An exploratory discussion of online game as computing entertainment: eSport perspectives using mobile gaming devices

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Keywords: media entertainment, mobile gadgets, online games, eSport, public living room

Abstract

This study aims to develop implications for the future development of Japanese eSports. A mixed method was applied including survey data and in-depth interview data collected from Japanese online game stakeholders. The greatest contribution of this research is an in-depth study of the future prospects of eSports in Japan using primary data. This has been lacking in previous discussions, which have not been able to submit clear proposals. This study also suggests a different development path for media entertainment towards a trinity that includes players, spectators and viewers on virtual video sharing platforms, as is the case in the advanced eSports countries of Europe, the US, China and Korea. In terms of strategy development, there is clear indication that a Japanese-style model should be pursued, drawing on Japan's unique background and strengths.

This study is the first of its kind to make this finding and argument in the world of eSports. In the world of eSport, the path to media entertainment, as suggested by the leading markets in the US and China, has been seen as the default strategic path to follow. This study, however, clearly suggests a different possibility. In other words, the study clearly shows that

the eSport sector should not be limited to the path followed by the major markets, but should also be open to unique and original directions. This finding is also significant in that it suggests the diversity of models of eSport across cultures.

1. Introduction

1.1 Background of the study

Japanese subcultures are popular around the world and are now regarded as the embodiment of Japanese culture (Mukai, 2020). The opening ceremony of the Tokyo Olympics was held at the National Stadium on 23 July 2021 and included a medley of themes from popular games, such as Dragon Quest, Final Fantasy and Monster Hunter, which played as the athletes entered. Meanwhile, according to KADOKAWA Game Linkage, the Japanese eSports market reached 6.12 billion yen in 2019 and 6.68 billion yen in 2020, a 109% increase. The number of eSports fans in Japan is currently expected to increase by 142% compared to last year, to 686 million, and the Japanese eSports market is expected to continue to grow (Half Time, 2021).

At the same time, the size of the global eSports market in 2020 was approximately $973.9 million, an increase of only around 1.7% compared to the previous year. This was caused by the wide spread of COVID-19 around the world in 2020, which restricted people from going out. As a result, more attention is being paid to eSports, which can be enjoyed in the comfort of one's own home. The global market size of eSports is forecast to reach $1,598.2

million by 2023, with further growth expected (Ministry of Economy, Trade and Industry, 2020).

1.2 Rationale and purpose of this study

However, with regard to the public understanding and future prospects of eSports in Japan, the size of the eSports market is still small due to the different perceptions of sport, the different popular game titles, the different preferences of game enthusiasts, and the legal framework in Japan, among other issues. Thus, measures to expand the market are still an issue. Not many studies have focused on the phase of public awareness and expectations regarding eSports in Japan, and there appears to be a gap between the public sector, which is trying to promote eSports from the perspective of industrial promotion, and the government.

The Ministry of Economy, Trade and Industry (METI) has already set out a policy to intervene in the emergence of eSports from the perspective of promoting potential new information and communications technology (ICT)-based businesses, and it has already established a third-party organisation to act as a focal point for this purpose. In addition, attempts to professionalise eSports through the creation of a competitive environment have been made. However, the situation of the eSports market in Japan, a major online gaming nation, differs from the development path followed by the leading eSports regions of Europe, the US, China and South Korea, where eSports has developed into media entertainment, mainly through

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video sharing platforms. The path of public sector intervention to promote the industry is also unclear.

In light of this transitional stage of eSports in Japan, we aim to investigate citizen attitudes towards eSports and to identify and propose issues that cannot be overlooked if eSports is to develop as an emerging industry in Japan. To this end, this study aims to develop answers and suggestions to the following research questions:

RQ1: What are the opinions and evaluations of Japanese citizen consumers towards eSports?

RQ2: Should Japanese eSports follow the path of other eSports countries, such as Europe and the US, in becoming media entertainment, focusing on viewing on video sharing platforms?

RQ3: What is the best direction for eSports in Japan to take as a socially rooted sport?

Japan, as a leading country in terms of subculture, already has its own gaming culture and console industry. In this sense, the Japanese eSports market may already be on its way to developing a unique Japanese eSports model. We will examine these fundamental issues in a comprehensive manner using a literature review and primary data collected from citizens.

2   Literature review

2.1 The emergence of eSports in Japan

The first issue is the definition of eSports. The global and Japanese eSports market trends

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actually follow different genealogies. Generally, they evolve along the axis of the three waves of eSports advancement abroad presented by Taylor (2018): first as a 'game', second as a 'sport' and third as 'media entertainment'. It has been suggested that the Japanese eSports needs to develop in response to the problems and legal issues facing the gaming market. The current state and characteristics of eSports in Japan can be understood by comparing its development with that of other leading eSports countries. In contrast to the bottom-up US/European model and the top-down South Korean/Chinese model, the various trials and errors that have occurred in each country's move towards media entertainment have shown that the mobility of eSports development is based on the use of video sharing platforms to broadcast sporting events and promote eSports in the sector. The various trials and errors that have occurred as countries have progressed to eSports entertainment highlights the fact that the driving force behind the development of eSports has been the activation and promotion of the sector in general, including the broadcasting of eSports events on video sharing platforms and the promotion of eSports awareness by game developers.

2.2 Japanese gaming environment and its peculiarities

eSports is a new and innovative form of sport in the age of symbiosis with COVID-19, and it is also a new and innovative activity in terms of expanding the diversity of sports, as competitors compete against each other remotely and across generations. It also attracts

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attention for its social significance as a networked sport, which has the potential to include a wide range of participants and to support the expansion and tolerance of social diversity online.

In Japan, a country with a large video game industry, eSports is still a highly innovative sport that has the potential to drive the creative industry. It was developed by Nintendo and has many fans around the world. However, in the field of eSports, which is highly innovative and has the potential to drive creative industries, the level of activity is still low, and the research results dealing with this field are limited. This appears to have led to a lack of a strategic agenda for the future examining eSports in Japan from a comprehensive perspective.

Therefore, to provide a guidepost for examining the current status and future prospects of eSports in Japan, which is a gaming powerhouse, this study aims to present an analytical model useful for developing the potential, strategic direction and social significance of eSports promotion in Japan. This is achieved based on the results of a survey of stakeholders in eSports in Japan, including citizens, relevant organisations, local governments that invite eSports competition and school educators.

2.2.1 How eSports has been developed in Japan

It has been pointed out that the development history and challenges of eSports in Japan are largely divided into gaming market issues (especially differences in popular game titles from overseas) and legal issues (especially high prize money issues related to the Act Against

Unjustifiable Premiums and Misleading Representations; Igarashi, 2020). In addition, it has been pointed out that the lack of dynamism and traction of organisations systematically driving the promotion of eSports was a characteristic issue in Japan. Later, the establishment of the Japan eSports Union (JeSU) in 2018 led to the establishment of a third-party organization, the resolution of the issue regarding high prize money under the Act Against Unjustifiable Premiums and Misleading Representations and the development of a competitive environment. According to the JeSU, eSports is an abbreviation for electronic sports, and in a broad sense, it refers to entertainment, competitions and sports in general that are played using electronic devices (Japan eSports Union, 2018).

The history of eSports in Japan can be traced back to the birth of computer games in the 1980s, and since then, a number of gaming tournaments have been held (Ministry of Economy, Trade and Industry, xxx). In the 1990s, professional gaming leagues, such as the Cyberathlete Professional League (CPL) and the Professional Gamers League (PGL) appeared in Europe and the US, and large amounts of prize money were awarded to the top performers. However, in Japan, due to restrictions imposed by the Act Against Unjustifiable Premiums and Misleading Representations, there was no scheme to offer large cash prizes, and the emergence of professional gamers and tournaments to support the promotion of eSports on a large scale, as led by Europe and the US, was delayed.

In 2000, the World Cyber Games Challenge (WCGC) was held in Korea, and the term

'eSports' quickly gained global recognition (Jonasson and Thiborg, 2010). Ten years later, in 2010, Daigo Umehara became the first Japanese professional gamer to be sponsored by a Western company, and in 2011, the first eSports Japan Cup was held (Ferrari, 2013). At this point, eSports began to gain prominence in Japan. Later, in 2018, the JeSU was established, and as mentioned above, eSports in Japan has been gaining further momentum (JeSU, 2018).

2.2.2 The position of eSports in Japanese society

Even though online games are defined as 'sports' by the JeSU, the awareness and socioeconomic impact of eSports in Japan, a country that is essentially a gaming powerhouse, are still low. Compared to the evolution and development of eSports into media entertainment in developed gaming countries, such as Europe, the US, China and Korea, they are still in their infancy. Igarashi (2020) attributes this to a small audience, mainly due to market problems, but he does not provide a clear explanation as to why the audience for live online gaming competitions has not expanded in Japan. Indeed, even in the international debate, Tjønndal (2020), for example, argues that there is still resistance to recognising eSports as a sport, drawing on various examples.

eSports has been the subject of research in the field of sport studies since the early 2010s, and research results have been accumulated on its potential as an industry, its position in the social economy and its impact on sport as a whole (e.g. Ferrari, 2013; Jonasson & Thiborg,

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2010). The main recent research directions include, for example, Tjønndal's (2020) suggestion that there is a need to reconsider the positioning of eSports as sport itself. Billings and Hou (2019) suggest that we should go back to its roots and learn from the origins and evolution of eSports, which has become an international phenomenon.

2.3 Issues and challenges surrounding eSports

2.3.1 The potential and social significance of eSports

eSports is still in its infancy in Japan compared to other developed countries. However, the COVID-19 disaster has encouraged the diversification of sports and eSports towards those that can be enjoyed indoors, which is likely to be a powerful guidepost when considering the nature of new sports in the age of diversity. In addition, the style of simultaneous online gaming, which is based on cutting-edge technology, is expected to have a significant impact on the social economy as an innovative industry and is also likely to drive the creation of high-potential businesses from the perspective of information strategy and digital innovation. In other words, the potential of eSports is huge, and it is time to consider the potential and social nature of eSports in light of the new challenges of living in harmony with COVID-19. For example, Baym (2021) sees eSports from the perspective of the new creative industry of game design, noting the potential and possibilities of media entertainment developed on social media in the global market. Shtern and Hills (2021) discuss the role of social media platforms in the creation

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of sponsor-supported media entertainment productions for the development and launch of large-scale eSports programmes that require significant investment.

In the wake of COVID-19, the world is becoming increasingly remote and online, with teleworking, remote education and online drinking, among many other activities. eSports will therefore easily be accepted as a new way of life. From the point of view of health promotion and intergenerational interaction, eSports is a new format of activity that should be studied with interest (Funk et al., 2018; Hallmann & Giel, 2018). There is a growing movement to study the measures taken and the challenges involved in bringing previously physical competitions online, i.e. 'eSporting' them (Westmattelmann et al., 2021).

2.3.2 Social significance as an innovative and creative sector

eSports embodies the realisation of a symbiotic and diverse society, in which everyone can participate, regardless of age, gender, nationality, disability or other barriers. This is an effective measure. In other words, it is now required to redefine the potential and social significance of eSports as a participatory activity that goes beyond mere games (Hayday & Collison, 2020). In this respect, Newman et al. (2021) also discuss the rapidly developing and expanding phenomenon of eSports as a new form of sport through a narrative analysis.

The debate on eSports is strongly based on its potential as a novel, innovative and creative industry and as a new powerhouse for the social economy. In considering well-being in the

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digital age, there is also interest in the positive psychological and health effects of eSports, as discussed in the previous section (Rieger et al., 2014). Overall, it goes without saying that the impact of sport on people's psychology needs to be closely examined, such as by comparing different attributes of sport participants (Hallman & Giel, 2018). For example, Mares and Bonus (2021) suggest that watching eSports as media entertainment can lead to psychological and physical growth through the simulated experience of sports, not only when acting as a player but also through the realism and excitement of the game. From this perspective, Funk et al. (2018) reconsider the social significance of eSports and suggests the possibility of developing human resources and education through eSports.

2.3.3 eSports as media entertainment or another pathway in Japan

Finally, this section examines whether it is appropriate for eSports in Japan to follow the model that other major eSports countries have followed and aspired to, which is to revitalise eSports as media entertainment and drive the economy as a core creative industry. As already mentioned, the majority of commentators believe that eSports in Japan is still in the process of establishing its environment, is small in scale and has only just begun. However, in the grand scheme of things, Japan's eSports industry is not behind the rest of the world in terms of time. As a gaming superpower, Japan has been hosting gaming competitions since the 1980s and has produced some of the most famous professional gamers in the world.

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Figure 1. Share of gaming market held by mobile gaming

However, in terms of scale, the Japanese market is still in its infancy, as discussed in the previous section. Ironically, the high-quality console industry and the solid base of Japanese gamers who love their consoles may be the main reason the development of eSports in Japan has been hampered. The typical style adopted eSports, which includes high-powered PCs and equipment along with instantaneous head-to-head action between players, is not common in Japan. The first generation of eSports games, such as StarCraft, Warcraft and Counter-Strike, which are highly popular PC games overseas, and the new generation of eSports games, such as Dota 2, League of Legends (LOL) and Overwatch (OW), are of very little interest to Japanese gamers (Conroy et al., 2021). Due to the small number of competitive players, no strong players have emerged, and the path to sponsorship has been cut off.

However, in Japan, the number of companies sponsoring eSports is gradually increasing, with three of the country's leading industrial sectors – automotive, beverage and apparel – playing a central role in the early days of eSports (Jensen et al., 2021). In November 2020, a provider of high-speed mobile communication services decided to create a new league based on a high-capacity, high-speed network, and declared that Japan would become a sacred place for eSports in the future, which could determine the market and direction of eSports in Japan

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(NTT Docomo, 2020). The fact that a well-known mobile services company has declared its support for eSports is in line with the fact that the global gaming market is already shifting from home consoles and PCs to mobile platforms. The impact of the development of a stable infrastructure for 5G services, which will enable high-speed, high-capacity communications, should not be overlooked. In this sense, the future of the eSports market may well be driven by mobile gaming on Japanese-style mobile devices.

However, the specificity of the Japanese method of enjoying eSports is also relevant here. Japanese eSports is not necessarily based on the Western style of playing games on high-performance PCs but appears to be trending towards a path based on Japan's own mobile gaming devices. As Docomo announced, Nintendo and Sony are still the dominant players in the world of gaming consoles, and there is no need to follow the PC-based eSports boom.

As Vorderer et al. (2004) and Bartsch and Viehoff (2019) have discussed, the core value of eSports as media entertainment is enjoyment, enabling players compete in the cyberspace and the audience to watch and support their favourite players. Zillmann and Vorderer (2000) also discussed the potential of eSports as a media entertainment more than two decades ago.

In other words, instead of following the Western path of media entertainment, eSports in Japan follows a unique style of online gaming, where each gamer uses his or her mobile gaming device or home PC to play games, with a relatively small community of members interacting and playing against each other, and the audience watching online (Lin & Zhao, 2020). With the

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support of the Japanese console industry and a robust infrastructure enabling the gamers to play eSports, a Japanese eSports model has already been established based on online gaming in Japan.

Thus, it should be asked: Will the reality of Japanese online gaming, as a creative industry, revitalize and direct the gaming industry itself? And is it appropriate for Japan to seek a path of evolution towards Western-style media entertainment? Moreover, would it be realistic for Japanese public sectors and industries to seek a strategy following a media entertainment pathway based on the Western eSports market? In order to answer these questions, this study examines the current status and future prospects of eSports in Japan based on the results of a survey and interviews with various people involved in eSports.

2.4 Organisation of extracted discussion points to be analysed by primary data

Having summarised the recent academic discourses on eSports in the above section, let us design an analytical framework to be implemented for analysis with primary data in the next section (Figure 2). As mentioned at the outset, this study aims to address three research questions, but the underlying debate and conceptualisation is that regarding a Japanese-style model of eSports – a way of enjoying games using mobile gadgets as the primary medium. This differs from the Western path of media entertainment, where gamers enjoy interacting in cyberspace, including through viewings in small YouTube communities.

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The Japanese style of eSports is unique and differs from the Western method of large, syndicated media entertainment, and it might be arguable that eSports in Japan is not living up to its full potential. However, this may not be a persuasive approach to the Japanese eSports model. Rather, with the development of high-capacity, high-speed mobile networks as a tailwind, it makes more sense to evaluate mobile gaming itself as the basic format of eSports, based on Japan's globally acclaimed precision and high-performance mobile gaming devices, and to discuss the future prospects of a unique Japanese style of eSports that is derived from this style of interaction in physical and virtual spaces.

Based on the previous literature review, and in particular, the comparative study of the current state of Western eSports in Japan, we will now continue our analysis based on an analytical framework of research topics to be examined in light of primary data.

Figure 2. Analytical framework and discussion points

In this study, based on the socioeconomic potential of eSports, the opinions and comments of interviewees will be collected in the light of the dual axes of formal and informal, community-based and individual and business and non-profit. We then explore the future design and potential of eSports according to the upper section of Figure 2.

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3. Methodology

3.1 Survey and data collection

This study applied a mixed method based on a quantitative approach including survey data (including text data for the open-ended questions), which was followed by in-depth interviews with experts, business suppliers and policy makers in the eSports field and citizen-centred community development.

Study 1: The survey was conducted with web monitors of a Japanese marketing company, MyVoice.com:

[Survey target] Questionnaire monitors of MyVoice.

[Survey method] Internet survey (online research with web monitors)

[Survey period] 1–5 July 2018 & 1–5 February 2021

[Number of Respondents] 10,052 (2021)

The questionnaire contained 33 questions asking the respondents about their general activities and views on eSports as well as one open-ended question, which asked about the image of eSports. For this open-ended question, we received 5,640 descriptive answers to the question. The survey was a second implementation of the same questionnaire.

Study 2: In-depth interviews with voluntary participants

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Based on the results of Study 1, in-depth interviews were conducted with 15 participants in order to capture their perceptions in more detail. The interviews were conducted using a semi-structured interview method, following the guidance given in Figure 1, in order to extract the main points. The interviews were recorded and transcribed. The resulting textual data were analysed using a thematic analysis approach to highlight the respondents' views and evaluations of eSports. The list of interviewees is summarised in Table 1.

First of all, P1, who had been involved in inviting large scale eSports events, was asked to call for participants using a convenience approach to gather members who expressed willingness to contribute. In addition, three online game players were recruited through a university club where one of the authors was working as a lecturer.

As shown in Table 1, Study 2 presents the results of interviews conducted with 15 participants from 6 sectors: local government officials in charge of attracting large-scale eSports events as part of the event-oriented policy, game business and entertainment providers, network and infrastructure companies, local community and industry associations, experts and school educators. In addition to these 12 participants, three online game players were also invited to the interviews.

Table 1. Interview participants

3.2 Data analysis

For Study 1, the response data from the above survey were statistically processed using SPSS

Electronic copy available at: https://ssrn.com/abstract=3976944

version 28 to understand the respondents' attitudes and ideas concerning eSports. The seven survey items were 'awareness of eSports', 'what have you done in relation to eSports in the past year (multiple answers)?', 'interest in eSports', 'thoughts on eSports', 'what would you like to do in relation to eSports?', and 'do you agree or disagree with the promotion of eSports?'. In addition to these seven questions, the respondents were also asked to write down their overall concept and opinions of eSports in an open-ended question. We used these questions to understand the current phase of Japanese consumer perceptions of eSports, mainly through descriptive statistical processing.

For Study 2, in-depth, semi-structured interviews were conducted with the 15 participants referred to in Table 1 using Zoom, based on the issues and guidance shown in Figure 2. In particular, because the interviews were conducted in July 2021, when a state of emergency due to the COVID-19 pandemic was declared in Japan, some comments were made in the interviews on the restriction of activities due to the pandemic and online interaction in virtual spaces from home. All interviews were recorded using the recording function of Zoom and then transcribed. The resulting text data were coded, and key topics were extracted using NVivo12. The data were categorised only by the sector of the interviewees to ensure the anonymity of the respondents. The IDs are given in Table 1.

4 Findings and analysis

4.1 Survey data analysis

The following sections examine the current situation and issues regarding the recognition of eSports in Japan. The general results can be summarised as follows:

The recognition rate of eSports was just under 80%, whereas over 80% not interested. As for what they would like to do in relation to eSports, 3%–5% said they would like to 'watch matches on TV', 'gather information on the internet etc.' and 'watch matches live on video or streaming'. There was no significant difference between the results of the two surveys conducted in 2018 and 2021.

4.1.1 Awareness and experiences of eSports

Overall, 35.3% of respondents knew what eSports were, and 43.6% had heard the name but did not know what they were. The combined recognition rate was thus 78.9%, which represented an increase compared to the 2018 survey. However, it is worth noting that more than 43% of all respondents were not familiar with what eSports are (Figure 3).

Figure 3. Awareness of eSports

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In terms of what they had done in relation to eSports over the past year (multiple answers), 56.7% of those who were aware of eSports said, 'I saw or heard about eSports on TV, in newspapers or on the Internet', and 3%–4% said 'I talked about it with my family, friends or acquaintances' and 'I collected information about eSports on the Internet etc.'

Among male users in aged 10–39 years, the ratio of 'collecting information about eSports on the Internet' and 'watching games on the Internet through live video or streaming' was higher than for other segments of respondents.

4.1.2 Level of interest in eSports

The total number of respondents who were interested in eSports was approximately 7%, including those who were 'interested' and 'fairly interested'. This figure is less than the 30% for males in their teens and twenties. For those who were not interested, the combined total of 'not interested' and 'not really interested' was over 80% (Figure 4).

Figure 4. Level of interest in eSports

Respondents were asked to select what they thought was true about eSports (multiple answers). 24.9% said, 'Games are a form of play and cannot be regarded as s

ports competitions'; 20.2% said, 'Games are not mainly physical activities and cannot be regarded as sports competitions'; and 16.9% said, 'The name 'eSports ' does not give an image of competitive gaming'.

Only among males in their teens and twenties were the percentages of 'It is a sporting event because it is played by individuals or teams' and 'It is a mind sport like chess or chess' relatively high, but these answers are not significantly different from those of other age groups.

Regarding what they would like to do in terms of eSports, still only 3%–5% of respondents said they would watch a game on TV, gather information about eSports on the internet or watch a game on the internet with live video or streaming. However, the overall impression and interest in eSports itself was low. As mentioned earlier, males in their teens to thirties barely showed any interest in eSports, such as 'collecting information about eSports on the Internet, etc.', and 85% of the total sample chose 'I have no interest in eSports', clearly indicating the position of eSports in Japan at the moment.

4.1.3 Promotion of eSports

Opinions on the promotion of eSports were much more scathing: barely 16% of respondents were either 'for' or 'somewhat for' the promotion of eSports. The results for 2021 showed a

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slight increase compared to the results for 2018, with just over 20% of respondents saying they were either 'opposed' or 'somewhat opposed' to eSports, compared to 62.7% who were 'undecided', which seems to suggest that their affinity and sympathy for eSports itself is not high enough that they would be able to express their own opinions in the first place.

4.1.4 Respondents' comments

This section discusses representative responses to the open-ended questions from the July 2021 survey (5,640 responses in total). The free-text responses were coded using NVivo version 26, a text-mining software, to identify trends and key topics. Three sub-topics were found to be common to the respondents: (1) the impact on health (most comments were about the negative health effects of too much online gaming, though there were also some on the positive aspects of improving reflexes and intuition); (2) expectations of the potential of the creative industry sector; and (3) doubts about its position as a sport. As shown in the summary in Table 2, the majority of the free text answers were dominated by negative perceptions towards eSports as a sport.

Table 2. Comments based on open-ended question

4.1.5 Summary of Study 1

From the results of Study 1, it was found that in Japan, a country with a large gaming population

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and high specs regarding game gadgets, the awareness and interest in eSports is low, and the impression of eSports is not necessarily good. Some respondents even rejected the idea of eSports being a sport in the first place. There were also a small number of respondents who expressed an expectation or positive outlook on the future potential of eSports as a new industry.

Particularly, extracted subtopic (3) suggests that, in Japan, the concept of sport is recognized in close relation to physical education, and that the perception of sport in society is based on the assumption that it involves physical exercise and promotes physical health. This suggests that many respondents were uncomfortable with the definition of eSports itself.

Therefore, for Study 2, we conducted in-depth interviews with 15 participants to explore perspectives on the future of eSports in Japan, referring to the discussion points developed from the literature review for interview guidance.

4.2. Conducting interviews and data analysis around eSports in Japan

As mentioned above, in Japan, actual face-to-face games on home consoles and in game centres has been thriving for a while, so eSports, which consists of engaging in online games on PCs and other devices with foreign countries, are only just beginning to take off. Japanese manufacturers seem to be more focused on the promotion of traditional game titles, and eSports competitions have not yet reached the stage where they have gained much support. However, the opportunity provided by the Tokyo Olympics, postponed until 2021, once again suggests a

debate on the inclusion of eSports as a new form of competition in the Olympic Games in light

of its socioeconomic potential and future (Miah, 2021).

At the same time, online distribution has attracted a lot of attention due to COVID-19,

and local governments in Japan are interested in using eSports to revitalise their local

communities, with some even beginning to attract tournaments. However, the public perception

of eSports in Japan is still dominated by an unhealthy image, as exemplified by gaming

disorders. For example, interviewee P1 mentioned the following comments:

'As a method of "regional PR", we would like to use games (eSports) as a catalyst

for regional development in addition to the traditional image of anime and manga

as sacred places within the framework of pop culture. For education, we would like

to deepen the understanding of the game field through programming education and

game literacy courses'. (P1)

In the following sections, the interviewees' comments are categorised and discussed in

line with the key topics as a discussion guide for the semi-structured interviews.

4.2.1 Sociocultural factors and eSports

On the one hand, the most noticeable and characteristic comments, including from gamers,

concerned the lack of acceptance of eSports in Japanese society and culture as well as their

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experiences and their assessment of this. On the other hand, as an event-oriented policy, the

'locals' also hoped that by hosting eSports tournaments, the recognition of the host community

and the awareness of its tourist resources would lead to a branding of the society in the medium

to long term and an increase in inbound tourism:

'If we only focus on eSports, we will not be able to gain the understanding

of the people of the prefecture'. (P2)

'When we put up flyers for an eSports tournament in our school, we received

several complaints from teachers'. (P1)

'This is a far cry from the Japanese concept of sport, which involves sweat

and toil. If we don't break down the concept of physical education = sports

in school education, eSports will not take root. I do it with the understanding

that it's not a sport, and I understand that it's not a sport'. (GP3)

'eSports is an online game, isn't it? That's what people often say to me. They

look at me as a step down. It's like a bad hobby, a geek's art'. (GP2)

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At the same time, there was a large amount of commentary on the politeness and discipline of the Japanese community when it comes to live gaming. YouTubers are leading the way in this style of live action, with viewers able to comment on the game as they see fit.

'The rules are set and adhered to by the YouTubers themselves, whether in the YouTube comments section or on social networking sites where the code is shared. For example, you can ask people to add their Switch friend code (e.g. code -> SW-09xx-34xx-76xx), or in the case of PlayStation or PC, you can exchange the friend code and PlayStation ID of the game via Twitter DM. There is an image of a group of trusted friends'. (P2)

'In games, we ask players to stop playing in a way that makes others feel uncomfortable. Asking people not to stir up trouble for the killers or attack individuals in the comments section generally makes for a pleasant match'. (P1)

'Extend the community by welcoming beginners. We are proud of the fact that we have created our own community, for example, when there are a lot of participants, we take turns [two games at a time]'. (P3)

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'YouTube membership allows off-line meetings, information exchange on

Twitter, spin-out projects, etc. We promote community activities on a small

scale. Basically, we don't expect to play with foreigners'. (P2)

In this way, Japanese gamers seem to be taking full advantage of existing social networking services, such as YouTube and Twitter, to gather peers and build their own virtual online communities under their own ownership. This is a different approach to the large-scale media entertainment outlets outlined above, instead using Japan's first app games and gadgets to create a model of easy enjoyment in small communities.

4.2.2 Market orientation and creative industry

As we have already seen in the previous section, the Japanese online gaming market is not moving in the direction of Western-style mass media entertainment, and this direction seems to be inconsistent with the strong Japanese gaming industry market and the flourishing mobile gaming scene.

In fact, Japanese online gamers appear to be reluctant to recognise online gaming as a sport in the first place, and the phase of gamer and citizen attitudes towards eSports can be ascertained from the results of the quantitative analysis (no significant change in attitudes over

the three years from 2018 up to 2021) and the text mining results from the previous section.

So, we should ask: What are the views and strategies of Japan's leading gaming and telecommunication infrastructure industries regarding the future of eSports? In this section, we mainly analyse the comments from ICT network providers, digital game experts and game players:

'The emergence of 5G will enable a robust infrastructure for the operation of games and will expand the scope of gaming'. (G1)

'eSports *in Japan has been and will continue to be based on home gaming devices and online gaming on smartphones'. (G2)*

'Japanese online gaming is characterised by native app gaming (broadly sp eaking, web apps), where data is managed online and a social network co mmunity of friends is at the heart of the gaming system, and this is the st rength of Japanese eSports*'. (G2 & N2)*

'Japanese eSports *prefers small-scale gadget mobility rather than large scal e event-like eSports using sophisticated PCs. Japanese* eSports *has evolved*

and will continue to evolve in line with Japanese tastes and lifestyles'. (C1 & C2)

In particular, there were high confidence and expectations about the future prospects of Japanese eSports:

'The Japanese gaming industry has traditionally been dominated by programmed apps that run on devices such as smartphones. These off-line, programmatically complete Japanese web-application games are not primarily focused on systematically extending the network'. (G1, G2, N1 & N2)

'The emergence of social games (web apps) that can be played on any operating system with the same program as long as there is a standard browser for smartphones has led to the rapid development of apps with multi-platform support on the development side. This is one of the strengths of the Japanese mobile games industry'. (G1, G2 & E1)

'One of the challenges that developers recognise is that the slow response time of social games and the lack of attention to detail of early native apps may lead to a return to native apps in Japan'. (G1 & GP1)

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'As for the future, we believe that "making it in" as a native app has an affinity with the traditional Japanese spirit of craftsmanship, which stimulates the motivation of the creator and is also appreciated by the user'. (E1)

'In any case, the foundation of Japanese online games has been and will co ntinue to be applications for smartphones and tablets'. (G1 & G2)

Thus, it appears that what the gaming industry and gamers recognise and appreciate is not the networked competitive nature of eSports but the communication in a 'closed' community, the precision of the application and the narrative. In other words, rather than the novelty and development of Western-style media entertainment as an industry, Japanese eSports has been and will continue to be based on communication and gaming within a tight-knit community. It is understood that this is the way in which the unique character of Japanese online games will stand out and become a source of competition.

This is partly due to the language barriers faced by the Japanese, partly due to the basic Japanese cultural values that do not favour a belligerent attitude (Wierzbic, 2020) and partly due to the fact that the leading Japanese gaming companies have not adopted a Western-style eSports strategy (Yamaguchi et al., 2017).

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4.2.3　Community reciprocity

The third theme that was developed from the interviews was the impact of interaction in the community via collaboration with local businesses and co-creation of value with citizens and gamers as part of community development policy. Oe and Yamaoka (2021) use the concept of a 'public living room' to discuss the meaning of mutual exchange and learning, including the 'talk of the town'.

> *'The creation of a hybrid entertainment venue, moving the online community through gaming to a real physical facility, is significant in terms of creating opportunities for citizens to come together'. (P1)*

> *'In the case of* eSports *tournaments held in Japan, the basic format is online, with participants participating from home, but for the more expensive tournaments, the players are brought together to compete under the same conditions using official PCs with the help of sponsors. The reason for this is that this would have an advertising effect for the sponsors. It may help to expand the market, but it is not yet common in Japan'. (E2)*

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'In Japan, there is no doubt that the enhancement of the communication infrastructure will encourage the revitalisation of eSports, but there are also moves by communication companies to create subsidiaries specialising in eSports and to work with local authorities to induce inbound effects in local communities, seeking a win-win-win relationship between game professionals, local communities and participants'. (N1)

The concept of increasing community reciprocity through eSports has not been discussed in previous eSports research. Gamers and citizens can gather in a physical facility to watch eSports matches, which is a new style of hybrid eSports enjoyment. As N1 said, the idea of eSports working with local authorities and local shopping associations to induce an inbound effect on the local community is a very promising approach in terms of the socioeconomic impact of eSports.

4.2.4   Future prospects

Finally, we asked for opinions on the future direction and potential of eSports in Japan. Some of the answers were as follows:

'In Japan, due to the culture and familiarity of the country, mobile games on

smartphones are the mainstream and will continue to flourish' (GP1)

'Several Japanese game companies that have launched official games for the Olympics have also tended to position games as a catalyst or catalyst for revitalising tourism, for example by including tourist attractions in Tokyo in their scenarios and contexts. We believe that the use of local stories in game content will continue to grow' (G2 & C1)

'In the future, the use of local tourism assets, sacred anime sites and local industries (e.g. Japanese food and sake, both of which are on the World Heritage List) will be used to create stories that will be able to draw on the precise and beautiful animation and detailed narratives that Japanese game fans love'. (G1)

'Online gaming in the Japanese style is a different genre to eSports as a Western media entertainment industry'. (G2)

'Isn't it time to find a way to merge virtual and physical communities? Indeed, an event that invited online gaming to a local shopping centre was well received' (P2)

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In the interviews on eSports, all 15 participants referred not only to the virtual gaming community but also to the connection with the physical community (including offline meetings).

5. Conclusion

5.1 Theoretical contribution

The eSports market in Japan has begun, albeit belatedly, with the resolution of legal and other issues, the establishment of a central third party organisation and the professionalisation of the sport. Following the development of its environment, the eSports market can be said to have entered a new phase from 2018 onwards. However, there are significant differences between the eSports markets in Japan and abroad, and there has been no clear research on the direction in which the Japanese eSports market, which has the potential to become a new industrial sector using innovative technologies, should develop. This research has focused on the characteristics of the Japanese eSports market, the attitudes of gamers and the strategies of suppliers, such as communication networks and equipment developers. It is not possible to support eSports in Japan without this kind of investigation into the background and key elements of eSports markets.

The greatest contribution of this research is that it includes an in-depth study of the future prospects of eSports in Japan using primary data. This has been lacking in previous discussions, which have has not been able to provide clear proposals. This study also suggests a different

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development path for media entertainment towards a trinity that includes players, spectators and viewers on virtual video sharing platforms, as is the case in the advanced eSports regions of Europe, the US, China and Korea. In terms of strategy development, there is clear indication that a Japanese-style model should be pursued, drawing on Japan's unique background and strengths.

This study is the first of its kind to make this finding and argument in the world of eSports. In the world of eSport, the path to media entertainment, as suggested by the leading markets in the US and China, has been seen as the default strategic path to follow. This study, however, clearly suggests a different possibility. In other words, the study clearly shows that the eSport sector should not be limited to the path followed by the major markets, but should also be open to unique and original directions. This finding is also significant in that it suggests the diversity of models of eSport across cultures.

5.2 Managerial contributions

This study presents an important basis for considering the future development strategy of eSports in Japan. We ask the questions: How will eSports develop in Japan in the future? How will eSports develop in Japan in the future? Is there any point in promoting it in the first place? Is it an area where policy measures should be taken? In addressing these issues, the analytical model and results proposed in this study provide a clear course of action for policy makers,

gaming stakeholders and telecom network service providers.

In particular, the COVID-19 pandemic is having a major impact on people's lifestyles and hobbies. In a difficult environment where people are less connected to each other, the possibility of hybrid entertainment through community venues (public living rooms) is one useful guideline. It is also socially timely to consider methods to diversify and develop the ways in which people play and enjoy themselves.

The most important managerial contribution of this study is to suggest the future of the eSports market in Japan, which has not been discussed in depth so far, and to propose (1) seeking a Japanese model based on online game culture and history, which is a unique and differentiated strategy from the Western media entertainment approach and (2) a hybrid of cyberspace and real community entertainment based on Japanese online games.

5.3 Limitations and further research opportunities

While this study can be regarded as the first of its kind to provide an important foundation for future development strategies for eSports in Japan, the authors recognise it has several limitations. The dataset used for the analysis included survey data from 2017 and 2021 as well as qualitative data from the in-depth interviews conducted in 2021. As the results of the analysis show, Japanese attitudes towards eSports are at this point in time negative and unresponsive, and they are biased towards the characteristics and strengths of Japanese online gaming,

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especially the enjoyment of gaming through mobile devices and smartphones. The conclusions

of this study capture a snapshot of attitudes towards eSports in Japan at this point in time, in its

infancy, and it will be important to examine the changes in attitudes and policy directions as

the market matures.

In light of the above remit, the direction of future research should be to examine the

prospects and potential of eSports in Japan over time through larger-scale data collection. In

addition, we would like to re-examine the position of eSports in people's lifestyles and hobbies

and present policy implications regarding the possibility of using eSports for vulnerable citizens,

such as the elderly and disabled, who have limited mobility.

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