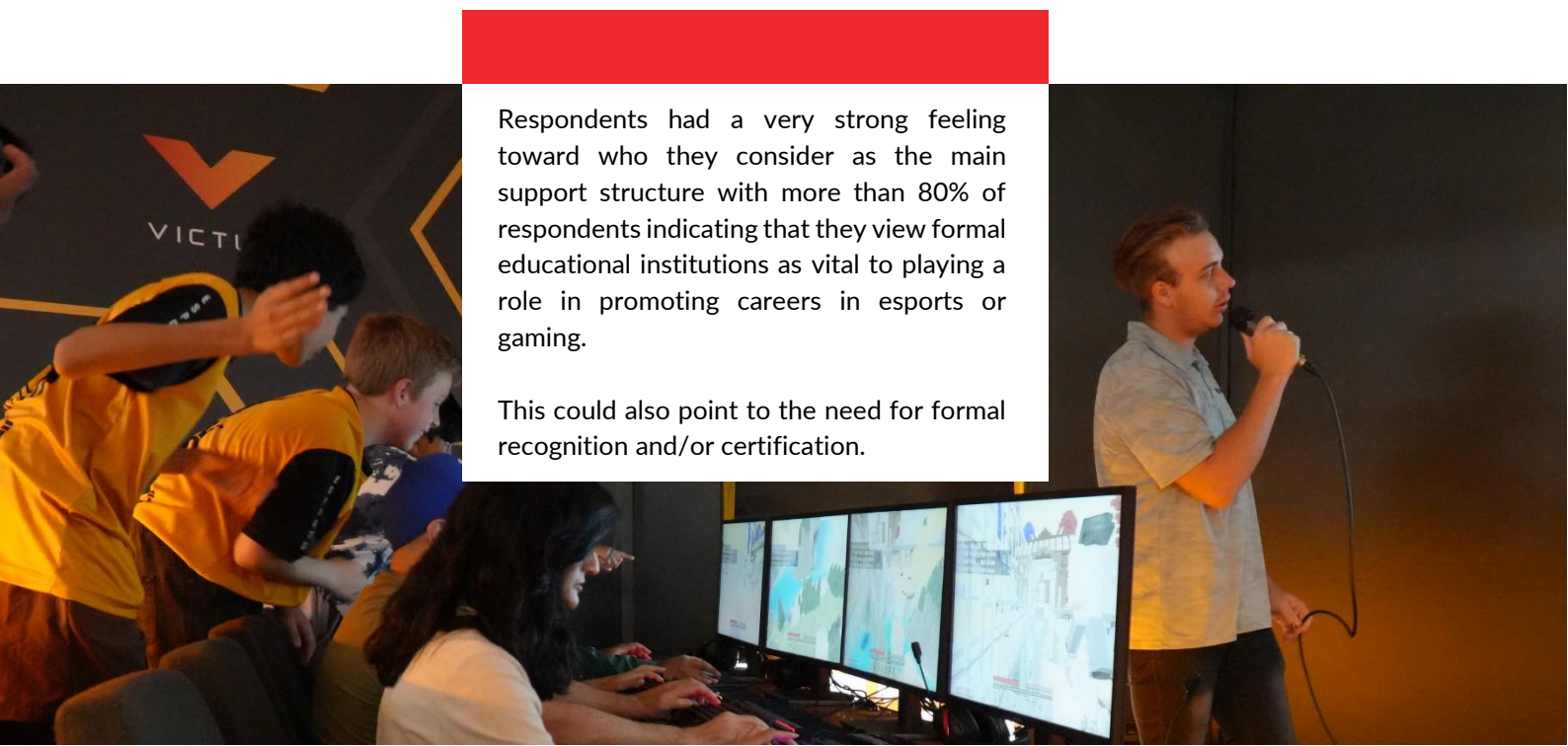


➔ How supportive are your parents/guardian of you pursuing a career in the gaming and e-sports industry

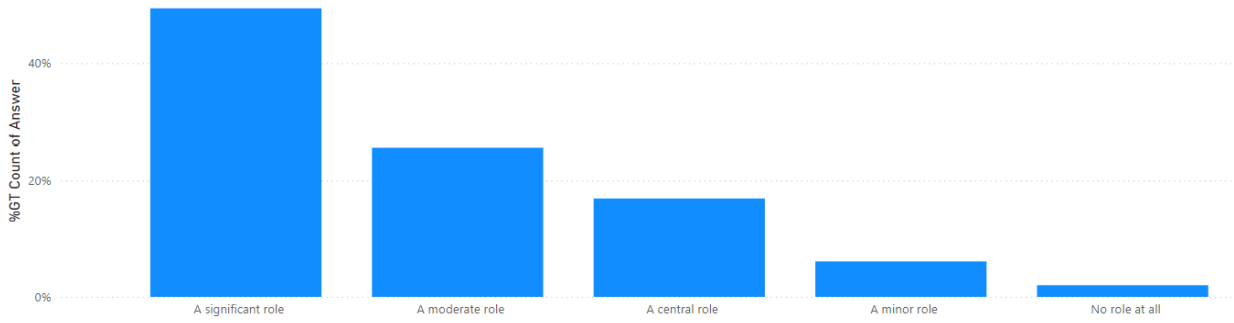


Respondents had a very strong feeling toward who they consider as the main support structure with more than 80% of respondents indicating that they view formal educational institutions as vital to playing a role in promoting careers in esports or gaming.

This could also point to the need for formal recognition and/or certification.



➔ To what extent do you believe educational institutions (like universities or colleges) should play a role in promoting careers in the gaming and e-sports industry



3. Career and Skills

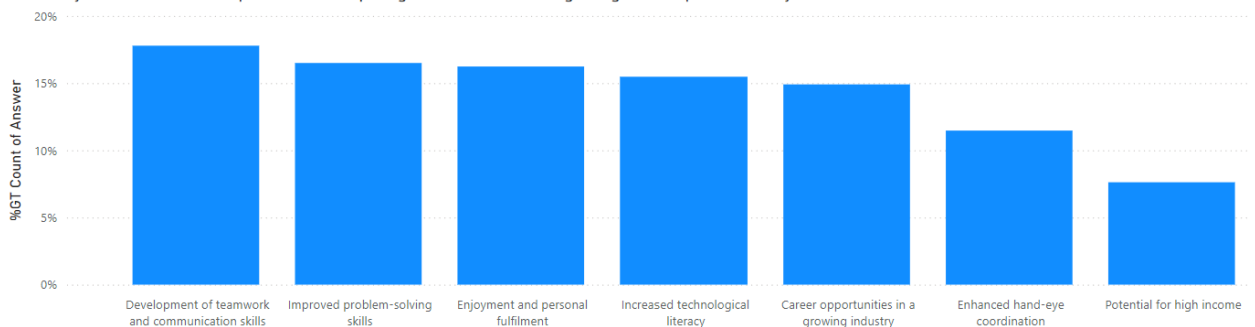
When asked the question: **What do you perceive as the biggest barriers to accessing education and training in the gaming and esports industry**, the majority of respondents highlighted the lack of information about available programs as the primary driver.

➔ What do you perceive as the biggest barriers to accessing education and training in the gaming and e-sports industry

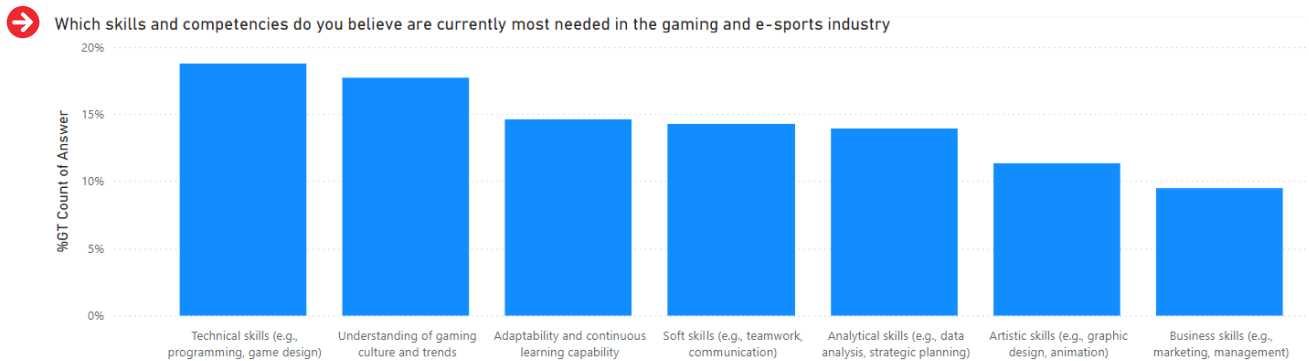


The perception of respondents on skills that could be obtained via a program varied, but predominantly highlighted 4IR related skills and technically quantifiable skills such as Teamwork, Problem solving, Programming and Game Design.

➔ What do you believe are the top benefits of acquiring skills related to the gaming and e-sports industry



Respondent **expected entry level income** for the gaming industry is estimated between R10 000 and R30 000



This bracket view would be highly driven by the perceived skillset obtained and type of qualifications earned during a program. The % breakdown can be viewed as **Figure 1: INCOME EXPECTATION** in Appendix 2.

4. Key Influencers

In the deeper analysis section, we looked at how a leading question impacted the resulting answers on other questions in the survey, using a multiplier approach.

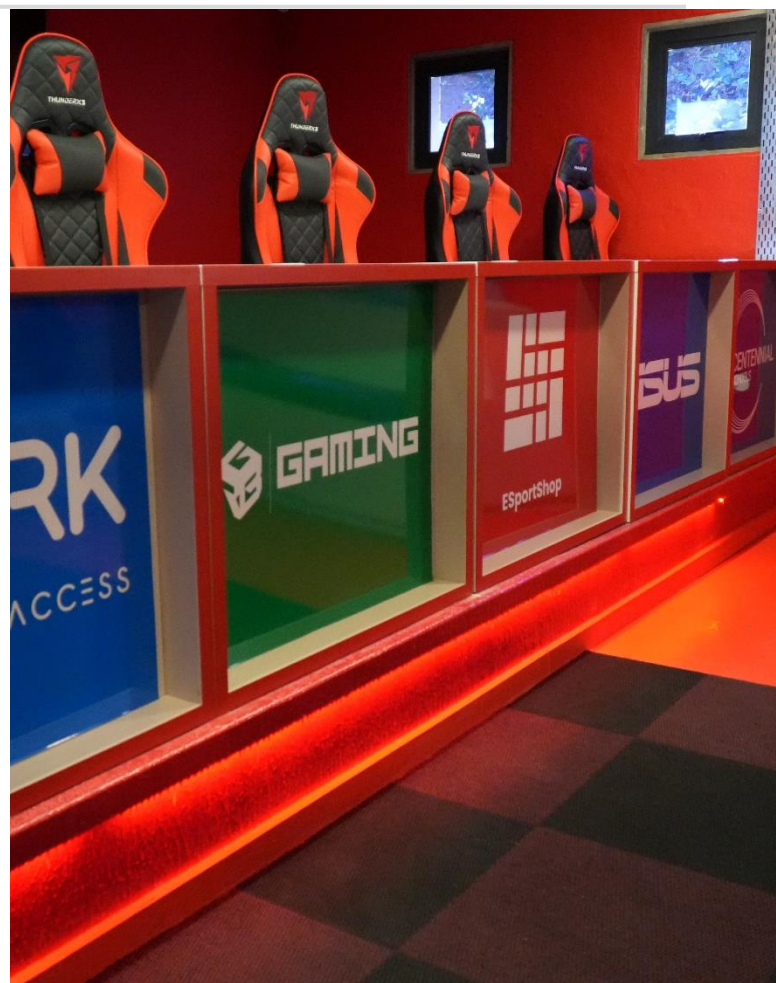
This indicated how likely a respondent is to answer positively on another question when considering the leading question as the indicator.

In this case the leading question used was:
 What influences how interested you are in participating in training programs related to gaming and esports, such as the HP Gaming Garage?:

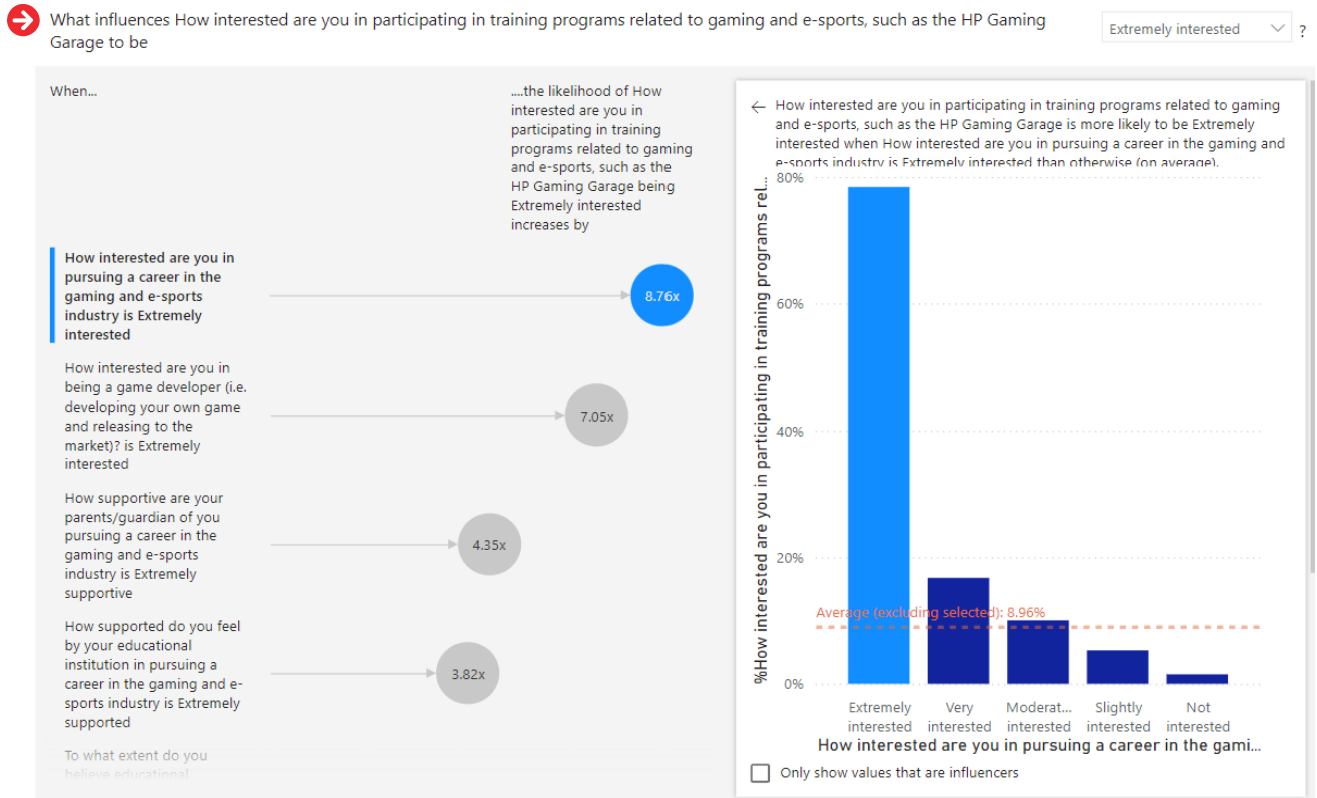
While several influencers showed high multiplier values, 3 questions showed up with above average multiplier values. These 3 questions are highlighted below.

How interested are you in pursuing a career in the gaming and esports industry: Participants were 9 times more likely to indicate that they would want to pursue a career in the gaming industry if they also indicated high interest in participation in a program like HP Gaming Garage.

Participants were 9 times more likely to indicate that they would want to pursue a career in the gaming industry if they also indicated high interest in participation in a program like HP Gaming Garage.



Key Influencers continued



How interested are you in being a game developer: Participants where 7 times more likely to indicate that they would want to pursue being a game developer if they also indicated high interest in participation in a program like HP Gaming Garage.

How supportive are your parents/guardian of pursuing a career in the gaming and esports industry: Participants where 4 times more likely to indicate that they would want to pursue being a game developer if they also indicated high interest in participation in a program like HP Gaming Garage.

This analysis indicated that while participants believe that the main support structure should be driven from formal education institutions as indicated under point 2, Interest and Support: having support from parents and guardians increases the likelihood of participants joining a program like HP Gaming Garage.



Report summary and **key findings**



Awareness

- **Low Awareness:** 80% of respondents were unaware of training or employment opportunities in the gaming and esports industry in South Africa. Awareness of initiatives like HP Gaming Garage was similarly low.
- **High Interest:** Despite low awareness, over 70% of participants expressed moderate to high interest in programs like HP Gaming Garage, indicating a strong latent demand.

Interest and Support

- **Positive Career Interest:** Most respondents showed a positive interest in pursuing careers in gaming and esports, with only 30% indicating below-average interest.
- **Perceived Lack of Support:** There is a significant perceived lack of support from both educational institutions and households. Over 80% of respondents believe that formal educational institutions should play a crucial role in promoting gaming careers, underscoring the need for formal recognition and certification.

Career and Skills

- **Information Gap:** The primary barrier to accessing education and training in gaming is the lack of information about available programs.
- **Skill Perception:** Respondents highlighted the importance of 4IR skills and technical competencies such as teamwork, problem-solving, programming, and game design.
- **Income Expectations:** The expected entry-level income in the gaming industry ranges from R10,000 to R30,000 per month, driven by the perceived skill set and qualifications obtained.

Key Influencers

Program Participation Impact: Interest in participating in programs like HP Gaming Garage significantly increases the likelihood of pursuing a career in gaming and esports. Participants with high interest in such programs are:

- **9 times more likely to pursue a gaming career.**
- **7 times more likely to want to become game developers.**
- **4 times more likely to have supportive guardians.**

Conclusion

The research indicates a strong interest in gaming and esports careers among South Africans, despite low awareness and perceived support.

Formal educational institutions are seen as key to promoting and supporting these careers.

Addressing the information gap and enhancing support structures, both within educational settings and at home, will be crucial in nurturing this interest and transforming it into viable career paths.



Our experience in establishing sustainable esports programs in schools has established a footprint in 5 African countries.



APPENDIX A:

List of questions and outcomes

[CHOOSE ONE]

How interested are you in pursuing a career in the gaming and esports industry?

- Not interested
- Slightly interested
- Moderately interested
- Very interested
- Extremely interested

[CHOOSE ONE]

Are you aware of any training or employment opportunities in the gaming and esports industry available in South Africa?

- Yes
- No

[CHOOSE MULTIPLE]

What do you believe are the top benefits of acquiring skills related to the gaming and esports industry?

- Improved problem-solving skills
- Enhanced hand-eye coordination
- Increased technological literacy
- Career opportunities in a growing industry
- Development of teamwork and communication skills
- Potential for high income
- Enjoyment and personal fulfilment

[CHOOSE ONE]

How interested are you in participating in training programs related to gaming and esports, such as the HP Gaming Garage?

- Not interested
- Slightly interested
- Moderately interested
- Very interested
- Extremely interested

[CHOOSE MULTIPLE]

What do you perceive as the biggest barriers to accessing education and training in the gaming and esports industry?

- High cost of training programs
- Lack of information about available programs
- Limited access to technology or internet
- Insufficient support from parents or educators
- Cultural or societal perceptions about gaming careers
- Limited number of training facilities or institutions
- Language barriers in training materials

[CHOOSE ONE]

To what extent do you believe educational institutions (like universities or colleges) should play a role in promoting careers in the gaming and esports industry?

- No role at all
- A minor role
- A moderate role
- A significant role
- A central role

[CHOOSE ONE]

How supported do you feel by your educational institution in pursuing a career in the gaming and esports industry?

- Not supported at all
- Slightly supported
- Moderately supported
- Very supported
- Extremely supported

[CHOOSE ONE]

How supportive are your parents/guardian of you pursuing a career in the gaming and esports industry?

- Not supportive
- Slightly supportive
- Moderately supportive
- Very supportive
- Extremely supportive

[CHOOSE MULTIPLE]

Which skills and competencies do you believe are currently most needed in the gaming and esports industry?

- Technical skills (e.g., programming, game design)
- Soft skills (e.g., teamwork, communication)
- Artistic skills (e.g., graphic design, animation)
- Business skills (e.g., marketing, management)
- Understanding of gaming culture and trends
- Analytical skills (e.g., data analysis, strategic planning)
- Adaptability and continuous learning capability

[CHOOSE ONE]

What is your perception of the potential income for professionals working in the gaming and esports industry?

- Very low
- Low
- Average
- High
- Very high

[CHOOSE ONE]

Are you aware of any initiatives like HP Gaming Garage that provide education or training in gaming and esports?

- Yes
- No

[CHOOSE ONE]

Would you be willing to collaborate or support such programs?

Yes
No
Maybe

APPENDIX B:

Income expectation

As a gaming and/or e-sports professional, what is the monthly salary bracket that South Africans can expect, if they were to enter the industry?

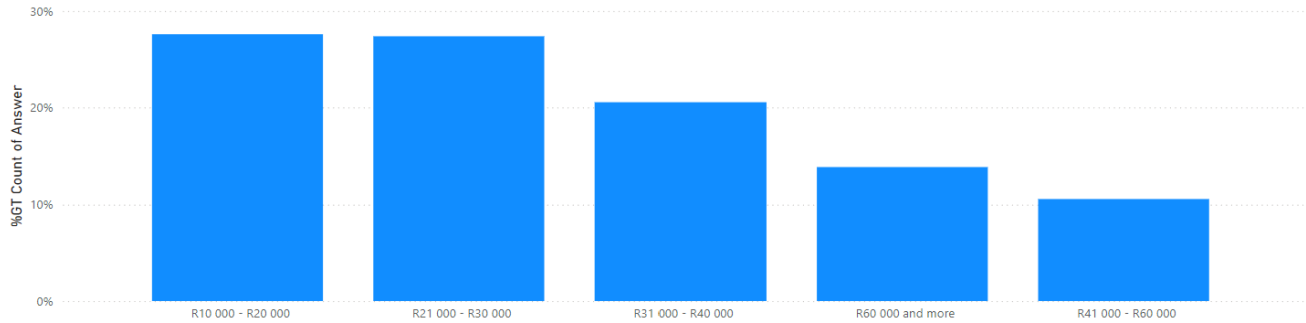


Figure 1: INCOME EXPECTATION