

Study on Scope, Growth, and Awareness of E-Sports in India

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Abstract: *Electronic sports (e-Sports, eSports) are gaining importance in terms of popularity and also in terms of its recognition. It has now been recognized by Olympic Council of Asia. This study covers three dimensions in terms of scope, growth, and awareness. Scope includes the number of games included in formal setup, types of e-games played across the country and its impact on sports industry and economy. Growth is measured in several terms viz. number of games, players, tournaments, spectators and sponsors. Awareness is measured by collecting primary data from the respondent and by using descriptive analysis. The study delivers that how e-sports can be one of the major segment in sports industry.*

Keywords: *E-Sports, E- Games, Video Games, Growth.*

I. Introduction

Whether you have played video games or even if you haven't touched a controller / game pad as yet you surely must have heard about e-sports. A business that is estimated to be \$1.5 billion by 2020. E-sports are a bit hard to understand with its jargon, and not exactly like the sports we typically associate with competition on a global scale.

II. E-Sports

Easiest definition to give is competitive video gaming at professional level. E-sports are also known as electronic sports, competitive video gaming, professional video gaming and many more. E-sports are form of organized multiplayer video game competitions, between professional teams and players depending upon nature of the game.

The very first video game competition took place on 19th October, 1972 at Stanford University for the game of Spacewar with grand prize being a year's subscription of Rolling stone with Bruce Baumgart winning the five-man-free-for-all tournament and Tovar and Robert E. Maas winning the Team Competition. The Space invaders Championship held by Atari in 1980 was the earliest large scale video game competition, attracting more than 10,000 participants across the United States, establishing competitive gaming as a mainstream hobby. During the 1970s and 1980s, video game players and tournaments began being featured in popular websites and magazines including Life and Time. One of the most well known Classic arcade game players is Billy Mitchell, for his listing as holding the records for high scores in six games including Pac-Man and Donkey Kong in the 1985 issue of the Guinness book of world records.

III. Evolution

After the internet took over many games started to be benefitted, especially PC games. As E-sports started to pick up many companies started to have e-sports competitions and tournaments. Nintendo World Championship toured around the United States in 1990 and held its Finale at Universal Studios Hollywood in California. Nintendo held its 2nd World Championships four years later in 1994 for the Super Nintendo Entertainment System called Nintendo PowerFest '94. There were a whopping 132 finalist that played the finals in San Diego, California. Mike Larossi took away the 1st Prize.

Looking at the popularity Blockbuster Video also conducted their own World Game Championships in early 1990s which was co-hosted by GamePro Magazine. Players from around United States, Canada, Australia, Chile and United Kingdom were eligible to participate and compete.

Tournaments started to establish in the late 1990s include Cyberathlete Professional League (CPL) QuakeCon, and Professional Gamers League. Games played at CPL include Counter-Strike series, Quake Series and Warcraft.

As e-sports started to gain importance many countries started to use it to their benefit. One such country was South Korea. It was mainly influenced by the broadband internet after the 1997 Asian Financial Crisis. It is also said that high rate of unemployment at the time caused people to look for something in their free time. In 2000 Korean e-Sports Association was formed to promote and regulate e-sports in the country.

During the 2010s e-sports saw a great jump in viewership as well as the in the prize money associated with it. From 10 tournaments in 2000 it went to 260 in 2010. Many new tournaments were found during this period, including the World Cyber Games, the Intel Extreme Masters, Major League Gaming and many more. In 2006 G7 team federation were formed by seven prominent Counter-Strike teams. It was formed to bring stability in the e-sports world, particularly to standardize player transfer and working with the leagues and tournaments. The organization only lasted for 3 years and eventually dissolved in 2009.

South Korea also established and made sure the competitions and tournaments are covered on televisions in the 2000s. WarCraft III and StarCraft were regularly aired on television on dedicated 24 hour channel for e-sports MBC Game and Ongamenet. German based GIGA Television tried to air but eventually was shutdown in 2009. Many players tried to air the e-sports but were eventually shutdown at some point of time.

It was the emergence and popularity of online services that helped the growth of e-sports in that period. Till date it has stayed to be the most common way or method of watching the game. Twitch launched in 2011 for streaming online the games played at e-sports reached 12 billion minutes of video on the service, with Dota 2 and League of Legends being the most popular. Twitch recorded 4.5 million unique users with each user watching 2 hours on average on one of the days of International.

Seeing the growth of e-sports many gaming companies started to embrace their video games in e-sports field. After many years of ignoring and at times suppressing the eSports scene, Nintendo hosted Wii Games Summer 2010. Spanning over a month, the tournament had over 400,000 participants, making it the largest and most expansive tournament in the company's history. Many other gaming companies started to have their own leagues to promote their games, one of which was the developers of Halo 343 Industries to revive halo.

Electronic Sports League, the largest eSports league in 2014 partnered with local brand Japan Competitive Gaming to try to grow the sport in the country.

Physical viewership of eSports competitions and the scope of events have increased in tandem with the growth of online viewership. In 2013, the Season 3 League of Legends World Championship was held in a sold-out Staples Center. The 2014 League of Legends World Championship in Seoul, South Korea, had over 40,000 fans in attendance and featured the band Imagine Dragons, and opening and closing ceremonies in addition to the competition.

In 2015, the first Esports Arena was launched in Santa Ana, California, as the United States' first dedicated eSports facility. In 2018, the Luxor Las Vegas will open the first eSports Arena on the Las Vegas Strip and additional locations are planned to open in the coming decade.

IV. Types

Video games which are played in professional competitions usually fall into a few major genres. The majority of eSports titles are Fighting games, First-Person shooters (FPS), Real Time Strategy (RTS), or Multiplayer Online Battle Arena games (MOBA), with the MOBA genre being the most popular in terms of participation and viewership.

V. Fighting Games

Competitions in the genre are generally individual competitions with both players providing input to the same machine. The genre originally focused on arcade play, but has gradually moved to console play as arcades have declined.

First-Person Shooter

First person shooters focus on simulating a firefight from a first person perspective, and may be either individual or team based.

VI. Real Time Strategy

Competitions involving traditional real time strategy games generally feature individual competitors competing on personal computers over a local area network or the internet.

VII. Sports Games

Games related to sports are involved in this genre. Games like FIFA, NBA, Real Cricket etc fall under this genre.

VIII. Multiplayer Online Battle Arena

Multiplayer online battle arena (MOBA) games are historically a spin-off of real-time strategy games, but are different enough that they are now generally considered a separate genre. While traditional RTS games feature

many units controlled by a single player, MOBAs are typically team focused, the model being five players on a team, each controlling a single "hero" unit. MOBAs are generally played on personal computers.

IX. Classification

It's still a debate in labeling video games as sports. While some point to the growth and popularity of eSports as the justification others say it can never achieve an image of true sport. There are reasons other than just the popularity, which state proper planning, precise timing, skillful execution is need. Video games are often said to be mind sports.

In 2013, Canadian League of Legends player Danny "Shiphtur" Le became the first pro gamer to receive an American P-1A visa, a category designated for "Internationally Recognized Athletes".

In 2014, Turkey's Ministry of Youth and Sports started issuing e-Sports Player licenses to players certified as professionals

In 2016, French government started to work on a project to recognize and promote eSports.

E-Sports Federation of India is trying to promote the sport in India. ESFI is a full member of International eSports Federation, Korea and Asian eSports Federation, Dubai.

The main objectives of ESFI are to promote, encourage, organize, educate, train, and control electronic sports in India. It also looks at making sure there is proper place to train. It is trying to build a sustainable eco-system for eSports in India.

E-Sports has been recognized by the Olympic Council of Asia. E-Sports will be first added as demonstration sport at next year's Asian Games. OCA says eSports will be added to official programme at Hangzhou 2022.

X. Facts



Asia Pacific accounted for 44% growth in audience in year 2016.

Asia is the largest market for e-Sports.

League of Legends World Championship-2015 Finals was watched online by 36 Million Unique viewers with peaks hitting to 14 Mn. again beating the last year stats.

Not only there is surge in spectators, the prize pools are setting world records, The International - 7 (TI7) had a prize pool of ~\$ 25 Mn

74% of revenue of e-Sports comes from ads and sponsors.

41.3% is the projected growth of e-Sports revenue year-over-year.

Thanks to the efforts of the International eSports Federation (IeSF), the Olympic Council of Asia (OCA) has included eSports in the Asian Indoor Games since 2007, where it was included as a demonstration discipline. Since the 4th Asian Indoor & Martial Arts Games, (Incheon Korea, 2013), eSports has been included as an Official Discipline.

In year 2013, the US Government officially recognized eSports as an official sport and granted visas for professional eSports players. ESports players are called Athletes not "nerds".

61% of eSports viewers are under the age of 35.

In June 2014, University of Illinois, USA, announced Athletic Scholarships to eSports players, and now we have 3 more universities who have started giving eSports Scholarships

One gamer, Spencer "Gorilla" Ealing, has earned \$250,000 in FIFA 17 tournament winnings over a one-year time period. On the other hand, Iain Hume of ISL club Kerala Blasters pockets an annual salary of \$215,000!

XI. E-Sports in India

e-Sports Federation of India handles the e-sports in India. Its main objectives as mentioned earlier are to encourage, organize, train, educate and control e-sports in India. It looks forward to provide training facilities and to build a sustainable eco-system for e-sports in India and not to restricting themselves just to organize events and tournaments.

The ESFI looks into official organization in complete and sole in charge of all eSports matters in India and to guard and enforce rules in co-operation with the States eSports Associations/Federations of the country and in full and complete collaboration with the Indian Olympic Association, to select and control the Indian eSports Contingent to the Olympics, Asian Games, Common Wealth & SAF Games and various other

International competitions under the patronage of the IESF, OCA, IOA other Federations Associations and to stimulate the interest of the people of the country in promotion of eSport
Its mission is to Lead, Grow and Support e-Sports in India.

Another player in India is Nodwin gaming which is the premier and most recognized esports company in the country. It NODWIN gaming has played a vital role in developing the sport in the last decade. It has partnered with ESL and ESWC to popularize competitive gaming in the country.

NODWIN gaming also produces additional online content on gaming and esports such as esports centers and the Games and Gadget show.

NODWIN gaming came up with a study '**How Indian eSports works with medicine**' where they showed, need of professional dedicated doctors to look after eSports athletes and their problems.

Flipkart VP Adarsh Menon of Electronics and Auto Department said there are 10 million serious online PC gamers & 30% of today's youth engage in online gaming at least once a day.

The average age of these gamers is from 16 to 27 years.

40% of men and 35% of women play at least 5 days a week.

XII. E-Sports at global level

The eSports market is experiencing a rapid growth, despite being in its formative stage. In 2016, worldwide revenues generated in the eSports market amounted to 492.7 million U.S. dollars. By 2020, the market is expected to generate over 1.48 billion U.S. dollars in revenues, which indicates a compound annual growth rate of 32 percent. These revenues came from betting, prize pools and tournaments, but overwhelmingly from sponsorship and advertising, which brought in almost 661 million U.S. dollars in 2016. In terms of revenue, Asia was the biggest eSports market overall, followed by North America and Europe.

From the DOTA 2 competitions offering millions of dollars to winning players, to Call of Duty extending its reach into the million-dollar prize pools, eSports is gradually becoming a worldwide profession for individuals. As of February 2017, The International 2016 was the leading tournament of all time, in terms of overall prize pool. And so, many gamers see the appeal of such rewards and partake in numerous tournaments and championship, either as individual contestants or in teams. Among the leading players known to the industry is the U.S. player Peter Dager, who earned 2.62 million U.S. dollars throughout his recorded eSports gaming career. However, female eSports players still earn considerably less, with Sasha Hostyn, known as Scarlett, having recorded overall profits of 171 thousand U.S. dollars as of March 2017. All in all, with the constantly growing eSports market, the earnings are bound to grow and attract masses of new, skilled players.

In its latest eSports market report, market researcher Newzoo thinks eSports at large will make \$696 million in revenue in 2017, with its total audience - be it hardcore fans or those who just watch the bigger game championships - reaching 385 million. By 2020, Newzoo projects, those will reach \$1.48 billion and 589 million, respectively. (That revenue figure doesn't include money made from eSports-related gambling, either.) That'd still fall well behind major sports leagues like the NFL and NBA, and the relative inscrutability of, say, "League of Legends" - the most popular competitive video game in the world - still makes it harder for newcomers to get into. Plus, while sports media titans like ESPN has stopped ignoring the trend, some of their forays into gaming haven't been popular.

But eSports' fans are overwhelmingly young and online, media and tech giants are increasingly dipping their toes in the sport, and more and more game developers are building their titles to have eSports-friendly features. Put it all together, and these sorts of expectations may not be unreasonable.

XIII. Platform

Combined eSports and gaming market is estimated to be around Rs.3900 Crore with more than 2000 teams consistently participating in tournaments in India and across with over 50 crore players worldwide.

Recently, eGamers Arena partnered with World Cyber Arena (WCA) to host the national qualifiers in India for a championship to be held in China at the end of this year. There is a \$28-million jackpot that winner of online games like *Counter Strike* and *Overwatch* get to take home.

Last year, ESL partnered with Indian eSports gaming company Nodwin to announce a domestic gaming tournament with Rs 42 lakh in cash prize pool.

Mobile game publisher Nazara Games has committed Rs 136 crore in its eSports venture.

Many well-known companies and gaming giants have had leagues and tournaments in Indian market but the recently concluded U Cypher which aired on the youth channel MTV has turned the tables for Indian gamers giving them a platform so that they can make careers in eSports.

UCypher- platform for Indian gamers

Ronnie Screwvala founder of U Sports, and Supratik sen, Co-Founder and CEO of U Sports launched a league known as U Cypher. It was a month long championship which was aired on MTV.

The difference between U Sports and other companies is that, they focus on single sport, some are team owners in a league and some own a league, but U Cypher is combination of both.

Total of 84 players were handpicked which made six teams with 14 players in each team. Teams competed against each other in games like DOTA:2 , Counter Strike: Global Offense both of them being PC games. Real Cricket 2017 a mobile game and Tekken 7 on PS4.

The teams that played were Yakshas, Marksmen, Sherdils, Akramaks, Yodhas, and Crusaders.

Yakshas won the championship by defeating the Sherdils.

Final 4 teams played in knockout style to determine the winner. It was noted that the total pool prize was Rs.51 Lakhs.

About Players

When it comes to Indian e-Sports, only a handful of players stand tall than the rest. Being on top isn't easy given the competitiveness of eSports. The drive for eSports players is that they want to be the best at the highest level. They are like other athletes who practice day and night. Be it MOBAs like DOTA: 2, or the first-person shooters like Counter Strike: Global Offense. The amount of dedication to master a game is massive as there are more barriers than a usual sporting game.

Let's look at some of the best players in India

Ishpreet "HuNr" Singh Chadha	CS:GO
Raunak "Crowley" Sen	Dota 2
Mrinmoy "MRIN" Lakhar	Clash Royale
Ankit "Venom" Panth	CS:GO
Kshitij "Killerpriest" Bawa	OverWatch
Balaji "BlizzarD" Ramnarayan	DOTA 2
Sudin "The HeadMaster" Dinesh	FIFA
Moin "No Chanc3" Ejaz	Dota 2

The above players are the best players in their respective fields and play local as well as global tournaments.

XIV. Literature Review

Khaitan, A. (2017). Online gaming in India: Reaching a new pinnacle. The study gives overview of online gaming in India. The overall study analyzes about an Indian gamer and things revolving around him. This study helps to show the scope and growth of online gaming in India. The outcome of this research has led to the conclusion that there is growing popularity for online gaming.

Sachitanand R. (2018). Gaming Industry is seeing a boom as firms cash in on everything. The study talks about the gaming companies that have started to invest money in the upcoming youth E-Gamers. It also talks about the opportunities for gamers of every genre. The conclusion that can be derived from this study is that the tide is turning in gaming industry's favor.

Mallya H. (2018). 3 companies looking to make e-sports mainstream in India. The article talks about the companies that are trying to make e-Sports big in India. The article also states the popularity and growth has had the effect that e-sports are now functioning like other professional sports leagues. It was also found that e-Sports is going to be a medal event in 2024 Olympics. Conclusion derived from this study is that the companies are spending huge in development of E-Sports.

Gambit. (2017). U Cypher announces details for Season 1 of its Indian Esports League. AFKGaming. The study talks about the Indian Online gamers and their excellence in the gaming industry. It also adds about the UCypher tournament that happened in India to promote e-Sports in India. It shows how many gamers participated and who came out as the winner. By the study we can conclude that Indian E-Sports is growing rapidly and is something that we need to watch out for.

XV. Objective

1. To study the scope of e-Sports in India.

The areas covered under scope are players, tournaments, companies etc. Scope helps to understand the total coverage of the sport played in the country. It also helps to understand about the various companies that have put money in e-Sports and the various industries and economies affected by it.

2. To measure the growth of e-Sports in India.

Measurement of growth is done by analyzing the market and taking the current scenario and comparing it with the scenario years ago. It is been seen that there is tremendous growth in terms of players taking the sport and tournaments that have taken place.

3. To assess awareness of e-Sports.

By assessing the market size in India and comparing it with other e-Sports playing nations. Companies like Nazara, NODWIN, etc have contributed in creating awareness about e-Sports in the country.

XVI. Research Methodology

The study is based on quantitative and survey research. Quantitative because research is based on quantified facts. It is a survey research because it focuses on the primary data for collecting information from the people of Mumbai.

Data Collection

Primary Data: Primary data was collected from people living in Mumbai with the help of well designed and structured questionnaire. The sample size of the questionnaire is 60. It was collected by convenience method.

Secondary Data: Secondary data was collected through reports, articles, official websites and newspapers.

Sampling is done by convenience method.

Descriptive statistics was used to analyze the research.

Scope of study: The study covers important areas like gaming styles, gaming patterns, average age, psychology towards the sport etc which will be beneficial for the related areas.

XVII. Analysis

Table No.1
Revenue (in \$ Mn)

Year	2012	2014	2015	2016	2017	2018*	2019*	2020*	2021*
Revenue	130	194	325	493	655	906	1187.4	1488.1	1650

*- Forecasted

Source: Newzoo (Modified)

Table No.1 shows that by 2021 Esports industry is expected to be of 1650 Million US dollars which is more than 12 and half times that of 2012 which shows exponential growth in terms of Revenue.

Table No.2
Growth of Audience (in MN)

Year	2015	2016	2017	2020*
Enthusiast	120	162	191	286
Occasional	115	161	194	303
Growth	-	36.6%	19.6%	20.1%

*- Forecasted

Source: Newzoo (Modified)

Table No.2 shows the growth of audience to reach 286 Million of enthusiast audience and 303 Million of occasional viewers. The growth of occasional viewers is faster as compared to enthusiast from which it can be interpreted that the awareness for Esports has increased. Also occasional viewers can be shifted to enthusiast once they find a game of their interest.

Table No.3
Prize Money Development (in \$ MN)

Year	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Amt	4.4	6.1	6.4	3.5	5.2	9.7	13.1	19.8	36	61	93.3

Source: Newzoo

Table No. 3 shows that the total prize money involved in Esports is 93.3 Million US Dollars which is more than 2100% growth as compared to 2006 which shows that in 10 years time prize money has grown phenomenally.

Chart No.1

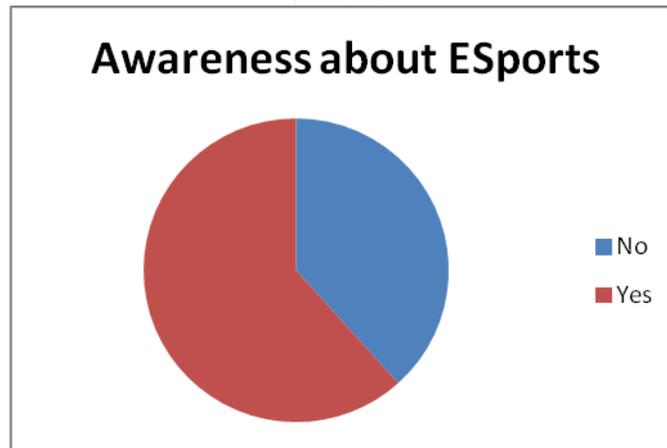


Chart no.1 shows 62% i.e. 37 people were aware about Esports and 38% i.e. 23 people were not aware about ESports out of the total 60 people.

Chart no.2 Physical games

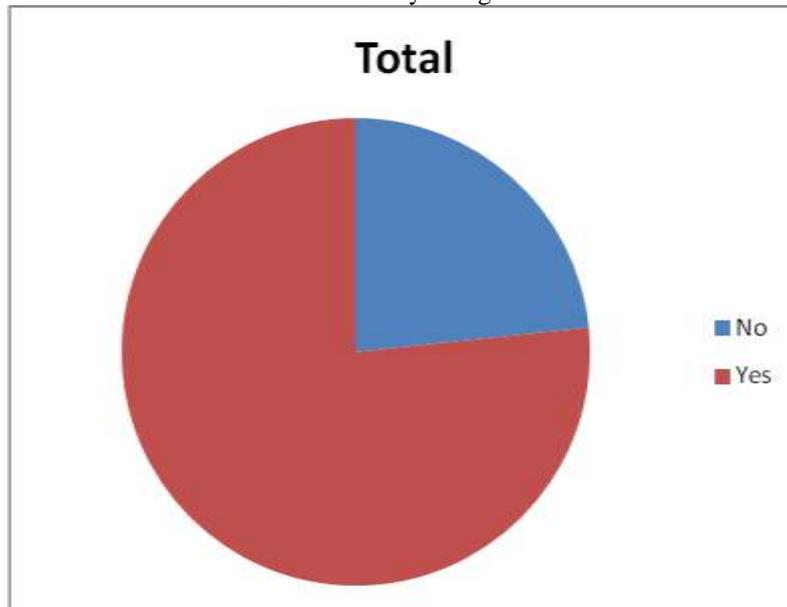


Chart no. 2 shows that 76% i.e. 46 people play physical sports where as 24% i.e. 14 people don't play any kind of physical games.

Chart no.3 PC Games

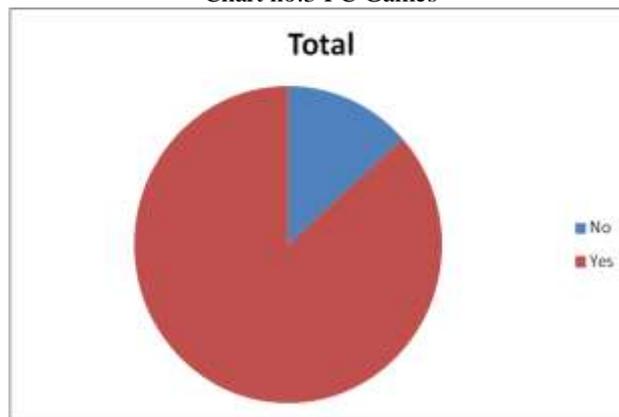


Chart no.3 helps to understand how many people play PC or mobile games. About 86% people play on mobile games which is 52 people and only 14% i.e. 8 people do not play on Mobiles or PC.

Chart no. 4 how often do you play

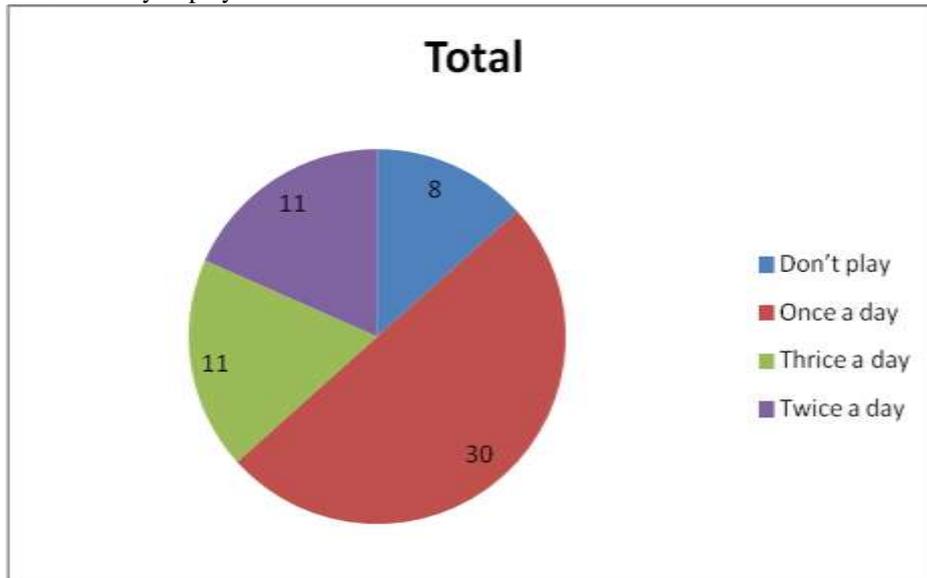


Chart No. 4 helps to recognize how often people play on their mobile phones.

14% people do not play any games

50% people play at least once a day on their mobile phones.

18% people play twice on their mobile phones.

18% people play as many as three times a day on their mobile phones

Chart no.5 Professional sport or no

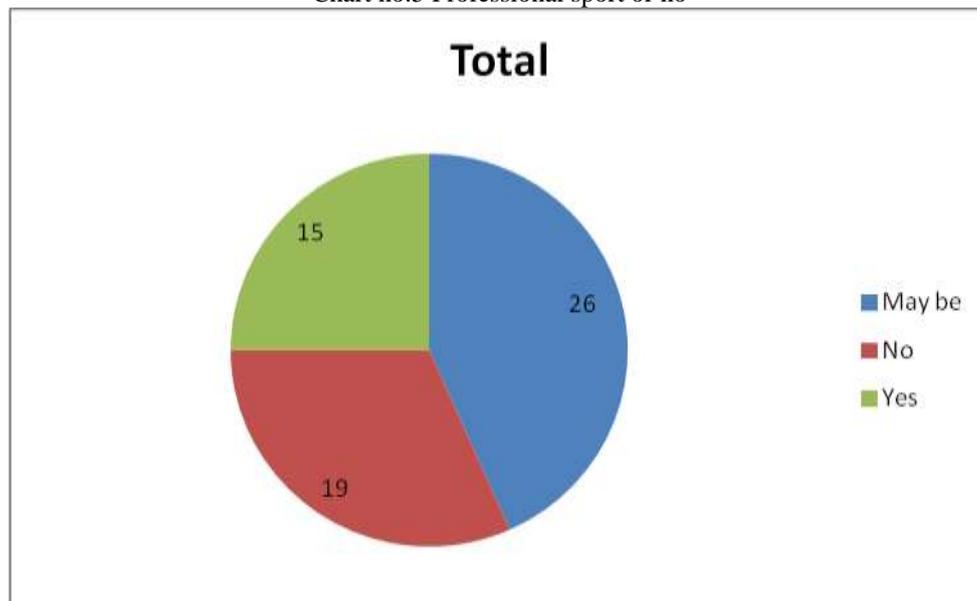


Chart no. 5 shows that

44% people are still not sure if ESports can be considered as professional sport or no.

31% people believe ESports is not a professional game.

25% people think ESports should be considered as a professional game as it requires certain skills.

Chart No.6 players to be athletes

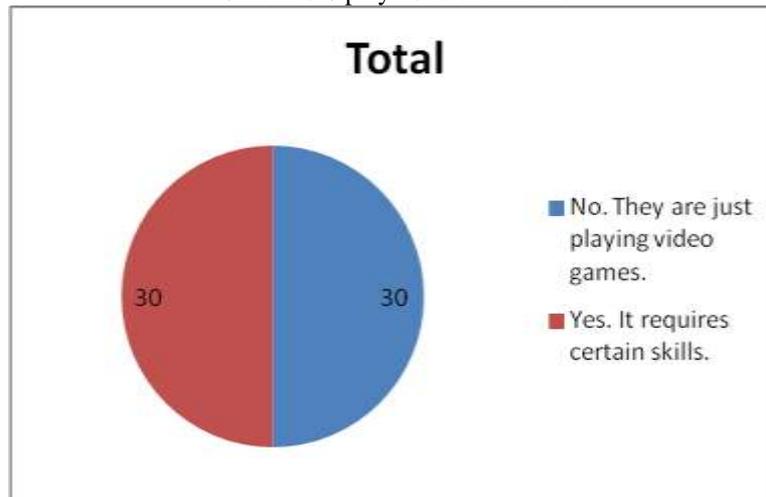


Chart no 7 shows what people think about eSports players
50% people think players are just playing video games whereas
50% people think players who play eSports are athletes because it requires certain skills to master a game.

Chart no 7 Prize pool

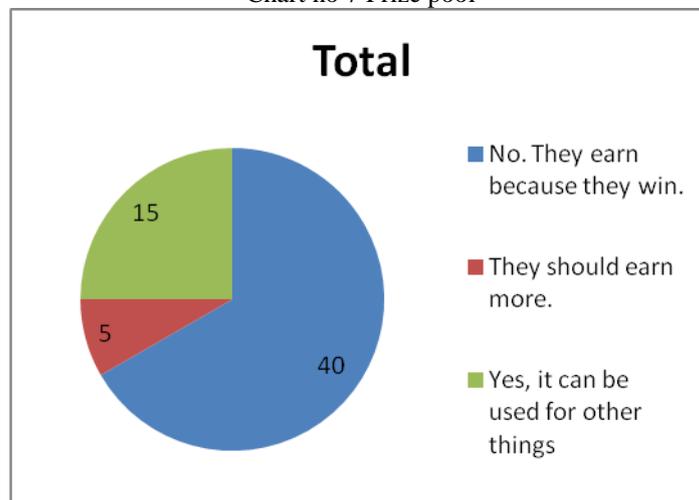


Chart no.7 helps us to understand the thinking of people towards prize money earned through eSports
67% people think its okay to earn through playing eSports.
8% people think players/ athletes should be making more money.
25% are against making money through eSports. They think the money can be used in other activities.

XVIII. Findings and Conclusion

It was found out that e-Sports will be a medal event at 2022 Asian Games. The research paper shows the acceptance of competitive gaming (e-Sports) in today's world. Research speaks about the increasing number of players taking e-Sports as a carrier option. Also many companies have shown keen interest by organizing different e-Sports tournaments throughout the year.

The study also speaks about the growing trend of competitive gaming. Many new players have started playing E-Sports on a professional level. These players are scouted by companies and are offered contracts to represent them at different tournaments.

The growth can be seen by the number of spectators and gamers that have kept increasing on and off the field. Many occasional viewers have turned into hardcore e-sports enthusiasts.

There were positive feedbacks when asked to people about the future of e-Sports as well as what they think about making money by playing video games.

People are now accepting competitive gaming as a global sport.

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