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The Growth of eSports in India

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Abstract

Over the past decade, the growth of eSports in India has been remarkable, driven by the expansion of competitive gaming cultures, the penetration of the internet, and technological advancements. This paper explores the factors contributing to the rapid expansion of the eSports ecosystem in India, including the proliferation of affordable smartphones, the impact of government initiatives, and the role of private investments. It examines the key stakeholders such as players, game developers, sponsors, and tournament organizers, and how their collaboration has fostered a vibrant gaming community. The study also examines how eSports has created new avenues for employment, ranging from professional gamers to content creators, tournament organizers, and gaming analysts. It sheds light on how this growth has engaged India's youth, provided them with alternative career paths, and fostered a competitive environment. Moreover, the research explores the role of eSports in enhancing India's digital economy and its potential to contribute to global eSports revenues.

Keywords; eSports in India , Global Gaming Industry , Youth Empowerment , eSports Talent Development , Gaming as a Career.

INTRODUCTION

In recent years, eSports has emerged as a rapidly growing industry in India, fueled by advancements in technology, widespread internet penetration, and the increasing popularity of competitive gaming. What once started as a niche pastime has evolved into a mainstream phenomenon, captivating millions of players and spectators alike. With India's young and tech-savvy demographic, the country has become a significant player in the global eSports arena.

The rise of affordable smartphones and high-speed internet, coupled with the introduction of platforms like YouTube Gaming and Twitch, has democratized access to eSports, enabling gamers from diverse backgrounds to participate and showcase their skills. Moreover, the development of professional gaming leagues, tournaments, and dedicated eSports organizations has provided a structured pathway for aspiring players to pursue gaming as a career.

This burgeoning industry not only entertains but also creates opportunities in game development, content creation, and event management, underscoring its potential as a significant contributor to India's economy and youth culture.

The India Esports market is segmented by revenue source into sponsorship and advertising, tournament winnings, streaming and content creation and merchandise sales. Retrieved from <https://www.kenresearch.com/industry-reports/india-esports-market>

In the previous years, India's gaming industry has faced the following challenges:

Higher tax rates :-

As a result of the high tax rate, gaming products such as VR headgear, gaming consoles, and graphic processors were exceedingly costly in India. The acquisition of these supplies was not an easy task, as over 50% of the Indian population lived in middle-class households.

India Esports Market Segmentation by Game Genre (in %), 2023

India Esports Market
India Esports Market Segmentation by Game Genre



Sources : Kan Research Analysis

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Figure 1: India Esports Revenue Segmentation (2023)

Lack of awareness:-

In the past, people thought that gaming was only a hobby and could not be anything more. The creative and diverse employment options in this industry were being disregarded. Additionally, there weren't many courses accessible on game production.

Lack of support :-

The games that were developed by domestic organizations or individuals were not receiving considerable support. International games, such as Fortnite, PlayStation, and Xbox, were the primary focus of gamers.

Mindset of the society :-

Gaming corporations have substantially enhanced their capabilities in recent years. With an estimated 75% of the population under the age of 45 and a developing urban population, the gaming industry has been expanding at an exponential rate. Increased smartphone usage and the launch of 5G connection has brought out significant developments for this business. Gaming is finally being acknowledged as an art form and is receiving the recognition it merits.

In accordance with the reports issued by "the Federation of Indian Chambers of Commerce & Industry (FICCI)", the growth of online gaming in India will exceed that of online gaming globally. Growth trends in the gaming industry of India .k Kumar - international journal of social science and economics 2021 - ijs-ser.org retrieved from https://ijs-ser.org/2021/files/ijsser_06__164.pdf

Dash Between eSports

- **Entertainment and Sports:** eSports sits at the intersection of entertainment and sports. Unlike traditional sports, it blends competitive gaming

with engaging online content, catering to both players and spectators. The rise of platforms like YouTube and Twitch has created a unique synergy between gaming and streaming culture.

- **Passion and Profession:** For many, gaming starts as a hobby, but the growing ecosystem allows players to transition from casual gaming to professional careers. The "dash" represents the journey from being a player for fun to becoming an eSports athlete, coach, caster, or content creator.
- **Global and Local:** Indian eSports is influenced by global trends, but there's a need to localize content, tournaments, and games to suit the diverse Indian audience. This includes promoting regional languages in streams and developing games with cultural relevance.
- **Skill Development and Monetization:** Many gamers lack access to professional training or resources to enhance their skills. Similarly, while gaming has massive viewership, monetization opportunities are still limited for Indian players and teams. Closing this gap could boost the industry's sustainability.
- **Technology and Tradition:** eSports thrives on cutting-edge technology like VR, AR, and cloud gaming. However, its acceptance in traditional sports communities and mainstream society is still in its infancy. Integrating eSports into traditional sporting events or festivals could help bridge this gap.

India Esports Market Overview :-

- India's esports market is estimated to be worth USD 107 million in 2023. The market is predicted to increase over the period 2023-2028. Significant drivers include technological advancements, increased availability of high-speed internet, the rise of gaming influencers, and the growth of mobile gaming.
- The Indian esports market is fragmented with several key players in the Indian esports market including Nodwin Gaming, Nazara Technologies, Tencent Games, DreamHack, and Mobile Premier League.
- In 2023, Nodwin Gaming announced a significant partnership with Krafton Inc., the maker of PUBG, to launch a series of major esports tournaments in India. This collaboration is expected to elevate the competitive gaming scene in the country, attracting more players and viewership.

India Esports Market Size (In USD Bn), 2018-2028

India Esports Market
India Esports Market Size, (In USD Bn)



Sources : Ken Research Analysis

KEN RESEARCH

Figure 2: India Esports Market Overview

India Esports Current Market Analysis :-

- With over 900 million internet users in 2024 and the widespread availability of affordable smartphones, access to online gaming has surged, driving the growth of the esports market.
- The Southern region of India, particularly Bangalore and Hyderabad, dominates the esports market. These cities are tech hubs with a large population of tech-savvy individuals who are early adopters of gaming. Availability of robust infrastructure and internet connectivity supports the growth of esports activities.
- Among mobile games, PUBG Mobile has been particularly successful, capturing a large audience with its engaging gameplay and frequent updates. Despite a temporary ban, its rebranded version, Battlegrounds Mobile India, continues to thrive.

India Esports Market Segmentation :-

The India Esports Market can be segmented based on several factors:

By Platform: The India Esports market is segmented by platform into Mobile, PC and Console. The mobile platform's dominance in the Indian esports market in 2023, is primarily due to its accessibility and affordability. With the proliferation of budget smartphones and affordable data plans, mobile gaming has become the primary mode of entertainment for a large segment of the population.

India Esports Market Segmentation by Platform (in %), 2023

India Esports Market
India Esports Market Segmentation by Platform



Sources : Ken Research Analysis

KEN RESEARCH

Figure 3: India Esports Market Segmentation

By Game Genre: The India Esports market is segmented by Game genre into Battle Royale, Multiplayer Online Battle Arena and First Person Shooter.

Table 1: India Esports Market Competitive Landscape :-

Company	Establishment Year	Headquarters
Nodwin Gaming	2014	Gurgaon
FanClash	2020	Gurgaon
Nazara Technologies	1999	Mumbai
JetSynthesys	2014	Pune
Skyesports	2018	Chenna

- **Nodwin Gaming and Riot Games Partnership (2023):** Nodwin Gaming partnered with Riot Games to host the Valorant Conquerors Championship in 2023. This tournament aims to elevate the competitive gaming scene in South Asia, with the winners getting a direct slot in the Valorant Champions Tour, showcasing the growing collaboration between global game developers and Indian esports organizers.
- **FanClash Expansion into Southeast Asia (2023):** FanClash announced its expansion into Southeast Asia in 2023, introducing its esports fantasy platform to new markets. This strategic move aims to tap into the burgeoning esports communities in countries like Indonesia and the Philippines, enhancing FanClash's user base and international presence.
- **Nazara Technologies Financials:** For the first half of FY24, Nazara reported a 13% year-on-year growth in revenue, reaching 551.7 crore. Profit

after tax increased by 42% to 45 crore, with an improvement in the EBITDA margin to 11.1%.

India Esports Market Challenges :-

- **Monetization Issues and Revenue Generation:** Despite the growing popularity of esports, monetizing content remains a significant challenge. According to a report by the Internet and Mobile Association of India (IAMAI), the monetization of esports content is hampered by the limited revenue streams from advertising, sponsorships, and merchandise sales.
- **Infrastructure Limitations and Digital Divide:** Inadequate infrastructure in certain regions continues to hamper the growth of esports in India. The Ministry of Communications reported that only about 35% of rural areas have access to reliable high-speed internet, essential for competitive online gaming.
- **Cybersecurity Concerns and Integrity Issues:** Cybersecurity is a critical challenge in the esports industry. The increasing number of online tournaments and the use of digital platforms for streaming and transactions expose players and organizers to cyber threats. According to a 2023 report by the Indian Computer Emergency Response Team (CERT-In), the number of cybersecurity incidents related to online gaming increased by 25% compared to the previous year. The India Esports market is segmented by revenue source into sponsorship and advertising, tournament winnings, streaming and content creation and merchandise sales. Retrieved from <https://www.kenresearch.com/industry-reports/india-esports-market>

Increased Smartphone and internet penetration :-

Graph 1: Number of smartphone users in India in 2015 to 2020, with estimates until 2025 (in millions)

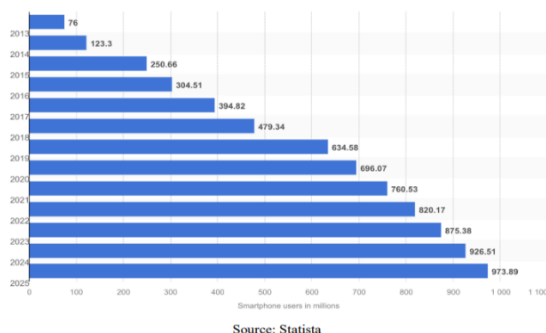


Figure 4: Increased Smartphone and internet penetration

India is now the second-largest internet and smartphone user nation. There is a greater adoption of digital payments, and the IT sector of the country is experiencing growth. The decrease in the cost of smartphones and the advancement of technology in the past few years have resulted in this development. In the future, it is anticipated that mobile applications will dominate the market.

Gaming as a career :-

Five days a week, Gen Z aspires to a more fulfilling lifestyle than a 9-to-5 employment. This is an interesting job possibility for people who adore playing games. Playing your preferred video games is an excellent method of earning money. For games with a large user base, several national and international competitions are organized. It is now acknowledged as a full-fledged occupation, and this discipline has a significant amount of latent potential.

Multiple gaming formats :-

Various playing formats, such as "play with computer" or multiplayer mode, have been introduced in digital games in recent years. An opportunity to engage and contend with others is afforded by the multiplayer format. Studies have indicated that Multiplayer games are favored more than single player games and players are more inclined to make in-app purchases in Multiplayer games.

Cloud gaming :-

Gaming is a service that is referred to as cloud gaming. The games are not necessary to be installed on your personal computer. In order to remain current with industry standards, there is no necessity to invest in costly computer enhancements. The game business might undergo a radical transformation due to this emerging trend. As the majority of enthusiasts in India are concentrated on mobile gaming, this sector is experiencing significant growth.

Improved parity in terms of age and gender :-

The assumption that games are just for children is largely gone. In the present day, games are being created for individuals of all ages. Some progress has been made, despite the fact that the age barrier has not yet been thoroughly overcome. The technical adequacy and availability of time are the primary reasons why the average age of a gamer in India is less than 24. In the gaming industry, women are no longer at an obstacle. As per a report by Inmobi, the proportion of women in the total user base of mobile games has increased significantly from 17% in 2016 to 43%.

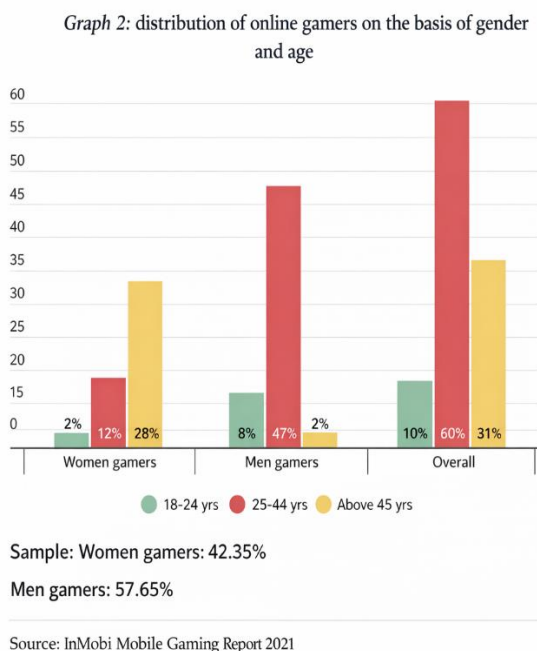


Figure 5: Graph Of Online Games On The Basis Of Gender

Lockdown effect :-

Everyone has been forced to alter their way of life and is now imprisoned in their own houses due to the COVID-19 epidemic. Due of this epidemic the World Health Organization (WHO) is recommending people to stay at home and play video games. In 2020, it started the #PlayApartTogether gaming campaign, which went viral. Free Fire, Fortnite, PUBG, and Among Us were at their peak. Google was not far behind in adopting the trend and began displaying doodles of its most popular titles on its homepage. Know more about eSports in COVID-19 Retrieved from :<https://search.proquest.com/open-view/9e020ee7050702ba0319d5961b86f58c/1?pq-origsite=gscholar&cbl=2045095>

Are E-sports sports ?

During the past decade, Electronic Sports, which are more commonly referred to as E-Sports, have consistently achieved impressive milestones in their development. The advancement of high-graphics, user-friendly interfaces in the gaming industry has been facilitated by the presence of large technology companies. This has substantially contributed to the advancement of Esports, which has opened up the possibility of Augmented Reality (AR) in terms of real-time interaction and precise 3D renditions of both virtual and physical objects. "But where does the average person end up with all of this? Do there exist any

developments socially? Do there exist any laws which control the so-called E-Sports? Should these be named and perceived as sports?" Are E-Sports sports? An Empirical Analysis vis-à-vis Developments so far by Aayush Sharma, Law Scholar. Manipal University, Jaipur 2021. Retrieved from

https://heinonline.org/hol-cgi-bin/get_pdf.cgi?handle=hein.journals/gblspr2§ion=10

What are the Findings & Suggestions about eSports ?

Findings

- **Exponential Market Growth:** India's eSports industry has witnessed significant growth in terms of players, audience, and investments, driven by affordable smartphones, low-cost internet, and the popularity of games like PUBG, BGMI, and Free Fire.
- **Rising Professional Opportunities:** There is a notable increase in opportunities for professional gamers, casters, content creators, and tournament organizers. eSports is evolving as a viable career option.
- **Government and Organizational Support:** The recognition of eSports as a legitimate sport by the Indian government and the emergence of organizations like ESFI (eSports Federation of India) are encouraging.
- **Challenges in Infrastructure:** Limited availability of gaming arenas, lack of high-speed internet in rural areas, and inconsistent electricity supply are hindering the growth of eSports in non-urban regions.
- **Gender Gap:** Female representation in the Indian eSports scene remains low due to cultural norms, safety concerns, and lack of visibility.
- **Monetization and Sponsorship Gaps:** While international brands invest in global eSports, Indian tournaments and players often struggle to attract sufficient funding and sponsorships.

Suggestions

- **Enhanced Infrastructure Development:**
 - Set up state-of-the-art gaming arenas across metro and Tier-2/3 cities.
 - Improve broadband penetration and ensure high-speed internet in remote areas.
 - Establish training academies for aspiring players and coaches.

- **Educational Integration:**
 - Introduce eSports-related courses or certifications in colleges and universities to promote awareness about the industry's professional aspects.
 - Organize school/college-level tournaments to nurture young talent.
- **Government Initiatives:**
 - Provide subsidies or grants for gaming startups and eSports event organizers.
 - Develop policies to regulate and promote the industry, similar to traditional sports.
- **Sponsorship and Investment:**
 - Encourage Indian corporations to invest in eSports events, teams, and infrastructure.
 - Collaborate with international eSports brands to bring larger tournaments to India.
- **Increased Female Participation:**
 - Organize female-only tournaments and offer scholarships for women in eSports.
 - Promote female eSports influencers and provide them with safer platforms for participation.
- **Awareness Campaigns:**
 - Conduct campaigns to educate parents and society about the benefits and opportunities in eSports.
 - Highlight success stories of Indian eSports athletes to inspire budding players.

India's esports landscape has witnessed significant growth, with several teams achieving prominence across various games. Here are a few of India's best esports teams:

S8UL Esports Founded in June 2022 as a result of the merger of SOUL and 8Bit, S8UL Esports has achieved exceptional success in games such as BGMI, claiming "the Battlegrounds Mobile India Pro Series".

iQOO Community



Figure 6: S8UL Esports

Global Esports Active in titles such as VALORANT and CS:GO, Global Esports has secured significant victories and represents India in international tournaments.



Figure 7: Global Esports

Godlike Esports Founded in 2018, Godlike Esports is renowned for its BGMI roster, featuring top players like Jonathan and Clutchgod. In the 2021 PUBG Mobile Global Championship, they represented India.



Figure 8: Godlike Esports

Orangutan Gaming With teams in BGMI, Free Fire, and Pokémon Unite, Orangutan Gaming has made notable achievements, including a second-place finish in the Battlegrounds Mobile India Showdown 2022.



Figure 9: Orangutan Gaming

Enigma Gaming Specializing in VALORANT, Enigma Gaming has won multiple tournaments, such as the TEC Challenger Series 8 and WD Black Cup: Season 3.



Figure 10: Enigma Gaming

TeamXSpark Led by Tanmay ‘ScoutOP’ Singh, TeamXSpark has succeeded in "Free Fire and PUBG Mobile, winning the THUG Invitational: Season 4 and PUBG Mobile Club Open – Fall Split 2020: India".



Figure 11: TeamXSpark

RevenantEsports A prominent organization in the Indian esports scene, Revenant Esports has teams competing in various games, including VALORANT and CS:GO.



Figure 12: Revenant sports

Velocity Gaming Known for their prowess in VALORANT, Velocity Gaming has been a dominant force

in the Indian esports circuit, securing multiple tournament victories.



Figure 13: Velocity Gaming

True Rippers Competing in games like VALORANT and CS:GO, True Rippers have made a mark with consistent performances in national tournaments.



Figure 14: True Rippers

Gods Reign Participating in CS:GO and VALORANT, Gods Reign has been active in the Indian esports scene, contributing to the growth of competitive gaming in the country.



Figure 15: Bgmi Roster

These teams have been instrumental in enhancing India's global esports presence, attaining success in a variety of gaming titles. Retrieved from <https://www.rooter.gg/blogs/top-12-esports-teams-in-india/2367>

BGMI esports teams statistics











Team	Prize Money Earned	Team Tournaments	Peak Viewers	# Matches	Win Streak
 BGMI BGMI	\$64,771	58	453,980	563	N/A
 Entity Entity	\$195,724	42	319,710	554	N/A
 Team Soul Team Soul	\$222,819	64	394,902	451	N/A
 GodLike Esports GodLike	\$123,829	60	646,633	406	N/A
 Reckoning Esports Reckoning	\$64,517	41	453,980	377	N/A
 Global Esports Global	\$116,156	47	319,710	329	N/A
 Chasin Esports Chasin	\$27,523	28	210,796	332	N/A
 Blind Esports Blind	\$185,876	40	210,796	318	N/A
 Guns Esports Guns	\$60,749	35	319,710	244	N/A
 OffEsports OffEsports	\$195,908	53	314,404	223	N/A

Figure 16: BGMI esports teams statistics

These are the teams which has earned highest no. of revenue by playing the game called as 'BGMI' because after covid this was only the game which was played so much . Retrieve from <https://escharts.com/teams/bgmi>

METHODOLOGY

The methodology outlines the systematic approach used to investigate the growth of eSports in India. It includes the following steps:

1. Research Design

Both quantitative and qualitative studies were used in a mixed-method approach. In the Indian eSports ecosystem, this methodology guarantees a thorough comprehension of the opportunities, challenges, and growth trends.

2. Data Collection Methods

- **Primary Data:** Surveys and interviews were conducted with key stakeholders such as professional gamers, game developers, eSports organizers, and enthusiasts.
- **Secondary Data:** Data was acquired from current literature, industry studies, government papers, and web articles about eSports in India.

3. Sampling

In order to identify participants from significant eSports centers in India, such as Mumbai, Delhi, and Bangalore, purposive sampling was implemented. The sample included 100 respondents representing diverse demographics and roles within the eSports industry.

4. Data Analysis

- Quantitative data from surveys were evaluated using statistical methods to discover trends, growth rates, and market potential.

- Thematic analysis of qualitative interview data revealed possibilities, difficulties, and insights unique to the Indian setting.

1. Limitations

The study is limited by its reliance on self-reported data and the absence of longitudinal data to measure changes over time.

2. Ethical Considerations

The anonymity and confidentiality of all participants were preserved throughout the study, and informed consent was obtained.

This methodology provides a structured framework for examining the factors contributing to the growth of eSports in India and identifying areas for future development.

CONCLUSION

India has shown itself to be revolutionary. Despite the numerous challenges it faces, including the high cost of supplies and a lack of awareness, the Indian gambling industry is demonstrating its status as one of the country's largest technology-based sectors. Due to the widespread use of smartphones and the ease of access to the internet, it is anticipated that mobile games will dominate the gaming industry. By enhancing the performance and experience, emerging technologies, including AR, VR, AI, and cloud computing, will contribute to the industry's growth. The prohibition on Chinese app created a floodgate of opportunity for professional progression in game production as well as game playing. The Government of India and numerous global technology corporations are acknowledging the latent potential of the Indian gaming sector. In the coming years, the industry will experience a twofold increase in investment, with a few strategic actors, private equity, and venture capitalists acquiring traction.

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