

A PROJECT ON Adoption of eSports In Mumbai

BY

Akash Rathore

SUBMITTED TO

Department of Sports Management

Nagindus Khandwala College of Commerce, Arts and Management Studies,

Mumbai - 400064

In partial fulfillment of the requirements for the degree of  
Bachelor of Management Studies - Sports Management - Sem VI

Academic Year 2021 - 2023

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Malad Kandivali Education Society's

**Nagindas Khandwala College of Commerce, Arts and Management  
Studies (Autonomous)**

Department of Sports Management

**CERTIFICATE**

This is to certify that Mr. Akash Rathore has successfully completed the Dissertation as a part of the semester VI syllabus title Adoption of eSports in Mumbai under the guidance of Dr Deepak Gupta during the Academic Year 2022-2023.

**Prof. Dr Deepak Gupta**

**Co-ordinator**

**Principal**

**Date:** 10/3/23



DECLARATION

I wish to state that the work embodied in this dissertation titled Adoption of eSports in Mumbai is my own contribution. The Dissertation is carried out under the guidance of Dr Deepak Gupta in this academic year 2022-2023.

**SIGNATURE OF THE CANDIDATE**

  
(Mr. Akash Rathore)

PLACE: MUMBAI

DATE: 04/03/23

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**Mr. Akash Rathore**

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## Chapter 1

### 1. Introduction

#### What is esports?

eSports, also known as e-Sports, ea games, or electronic sports is organized competitive video gaming.

It primarily involves teams competing against each other in tournaments for a cash prize. Functionally, it's the same as traditional sports. Top-level athletes are constantly vying for the top spots in their sport, or game, of choice.

Esports (short for electronic sports) is a form of competitive video gaming where players and teams compete against each other in organized tournaments and leagues. These events are often held in large arenas or online platforms, and attract huge audiences of fans who watch the games being played live or through streaming services.

Esports can involve a wide range of video games, but some of the most popular ones include first-person shooters like Counter-Strike: Global Offensive and Call of Duty, multiplayer online battle arena games like League of Legends and Dota 2, and sports simulations like FIFA and NBA 2K.

Professional esports players can earn significant amounts of money through prize money, sponsorships, and advertising deals. The industry has grown rapidly in recent years, and is now recognized as a legitimate form of sports competition, with some events even being included in major international sporting events like the Asian Games and the Olympics.

Put simply, eSports are electronic sports. Organised competitive gaming events in various leagues with teams and players battling it out for victory. Grand prizes are on offer, as is the prestige of being crowned champion(s).

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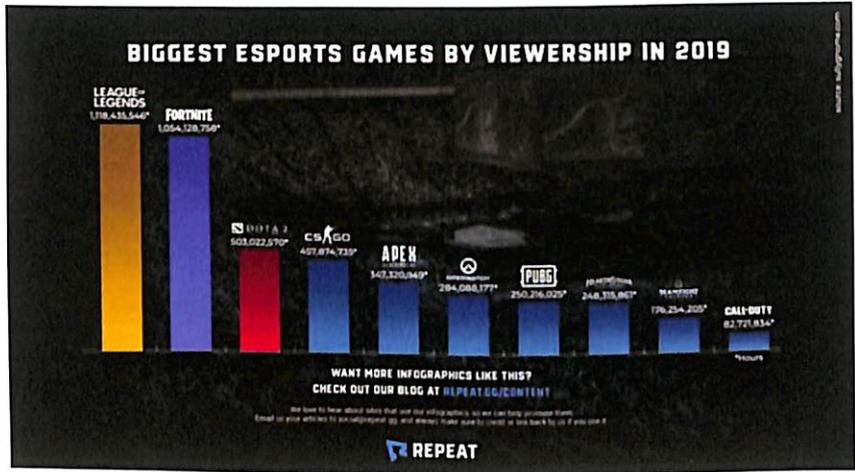
The very best players are essentially competing to become the best in the world at their favourite game. The winning teams or individual players can expect to potentially receive millions in prize money, as well as in more funding from sponsorship, endorsements and team salaries.

This industry includes not only traditional sports-related games like NBA2K and FIFA, but also—and more notably—games such as League of Legends, Counter-Strike, and Dota.

The players can engage with their fans in a variety of ways including social media, live-streaming platforms, and in-person at tournaments. On the other side, fans can watch and follow their favorite teams compete in regional and global tournaments. Many technology platforms, services, events, analytics platforms, and substantial investor capital surrounds this ecosystem as it continues to grow.

Esports is also unique in that a player's success is independent of how tall, strong, thin, or fast they are. Though there is certainly valuable insight linking good physical health to enhanced gamer performance, it is ultimately inconsequential whether the gamer stands at 5'2 or 6'8 tall. They can both excel at the highest levels of League of Legends, CS:GO, Dota 2, or any other game. Esports can further level the playing field for factors such as gender, culture, and location. This democratization of participation contributes to esports' allure and its generation of a globally engaged fan base.

Additionally, whereas traditional sports have physical/spacial limitations, esports is more fast-paced and scalable because of its reliance on digital platforms. For example, it'd be impossible to make basketball a 100 versus 100 sport, as a court could not feasibly fit 200 players. In esports, however, new games with infinitely scalable dynamics, variances, and players can be created. In fact, a new installment of, or update to, an established game franchise can hold massive implications. For example, when 2013's Call of Duty: Ghosts was released, players and viewers had to transition from the 2012 version by learning twelve new multiplayer maps. When updates are released to established games, it causes a massive learning curve as game dynamics and strategies can dramatically evolve.

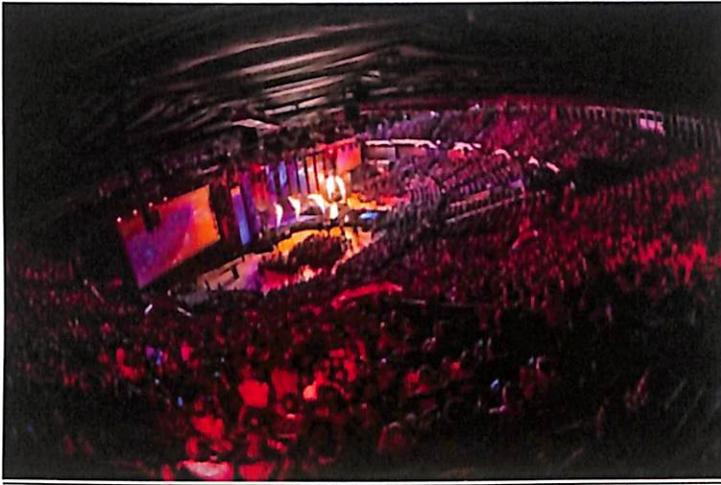


Intel started pushing eSports with the first **Intel Extreme Masters** gaming

tournament back in 2007 at **CEBIT**. Competitive gaming had been around as an idea a while before that too, with players always wanting to show that they were better than their friends. It's been going a lot longer than that though

The community wanted a move towards organised, stadium-based tournaments and that's where ESL and Intel stepped in.

Worldwide viewership of eSports competitions has helped push popularity into the mainstream. To the point that Intel has even tried to get eSports officially recognised by the International Olympic Committee by bringing season 12 of the Intel Extreme Masters to Pyeongchang during the 2018 Winter Olympics.



### How big is eSports?

eSports is a continually growing industry, both in popularity and money. In 2017, eSports had an estimated worldwide revenue of £565 million. In 2021, **according to Statista** the global market for eSports was valued at over a billion US dollars. Increasing by over half from the year before.

Event attendance at the big stadium competitions is increasingly on the rise as fans make an effort to watch their favourite teams compete, but **online viewing is increasing too**.

During the 2018 **League of Legends Mid-Season Invitational**, 60 million unique viewers tuned in to watch, consuming a combined 363,000,000 hours of footage. The Intel Extreme Masters World Championship 2017 saw 46 million unique online viewers. Both these events had significantly more viewers than the **televised inauguration of President Trump** which gives you an idea of how significant this industry is.

In 2021 it's estimated that **474 million people** watched eSports worldwide.

In 2017, a **YouGov report** published data that found that around just seven per cent of British adults (around four million people) had watched eSports gaming. As a nation, we still lag behind other countries that take eSports much more seriously.

### Why Esport is important in Gaming Industry?

Firstly, esports has had a significant impact on the gaming industry itself. As the popularity of competitive gaming has grown, video game developers have increasingly focused on designing games that are suitable for esports. This has led to the creation of games that are more balanced, competitive, and engaging, as developers strive to make their games popular among esports players and audiences.

Esports has also led to the development of new technologies and gaming infrastructure. In order to support the growing demand for competitive gaming, companies have invested in new gaming equipment and infrastructure, such as gaming chairs, gaming monitors, and high-speed internet connections. These innovations have not only improved the gaming experience for esports players, but have also led to new business opportunities and revenue streams for gaming companies.

Moreover, esports has emerged as a significant source of revenue for the gaming industry. Esports tournaments and leagues have attracted huge audiences of fans, both online and offline, who are willing to pay to watch their favourite players and teams compete. This has led to the creation of a new esports economy, with players, teams, and event organizers earning significant amounts of money from prize money, sponsorships, and advertising deals. According to a report by Newzoo, the esports industry generated over \$1 billion in revenue in 2020, and this figure is expected to grow rapidly in the coming years.

However, esports is not just important for the gaming industry; it also has broader cultural and societal significance. One of the key benefits of esports is that it provides a platform for diverse communities to come together and connect over a shared passion for gaming. Esports has become an inclusive and welcoming space for people of all ages, genders, and

backgrounds, and has helped to break down traditional barriers to participation in sports and competitive events.

Esports has also been recognized as an important tool for education and personal development. The strategic and analytical skills required to succeed in competitive gaming can help players develop important life skills, such as problem-solving, communication, and teamwork. Moreover, esports has been used as a tool for teaching digital literacy and coding skills to young people, helping to prepare them for the increasingly digitalized workforce of the future.

Esports has also emerged as a significant cultural phenomenon, with a growing fan base and a vibrant community of players, teams, and content creators. Esports events have become major cultural events, attracting millions of viewers and generating huge amounts of social media engagement. This has led to the emergence of a new form of celebrity culture, with esports players and content creators becoming role models and influencers for young people around the world.

Finally, esports has significant potential as a tool for social and economic development. Esports events have the potential to attract large numbers of tourists and generate significant revenue for host cities and regions. Moreover, esports can help to promote economic development by creating new business opportunities, such as esports teams, content creators, and event organizers. In addition, esports can be used as a tool for promoting social development, by fostering community engagement, promoting cultural exchange, and supporting social initiatives.

In conclusion, esports is an important and rapidly growing industry with significant impact on the gaming industry, society, and culture. Esports has led to the development of new technologies and infrastructure, provided a platform for diverse communities to connect, and created significant revenue and economic opportunities. Moreover, esports has emerged as a tool for education and personal development, and has significant potential for social and economic development. As esports continues to grow and evolve, it will be important for

stakeholders to continue to support its development and ensure that it remains an inclusive, engaging

**In China, for example, around 45 per cent of adults have watched eSports online.**

Passion for eSports and competitive gaming is growing within UK though. Thanks, in part, to the rise in popularity of video game streamers, YouTuber content creators and the increasing popularity of Twitch.

In 2018 Scott Gillingham from Intel told us:

"The UK is the fifth-largest gaming market in the world. That comes down to people buying games and the hardware to play games. The eSports industry side of it is still growing and it's underdeveloped compared with other parts of the world. The US is one of the top gaming countries in the world and their eSports industry is massive.

This year has been a real growth area for eSports in the UK. We've seen more tournaments with the likes of **ESL One**. It's the first time that ESL bought a major to the UK. It sold out in 24 hours and it was one of the quickest selling **ESL tournaments** globally. Over 24,000 people attended that event over three days. We are seeing that industry and the community growing in the UK and we're seeing more eSports events coming to the UK.

**Newzoo** looks at the size of gaming markets in the UK and around the world. A lot of it is measured by the sales of games and data they get back from companies like ESL. In the UK in 2017, according to Newzoo research, there were **over 33 million gamers in the UK**. Of that, 12 million of those gamers are gaming on PC. We do see that growing as well. The data also shows PC gaming growing between two and three per cent year-on-year.

People are watching eSports and following gamers and a lot of that is PC based. They're getting a lot of information about the best experience that way as well. This is probably why we're seeing the PC gaming side of the market growing a bit too.

To give you an idea, we're seeing double-digit growth from our side of the business in gaming. We're continually seeing that growth happening."

A simpler way of showing how popular eSports has become can be seen with a quick Google search for the phrase "lol". No longer does this search bring back a definition for the acronym (laughing out loud) but it instead returns a long list of results related to League of Legends. That game has been one of the most popular games in eSports for a while now.

Historically, there's been a stigma around eSports and that's changing too.

Scott Gillingham put it best:

"There is a certain stigma that a gamer sits at home in their basement, playing games and isn't sociable, but that is lifting.

An event like **EGX** shows how gamers are very sociable. They're online, they're recording, they're talking to each other through headsets, they're streaming what they're doing via Twitch with their community and they're coming to big events like **EGX**.

As the gaming industry grows, that stigma is disappearing. eSports helps remove that stigma, with the Intel Extreme Masters, for example, there are 173,000 people sitting in a stadium watching eSports - it shows it's a big growing thing."

What games are played by eSports teams?

Passion for eSports comes from all angles and there are many different games with communities formed around them that people love. There are a variety of games being played including racing games, first-person shooters, strategy card games and more.

Historically the most popular games have been League of Legends, CS: GO, Hearthstone, DOTA 2, StarCraft and Rainbow Six Siege.

Recently though, the staggering popularity of Battle Royale games like **Player Unknown's Battlegrounds** and **Fortnite** have pushed those games into the eSports arena too.

This has come with some challenges as traditionally eSports games have been small teams five vs five or six vs six, bigger games make it challenging to present an interesting broadcast.

This was nicely summed up during our chat with Scott Gillingham:

"ESL got the ability to hold the EU qualifiers for the PUBG invitational here in the UK in Leicester. They had to have a three-tier stage to get all 20 teams on there and that was challenging for them, but the spectacle that it created was amazing.

This raises some challenges, as does viewing it online. You're looking over a map with all these teams converging and then zooming in on the action as it happens, that's probably a broadcaster's nightmare."

James Dean talked to us a bit about those challenges too: "...the challenge was how do you find where the action is happening and broadcast that live. We had literally a whole wall of TVs and virtual camera directors looking and trying to spot what's happening and were. We had feeds of 80 players coming in and manually trying to find what's happening to make it interesting.

The spectator side of things is being retrofitted and developed for the game and is only just coming out. Fortnite also has the same challenge, but they're working on it and it's getting a lot better.



We find that a lot - the gaming industry is a lot different to the eSports community and they've not necessarily spoken to one another and when a game becomes super successful, in that eSports environment it becomes tricky.

There are a lot more game developers who have grown up with eSports in their lives and know about it and want to put features into the game to accommodate it."

Ubisoft's **Rainbow Six Siege** was built from the ground up with a focus on eSports to begin with. The developers knew the game would be a great fit for competitive gaming and implemented tools to allow for interesting live broadcasts during competitions.

Differing viewpoints, in-game stats, birds-eye overviews as the game plays out make the game engaging and incredibly appealing to watch for live viewers.

### How can you get started in eSports?

For passionate gamers, getting into eSports might be easier than you think. James Dean, CEO of ESL UK explains:

"eSports has no barrier to entry. If you're a gamer, you're a gamer. If you want to step up your game and play in a competition you can do so. If you're really great and you practice a lot you might be on a big stage winning a million dollars. And that's open to everyone in the large part. It's about making opportunities for anyone to do anything."

Most competitive players get into professional gaming by starting out playing casually. They then join a team, then start taking it a bit more seriously - joining an organisation and aiming for higher levels.

Players can **register and start competing** with relative ease too. Other players have managed to get into the industry in usual ways too. Previously, UK football teams **Manchester City** and **West Ham** have signed eSports players - showing a move into the mainstream.

### How much can eSports players earn?

We've written before about **how much eSports players can earn** if they win competitions. There's also money in sponsorships, endorsements and more if you're good enough.

James Dean from the ESL warns that there isn't quite enough money to earn a wage for most people at the moment though:

"In the UK, you can't currently go full time at a national level, there's not enough money in it. But it is growing - in three- or four-years' time there will be people playing at a good level, playing in a national team, earning a good wage, with an aspiration to go higher."

It's the international competitions where the money comes from. As an example, the DOTA 2 finals in 2016 had the largest prize pool of the time, totalling \$20 million with \$9 million of that being awarded to the winning team.

Epic Games, the company being Fortnite announced its intention to provide a \$100 million prize pool for Fortnite competitions during the first season of competitive play. This gives you an idea of earning potential of winning teams.

Of course, it's not just the competitions where professional gamers can make money. The very best players are also making money on YouTube and Twitch. Famous professional gamer Tyler "Ninja" Blevins revealed he makes around **\$500,000 a month** streaming to his fans on Twitch.

Ninja himself is a professional gamer and has been competing since 2009 with various eSports teams including Cloud9, Renegades and Team Liquid. It's only recently that he's become a household name, but he's also a prime example of how well gamers can do with enough commitment.

Other professional gamers have turned gaming into a day-to-day career choice. Sacriel, for example, plays and streams via Twitch eight hours a day, six days a week. Quite a day job.

### Esports in Mumbai-

Esports has been rapidly gaining popularity in Mumbai, one of the largest and most populous cities in India. While the adoption of esports in Mumbai is still in its early stages, there are a number of factors driving its growth and making it an attractive destination for esports enthusiasts.

One of the key factors driving the growth of esports in Mumbai is the city's thriving gaming culture. Mumbai is home to a large number of gaming cafes, where gamers can come together to play and compete with each other. These cafes provide a social and supportive environment for gamers, and have helped to foster a vibrant gaming community in the city.

Moreover, Mumbai is home to a number of gaming and technology companies, which have been instrumental in the development of the esports industry. These companies have invested

in the development of gaming infrastructure, such as high-speed internet connections and gaming equipment, which has helped to improve the quality of esports events and tournaments in the city.

In addition, Mumbai has a large and growing youth population, which is increasingly interested in gaming and esports. This has led to the emergence of a new generation of esports players and enthusiasts, who are driving the growth of the industry in the city.

Another factor contributing to the adoption of esports in Mumbai is the city's growing recognition of the economic and social benefits of the industry. Esports events have the potential to attract large numbers of tourists and generate significant revenue for the city's hospitality and entertainment industries. Moreover, esports can be used as a tool for promoting education, personal development, and community engagement, which is increasingly important in a city with significant social and economic challenges.

As the industry continues to grow and evolve, it will be important for stakeholders to work together to ensure that the industry is able to reach its full potential and provide benefits to all stakeholders involved.

Esports has been gaining traction in Mumbai, one of the largest and most populous cities in India. The city has a vibrant gaming culture and a growing number of gaming cafes, which provide a social and supportive environment for gamers. Moreover, Mumbai is home to a number of gaming and technology companies that have been investing in the development of gaming infrastructure, such as high-speed internet connections and gaming equipment, which has helped to improve the quality of esports events and tournaments in the city.

The adoption of esports in Mumbai has been driven by the growing interest in gaming and esports among the city's youth population. Esports events have the potential to attract large numbers of tourists and generate significant revenue for the city's hospitality and entertainment industries. Furthermore, esports can be used as a tool for promoting education, personal development, and community engagement, which is increasingly important in a city with significant social and economic challenges.

However, the adoption of esports in Mumbai faces several challenges, including the lack of infrastructure and resources to support the growth of the industry. While there are a number of gaming cafes and technology companies in the city, there is still a need for more investment in gaming infrastructure, such as dedicated esports arenas and training facilities.

Another challenge is the lack of recognition and support from the government and other stakeholders. While there is growing awareness of the potential of esports in the city, there is still a need for more support and investment from the government and other stakeholders to help the industry reach its full potential.

Despite these challenges, the future of esports in Mumbai looks promising. The city's vibrant gaming culture and growing youth population provide a solid foundation for the growth of the industry. Moreover, as the industry continues to evolve, there is significant potential for esports to become a major industry in Mumbai, providing economic and social benefits to the city and its residents.

Esports in Mumbai are carried out through a variety of platforms and events. Here are some of the ways in which esports are carried out in Mumbai:

1. **Gaming cafes:** Gaming cafes are popular in Mumbai and provide gamers with access to high-quality gaming equipment and fast internet connections. These cafes are a popular destination for esports enthusiasts, who come to play and compete with each other in games such as Dota 2, Counter-Strike: Global Offensive, and Fortnite.
2. **Online tournaments:** Online tournaments are a popular way for esports players to compete with each other in Mumbai. These tournaments are often organized by gaming communities, esports organizations, or gaming cafes, and offer players the chance to compete for cash prizes and recognition.
3. **LAN parties:** LAN parties are gatherings of gamers who bring their own computers or consoles to play games together in a local area network (LAN) setup. LAN parties are often organized by gaming communities and can be a great way for gamers to connect with each other and compete in esports tournaments.

4. Esports events: Esports events are a growing phenomenon in Mumbai, with a number of events taking place each year. These events bring together gamers, fans, and industry professionals from all over India and the world to celebrate esports and compete in tournaments.
5. Esports arenas: Mumbai is starting to see the development of dedicated esports arenas, which are designed to host large-scale esports events and tournaments. These arenas are equipped with high-quality gaming equipment, fast internet connections, and seating for spectators, and are a sign of the growing importance of esports in the city.

Overall, esports in Mumbai are carried out through a combination of online and offline platforms, and there are a variety of ways for esports enthusiasts to get involved and compete in tournaments. As the industry continues to grow in Mumbai, we can expect to see more events, tournaments, and gaming infrastructure being developed to support the esports community in the city.

The future of esports in Mumbai looks very promising. Here are some of the reasons why:

**Growing gaming culture:** Mumbai has a vibrant gaming culture, with a large and growing community of gamers and esports enthusiasts. This community provides a strong foundation for the growth of the esports industry in the city.

**Thriving technology sector:** Mumbai is home to a thriving technology sector, which includes a number of gaming and tech companies that are investing in the development of gaming infrastructure and esports events. This investment is helping to improve the quality of esports events and tournaments in the city.

**Large youth population:** Mumbai has a large and growing youth population, which is increasingly interested in gaming and esports. This demographic provides a large and growing audience for esports events and tournaments, and creates opportunities for the development of new esports players and talent.

Economic benefits: Esports events have the potential to generate significant revenue for the city's hospitality and entertainment industries, as well as create jobs and stimulate economic growth.

Social benefits: Esports can be used as a tool for promoting education, personal development, and community engagement, which is increasingly important in a city with significant social and economic challenges.

### 1.1. Objectives of this Research Project:

The objectives of the topic of adoption of esports in Mumbai may include:

1. Understanding the current state of esports in Mumbai: This involves researching the current level of awareness, interest, and participation in esports in Mumbai. It also involves assessing the existing infrastructure and facilities for esports in the city.
2. Identifying the potential benefits of esports: This includes identifying the economic, social, and cultural benefits associated with the adoption of esports in Mumbai. It also involves examining how esports can contribute to the growth of the gaming industry and create new job opportunities.
3. Addressing the challenges to adoption: This involves identifying and addressing the various barriers and challenges to the adoption of esports in Mumbai. These challenges may include lack of infrastructure, limited awareness, cultural barriers, and regulatory challenges.
4. Promoting esports as a viable form of entertainment: This involves creating awareness and promoting esports as a legitimate form of entertainment and a viable career option in Mumbai. It may also involve creating events and tournaments to showcase the potential of esports and encourage participation.
5. Developing strategies for growth: This involves developing strategies for the growth of esports in Mumbai. It may include initiatives to attract investment, build infrastructure, create partnerships, and encourage entrepreneurship in the gaming industry.

## 1.2. Scopes of the topic include:

**Infrastructure:** This includes assessing the current infrastructure for esports in Mumbai and identifying the need for new facilities such as gaming arenas, high-speed internet connectivity, and gaming cafes.

**Awareness and Perception:** This involves understanding the current level of awareness and perception of esports among the general population in Mumbai. It may include conducting surveys, focus groups, and interviews to gather data on attitudes towards esports.

**Economic Impact:** This includes assessing the economic impact of esports in Mumbai, including job creation, investment, and revenue generation. It may also involve identifying opportunities for growth in the gaming industry and creating strategies to attract investment.

**Regulatory Framework:** This includes understanding the current regulatory framework for esports in Mumbai and identifying any barriers or challenges to the growth of the industry. It may involve identifying opportunities for policy reform to support the growth of esports in the city.

**Social and Cultural Impact:** This involves examining the social and cultural impact of esports in Mumbai, including its potential to bring people together, promote diversity and inclusion, and provide new opportunities for youth development.

## 1.3. Limitations of this Study-

There are several limitations to consider when discussing the adoption of esports in Mumbai. These include:

1. Limited infrastructure: While there are gaming cafes and some esports events taking place in Mumbai, the city currently lacks the infrastructure needed to support large-scale esports events and tournaments. This includes dedicated esports arenas, high-speed internet connections, and other gaming infrastructure that is common in other major esports destinations.
2. Limited recognition: While esports is gaining popularity in Mumbai, it still lacks recognition from some quarters. This can include government bodies, educational institutions, and some members of the public who view esports as a mere form of entertainment rather than a legitimate sport.
3. Limited funding: The esports industry in Mumbai currently lacks the level of funding and investment that is available in some other major esports destinations. This can limit the growth and development of the industry, and limit the opportunities available to esports players and enthusiasts in the city.
4. Limited talent pool: While there is a growing community of esports players in Mumbai, the talent pool is still relatively small when compared to some other major esports destinations. This can limit the competitiveness of esports events in the city and limit the opportunities available to local players.
5. Cultural barriers: Esports may face cultural barriers in Mumbai and other parts of India due to traditional views about gaming and sports. Some may view esports as a distraction from more important pursuits or as a form of time-wasting activity.

These limitations highlight the challenges that need to be addressed for esports to reach its full potential in Mumbai. However, they also present opportunities for growth and development, and with the right investments and support, Mumbai has the potential to become a major player in the global esports industry.

## Chapter 2

### 2.Review of Literature:

Esports is a rapidly growing industry that has gained significant attention and popularity in recent years. As the financial capital of India, Mumbai has witnessed the emergence of various gaming organizations, tournaments, and gaming cafes. This literature review aims to explore the adoption of esports in Mumbai and the factors that have influenced its growth.

According to a report by Livemint, Mumbai has the highest number of esports players in India. The report also states that Mumbai has the highest number of esports tournaments and events in the country (Livemint, 2019). This indicates that Mumbai is at the forefront of the esports industry in India.

The rise of esports in Mumbai can be attributed to several factors. One of the key factors is the growth of the gaming industry in India. A report by Google and KPMG shows that India has over 250 million gamers, and a significant portion of them are in the age group of 18-24 years (Livemint, 2019). This has created a large pool of potential esports players in Mumbai.

Another factor that has contributed to the growth of esports in Mumbai is the availability of high-speed internet. With the widespread availability of affordable high-speed internet in Mumbai, gamers can easily connect and compete with players from around the world.

The emergence of gaming cafes and esports organizations has also played a crucial role in promoting esports in Mumbai. Gaming cafes like Playmax Gaming Lounge provide gamers with a place to play their favourite games, interact with other gamers, and participate in esports tournaments.

Esports organizations such as U Cypher, Nodwin Gaming, and LXG Esports have organized several esports tournaments in Mumbai, attracting gamers from all over the country.

The growth of esports in Mumbai is expected to continue in the coming years. A report by Wazir Advisors shows that Mumbai accounted for 30% of the esports market in India and had the highest number of registered gamers in the country (Economic Times, 2019). This indicates that Mumbai is likely to remain a key player in the Indian esports industry.

The popularity of esports in Mumbai has also been fuelled by the increasing interest of young people in competitive gaming. According to a report by Google and KPMG, India has over 250 million gamers, and a significant portion of them are in the age group of 18-24 years (Livemint, 2019). The report also stated that the esports industry in India is expected to grow at a CAGR of 36% between 2019 and 2024.

"Esports in India: An Overview" by Subhajt Basu and Sangeeta Sharma. This article provides an overview of the growth of esports in India, including Mumbai, and the challenges that the industry faces. It discusses the potential of esports as a tool for social and economic development in India, and explores the regulatory and legal frameworks that are needed to support the industry.

Esports in India: A Review" by Tanay Dalal and Shreya Parikh. This article provides an overview of the history and current state of esports in India, including Mumbai. It discusses the potential for esports to become a mainstream entertainment industry in India, and explores the challenges that the industry faces, including the lack of infrastructure and the need for greater investment in talent development.

"Exploring Esports in India: A Study of Consumer Behaviour" by Aditi Kapoor and V. Raghunathan. This study examines the consumer behaviour of esports fans in India, including Mumbai, and explores the factors that influence their adoption of esports. It discusses the potential for esports to become a major entertainment industry in India, and highlights the need for greater investment in infrastructure and talent development to support its growth.

The literature review shows that the adoption of esports in Mumbai has been driven by several factors, including the growth of the gaming industry in India, the availability of high-speed internet, and the emergence of gaming cafes and esports organizations. Mumbai has

emerged as a significant player in the Indian esports market, with a large player base, a thriving esports infrastructure, and several esports organizations. The growth of esports in Mumbai is expected to continue in the coming years, presenting new opportunities for gamers, gaming cafes, and esports organizations.

## Chapter 3

### 3. Conceptual Framework

India has embraced the esports phenomenon with open arms, a fact most recently demonstrated by its international success at the Asian Games 2018 where it won a bronze medal in Hearthstone. The growth has come in cycles, largely influenced by global trends and access to the internet. In mid-2000s, Counter-Strike and Dota were extremely popular and the majority of suburbs and cities in the country had cyber-cafes where teenagers congregated. Popularity surged as the World Cyber Games and Asian Cyber Games hosted qualifying events in India. Then, as internet connectivity improved and games moved away from local area networks (LAN) to online, esports somewhat lost its charm. <sup>2</sup> Now, it's in full revival mode and considered to be in a nascent stage, primed to explode with investments being made by stakeholders such as Nazara Games and Ronnie Screwvala.<sup>3</sup> In 2016, 120 million Indians engaged in online gaming, creating a market value of USD 290 million. <sup>4</sup> As per a KPMG study in 2017, the average Indian gamer is under 24 and has a preference for action and adventure games.<sup>5</sup> The peak performance for esports players is said to be around this age, so Indian's sizable young population gives it a demographic dividend that appeals to esports stakeholders.

There is a growing infrastructure for esports in Mumbai, with several initiatives being taken to promote the industry. One of the most significant developments in the infrastructure for esports in Mumbai is the establishment of dedicated esports arenas. These arenas offer state-of-the-art equipment and high-speed internet connectivity, providing players and spectators with a space to come together and enjoy the games.

In addition to dedicated arenas, gaming cafes are also becoming increasingly popular in Mumbai. These cafes offer a space for gamers to come together and play, with high-speed internet connectivity, gaming equipment, and snacks and drinks available to keep gamers fuelled up during long gaming sessions. Several online platforms for esports are also gaining popularity in Mumbai, providing players with the convenience of playing from home.

Esports tournaments and events are also becoming more common in Mumbai, with many offerings prize money and other incentives to participants. These tournaments bring together players from different parts of the city and provide a platform for the growth and development of the gaming industry in Mumbai.

Partnerships are also being formed between the gaming industry and other industries in Mumbai to promote the growth of esports. For example, some hotels in Mumbai are offering esports packages for guests, which include gaming equipment, high-speed internet connectivity, and other amenities.

Overall, the growing infrastructure for esports in Mumbai is creating new opportunities for gamers and providing a platform for the growth and development of the gaming industry in the city. With the continued growth of the infrastructure for esports in Mumbai, the city is poised to become a hub for esports in India.

An eSport summit was held in Mumbai in the year 2019 to showcase and bring out esport talent in Mumbai and India.

#### ESPORTS SUMMIT 2019 (MUMBAI)

Dveo Media in association with Esports Federation of India (ESFI) presents “Esports Summit 2019 (Mumbai)” scheduled on 18th April 2019 at Courtyard by Marriott, Andheri East, Mumbai.

The video gaming industry is one of the fastest growing industries in the world and in India. Esports is now bringing a new dimension to the sports, video gaming and entertainment industry. India won the Bronze Medal in Esports at Asian Games’ 18 (Demonstration Title). Globally, Esports industry has already crossed \$ 1 Bn mark in revenues, and India with 250 Mn gamers is poised to be the next big esports market.

The objective of Esports Summit 2019 (Mumbai) is to bring together publishers & various stakeholders in gaming, sports and entertainment industries to network and share insights on the opportunities and challenges of Esports in India and explore its future impact.

## EVENT HIGHLIGHTS

The key topics that the summit covered include the growth drivers of the video games industry in India, the growing importance of Esports in global markets, the reasons to invest in Indian Esports, the possible impact of Esports on the organisation and broadcast of mainstream sports events and how to optimize on the marketing, merchandising and advertising opportunities of Indian Esports. There will also be a focus on the incredible opportunity for young talented Indian Esports Athletes to make it big.

Presentations and masterclasses was highlighted on coping with video game addiction, AR/VR and the augmented Esports experience, payment gateway solutions & monetization and intellectual property & rights management challenges.

## TARGET AUDIENCE

Esports Summit 2019 (Mumbai) is looking to welcome 25+ Industry Executive Speaker (local & international) and over 150 of the different stakeholders in the industry including game publishers, Esports enthusiasts, Sports Marketing, Media & Entertainment & Telecom companies, marketing and merchandising strategists and Esports Athletes.

Lokesh Suji, Director of Esports Federation of India, said “Esports has garnered a lot of interest in India, but there are gaps in understanding of the What, Who and Why in this domain. In line with our mission & endeavours of growing the sport and building a sustained esports ecosystem in India, we are pleased to associate with Dveo Media to organize India’s first Esports Summit. We encourage stakeholders in Esports to make the best of Esports Summit 2019 and the learning opportunities with industry experts”.

Commenting on the event Deepak Ramsurrun, CEO and Director of Events of Dveo Media, said “After pioneering events on Digital Video Business and Kids & Animation, Dveo Media is proud to launch the Esports Summit 2019 (Mumbai) in association with Esports Federation of India. With the participation of key leaders in this industry, the conference will be a good

opportunity to look at Esports from different perspectives: publishers, platforms, players and brands, and evaluate its future impact. If you want to know more about Esports, this is a must-attend event!”

#### About DVEO MEDIA

Dveo Media is specialized in the curation and organization of conference events with focus on technology and entertainment. In the last 2 years it launched the OTTv Events IP in Mumbai, and organized pioneering events on Digital Video Platforms and Kids & Animation, with active participation of C-Level executives and key stakeholders from these industries.

[www.dveomedia.com](http://www.dveomedia.com)

#### About ELECTRONIC SPORTS FEDERATION OF INDIA (ESFI)

ESFI is a Non-Profit organization, with the objective to promote, encourage, organize, educate, train and control Electronic Sports (Esports) in India and to provide facilities for training in esports, to build and sustain the eco- system for esports in India. ESFI is a full member of International Esports Federation (IESF), Korea and Asian Esports Federation (AESF).

A new kind of sport - esports is on the rise in India. The industry is expected to grow at 46% CAGR to grow over fourfold from INR2.5 billion in 2021 to INR11 billion by 2025 states the EY report, 'Ready' launched on that day. The prize pool is expected to reach INR1 billion by 2025. Unlike online gaming, esports is defined by online games of skill that are played in tournaments where different teams or individual players compete against each other to win the championship, league or title like physical sports.

Ashish Pherwani, Partner and Media & Entertainment Leader, EY India, stated, “Esports in India tells a great growth story. As a game of skill accessible indoors and on the ubiquitous mobile phone, it has gained popularity during the lockdowns witnessed in 2020 and 2021. Consequently, it has become an attractive option for brands to connect with young and empowered audiences.”

### Prize money

The prize money pool in India was expected to grow at 66% CAGR to reach INR1 billion. As the Indian esports industry grows at a faster pace than the global esports industry, India is picking up the pace in growing its prize pool as well. The Indian esports prize pool accounts for a meagre 0.6% of the global prize pool but is expected to reach almost 2% by 2025. Growth in the prize pool remains one of the most important factors and incentives for attracting new serious players.

### Professional players and teams

It is estimated that India currently had 150,000 players and around 60,000 teams. As esports becomes a viable profession for the youth, the number of players playing esports is expected to grow at 78% CAGR by 2025 to reach 1.5 million players and 250,000 teams. The growth will be propelled by the increase in prize money, more games, localization, regional adaptation and growth of smartphone, laptop and broadband infrastructure. In contrast to the west, mobile phones are the preferred choice of device for esports in India with over 90% esports players participating in mobile esports tournaments.

### Broadcasters and audience

As esports tournaments grow more competitive, they drew more viewership and support from players and the audience. Presently there were over 14 esports broadcast platforms, it is expected to cross 20 platforms by 2025. While current viewership is 17 million, by 2025 over 85 million unique viewers watched esports tournaments in the country, comprising around 10% of global esports viewership.

### Economic impact of esports

Esports will generate a total economic impact of over INR100 billion in the next four years through investments, direct industry revenues, in-app purchases and other revenues. Games

popularized by esports tournaments will generate about INR14 billion in in-app purchases revenues and the industry is also expected to generate over INR300 million of ancillary revenue comprising of licensing and merchandising revenue and player salaries revenue by 2025.

### Creating employment opportunities

The esports industry is expected to create over 11,000 direct and indirect jobs by 2025. Apart from specializing in gaming skills and game theory, the esports industry will also create opportunities and make way for new income streams in licensing and merchandising, player salaries and event management in the coming years.

### Esports emerging a major industry segment

With increase in the number of esports tournaments catering to a growing audience and gamer base, advertisers and agencies are expected to leverage esports tournament viewership to gain reach and engagement with the audience. Streaming ad revenue is expected to quadruple to INR6.5 billion by 2025 generating the largest portion of esports revenues. Tournament sponsorship and syndication revenue is expected to grow at 45% CAGR to reach INR3.5 billion by 2025.

### Regulatory support required

To facilitate the industry to achieve its potential regulatory support is required from the Government of India and state governments in terms of recognizing esports, creating a nodal esports body, providing SEZ benefits, development grants and incentives for grass root inclusion. Esports has carved a special niche for itself in the gaming industry. Countries such USA, China, Germany, South Korea and Sri Lanka have realized the impact of esports on the economy and have recognized esports as a professional sport and made policies to harness the potential.

## Build India's soft power

Esports creates an opportunity to build India's soft power globally as large-scale organizers such as Asian games and the South Asian Games have added esports in their list of official competitions. Olympics too is evaluating adding esports to their competitions. In the 18th Asian Games held in 2018, nine Indian esports players participated and one of them won a bronze medal. With our young demographic and our ability to be native mobile esports players, we are well poised to do well in esports.

As the popularity and frequency of esports tournaments grow, esports is often confused with online gaming. The need for an electronic device and online multiplayer game fuels the misnomer. However, esports is not online gaming. Unlike online gaming, esports is defined by online games of skill that are played in tournaments – different teams and individuals playing against each other to win the championship, league, title like physical sports. Esports also includes games which are the digital/virtual manifestations of traditional sports.

Esports is more versatile and adaptable than regular sports, and its tournaments vary in scale, operations and frequency

Furthermore, esports is indistinguishable from traditional sports. In esports, games are monitored; and participants are actively playing and using their skills to win the championship. Like traditional sports, excelling at esports requires hand-eye coordination, attention, visual processing, executive function and strategy development. All of that perfectly combined with well-timed responses to game stimuli helps players excel and grow in the space.

As a sport, it has steadily gained popularity with youth, and consequently has become an attractive option for brands to connect with young and empowered audiences. As a game of skill accessible indoors and on the ubiquitous mobile phone, it gained much popularity during the lockdowns witnessed in 2020 and 2021. And as a mode of entertainment, it continues to serve hard core gamers as well as social gamers who wish to get competitive.

## Future of esports in Mumbai

Though at a nascent stage, the esports market size in India has quickly scaled to INR3 billion in FY2021 and we expect it to reach INR11 billion by FY2025 vice versa towards Mumbai. However, the sport has a much larger economic impact: we expect it to generate economic value of around INR100 billion between now and FY2025.

The growth of esports in Mumbai has been spectacular. As a game of skill accessible indoors and on the ubiquitous mobile phone it has gained popularity during the lockdowns witnessed in 2020 and 2021. Consequently, it has become an attractive option for brands to connect with young and empowered audiences.

At the moment, Esports has sparked broad attention and focus. That's because the esports sector has grown exponentially over the last decade and now boasts enormous audience and participation figures. This article aims to examine the growth of this sector and the potential effect on India's sports industry.

There are many misconceptions and misunderstandings about what esports is and what its business entails, therefore it is essential to define the concept. Esports began as a subset of the gaming business but has grown to the point that it is now its own sector. Esports, according to Techopedia, are "competitive first-person shooter games, massively multiplayer online role-playing games, or even basic logic or action games, as long as there is a competitive component."

## India's Growth in Esports Industry

Esports is nothing more than competitive gaming, and the growth of esports has attracted followers who are interested in not just gaming but also in watching tournaments and leagues. In 2019, Esports viewership reached about 458.8 million people globally, a 15% increase year over year (Newzoo - 2019 Global Esports Market Report, 2019). The League of Legends World Championship in 2019 was an esports event with a record-breaking

viewership of over 100 million. The majority of these fans accessed the game through streaming platforms such as Twitch and YouTube. By contrast, the Super Bowl drew 100.7 million viewers across the NFL's digital platforms and CBS the same year. Statista estimates the global esports viewership size.

India was previously absent from the esports scene until 2018. The emergence of PUBG Mobile resulted in the esports revolution in India, establishing the country as a significant worldwide market for esports. India dominates the PUBG Mobile rankings in terms of both player numbers and viewership. India boasts the world's biggest young population, increasing mobile use, and affordable internet access, making it a huge opportunity for mobile gaming.

India has been holding massive international and national esports events since 2018, the most notable of which being Dream Hack Delhi, ESL One: Mumbai, COBX Masters, and PUBG Mobile Indian Series. The overall prize pool increased by 180 percent to \$1.5 million in 2019, up from \$288.3K in 2017. (2019, Esports Observer)

In India, esports viewing and streaming are also very popular. "Mortal" is a massive esports influencer in the nation as a former esports player turned caster. He has about 6 million followers on YouTube and each video receives up to 15 million views. Numerous such players have established internet communities and fan bases in the nation.

As mobile games gain popularity and Indian players and teams rise in significance, substantial funding from sponsors will ultimately flow in, substantially boosting income.

**Increase in Esports Audience** According to research conducted by Data Reporters on the Global Esports Audience, 32% of the esports audience is between the ages of 16-24, while 30% is between the ages of 25-34. According to a BARC study on Indian Sports Leagues, the bulk of viewers for the most popular Indian leagues are between the ages of 31-50. The next significant demographic for traditional sports is between the ages of 15 and 30. Clearly, there is considerable overlap in terms of target audiences. As a consequence,

sports assets will compete for the same target audience. This may represent a risk to traditional Indian sports in the long term for the following reasons.

Apart from Esports, there are conventional games that rely on lottery participation to draw an audience. These traditional games appeal to an unfamiliar audience with technology and rely on traditional methods of earning money. These lotteries are held in 13 states in India. Lottery Sambad is a Nagaland State Lottery with bumper offer of up to 1 crore. Another regulated archery-based lottery game is played in regions of Shillong and Khanapara, the Teer Result is published at 3:00 PM and 3:45 PM. These lotteries' primary objective is to enhance the quality of life in those states. These lotteries are conducted regularly, with results published daily.

In terms of audience and sponsorship income, the growth of esports in the nation will generate extra competition for athletic assets. It will come down to who interacts and has the most influence on the intended audience.

The degree of fan involvement is much higher in esports, and audience growth is very rapid. Eventually, companies will see the value of these figures, and esports may get a greater share of sponsorship revenue.

The majority of businesses are attempting to reach Gen Z and Millennials. Marketers find it more challenging to keep their intended audience interested as their attention spans continue to shrink. These target groups are the core of the esports audience and are very engaged in the sector. As a result, brands are expected to place a considerably higher premium on sponsoring esports assets.

With India's capabilities in mobile gaming and the influx of global esports players, we will ultimately produce world-class esports athletes capable of competing at the top levels. Following Cricket, we have the most significant potential for worldwide success in esports. As a result, it reaches a worldwide audience in a way that most conventional sports do not.

Another benefit that esports has over traditional sports is the ease with which grassroots organizations may be formed. We certainly fall short in several areas, just as traditional sports do, but it will be far simpler to develop grassroots for esports than it would be for other sports. This is because children are already acquainted with and involved in gaming, and its reach is considerably greater and broader than that of different sports.

While esports has many benefits over conventional sports, their development may not be simple. Acceptance of esports over traditional sports on a social and political level will not be simple and may take years or decades. However, it is fair to conclude that the future is digital and that the future is esports.

This is not to say that it would endanger the development of conventional sports. This simply means they will compete for the same audience, companies, and sponsorships. The growth of esports in the nation will open up many opportunities for the future; in the long term, we may even witness a fusion of the two!

Ashish Pherwani

EY India Media & Entertainment Leader

1.5 million players, 85 million viewers, 20+ broadcasters and several brands, organizers and publishers will collectively define the esports market in India by FY2025. Presently, about 4% of mobile games on the Play Store are from Indian publishers. As Indian game developers transition from developing social games to multiplayer games, Indian developers are expected to create games that are better suited for esports tournaments. The number of Indian gaming studios have grown 5x since 2015. There are over 14 esports broadcast platforms in 2021 which are expected to cross 20 platforms by 2025. While current viewership is 17 million, over 85 million unique viewers will watch esports tournaments in the country by 2025.

The esports industry is expected to grow at 46% CAGR over the next four years and streaming platforms will generate the largest chunk of esports revenues.

As esports grows popular amongst youth and the affluent, advertisers and agencies are expected to increasingly use esports tournament viewership to gain reach and engagement with the audience, growing over 4x to INR6.5 billion by FY25. Eventually, the industry could explore subscription revenue models.

Tournament sponsorship and syndication revenue would likely quadruple to more than INR3.5 billion CAGR growing at a CAGR of 45%. Media broadcasting rights and advertisement sponsorship revenue together constitute this segment.

The prize money or prize pool would likely contribute to about 10% to the esports economy FY 2025 and reach an estimated INR1 billion esports market size India by FY2025. About 85% of the prize money will be for mobile esports tournaments.

The industry, however, faces regulatory challenges and uncertainty such as misconception that esports is gambling or a game of chance and its consequent banning by certain states. Additionally, lack of an industry nodal body, regulatory clarity and multiple ministries adds to its woes.

At the Asian Games 2018, which ended in September, India won bronze in a unique category, though it didn't count in the official medal tally: It was in the collectible card-based video game tournament Hearthstone. Tirth Mehta (23) from Gujarat created history of sorts by winning the country's first ever e-sports medal. (Hong Kong won gold, while Indonesia won silver.)

Short for electronic sports, e-sports involves competitive team-based gaming of spectator sports with ranked matches.

Esports was played at smaller stages but now it is gaining importance at national and global levels. It takes the form of structured, multi-player competitions between professional

players.

While e-sports has been around for a few years, of late it has gained popularity and support, with well-known companies and gaming giants holding leagues and tournaments in the Indian market.

### Recognition of professional esports players as “athletes”

Traditional sports have evolved their jurisprudence around the fact that professional participants are considered as “athletes”. Professional esports players are not yet considered as athletes in India. This can impact participants in a number of ways, including: • The provision of special visas to allow participation in global events. For example, the United States has allowed eSports players to apply and even granted the P-1 visa which is an “event-only” visa therefore allowing participation in US-based eSports events. • Being categorized as an athlete also affords certain protections. Professional footballers, for example, are registered with FIFPro which acts as a body which represents the interests of the players. At present there are no such organisations promoting the interests of professional esports athletes or protecting them from exploitation. Formal recognition as “athletes” would, in the authors’ view, help catalyse this process.

Additional “job” security. In India, the majority of the athletes across team sports and track & field athletes are provided government jobs. These jobs include positions in the Railways, nationalised Banks and even bureaucratic positions. For example, Sandeep Sejwal who swam for India is employed with the Indian Railways. 7 Vikas Krishnan, a boxer who represented India at London Olympics had a job as a police officer. 8 The government provides special sports quotas which allows these exceptional athletes to train without the fear of being without a job and regular income. In 2015, the Central Government, through the then Minister of State for Youth Affairs and Sports, Shri Sarbananda Sonowal, clarified that those sportspersons who have represented a State or the country in National or International competitions are eligible for being considered for appointment in Central Government offices as meritorious sportspersons. These jobs ensure steady income and job security which allows them to focus on their sport. 9 Esports players have yet not been provided with this luxury

and thus it remains stigmatised in the larger societal context. If the Government were to recognise esports players as athletes it would help provide certainty and security to professional players. However, the Indian government has taken no steps in this regard and nothing seems to be in discussion within the governmental circles presently. To help in the recognition process, significant regulatory developments are necessary. The Esports Federation of India (ESFI) is the main representative body. In the authors' view, the ESFI must maintain a healthy dialogue with the developers, events' organizers and governmental authorities to help create standardisation, certainty and legitimacy to the spectacle. ESFI is a member of the International Esports Federation (IESF) and the Asian Electronic Sports Federation (AESF). This membership mandates that Indian esports players adhere to the same standards of conduct as laid out by these international bodies. Mr. Suji (the Co-Founder and Director of the ESFI) states: "Esports athletes are the core of esports. All our discussions with Developers, organisers and government authorities are centered around esports athletes and we have received an overwhelming response. Esports is not yet recognised as a sport in India but we have strong commitment from relevant authorities to support ESFI in growing esports in India. ESFI also has an Athlete commission, whose sole purpose is to ensure that interest of our esports athletes is taken care of and it also ensures that our athletes conduct themselves professionally.

### Looking ahead

Esports has seen a global meteoric rise in the last few years and India has not been spared in that regard. Barring regulatory hurdles, India's demographics and cheap nationwide internet connectivity give it a massive competitive advantage in embracing esports. In support, Nvidia's report from 2014-2017 shows that the active esports community in India has increased from a mere 300,000 to a massive 1.5 million.<sup>17</sup> This means that the rate an individual who has just entered gaming will become passionate about eSports is higher than the rate of people getting into gaming. All this points to a singular fact, the Indian populace is ready for esports. If India can tackle the key issues identified above, most notably growing and maturing the regulatory environment, then it should be a global leader in years to come.

The year 2022 has perhaps been the most exciting year for gaming and esports enthusiasts globally. With esports' growing prominence, the world witnessed the first-ever Commonwealth Esports Championship. India's stellar performance was acknowledged with a bronze medal win by the Indian DOTA 2 squad. Continuing with this momentum, we are now gearing for the Asian Games, which will host Esports as a recognized medal event. This was inconceivable till a few years ago.

This year, we have also seen some of the biggest acquisitions in the gaming and esports industry – Microsoft announced its intent to acquire Activision Blizzard for a whopping \$68.7 billion in cash, and two of the world's biggest esports companies, ESL and FACEIT, have been purchased for a total of 1.5 billion dollars by Savvy Gaming Group. This is testimony to the unimaginable potential of this rapidly growing industry.

### Gaming and Esports Explained

Although gaming and eSports are often used interchangeably, there are some fundamental differences between the two. Gaming refers to playing video games in general. This includes playing Candy Crush on your mobile phone, God of War on your Play Station, or Counter-Strike on your PC. Online card games like Rummy and Poker are also classified under gaming, not eSports. This type of gaming is as competitive as you want to be and is majorly a form of recreation.

On the other hand, Esports are online games that are competitively played in the form of tournaments and leagues. Some of them are digital or virtual versions of mainstream sports like cricket, football, etc. Over the last few years, the popularity of eSports in India has been surging. Let's look at some statistics.

According to FICCI-EY Media and Entertainment Report 2022, the number of eSports players doubled from 300,000 in 2020 to 600,000 in 2021, and eSports revenue grew by 29% from INR 7.5 billion in 2020 to INR 9.7 billion in 2021. What's more interesting is that this growth is expected to continue, with the number of esports players reaching one million in 2022, out of

which 20% would be women. The gaming and eSports industry employs just over 40,000 individuals in India, and this is poised to grow.

### The Catalyst

The pandemic has acted as a catalyst for the growing esports industry. Amid the lockdown, millions diverted their attention to gaming recreationally, with some even turning to professionals. This trend came on the back of increasing digitization and deeper penetration of Internet connectivity, and this is expected to strengthen with the advent of 5G. There has also been an influx of international game developers in the Indian market, and localization of prominent games. As a result, we have witnessed the growth of 76 online gaming startups in India since the onset of the pandemic, taking the total number to well over 400 gaming companies. With the rise in gaming innovation, we have seen innumerable employment opportunities and a dire need to upskill and reskill the current workforce to be equipped with the knowledge and technical prowess of developing and market games.

Over the last couple of years, we have also witnessed a sharp increase in the number of gamers from Tier-2 and Tier-3 cities in India, especially mobile gaming. Thanks to mobile-based platforms, access to skill-based games and tournaments have become easier. A large part of these recreational gamers are women who picked up the hobby during the lockdown and continued to play even when normalcy returned.

### More than just gaming

Esports enthusiasts have started increasing their engagement with tournaments and events for BGMI, Valorant, Call of Duty, Tekken 7, DOTA 2, and other games that are being conducted online. Sports games, multiplayer online battle arenas (MOBAs), first-person shooter (FPS) games, fighting, card games, and real-time strategy (RTS) are the most popular esports genres in the country. And these games are not just popular among the players but have a dedicated viewership too. The rapid increase of eSports viewership in India has created a lucrative marketing opportunity for both endemic and non-endemic brands.

Speaking about esports tournaments, the last edition of The International DOTA 2 Championships boasted a staggering \$40 million in winnings and went up to 2.7 million peak viewers. When it comes to streaming games, Twitch is undoubtedly the largest streaming platform. In September 2021, 8.5 million channels were streaming monthly, and 1460 billion minutes were watched overall. This suggests that gaming and esports are not just big for players, but for viewers as well.

Leading brands and advertisers are collaborating with eSports platforms and tournaments to make the most of this growing space. In 2020, LetsGameNow collaborated with Flipkart for the Pro Gaming Showdown Tournament, and NODWIN Gaming partnered with Airtel to launch the Airtel India Esports Tour, a national ranking and award system for Indian esports players.

Advertising, collaborating, selling merchandise, and franchising via esports Teams have brought in a lot of revenue for brands. Gen Z and younger millennials remain the primary target audience for esports businesses. However, virtual gaming is no longer an expensive hobby for urban youth who can afford it. Interest in esports is expanding beyond metropolitan areas, covering Tier 2 and Tier 3 cities as well.

### The Road Ahead

With innovative collaborations in the media and entertainment industry, a large number of international pop stars are hosting “in-game concerts.” As the name suggests, these are musical concerts performed virtually in the middle of popular games like Fortnite and Roblox, to name a few. The wide reach of these games allows artists to reach a wider audience base. While many of these concerts were free, all attendees had to create a game account. This led to an increased database of users, beneficial for these gaming companies.

The marketing potential in the esports industry is immense and with the advent of Augmented Reality and Virtual Reality, we can only expect brands to devise unique and ultra-creative campaigns. With the ever-evolving innovations and technology, this industry is only poised for bigger growth.

In India, esports has a promising future with greater recognition, huge rewards, and rising popularity. Gaming companies are looking for talent to capture the untapped market and audience with innovative and immersive games. The Indian gaming industry currently employs around 40,000 people. That number could jump to two lakhs by the year 2024. Professionals such as game developers, game designers, game programmers, and 3D artists are in huge demand.

As the gaming and esports industry grows rapidly, so does the need for a knowledgeable and skilled workforce. This has to expand beyond developing games and animation to analyzing, scripting, asset creation, and building a robust foundation that will enhance the industry. It is time that enthusiasts be allowed to pursue a successful career in the world of gaming and esports.

## Chapter 4

### 4.1 Research Methodology:

Recently the critical aspect of research, namely research methodology, receives little attention. As a result, much research, particularly in the social sciences, involves an excessive amount of word spinning and quotes. As a result, a lot of research is pointless. In the context of planning and development, it's worth noting that the importance of the study is determined by its quality rather than its quantity. As a result, persons involved in research must pay close attention to creating and following suitable techniques throughout the research process to improve the quality of the research. Although the process varies depending on the subject, the essential approach to research stays the same.

### 4.2 What is Research?

Research is a voyage of discovery. Research may also be defined as a scientific and methodical search for relevant information on a particular topic. Research is, in reality, an art of scientific investigation. According to Clifford Woody, in his own words "Research entails defining and redefining problems, formulating hypotheses or suggested solutions, collecting, organizing, and evaluating data, deducing and arriving at conclusions, and finally carefully testing the conclusions to determine if they fit the formulating hypothesis". The goal of the research is to find answers to problems via the use of scientific processes. The major purpose of research is to uncover the truth that has been suppressed and has yet to be uncovered. Why do people undertake research? Factors such as Government instructions, work conditions, curiosity about new things, desire to comprehend causal linkages, societal thinking and awakening, and other causes may also inspire (or push) people to conduct the research.

### 4.3 Types of research

4.4 Basic types of research are:

### 1.Descriptive vs Analytical:

Descriptive encompasses several types of surveys and fact-finding inquiries. The most important goal of descriptive research is to describe the current condition of circumstances. The major feature of this approach is that the researcher does not influence the variables; he can only describe what has occurred or is currently occurring. These kinds of studies include attempts by researchers to discover the causes even though they are unable to control the variables. Survey methods of various types, including comparative and correlational approaches, are used in descriptive research. Analytical research, on the other hand, requires the researcher to evaluate facts or information that is already accessible to produce a critical assessment of the material.

### 2.Applied vs Fundamental

Applied research tries to identify a solution to a problem that a society or an industrial/business organisation is now confronting. "'Pure' or 'basic' research is defined as obtaining data for the sake of gathering knowledge." Fundamental research is primarily focused on making broad generalisations and formulating theories. Fundamental research might include studies of natural phenomena or pure mathematics. The main goal of applied research is to find a solution to an urgent practical problem, whereas basic fundamental research aims to locate information that has a wide range of applications and thereby contributes to the previously structured body of scientific knowledge.

3. Quantitative vs Qualitative Quantitative research is centred on determining the quantity or amount of something. It can be used to describe phenomena that have a numerical value. Qualitative research, on the other hand, is concerned with qualitative phenomena, such as those involving or about quality or kind. In the behavioural sciences, where the goal is to identify the fundamental causes of human behaviour, qualitative research is very significant. We may analyse the many elements that push individuals to behave in a certain way or make them like or detest a certain thing through such research.

4. Conceptual vs Empirical The term "conceptual research" refers to the study that is concerned with abstract ideas or theories. Philosophers and intellectuals commonly utilise it to build new concepts or reinterpret current ones. An empirical study, on the other hand, depends solely on experience or observation, typically without concern for system or theory. When the proof is needed that some factors impact other variables in some way, an empirical study is a method to go. Experiments and empirical research are now often regarded as the strongest sources of evidence for a particular idea.

All other sorts of research are variants of one or more of the above-mentioned methodologies, dependent on the study's objective, the time it takes to complete it, the environment in which it is conducted, or some other relevant feature.

#### 4.5 Primary data:

There are basic approaches to data collections using primary methods:

##### 4.5.1 Quantitative research approach:

The quantitative approach includes the creation of quantitative data that can be submitted to strict quantitative examination in a formal and disciplined manner.

##### 4.5.2 Qualitative research approach:

The subjective assessment of attitudes, views, and behaviour is central to the qualitative research approach. In this case, research is based on the researcher's observations and impressions. Such a method of study yields outcomes that are either non-quantitative or have not been submitted to rigorous quantitative analysis. Focus group interviews, projective approaches, and depth interviews are often utilised methodologies.

#### 4.6 Research Design: -

"A research design is a method, framework, or technique for obtaining an answer to a research topic while controlling variation."

#### 4.6.1 Type of research design: -

A descriptive research design was used for this particular project.

#### 4.7 Research Instrument: -

The instrument used for gathering data was a questionnaire. To supplement the primary data and to facilitate the process of drawing inference, secondary data was collected from published sources like online newspapers, websites, etc.

#### 4.7.1 Primary Data: -

The questionnaire aimed at discovering the underlying motives and desires. It was also designed to find out how people feel or what they think about this particular subject to analyse the various factors which motivate people to behave in a particular manner or which make people like or dislike

#### 4.7.2 Secondary data

Articles on the adoption of Esports in Mumbai are taken from online Newspaper, Online articles, published from time to time through the internet.

#### 4.8 Sample Design and Size: -

In this research project, Descriptive and Applied research design is used. Judgment and convenience sampling methods will be used to get information about people's views and opinions. This method is used because we are interested in exploring gender, age, and interest

in the topic. A structured questionnaire is prepared and a sample of 101 respondents is taken from the age category of 18 & above, wherein respondents in the category 18-25 years of age contributed the most.

#### 4.9 Sampling Size: -

It indicates the number of people to be surveyed. Though large samples give more reliable results than small samples, due to constraints of time and location, the sample size was restricted to 101 respondents. The respondents belong to different income groups and professions.

#### 4.10 Sampling Unit: -

It defines the target population that will be sampled i.e., it answers who is to be surveyed. In this study, the sampling unit is the people of Mumbai.

#### 4.11 Tools and Techniques of Analysis: -

The data so far collected will be analysed through the application of statistical techniques, such as pie charts.

## Chapter 5

### 5.1 Data Interpretation:

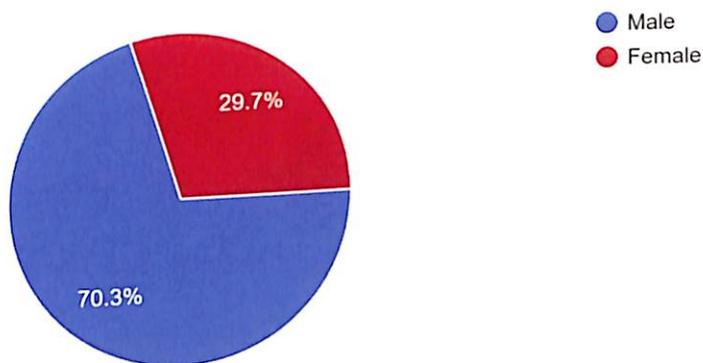
Data interpretation is the process of evaluating, cleansing, manipulating, and displaying data to identify useful information, conclude, and support decision-making. In diverse business science and sociology domains, data interpretation includes a variety of features and techniques, including multiple methodologies under a variety of labels.

Gender of respondents who took part in the survey.

Graph 1

Gender

101 responses



Objective: The purpose of asking this question is to find the gender of respondents who took part in the survey.

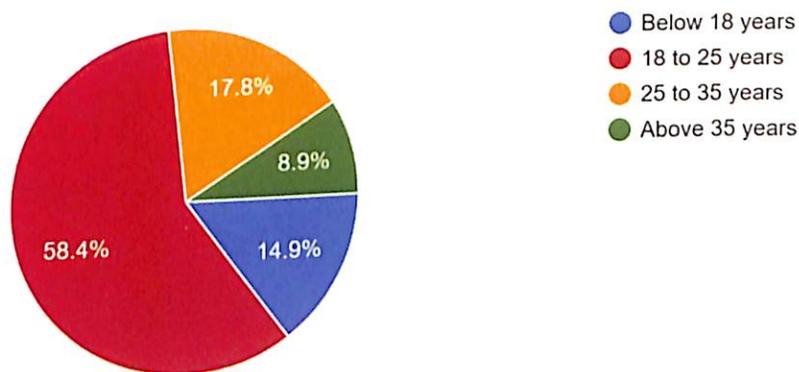
Data interpretation: The pie chart above shows us that most of the respondents are males with 70.3% of the total respondents. The other half of 29.7% of respondents are females who have expressed their views. It showcases highly towards the male.

The data recorded is the age of the average respondents.

What was the average age of the respondents?

Graph 2

Age  
101 responses



**Objective:** The purpose of asking this question is to find the average age of the respondents.

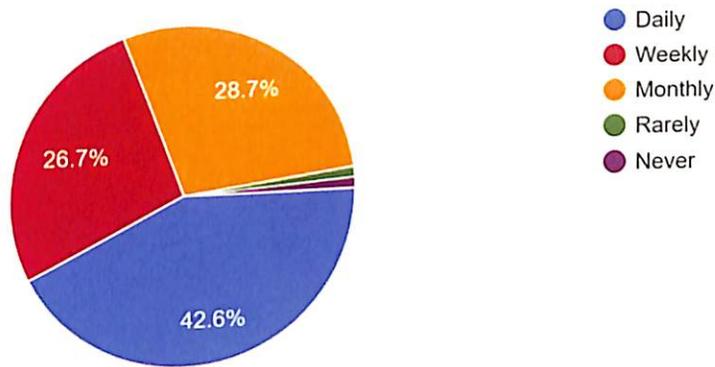
**Data interpretation:** The above graph shows us that most of the respondents are in the age group 18-25 of 58.4%. The next group of people who took part in this survey is people from the 25-35 age group who are of similar age to the surveyor and share the same interest with data recorded of 17.8%. This shows that the respondents are mostly from the age group of 18-25 and that they are adults, the opinions on this survey will majorly be from this age category only. Below 18 years recorded data of 14.9% and people above the age of 35 years recorded data of 8.9%.

The time data recorded of players playing eSports.

Graph 3

How frequently do you participate in esports?

101 responses

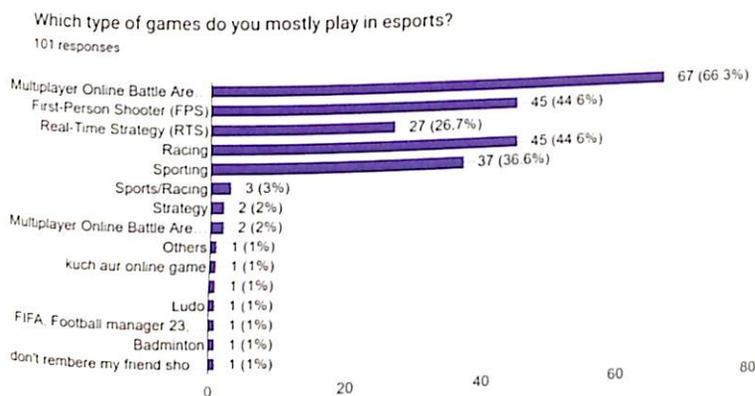


**Objective:** The Purpose of asking this question is to record the time data of players.

**Data Interpretation:** The above graph shows us that majority of the players play Esports daily with the record of 42.6% followed by monthly and weekly with the record of 28.7% and 26.7%.

The data recorded of the esports games which are highly played esports type game amongst them in the current time.

Graph 4



**Objective-** The purpose of asking this question is to find the largest audience of the most played esports type.

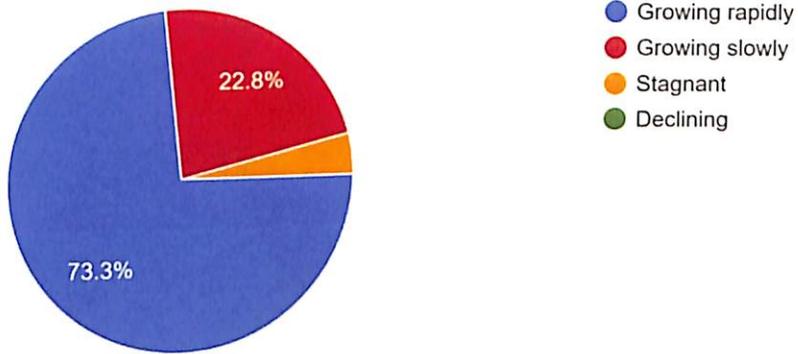
**Data Interpretation-** The most played esports category are Multiple Online Battle Arena with the recorded data of 66.3% followed by FPS and Racing and then Sporting of 44.6%, 44.6% and 36.6%. RTS Recorded data of 26.7%, Sports/racing recorded data of 3%, Fifa, Football Manager of recorded data of 1%, Sporting recorded data of 36.6%.

The data recorded of the no. of people understandings of how they think about the growth of esport in Mumbai.

Graph 5

How do you perceive the growth of esports in Mumbai?

101 responses



**Objective:** The purpose of asking this question is to know about the opinion of people regarding the growth of esports in Mumbai.

**Data Interpretation:** The above data shows that 73.3% of people agree that the growth of esports in Mumbai are increasing whereas 22.8% of people thinks that growth is slow.

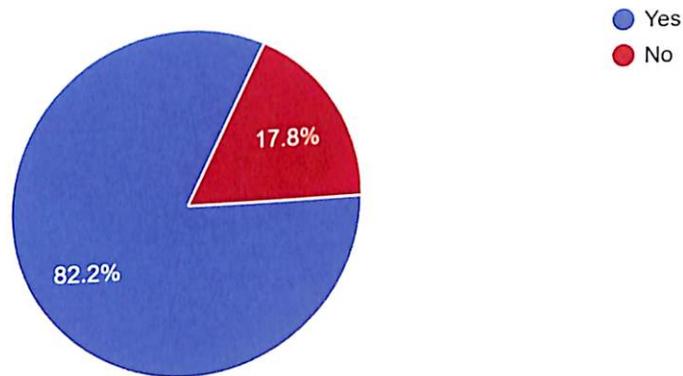
There is very less no. of data recorded of stagnant category.

The data recorded of the no. of people who knows about any tournaments that were held in Mumbai.

Graph 6

Are you familiar with any esports tournaments held in Mumbai?

101 responses



**Objective:** The purpose of asking this question is to know about the people interest in knowing about esports tournament.

**Data Interpretation:** The above graph shows that 82.2% people know about tournaments that are held in Mumbai.

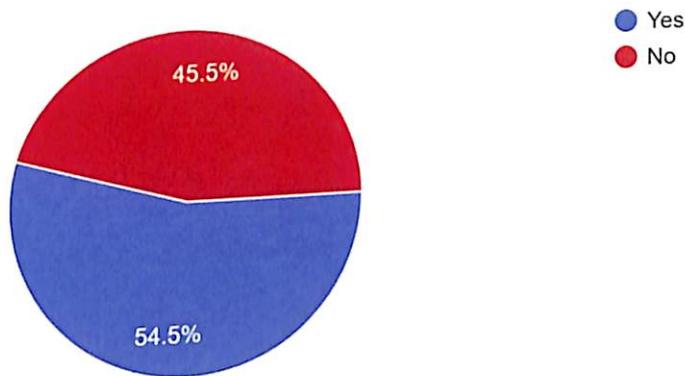
Whereas 17.8% of people are not familiar with any esports tournament held in Mumbai.

The data recorded is about the no. of people who have attended any esports event in Mumbai to get to know more about it.

Graph 7

Have you attended any esports events in Mumbai?

101 responses



**Objective:** The purpose of asking this question is known about people who have attended any esports tournament in Mumbai

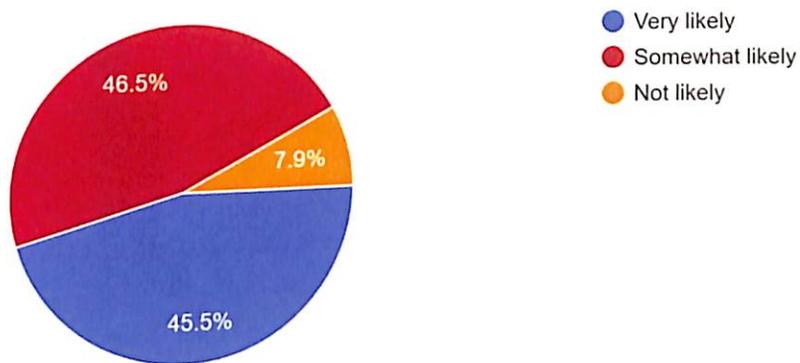
**Data Interpretation:** The above graph shows about 54.5% people have attended esports event in Mumbai whereas 45.5% did not!

The data recorded is about the no. of people who regularly watch and participate in the present as well as in the future to carry esports forward to another step.

Graph 8

How likely are you to regularly watch or participate in esports in the future?

101 responses



**Objective:** The purpose of asking this question is to find out the data regarding the interest of the people to carry forward the esports in Mumbai.

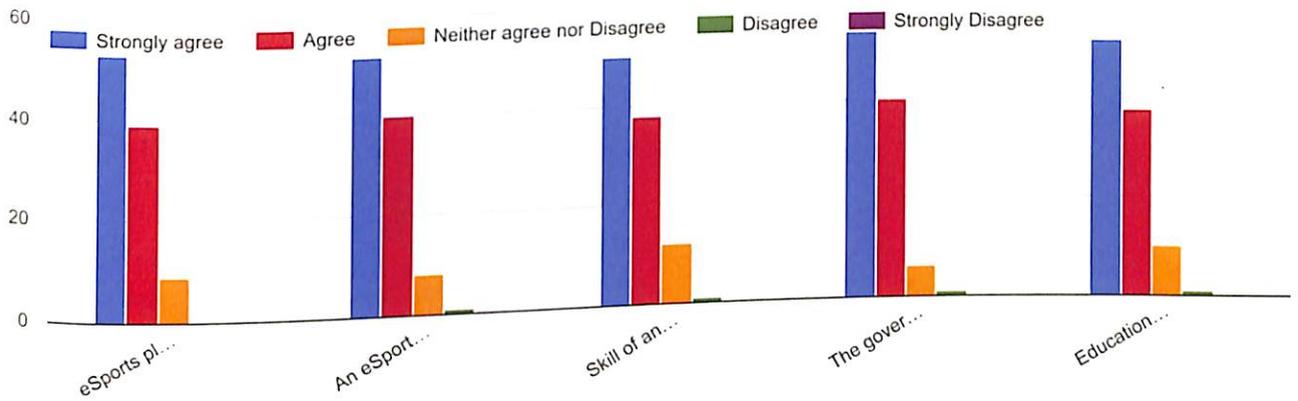
**Data Interpretation:** The above graph shows that most of the people do participate and watch regularly as well as same in the future with the recorded data of 45.5% people of very likely and 46.5% people of somewhat likely.

There also a data recorded of 7.9% people who are not likely will watch or participate at all in esports in the future.

The recorded data of people include their level of understanding as well as their beliefs in related to some phrases.

Graph 9

To what extent do you agree or disagree with the following statements



**Objective:** The purpose of asking this question is to gain knowledge about players which will eventually help in building of esports in Mumbai.

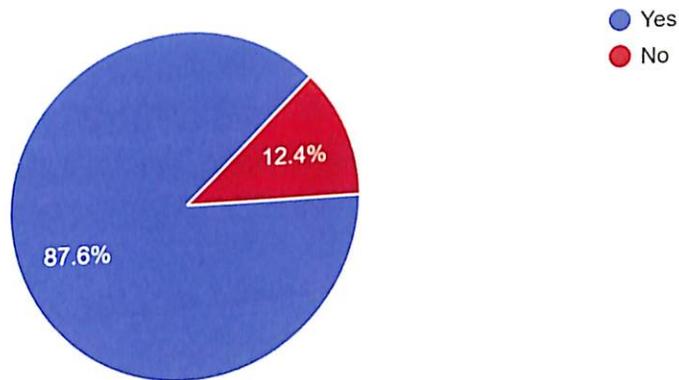
**Data Interpretation:** The Above graph shows the people opinion on their agreement and disagreement on the phrases given related to esports.

The recorded data of people who encounters advertisement related to esports.

Graph 10

Have you ever encountered advertisement of esports?

97 responses

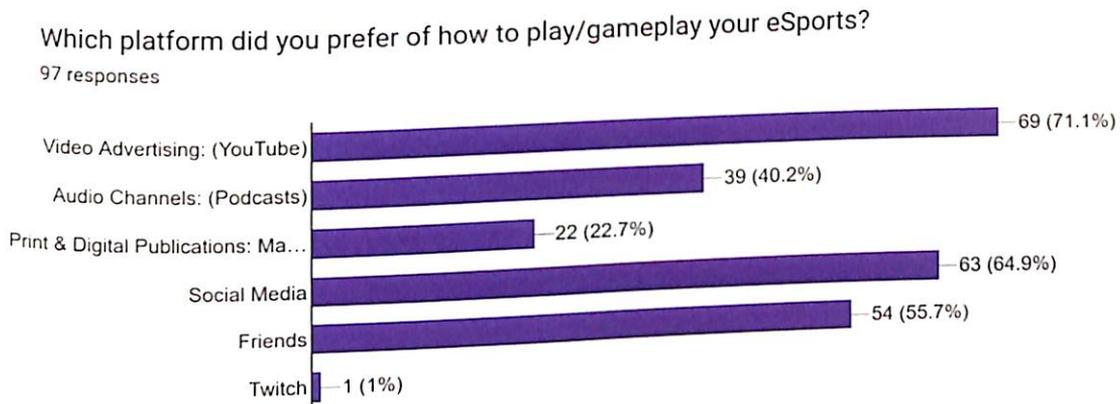


**Objective:** The purpose of asking this question is to know of how many people play esports and so ultimately receive advertisement through AI.

**Data Interpretation:** The above graph shows that 87.6% people encounter advertisement whereas 12.4% do not.

The data recorded is about the platforms players prefer to watch/play esports.

Graph 11



**Objective:** The purpose of asking this question is to know the medium which is highly used amongst players to watch/play.

**Data Interpretation:** The above graph shows that video advertising such as YouTube are highly used with recorded data of 71.1% followed by social media of 64.9%.

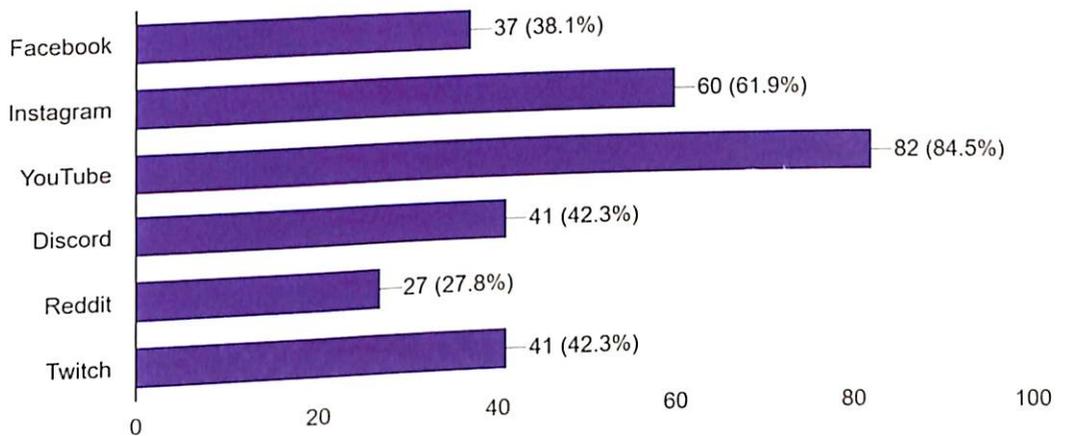
Print and Digital Publications recorded data of 22.7%, Audio Channels recorded of 40.2%, Twitch recorded only 1% with drastic Downfall in this period of time, Through friends it has been recorded a data of 55.7%.

The data recorded shows about the platforms people prefer watching esports.

Graph 12

What social platforms do you prefer watching eSports?

97 responses



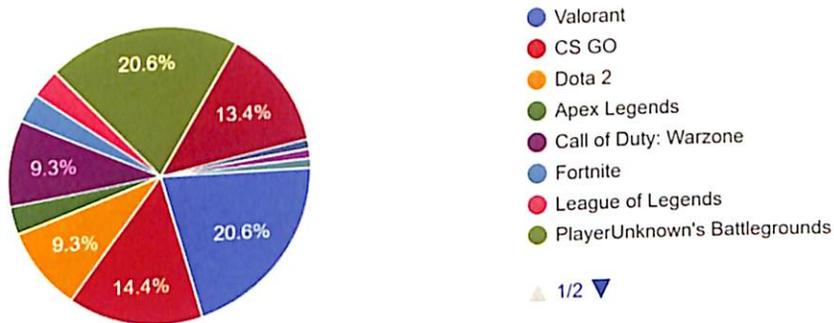
**Objective:** The Purpose of asking this question is to gain knowledge about the platforms that can be used in more marketing to reach out to the audience in Mumbai.

**Data Interpretation:** The above graph shows the most used platform used by the audience in the current time period is YouTube i.e., 84.5% followed by Instagram which recorded the data of 61.9%. The data collected for Discord is 42.3%, Reddit has 27.8%, Twitch has data of 42.3% and finally Facebook which has data recorded of 38.1%.

The recorded data showcase about the first ever esports played by a player for starting their passion in it.

Graph 13

Which is the first esports you have played?  
97 responses



**Objective:** The purpose of asking this question is to know the starting point of entering into esports industry through what esports game.

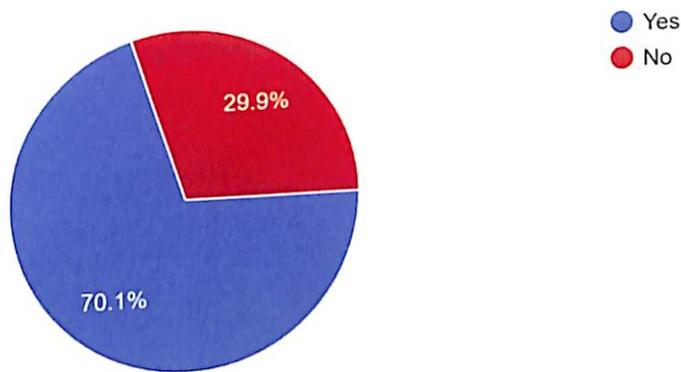
**Data Interpretation:** The above graph shows that 2 major esports are being played in their initial stage with the data recorded of 20.6% of PUBG and again 20.6% of Mini militia. COD Warzone covers 9.3%, Clash of clans with the 13.4%, CS GO of 13.4%.

The recorded data displays the no. of people who usually clicks on the link's related to esports advertisement.

Graph 14

Have you ever clicked/checked on esports advertisement?

97 responses



**Objective:** The purpose of asking this question is to define the exact no. of people who are really interested in advertisements related to esports which define they could start their passion in it.

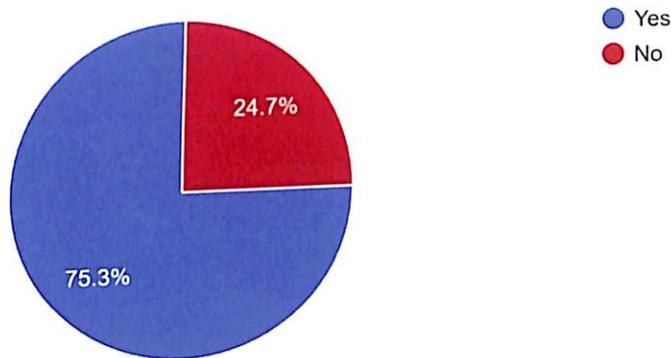
**Data Interpretation:** The above graph shows that majority of the people are interested in advertisement related to esports with data recorded of 70.1% whereas only 29.9% are not interested.

The data recorded states that does player can play for longer duration if he/she gets an updated console.

Graph 15

Can you play eSports for longer duration of hours if you use updated consoles?

97 responses



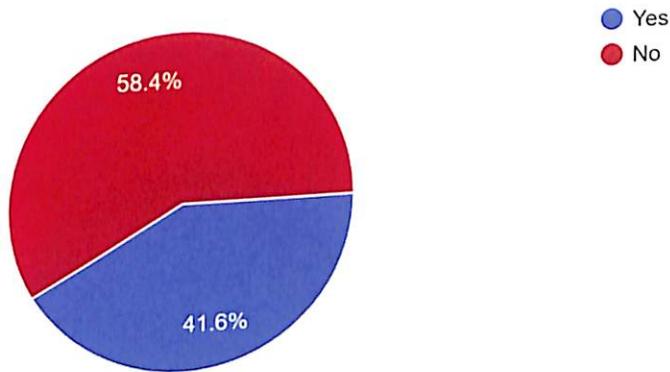
**Objective:** The purpose of asking this question is to take an exact no. of people who agree playing esports with updated console so that gaming company could provide console in lesser price to increase audience in gaming company.

**Data Interpretation:** The above graph shows that 75.3% people think that updated console is required whereas only 24.7% people don't think about it.

The recorded data defines that the no. of players who tries to bet to make esports more professional

Graph 16

Have you ever placed a bet on an esports game?  
101 responses



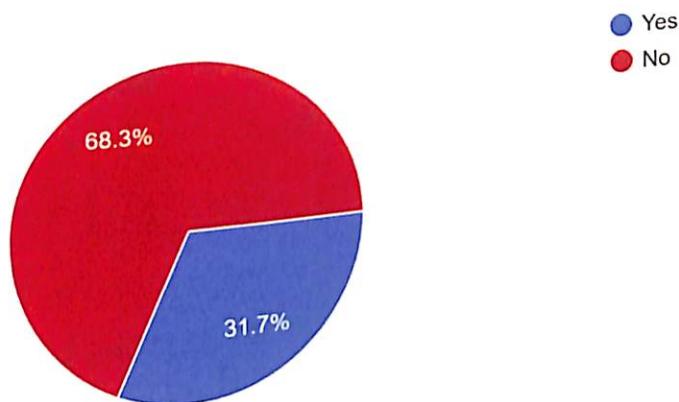
**Objective:** The purpose of asking this question is to know that how many people thinks that placing bet in esports makes it more professional.

**Data Interpretation:** The above data shows 41.6% of people who are in agreeable terms. 58.4% are the people who does not bet on esports game and are under the age category of under 18.

The data recorded are the people who are considered themselves as professional esports player.

Graph 17

Are you a professional esports player?  
101 responses

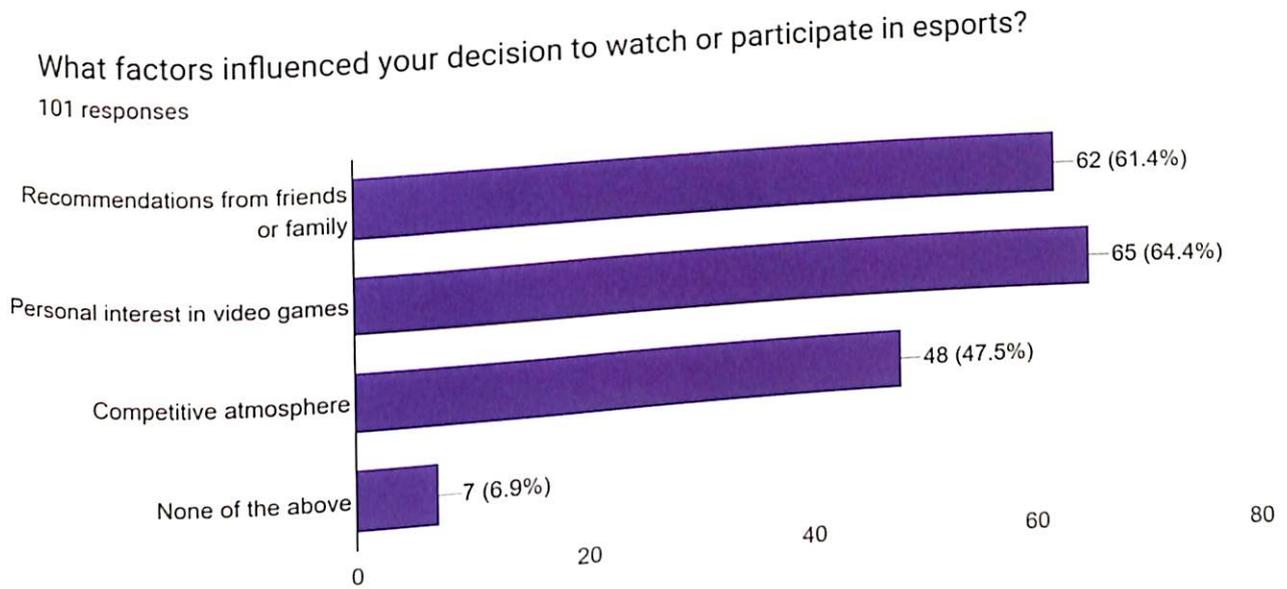


**Objective:** The purpose of asking this question is to defined the no. of players who are Professional esports player.

**Data Interpretation:** The above graph shows that currently in Mumbai 31.7% are professional esports player whereas 68.3% are not professional esports player.

The data recorded is all about the decisions of player made themselves to enter into esports.

Graph 18



**Objective:** The purpose of asking this question is to know about the player of how he got influenced to watch or participate in esports.

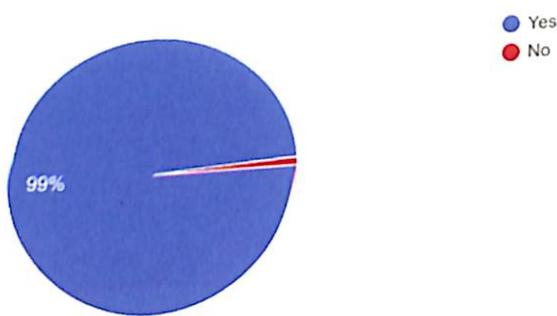
**Data Interpretation:** The above graph shows that most of the players got influenced by generating self interest in them to watch or participate in esports with the recorded data of 64.4% and recommendations from friends or family with the recorded data of 61.4%/ If we talk about Competitive atmosphere, the data recorded is 47.5%. None of the above recorded data of 6.9%.

The data recorded is to understand the people's opinion to see whether they want to see the new infrastructures of esports in Mumbai.

Graph 19

Would you like to see more investment and infrastructure for esports in Mumbai, such as dedicated esports arenas or events?

101 responses



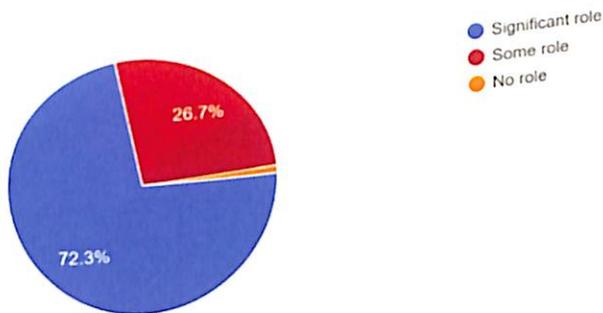
**Objective:** The purpose of asking this question is to know about the people whether they want to see investments and new infrastructure of esports in Mumbai.

**Data Interpretation:** The above graph shows that the data recorded of the people who wants to see more investments and new infrastructure for esports in Mumbai whereas only 1% of data collected of people said no who are not interested in investments and new infrastructure of esports in Mumbai.

The data collected is to review that what people think whether media and social media play in the popularity and recognition of esports in Mumbai.

Graph 20

What role do you think the media and social media play in the popularity and recognition of esports in Mumbai?  
101 responses



**Objective:** The purpose of asking this question is to gain information from people that whether they think that media and social media play in the popularity and recognition of esports in Mumbai.

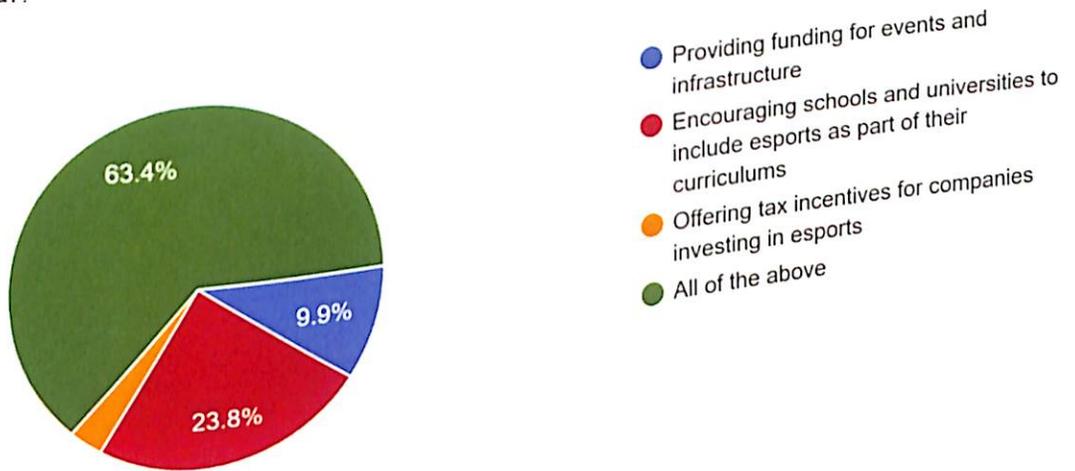
**Data Interpretation:** The above graph shows that 72.3% of the data recorded of the people who thinks that it is a significant role, whereas 26.7% is the data collected of the people who thinks that it has some roles that will eventually help esports in Mumbai.

The data collected is the players idea who thinks what will be beneficiary for the growth of esports in, Mumbai.

Graph 21

How do you think the government and local organizations can support and promote the growth of esports in Mumbai?

101 responses



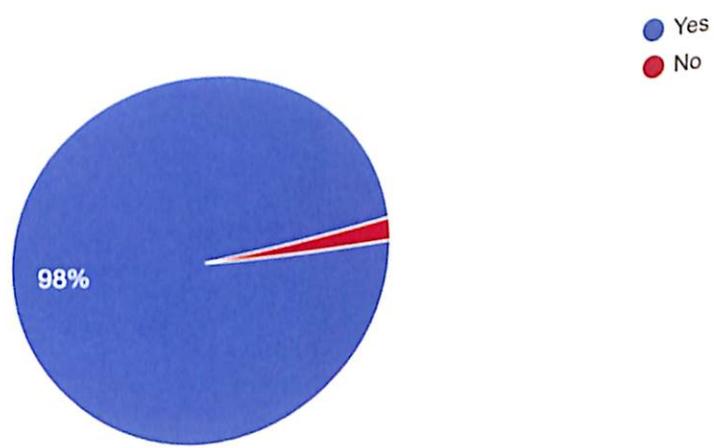
**Objective:** The purpose of asking this question is to gain information about people's understanding about the growth of esports in Mumbai with the help of government and local organizations.

**Data Interpretation:** The above graph shows that 63.4% is the data recorded who thinks all the given sentences are important that can help promote the growth of esports in Mumbai. 9.9% is the data collected of the people who thinks providing funding for events an infrastructure. 23.8% is the data collected of the people thinks that encouraging schools and universities to include esports and part of their curriculums. The data collected is what people thinks about the popularity or recognition of esports in Mumbai over the past few years.

The data recorded is about to gain information about the people's opinion on what they think about this phrase.

Graph 22

Have you noticed any increase in the popularity or recognition of esports in Mumbai over the past few years?  
101 responses



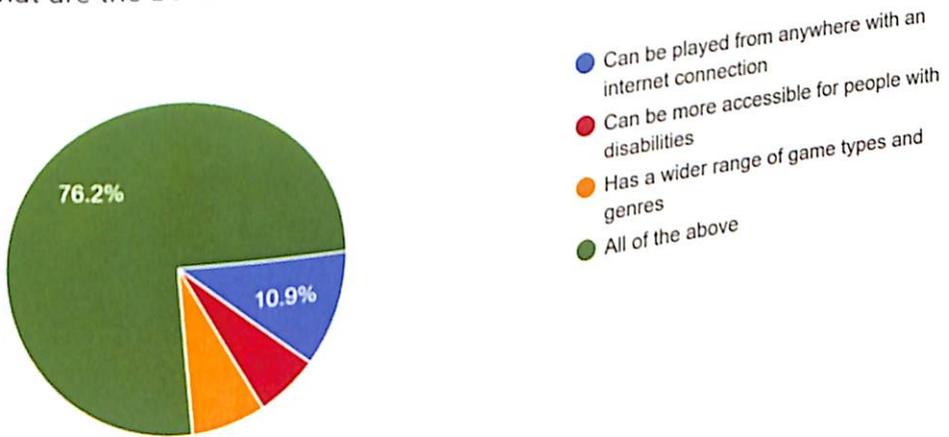
**Objective:** The purpose of asking this question is to know whether people think that if popularity or recognition of esports in Mumbai over the past few years.

**Data Interpretation:** The above graph showcase that 98% of the data collected is of the people who thinks that yes – The popularity or recognition of esports in Mumbai over the past few years, Whereas only few of the people thinks that no it has not been done.

The data collected is about the people thinks about some phrases which consider benefits of esports compared to traditional sports.

Graph 23

In your opinion, what are the benefits of esports compared to traditional sports?  
101 responses



**Objective:** The purpose asking this question is what people think about the above given phrases.

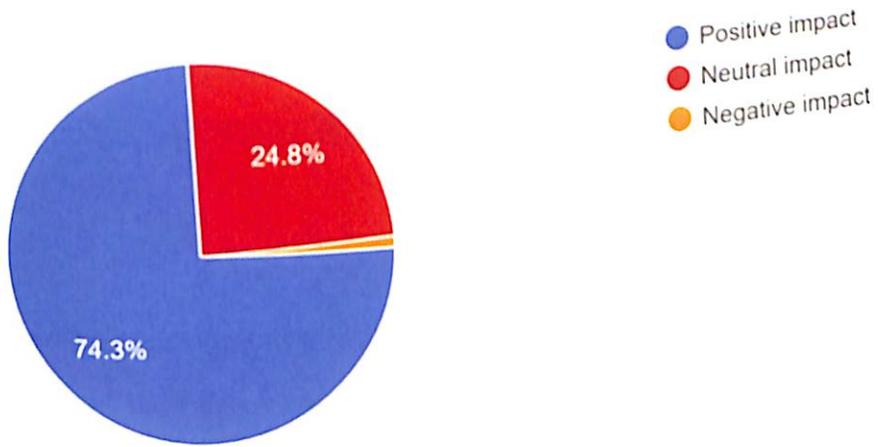
**Data Interpretation:** The above graph showcase that 76.2% people thinks the every pharses given above are important.

Whereas 10.9% is the data collected of the people thinks that can be played from anywhere with an internet connection.

The data recorded is what people think about the growth of esports that will have on the economy and job market in Mumbai

Graph 24

What impact do you think the growth of esports will have on the economy and job market in Mumbai?  
101 responses



**Objective:** The purpose of asking this question is to gain information about what players think about whether growth of esports will have on the economy and job market in Mumbai.

**Data Interpretation:** The above graph showcases that 74.3% of the data collected is the data of the people who thinks it can have a positive impact, whereas 24.8% of the data recorded are of the people who belief that it will have a neutral impact.

## Chapter 6

### 6 Findings of the research:

After carefully examining and reading through previously researched topics in the relevance of this research, we have found that the adoption of esports in Mumbai has been a topic of increasing interest over the past decade with the growth of the gaming industry and the increasing popularity of esports worldwide. Esports, or electronic sports, is a form of competitive gaming that involves players competing against each other in organized tournaments or leagues. The global esports market has been growing at a rapid pace, with revenue expected to reach \$1.1 billion in 2020, and Mumbai has been no exception to this trend.

Esports in Mumbai first began to gain traction in the early 2010s, with the emergence of dedicated gaming cafes and the organization of small-scale tournaments. These cafes provided a space for gamers to come together, play games, and socialize with like-minded individuals. The first dedicated gaming cafe in Mumbai was The Gaming Cafe, which opened its doors in 2006. This was followed by other cafes such as G-Game zone and the Playbox, which offered similar services and quickly gained popularity among gamers in the city.

As the popularity of gaming cafes grew, so did the organization of esports tournaments in Mumbai. The first major esports tournament in the city was the Mumbai Dota 2 Championship, which was held in 2012. This tournament attracted some of the best Dota 2 players from across the country, and was widely covered by local and national media. The success of this tournament led to the organization of other tournaments, such as the Mumbai Esports Championship and the Mumbai Gamers League, which have become annual events in the city.

In addition to these tournaments, Mumbai has also played host to several international esports events over the years. One of the most notable of these was the ESL One Mumbai, which was held in April 2019. This event featured some of the best Dota 2 teams from around the world.

and was attended by thousands of fans from across the country. The success of this event has led to speculation that Mumbai could become a major hub for esports in India.

However, despite the growth of esports in Mumbai, there are still several challenges that the industry faces. One of the biggest challenges is the lack of infrastructure and funding for esports in the city. While there are several gaming cafes and small-scale tournaments, there are few dedicated esports arenas or facilities that can host larger events. This has made it difficult for Mumbai to attract major esports events and has limited the growth of the industry in the city.

Another challenge that the industry faces is the lack of awareness and acceptance of esports among the general public. While the gaming industry has grown rapidly in recent years, there is still a perception among some people that gaming is a waste of time or a form of addiction. This has made it difficult for esports to gain mainstream acceptance in the city, and has limited the growth of the industry outside of dedicated gaming circles.

Despite these challenges, there are several factors that could drive the growth of esports in Mumbai in the coming years. One of the most important of these is the increasing availability of high-speed internet and the growth of mobile gaming. With the rise of mobile gaming, it has become easier for people to access games and connect with other players from anywhere in the city. This has created new opportunities for esports organizers to reach a wider audience and has made it easier for players to participate in tournaments and events.

Another factor that could drive the growth of esports in Mumbai is the increasing involvement of major companies in the gaming industry. Several major companies, such as Tencent and Amazon, have invested heavily in the gaming industry in recent years, and have launched their own gaming platforms and services. These companies have the resources and expertise to help develop the infrastructure and support systems needed for esports to thrive in Mumbai, and could play a key role in driving the growth of the industry in the coming years.

In conclusion, the adoption of esports in Mumbai.

The growth of esports in Mumbai has also been supported by the emergence of professional esports teams and players in the city. Over the past few years, several professional esports teams have emerged in Mumbai, including Signify, Global Esports, and Mumbai. These teams have competed in national and international tournaments and have helped to raise the profile of esports in Mumbai. Another challenge that the esports industry in Mumbai will need to overcome is the lack of a cohesive and organized esports community in the city. While there are several gaming cafes and small-scale tournaments in the city, there is no central organization or governing body that can help to promote and develop the industry. This has made it difficult for organizers to collaborate and share resources, and has limited the growth of the industry as a whole.

Despite these challenges, the future of esports in Mumbai looks promising. With the growing interest in gaming and esports among young people, the increasing availability of gaming content online, and the emergence of professional teams and players in the city, there is a strong foundation for the industry to build on. If the industry can overcome the challenges, it faces and continue to grow and innovate, there is no doubt that Mumbai could become a major hub for esports in India and around the world.

#### 6.1. Suggestions:

There are several suggestions that could help to further promote and develop the industry in the city. These include:

**Government support:** The government of Mumbai needs to recognize the potential of esports as an industry and provide support and funding for esports initiatives in the city. This could include setting up esports infrastructure, providing tax incentives for esports companies, and organizing large-scale esports events in the city.

**Community building:** The esports industry in Mumbai needs to develop a more cohesive and organized community that can help to promote and develop the industry. This could involve setting up an esports association or governing body that can help to bring together organizers, gamers, and other stakeholders in the industry.

**Talent development:** Mumbai has a large pool of young talent that could be developed for the esports industry. Universities and colleges in the city should continue to offer courses and programs in game design, esports management, and related fields, and should work closely with the esports industry to provide opportunities for students to gain practical experience and internships in the industry.

**Infrastructure development:** The esports industry in Mumbai needs to develop better infrastructure to support large-scale esports events and tournaments. This could involve setting up dedicated esports arenas, providing high-speed internet connections, and investing in advanced gaming equipment.

**Promotion and marketing:** To continue to grow and thrive, the esports industry in Mumbai needs to be promoted and marketed effectively. This could involve working with influencers and content creators to create buzz around upcoming events, leveraging social media platforms to reach a wider audience, and partnering with brands and sponsors to provide financial support for esports initiatives in the city.

**International partnerships:** Mumbai has the potential to become a major hub for esports in India and around the world. To achieve this, the industry needs to develop partnerships with international esports organizations and tournaments, and work to attract global esports events to the city.

**Diversity and inclusivity:** The esports industry in Mumbai needs to be inclusive and welcoming to all players, regardless of their gender, race, or background. Efforts should be made to promote diversity and inclusivity in the industry, and to provide opportunities for underrepresented groups to participate and succeed in esports.

## 6.2 Conclusion:

In conclusion, the adoption of esports in Mumbai has seen significant growth and potential over the past few years. The city has a large and diverse population of gamers, and the increasing availability of gaming content online has helped to fuel interest in esports. Additionally, the emergence of professional teams and players, as well as the organization of local tournaments and events, has helped to bring attention to the industry in Mumbai.

However, there are still challenges that need to be addressed in order for the esports industry in Mumbai to reach its full potential. These challenges include the need for government support, better infrastructure, and a more cohesive and organized esports community. Efforts should be made to develop partnerships with international esports organizations and tournaments, promote diversity and inclusivity in the industry, and attract global esports events to the city.

Overall, the future of esports in Mumbai looks promising, and the industry has the potential to become a major player in the global esports industry. With continued support and development, Mumbai could emerge as a hub for esports in India and around the world, providing opportunities for players, organizers, and businesses alike.

The adoption of esports in Mumbai has been growing steadily over the past few years, thanks to a combination of factors such as the increasing availability of gaming content online, the emergence of professional teams and players, and the growing interest in gaming and esports among young people in the city. However, there are still several challenges that need to be overcome, such as the lack of government support, the need for a more cohesive and organized esports community, and the need for better infrastructure to support large-scale events and tournaments. By following the suggestions outlined above, the esports industry in Mumbai has the potential to continue to grow and thrive, and to become a major player in the global esports industry.

## Annexure

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## Questionnaire

1.Name

2.Gender

3.Age

- Below 18 years
- 18 to 25 years
- 25 to 35 years
- Above 35 years

4.How frequently do you participate in esports?

- Daily
- Weekly
- Monthly

5.Which type of games do you mostly play in esports?

- Multiplayer Online Battle Arena (MOBA) e.g., Dota 2
- First-Person Shooter (FPS)
- Real-Time Strategy (RTS)
- Racing
- Sporting
- Other:

6.How do you perceive the growth of esports in Mumbai?

- Growing rapidly
- Growing slowly
- Stagnant
- Declining

7. Are you familiar with any esports tournaments held in Mumbai?

- Yes
- No

8. Have you attended any esports events in Mumbai?

- Yes
- No

9. How likely are you to regularly watch or participate in esports in the future?

- Very likely
- Somewhat likely
- Not likely

10. To what extent do you agree or disagree with the following statements.

- Strongly agree
- Agree
- Neither agree nor Disagree
- Disagree
- Strongly Disagree

- eSports players are more interested in fiercely competitive games compared to social gamers!
- An eSports Player is different from average social gamer
- Skill of an eSport player, much like of a traditional sports person is a function of amount of practice.
- The government should support the growth of esports in Mumbai!
- Educational institutions should promote esports as a career option!
- eSports players are more interested in fiercely competitive games compared to social gamers!
- An eSports Player is different from average social gamer
- Skill of an eSport player, much like of a traditional sports person is a function of amount of practice.
- The government should support the growth of esports in Mumbai!
- Educational institutions should promote esports as a career option!

11. Have you ever encountered advertisement of esports?

- Yes
- No

12. Which platform did you prefer of how to play/ gameplay your eSports? \*

- Video Advertising (YouTube)
- Audio Channels: (Podcasts)
- Print & Digital Publications: Magazines
- Social Media
- Friends
- Other:

13. What social platforms do you prefer watching eSports?

- Facebook
- Instagram
- YouTube
- Discord
- Reddit
- Twitch
- Other:

14. Which is the first esports you have played?

- Valorant
- CS GO
- Dota 2
- Apex Legends
- Call of Duty: Warzone
- Fortnite
- League of Legends

- Player Unknown's Battlegrounds
- Clash of Clans
- Other:

15. Have you ever clicked/checked on esports advertisement?

- Yes
- No

16. Can you play eSports for longer duration of hours if you use updated consoles?

- Yes
- No

17. Have you ever placed a bet on an esports game?

- Yes
- No

18. Are you a professional esports player?

- Yes
- No

19. What factors influenced your decision to watch or participate in esports?

- Recommendations from friends or family
- Personal interest in video games
- Competitive atmosphere

- None of the above
- Other:

20. Would you like to see more investment and infrastructure for esports in Mumbai, such as dedicated esports arenas or events?

- Yes
- No

21. What role do you think the media and social media play in the popularity and recognition of esports in Mumbai?

- Significant role
- Some role
- No role

22. How do you think the government and local organizations can support and promote the growth of esports in Mumbai?

- Providing funding for events and infrastructure
- Encouraging schools and universities to include esports as part of their curriculums
- Offering tax incentives for companies investing in esports
- All of the above

23. Have you noticed any increase in the popularity or recognition of esports in Mumbai over the past few years?

- Yes

- No

24. In your opinion, what are the benefits of esports compared to traditional sports?

- Can be played from anywhere with an internet connection
- Can be more accessible for people with disabilities
- Has a wider range of game types and genres
- All of the above

25. What impact do you think the growth of esports will have on the economy and job market in Mumbai?

- Positive impact
- Neutral impact
- Negative impact