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The emergent community of esports fans in Japan: an analysis of motivations and preferences

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ABSTRACT

Purpose/Rationale: This study examines esports players' and viewers' motivations in Japan to inform market segmentation and strategy for industry stakeholders.

Design/methodology/approach: Employing purposive sampling, data from 500 Japanese esports participants were collected through an online survey including behavioural, motivational, and demographic factors. Cluster analysis was applied to identify distinct groups.

Findings: Results revealed three unique clusters each for players (all-rounder players, immersive fun seekers, and skill-based players) and viewers (casual viewers, entertainment-excitement seekers and skill appreciation seekers), with each exhibiting distinct motivations and preferences. Socio-economic factors did not significantly differentiate clusters, but fan behavioural patterns were useful in characterising them.

Practical Implications: Our study provides insights into Japan's market preferences for console gaming and skill development and guides stakeholders in targeted strategy development for market engagement and growth.

Research Contribution: By applying the Uses and Gratifications theory within the Japanese context, this study enhances esports online community research by revealing distinct segment characteristics in a culturally unique setting and enriches esports interaction understanding.

Originality/value: This study sheds light on the motivations and preferences of esports players and viewers in Japan's emerging market, offering valuable insights for stakeholders to better understand and engage their audience.

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Japan; esports; motivation; cluster analysis; segmentation

Introduction

Esports refer to competitive video gaming, both professional and amateur, in which competitions are organised in various leagues, tournaments and championships (Taylor, 2016). While the term "esports" can be traced back to the competitive realm of video

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gaming, it has seen a significant evolution, notably marked by the inclusion of new esports titles in the Olympic Games. The first-ever Olympic Esports Week in 2023 represented this evolution with a selection of official esports titles, blending the realms of traditional sports and esports and forming part of the Olympic Esports Series (Olympic Esports, 2023). Esports is now a global phenomenon that has become a mainstream activity, attracting diverse participants, audiences and lucrative sponsorships. The continuous growth of esports has formed emergent online multimedia communities attracting attention from media, academics and policy makers (Anderson et al., 2021).

The amount of relevant academic research has grown rapidly in the last decade (e.g. Hong, 2023; Ke & Wagner, 2022; Onishi et al., 2022; Xue et al., 2019), however, most research has focused on developed regions in esports. These include the Asia-Pacific (APAC) regions (for example, South Korea and China), North America and Europe, which are the top three esports markets in terms of audience and revenue . These developed regions (versus developing regions) are generally delineated by government involvement (e.g. supporting policy and regulations), market scale of esports activities (e.g. tournaments, prize money, number of professional teams/clubs, players, spectators and supporters, presence of esports communities), revenue streams (e.g. livestreaming, advertising and sponsorship), and accompanying infrastructure (e.g. industry, technology, network and tournament venues) (Scholz, 2019; 2020). Little attention has been paid to developing markets like Japan where esports is budding. As the world's second largest market for games (following the US), Japan is undoubtedly one of the powerhouses of game industry in the world. Japanese games developers such as Nintendo, Sony, Square Enix, Sega, Bandai Namco, Konami and Capcom have always been at the forefront of the gaming industry. While gaming is the backbone of esports, and they share structural similarities (Macey & Hamari, 2018), having a successful or sizeable gaming market does not always translate to a thriving esports scene. Esports focuses on competitive videogaming where the stakeholders, components and dynamics for its growth differs from that of gaming. Even though Japan has one of the biggest gaming marketplaces worldwide, its esports industry is small (US$84.7 m in 2022) in comparison to other major esports markets like South Korea (US$360 m in 2022), China (US$480 m in 2022), and the US (US$871 m in 2022) (Statista, 2023c). However, with the gaming industry as one of the driving forces behind the growth of esports, Japan has the potential to outperform other esports leading countries.

In considering the huge potential from the contribution of esports to the growth of economy as seen in its neighbouring APAC countries – China and Korea, lawmakers and business enterprises in Japan started jumping on the esports bandwagon in 2018 (International Trade Administration, 2022). The shift also came about as the international profile of esports continues to rise, as seen by its inclusion as a demonstration event in the 2018 Asian Games in Indonesia. To create a conducive environment to support the growth of its esports industry, the Japanese government spearheaded the initiative with the establishment of the Japan Esports Union (JeSU) in 2018. While the budding development of esports in Japan was impeded with the outbreak of the COVID-19 pandemic in 2020, which had a negative impact on the live tournaments and sponsorships, participants and the market for esports grew due to the lockdown effects as competitions and events transited seamlessly online. Since then, Japanese esports-related market has expanded almost twice its size over the course of three years, from US$41 m in 2018 to

US$84.7 m in 2022 (Statista, 2023b). With esports designated as one of the official medal events for the 2026 Asian Games to be held in Aichi-Nagoya, the importance of and demand for esports in Japan is predicted to rise significantly in the coming years. Given the paucity of research, the late arrival of Japan to the esports scene and its potential to become one of the powerhouses in esports, this study fills a knowledge gap on the Japanese esports landscape.

Earlier studies have revealed that Japanese video gamers are unique in terms of their preferences and behaviours, which can be differentiated from consumers in other regions (see for instance Chen, 2013; Colwell & Kato, 2005; Mangiron, 2012). As esports has its roots in competitive video gaming, Japan's vibrant gaming culture and rich gaming history in both traditional console gaming and arcade gaming might have influence on Japanese esports consumers. This makes our research valuable as we reference this to understand if such cultural distinctiveness applies to esports as well. Understanding the nuances of the Japanese esports market can help identify the factors contributing to its growth and future development, which may differ from other regions. It also helps to establish how esports vary regionally (Flegr & Schmidt, 2022). As a global leader in the development and production of video games, Japan's experience may be indicative of future trends, regionally and globally as its esports presence grows steadily. To further investigate esports engagement in Japan, we draw from the Uses and Gratifications (U&G) theory (Katz et al., 1973). The U&G theory posits that individuals are not passively consume media, instead, they actively seek out specific media sources to fulfil their psychological and social needs. In the context of esports, the U&G framework provides insights into why consumers choose to engage with esports. By employing the theory, we aim to understand the specific motivations and gratifications sought by the Japanese esports fans. Such insights will not only reveal the unique characteristics of Japanese esports fans, but also shed light on how cultural nuances shape media consumption behaviours. This study thus seeks to answer the following research questions:

RQ1: Drawing on the U&G theory, what specific needs and desires motivate Japanese esports fans to engage with esports?

RQ2: How does the application of the U & G theory inform market segmentation within Japan's evolving esports culture, and what insights does this provide into the motivational drivers and consumption patterns of different players and spectator segments?

RQ3: How do Japanese esports fans choose different esports platforms (e.g. live streaming, online gaming platform, esports tournaments) based on the gratifications they offer?

RQ4: What are the outcomes of different engagement behaviours amongst Japanese esports fans?

The accelerated growth of esports has resulted in the formation of emergent online esports communities, often with their disparate characteristics (Xue et al., 2019). Esports online communities demonstrate several distinct structural characteristics that differentiate them from traditional gaming communities (e.g. massively multiplayer online role-playing games – MMORPGs). Unlike MMORPGs, which centre on immersive narratives and interactions with nonplayer characters (NPCs), esports place emphasis on skill-based and technology-mediated human competition (Seo & Jung, 2016). Consequently, esports online communities demonstrate several unique structural characteristics. Firstly, esports

emphasise a "play to win" ethos (Cullen, 2018) highlighting players' motivation for mastery and success. Secondly, within esports, the presence of in-game friends within a preformed team increases a gamer's likelihood for more match play (Mao, 2021). Thirdly, cultural nuances come into play in determining gaming patterns, with research found that Nordic and Eastern European gamers showing a tendency to engage in additional matches after wins, whereas Japanese gamers tend do so after losses (Mao, 2021). In addition, skill level also plays a crucial role in influencing esports participation and time spent in order to achieve the desired results (Lee & Schoenstedt, 2011). Given these unique structural attributes and their significant impact on gamer involvement, as well as the evolving dynamics of motivations, experiences, and behaviours esports communities present, it becomes important to explore more in-depth into the motivations underpinning participation in esports online communities. Such investigation reveals the complexities of esports participation and contributes to extant studies on the U&G theory and online community (OC) (Kraut & Resnick, 2012) in three ways.

First, by applying the U&G theory in the context of Japanese esports, this research contributes to our broader understanding of the theory in a modern digital age. The diverse and dynamic nature of esports and its growing online communities provides a novel perspective to the traditional applications of the U&G theory (Ruggiero, 2000), expanding its scope and relevance in contemporary media and sports studies. Second, reflecting the principles of U&G theory, we extend the application of two measurement scales – Esports Consumption (ESC, Jang & Byon, 2020a) and Motivation Scale of Esports Spectatorship (MSES, Qian et al., 2020a). Whilst the rapidly evolving nature of the esports industry presents a challenge for esports motivation research, applying these scales to the Japanese esports OC provides an insightful exploration into the specific gratifications of the audience in a unique cultural setting that has been largely under-researched empirically. Furthermore, the application of the measurement scales allows for comparability with studies from other cultural contexts, enriching the body of knowledge on esports OC and our understanding of global trends in esports. Third, we unpack the nuances of market segments of esports consumers to provide insight into the collective characteristics of communities and their behavioural patterns influenced by the country's gaming culture. It offers valuable insights for stakeholders aiming to understand and nurture the development of esports and its OC in Japan.

Literature review

Esports in Japan

With Japan's long history in gaming culture, one would have expected its strong presence in the global esports arena. However, recent study revealed that Japan's share in the global esports industry is estimated at an almost negligible 3% in 2022 (Sport Tech World Series, 2022). Esports development in Japan is impeded by several cultural and legal factors. One cultural barrier is that Japanese Role-Playing Games (JRPG) have traditionally been the country's top genre (Statista, 2023a). However, these story-driven games, typically produced by Japanese developers, may not be widely accepted or adaptable as esports titles in a global arena. Examples of popular JRPGs in Japan include Genshin Impact (see Figure 1), Dragon Quest, and the Final Fantasy franchise. Esports

Figure 1. Genshin Impact (原神)- poster advertisement in Tokyo's subway station.

development in Japan is also hindered by an unbalanced distribution of platforms. While mobile is the most popular platform in Japan in terms of revenues and players, followed by console and PC, PCs remain the most popular device for esports competitions globally (Dsouza, 2022). Consequently, many of the most well-known conventional global esports titles are not as prevalent in Japan.

In addition to cultural factors, legal regulations also pose a challenge. Any hosting and/or streaming of live matches is subject to the permission of the intellectual property (IP) holder. However, some big game developers in Japan, such as Nintendo, are reluctant to get involved in esports and are aggressive in enforcing their copyright (Toto, 2019). Furthermore, prize money that can be awarded to players is capped for any organised tournaments by IP holders due to Japan's Act Against Unjustifiable Premiums and Misleading Representations (AUPMR), which aims to prevent illegal gambling. The regulation of prize money has widely been believed to impede esports development in Japan (Ishikawa et al., 2022).

Despite these challenges, Japan's interest in esports has been increasing since 2018. Backed by a its debut as a demonstration event in the 2018 Asian Games in Indonesia, a growing esports market overseas and its popularity among especially young people, corporations and sponsors started to show more interest. Recognising the potential contribution of esports to revitalise its economy through ripple effects on peripheral industries, the Japanese government started addressing and revising legal regulations to support the growth of esports (International Trade Administration, 2022). The established of JeSU in 2018 was aim at creating a stable esports ecosystem in Japan, encourage business enterprises to participate in esports, and support the industry's growth (JeSU, 2022). The Japanese government also began legalising esports by issuing licenses through JeSU to exempt top esports players from the country's gambling laws. Although Japan is lagging in terms of its global esports presence due to its late arrival to the esports scene, the series of government initiatives provided the impetus to promote esports in the country. Japan is actively catching up on lost ground as esports activities fuelled demands and picked up pace during the pandemic. The presence of the "Big Five" Japanese game developers – Nintendo, Square Enix,

Sega, Bandai Namco, and Konami, which offers assurance of technological competency, together with Japan's strong gaming culture, provided further drivers for its post-pandemic market growth. The player population, fanbase and the number of Japanese teams competing in the global esports arena are steadily increasing according to market studies (Famitsu, 2020; Impactful Insights, 2023; Newzoo, 2023; SportsPro Media, 2021), with predicted revenue growth from US$55.6 million in 2019 to US $139.5 million by the end of 2023 (Newzoo, 2023). Apart from this, the first esports high school is setup in 2023 that specialises in esports training (eSports High School, 2023); high schools and universities have also started incorporating esports into their extracurricular activities (Seino et al., 2023). The quickly expanding Japanese esports scene is set to continue its momentum as the Aichi-Nagoya Asian Games Organizing Committee confirms the inclusion of esports for the 2026 Asian Games (Nalwala, 2023) following the successful esports medal events in the 2023 Asian Games in China.

To ensure the development of esports as a viable industry in Japan, the Investigative Commission on Measures for Vitalising Esports led by JeSU (2020) identified that expanding the esports market through increasing the number of esports players and fans is one of the key measures needed to promote the sustainable growth of an esports economy. As a core element of the esports industry, understanding its players and fans which forms the esports community, is necessary to reflect on the current setup, policies, and infrastructure needed for its sustainable development. This is fulfilled through one of the objectives of this study. The next section further explores the setup of an esports community.

Esports community as a unique online community

Online communities (OCs) are groups of users who interact socially through computer-mediated communication, sharing a common purpose, interest, or need (Rheingold, 2000). User participation, including sharing information, helping each other, and forming social connections, greatly contributes to the success of OCs (Wolff & Shen, 2024). However, the OC literature suggests that online members are less likely to develop a sense of attachment to the community and each other, making it easy for them to leave and join another community (Kraut & Resnick, 2012). In contrast to general social live streaming service (SLSS) communities, such as general Twitch users, esports OC often anticipate and have deliberate goals and motives in watching and playing esports (Jang & Byon, 2020b).

The uniqueness of esports communities lies in two perspectives. Firstly, the emergence of this highly commercialised, spectacular, and rationalised form of video gaming has provided members of the gaming community and OCs with a dynamic framework for discussing, adapting and incorporating emerging trends, technologies and practices. More specifically, this adaptability is manifested in: (a), commercial involvement – various stakeholders within the esports ecosystem frequently introduce game updates, novel mechanics and marketing approaches. The esports OC plays an active role in refining these inclusions through ongoing feedback loops and active engagement (Hussain et al., 2023); (b), content evolution – as esports content undergoes processes of production, distribution and consumption, the community's proactive exploration of innovative technologies such as Virtual Reality (VR) and Augmented

Reality (AR), shapes the future of esports viewership and fan engagement (Cranmer et al., 2021); and (c), collaborative interactions – the esports OCs actively collaborate through platforms such as Discord or Reddit, promoting modification suggestions, problem discovery and strategy sharing (Bergstrom & Poor, 2021). Thus, the community contributes to the organic growth of esports. Secondly, esports represent an industry that blurs the boundaries between sports, media, entertainment, and digital communications. As a result, the convergence of gaming and communication provides esports participants with improved OC models, enabling them to shape their own identities and experiences across gaming and social realms. Consequently, esports participants often have multiple blurred identities, as they can be consumers and producers through gameplay, social engagement, and spectating (Xue et al., 2019).

Esports represent an emerging form of digital culture that disrupts traditional mechanisms for developing OCs and identities, providing opportunities for academic exploration of the uniqueness, complexity, and variations of this new OC. Building on this understanding, the current study addresses the gap in the OC literature concerning the Japanese esports landscape by exploring the emerging esports culture and understanding its participants.

Sport fan motivation

Sports fans watch their favourite sports for various reasons, and it is crucial to investigate and understand their motivations in order to provide a more satisfactory experience, effective marketing strategies and maintaining loyal fans (Funk et al., 2001). Based on the early research of Sloan's framework (1989), which aimed to understand sport consume behaviour, motivation was classified into five categories: salubrious effects; stress and stimulation seeking; catharsis and aggression; entertainment; and achievement seeking. Several measurement scales for sports spectator motivations have since been developed and validated, including the Sport Motivation Scale (SMS) (Pelletier et al., 2013), the Sport Fan Motivation Scale (SFMS) (Wann, 1995), the Motivation Scale for Sport Consumption (MSSC) (Trail & James, 2001), and the Sport Interest Inventory (SII) (Funk et al., 2001) (See Table 1). Although these studies provide insight into motivational factors for sport watching, they did not differentiate between different sports. Furthermore, there is little consistency amongst these studies as to what motivation contributes to spectators' interests (Funk et al., 2001). With the increasing popularity of interactive media usage (e.g. websites, video games, mobile phone applications, and social media), more attention has been paid on how and why individuals use these media to watch sports. For example, Dwyer and Kim (2011); Dwyer et al. (2018) explored the motives for fans engaging in fantasy sports.

Esports participation motivation

Understanding the diverse motivations behind esports participation is not only critical for academic inquiry but is also a cornerstone for effective market segmentation in the esports industry. In the following section, we describe the different motivations of players, spectators, and fans, and this helps esports managers identify distinct customer segments, each with

Table 1. Key sport spectator motivation measurement scales.

Measures	Authors, Year of Publication	Sample Size	Context	Motives
SFMS	Wann (1995)	272	Softball	Eustress Self-esteem Escape Entertainment Economic Aesthetic Group affiliation Family needs
SMS-II	Pelletier et al. (2013)	Study 1: 412 Study 2: 290	Study 1:Variety of sports Study 2: Basketball and swimming	Intrinsic Integrated Identified Introjected External Amotivated
MSSC	Trail and James (2001)	N/A	N/A	Achievement Aesthetic Acquisition of knowledge Drama Escapism Social interaction Physical attractiveness Physical skills
SII	Funk et al. (2001)	1,321	Women football	Soccer fan Vicarious achievement Excitement Team identification Supporting women's opportunity in sport Aesthetics Socialisation National pride Drama Interest in player
N/A	Dwyer and Kim (2011)	Study 1: 23 Study 2: 235 Study 3: 201	Fantasy football	Competition Social interaction Entertainment/escape Competition

their unique needs and preferences. This segmentation allows for the development of targeted marketing strategies and enhances fan engagement, making the exploration of motivational factors critical for both theoretical and practical applications in the esports field.

The concepts "fans", "players", and "spectators" often overlap in the esports research and to clarify each group's unique characteristics is crucial to our research. As illustrated in Figure 2, we define ***players*** as individuals who actively engage in esports gaming. They can be further divided into casual players, who play for leisure and may not engage in esports watching; and competitive players, who focus on victories and may also participate in official matches and tournaments. Carter et al. (2017) found that in order to pursue expertise in the specific game, players are also likely to viewing esports and engage with third-party content. ***Spectators*** are individuals who watch esports matches through online or offline means and may not be active players. They may also engage with esports content creation through social media and content sharing sites during tournaments (Qian et al., 2020b). ***Fans*** can be characterised by their emotional connection to esports entities such as leagues, teams, or players (Huettermann & Pizzo, 2022). They tend to have long-term highly committed relationships with the teams or

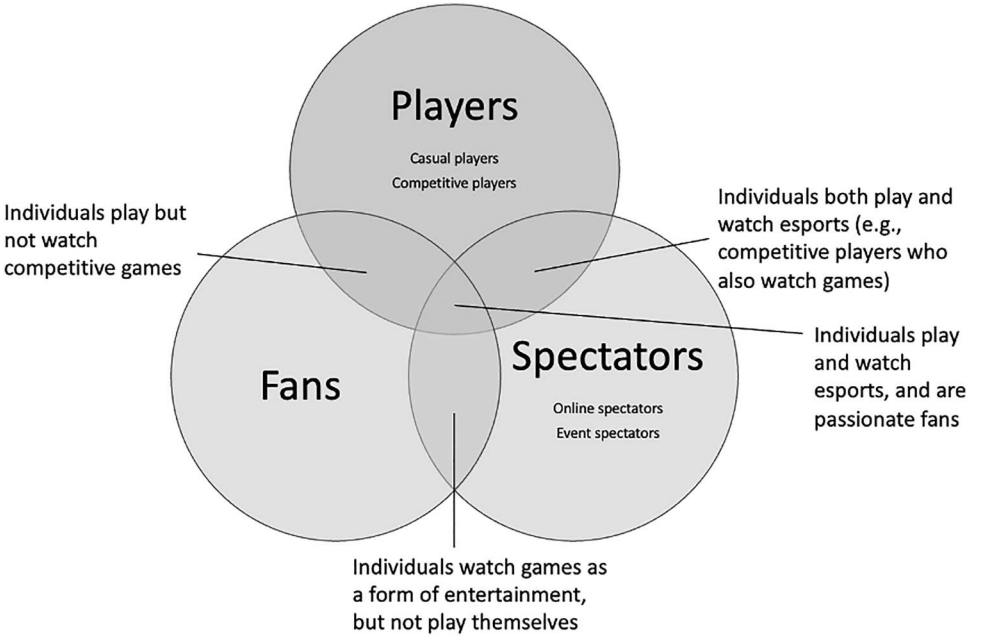

Figure 2. Concepts of esports players, spectators, and fans.

individuals they follow. Esports fans can be players, spectators, or neither and are more likely to engage with multiple esports entities across multiple digital media platforms (Carter et al., 2017). In a sum, an individual may belong to multiple categories. For example, a competitive player may also be an event spectator and a fan at the same time.

With the increasing popularity of esports worldwide in the last decade, researchers have drawn inferences from studies on sports fan motivation to identify motivations for esports participation amongst a broader variety of spectators (e.g. Choi, 2019) and players (e.g. Goldman & Hedlund, 2020). Nevertheless, current research is still in its infancy, with a limited number of studies examining the unique characteristics of esports OC, particularly spectators and gameplay groups. Kim and Kim (2020) examined esports spectatorship motivation via live streaming and how this influences fans' well-being, behavioural intentions, and game loyalty. Wohn and Freeman (2020) explored esports as a holistic media ecosystem that includes playing, streaming, viewing, and spending, revealing significant relationships between fans' playing, viewing, and spending patterns. Insights into esports participation motivations are important for esports managers seeking to understand their customer base and develop more effective marketing strategies accordingly. Market segmentation helps esports managers identify customer groups with similar needs to best meet the needs of fans (Seo, 2013).

Extending and filling in knowledge on existing OC, this study reviews esports participation motivations among the Japanese esports OC to determine motivations for playing and spectating. Three approaches have been employed to explain why people become involved in esports as a form of leisure and sport activity. Firstly, early research on esports participation investigated motivation and behaviour from a psychological perspective by segmenting consumers according to the degree of addiction and mental disorder (Gaetan et al., 2014; Lemmens et al., 2009). Addiction to video games was described as players' excessive and compulsive use of video games leading to social and/or emotional issues (Lemmens et al., 2009). Secondly, a more recent approach to understanding esports gameplay intention is grounded in technology acceptance theories. For example, Jang and Byon (2020a) proposed the Esports Consumption (ESC) model based on the Unified Theory of Acceptance and Use of Technology 2 (UTAUT2) (Venkatesh et al., 2012), and identified six dimensions of esports gameplay motivation (including hedonic motivation, habit, price value, effort expectancy, social influence, and flow), which all contribute to esports gameplay intention. Finally, regarding esports spectatorship, research to date has primarily viewed esports spectator motivation from an experiential consumption perspective, adopting U&G, motivation, or psychological needs theories (Qian et al., 2020a, 2020b). Qian et al. (2020a) developed the Motivation Scale of Esports Spectatorship (MSES) and identified nine dimensions for esports online spectator motives, including competitive nature, socialisation opportunity, friends bonding, game knowledge, skill appreciation, entertaining nature, dramatic nature, competition excitement, and vicarious sensation (Table 2). However, there is a lack of research exploring esports participation from both spectators' and players' perspectives.

Theories in understanding sports and esports motivation

Previous studies have widely used self-determination theory (SDT) (Deci & Ryan, 1985) to understand motivation for engagement in sports and esports. SDT explores people's

Table 2. A review of key factors influencing esports spectator motivation.

Measure Adopted/Developed	Authors, Year of Publication	Sample size	Game	Method	Motives
MSSC (adopted)	Hamari and Sjöblom (2017)	888	Not available	Online survey	Escapism Knowledge acquisition Novelty Aggressiveness
SII (adopted)	Pizzo et al. (2018)	517	K League soccer FIFA Online 3 StarCraft II	Stadium	Consumption motives for esports and traditional sports are similar
SESD (developed)		Phase 1: 8 interviews and 109 survey responses Phase 2: 1,309 online survey	CS: GO Overwatch DOTA 2 LoL StarCraft 2 WarCraft 3 Street Fighters 2K17	Mixed methods	Chat room Stream quality Commentary features Player characteristics Event attractiveness Streamer traits Virtual rewards Schedule convenience
MSES (developed)	Qian et al. (2020a)	Phase 1: 8 interviews and 207 survey Phase 2: 638	CS: GO Overwatch DOTA 2 LoL StarCraft 2 WarCraft 3 Street Fighters 2K17	Mixed methods	Skill improvement Skill appreciation Vicarious sensation Competition excitement Friends bonding Socialization opportunity Dramatic nature Entertaining nature Competitive nature Game knowledge
N/A	Qian et al. (2020b)	1,100	Not available	Online survey	Need fulfilment • Competence • Autonomy • Relatedness

volitional motivations, which are actions based on choice, interest, pleasure, or values, versus controlled motivations, which are actions based on rewards, punishments, guilt, or obligations. SDT also postulates that individuals' autonomy in making choices determines their course of action. In other words, people have a need for autonomy, and activities that promote autonomy are consistent with their personal interests and goals (Gagné & Deci, 2005). People tend to develop an organised and coherent sense of self when they voluntarily engage in exploratory, curiosity-driven, and developmental behaviours (Deci & Ryan, 1985). According to SDT, motivation is multidimensional, and different reasons for engaging in sports/esports reflect regulatory styles or intrinsic motivation and types of extrinsic motivation that vary in their degree of self-determination (Ullrich-French & Cox, 2009). In light of SDT, individuals' behavioural engagement is related to the satisfaction of their basic psychological needs. For example, in terms of esports consumption, commitment, word-of-mouth intentions, actual viewing, and consumption behaviour are largely the result of a fan's fulfilment of their basic psychological needs (Qian et al., 2020a).

Parallel with SDT, Uses and Gratifications (U&G) theory also plays a fundamental role in explaining consumer motivation and media usage (Dwyer et al., 2018). The U&G theory further enriches our understanding of esports participation motivations by shedding light on the specific gratifications sought by different consumer segments. There are four key principles of U&G theory. Firstly, the theory posits that media users are active and purposeful in their media consumption, different from other media theories that regard the audience as passive recipients (Quan-Haase & Young, 2010). Secondly, users engage with media sources in order to satisfy specific social and psychological needs and gratifications (Katz et al., 1973), and these needs can vary depending on the individual and context (Roy, 2009). Thirdly, different media are competing with other functional alternatives for obtaining users' time and attention. Users' specific media choices are based on their gratifications expected to achieve (Liu, 2015). Lastly, users have rational self-awareness regarding their media needs and selection (Ruggiero, 2000). U&G theory has been particularly relevant to esports research due to its online relevance (Hamari & Sjöblom, 2017). U&G focuses on individuals' understanding of media consumption from the perspective of individual consumers rather than media types. U&G theory is considered more suitable than SDT for this study for two reasons: First, our study aims to understand why individuals are attracted to esports in Japan, the U&G theory could be beneficial in determining the gratifications sought and obtained from esports consumption. Second, the theory emphasises the active and discerning nature of media use in the context of the diverse devices, channels, and platforms in esports. Inferring from this, players and spectators in Japanese esports are likely to have particular consumption needs that stimulate their selection of media platform. U&G thus provides a useful framework to explore esports fans' consumption motivation and their selection of media types. With regard to esports play and spectating, media selection ranges from a multitude of devices (mobile phones, PCs/laptops, tablets, and consoles) to channels (live streaming platforms, such as YouTube and Twitch, and online game platforms, such as Steam), which provide users with the ability to not only interact with these "media", but also interact with other users through them. Through the U&G lens, we can understand how various segments of the esports audience – ranging from casual players to enthusiastic fans – pursue different gratifications, such as socialisation, entertainment, skills, or

information. This understanding not only delineates the motives behind esports engagement but also highlights the active and discerning nature of media consumption within the esports community.

Therefore, the interplay between motivational factors, market segmentation, and the U&G theory presents a multifaceted framework for analysing esports participation. This integration not only helps identify the heterogeneous motivations across different esports consumer segments but also help understand the media selection preferences determined by these motivations. Therefore, by applying the U&G theory, we can better navigate the complex landscape of esports engagement and offer nuanced insights into the dynamic interrelations between participants' motivations and their implications for market segmentation and media selection strategies within the esports ecosystem.

Summing up

In summary, the academic research examining esports fans' participation motivation is still in its infancy. The research to date has primarily focused on understanding esports consumers from a sport consumer's perspective and using general sport motivation frameworks (Qian et al., 2020a). Within the small body of esports motivation research, the focus has been either on the spectators' or players' perspective separately. Although a general idea regarding esports participants' motives has been established to a certain extent, there is a lack of research investigating esports participants from both a player and spectator's perspective. It is suggested that a third of the population of esports players surveyed also watched the game (Newzoo, 2019). However, there have yet to be studies examining the behaviour of esports enthusiasts in the audience. Furthermore, there is a lack of research investigating the unique characteristics and motivations of esports consumers in the Japanese context, which is an essential aspect to consider due to Japan's vibrant gaming culture and distinct consumer behaviours (Hamari & Sjöblom, 2017).

Method

Instrumentation and Sample

This study seeks to examine esports play and viewership in Japan. To ensure appropriate respondents were targeted, data for this study was collected through a web-based questionnaire administered via Rakuten. As a reputable and one of the biggest data collection platforms in Japan, Rakuten met our requirement and provided the reach to our specified target of Japanese esports online communities and forums. Data collection took place in April 2022. To be eligible, respondents had to be Japanese residents currently living in Japan, aged 18 years old and above, who self-identify as esports enthusiasts. To qualify for the study, respondents were required to have actively engaged in playing or watching esports for at least five hours in the previous six months. This requirement was clearly communicated before starting the survey to ensure respondents were involved in esports, thus enhancing the relevance and depth of the data collected. As a precautionary measure, filter questions were also in place to ensure data is captured from targeted respondents.

In terms of the scope of esports competitions within our study, we included a variety of levels ranging from local amateur events to international professional

tournaments. This inclusive approach allowed for a rich exploration of esports engagement across diverse contexts. The participant information page, displayed on the survey landing paper, was designed to ensure informed consent was obtained from all participants. Participants were made aware of the study's nature, its aims, and the ethical use of their provided data. The sample profile was reflective of the general esports participant demographics in the APAC regions in earlier studies (Leung et al., 2021; Yu et al., 2022). Studies have generally established that esports players are mostly male millennials (Anderson et al., Yu et al., 2022), with a gender breakdown of males (68%) to females (30%), and a majority aged between 18 and 45 found in our study (See Table 3).

As the purpose of the study was to examine different aspects of esports engagement including behaviour, motivations, uses and gratifications among different demographic groups within Japan's unique cultural and esports landscape, we designed our methodology to reflect the theoretical foundations of the U & G theory, which emphasises the active role of individuals in media selection and consumption (Qian et al., 2020a). The survey questionnaire was structured into three major parts: The first part assessed behavioural-oriented variables relating to esports participation characteristics and patterns. These included the types of esports games played/watched, length of esports play/watch, length of being an esports fan, channels and platforms of play/watch esports, and means of getting information about esports play/follow. This foundational data provided insight into the broad engagement behaviours within the Japanese esports community. The second part measured esports play and watching motivation reflecting U&G principles. This part includes questions that measure gratifications with the specific context of Japanese esports with our recognition of Japan's unique cultural setting and its evolving esports landscape. The aim was to identify the specific needs and desires that drive engagement with esports, serving as the basis for our subsequent market segmentation analysis. The final part examined demographic information, offering context to the behavioural and motivational data collected, and assisting in the segmentation process by providing additional layers of differentiation amongst respondents..

A key methodological step was the application of cluster analysis to segment the market based on the motivational drivers identified through the U&G framework. This analysis was crucial in applying the theoretical insights from U&G theory into practical market segmentation. The cluster analysis allowed us to identify distinct groups within our respondents, categorised by their unique motivations and engagement patterns. This process not only revealed the diversity within the Japanese esports audience but also identified the specific market segments that emerge from Japan's evolving esports culture.

In the development of our survey questions, we integrated feedback from a pilot study involving eight Japanese esports fans to ensure the final version of the questionnaire resonated with the cultural and contextual factors unique to Japanese esports enthusiasts. This preliminary study was important in providing the relevance and clarity of our survey items, thereby ensuring the cultural validity of our research instrument.

To ensure the validity of responses, three attention-checking questions were included in the questionnaire (Liu et al., 2021). Twelve responses were eliminated from the analysis because they failed one or more attention-checking questions. In total, 500 valid

Table 3. Socio-demographic characteristics ($N = 500$).

Variable	Count	%
Gender		
Male	341	68.20
Female	153	30.60
Non-binary	4	0.80
Other	2	0.04
Age		
18–25	51	10.20
26–35	143	28.60
36–45	182	36.40
46–55	101	20.20
56 and above	23	4.60
Education		
Lower than secondary school	11	2.20
Secondary school	109	21.80
College	60	12.00
Bachelor's degree	21	4.20
Master's degree	258	51.60
Professional degree	31	6.20
Doctorate	9	1.80
Prefer not to answer	1	0.20
Living Region		
Kanto	231	46.20
Kansai	71	14.20
Kyushu	64	12.80
Shikoku	44	8.80
Chugoku	63	12.60
Others	52	10.40
Did not indicate	2	0.40
Employment		
Student	28	5.60
Part-time Employee	37	7.40
Full-time Employee	347	69.40
Self-employed	38	7.60
Unemployed	41	8.20
Retired	4	8.80
Prefer not to answer	5	1.00
Personal annual income		
No income	24	4.80
Less than 200万円	77	15.40
200万円 – 400万円	95	19.00
400万円 – 600万円	148	29.60
600万円 – 800万円	75	15.00
800万円 – 1000万円	29	5.8
1000万円 and above	25	5.00
Prefer not to answer	27	5.40

Note: "Kanto" includes Ibaraki, Kanagawa, and Tokyo; "Kansai" includes Aichi, Nara, and Osaka; "Kyushu" includes Kagoshima, Kumamoto, and Saga; "Shikoku" includes Kagawa and Tokushima; "Chugoku" includes Kouchi and Yamaguchi; and "Others" includes Niigata and Okinawa.

questionnaires were collected, and the socio-demographic statistics of the final sample are summarised in Table 3.

Measures

The measurements of the esports play and watching motivation were adapted from previous research. The scales were developed and validated by Jang and Byon (2020a) and Qian et al. (2020a). All items used a 7-point Likert scale, ranging from 1 (strongly disagree)

to 7 (strongly agree). The measurement for the 19 item esports play motivation scale and the 45 item esports watching motivation both showed a high degree of reliability with Cronbach's alpha values of 0.93 and 0.98 (Sarantakos, 2013).

Analysis

Cluster Analysis

We use cluster analysis to explore naturally occurring combinations of motivation regulations within a Japanese sample of esports players. To identify esports fans' playing and watching motivational profiles, cluster analysis for two types of motivations – esports play and esports watching – was conducted based on a two-fold approach (Hair et al., 2014). Cluster analysis categories motivational scores according to multiple characteristics to maximise between-group heterogeneity and within-group homogeneity, thereby capturing multivariate interactions of motivation dimensions. First, hierarchical cluster analysis using Ward's method and Squared Euclidean distance was used to determine the number of clusters for esports play and watching motivations. Inspection of the dendrograms and the agglomeration coefficients suggested that a three-cluster solution was most appropriate. Second, non-hierarchical k-means cluster analysis was used to further classify and interpret the clusters identified in step 1. Differing from hierarchical cluster analysis which represents a method for obtaining the optimal number of clusters, non-hierarchical k-means cluster analysis is a method for further fine-tuning the initial clustering solution through an iterative process.

The results of the cluster analysis indicate that a three-cluster solution for esports play and a three-cluster solution for esports watching appeared to be most appropriate. Specifically, multivariate statistics indicate that statistically significant differences existed between both sets of the clusters at $p < 0.001$. In addition, the Scheffe post hoc test results indicate that there were statistically significant differences between clusters, supporting an appropriate classification of three cluster groups (See Tables 4 and 5).

Table 4 displays the results of our analysis on the mean score characteristics of the three cluster groups. The first cluster, which accounted for 32.20% of the sample, had the highest mean score across all six dimensions. We labelled this group as "All-Rounder Players", as they demonstrated a penchant for a variety of esports across genres. The second cluster, comprising 51.80% of the sample, had the highest mean score on the hedonic motivations and flow experiences among the six factors. Consequently, we named this group "Immersive Fun Seekers", as they sought deep engagement and enjoyment in their gameplay experiences. The third cluster, which made up 16.00% of the sample, had the lowest mean score across all six motivation factors compared to the other two clusters. However, the effort expectancy dimension was scored relatively higher than other dimensions, followed by hedonic motivation. Thus, we identified this group as "Skill-Based Players", as they were dedicated to improving their skills in esports games.

Table 5 shows the results of our analysis on the mean score characteristics for esports watching motivation across the three cluster groups. The first cluster, which comprised 27.00% of the sample, had the lowest mean score across all nine motivation factors compared to the other two clusters. However, the mean values on all nine esports watching motivational dimensions were positive (higher than 3.50 on the 7-point Likert scale).

Table 4. Summary statistics of cluster analysis of esports play motivations.

	Cluster I (Mean/S.D.) ($n = 161$)	Cluster II (Mean/S.D.) ($n = 259$)	Cluster III (Mean/S.D.) ($n = 80$)	*F*-value	Scheffe post hoc test I–II	I–III	II–III
Hedonic motivation	6.15 (0.74)	5.30 (0.85)	3.63 (1.29)	207.72***	***	***	***
Habit	5.72 (0.72)	4.40 (0.74)	3.16 (0.86)	355.78***	***	***	***
Price value	5.64 (0.86)	4.36 (0.78)	3.12 (0.96)	258.86***	***	***	***
Effort expectancy	5.41 (0.87)	4.11 (0.79)	3.19 (0.98)	209.30***	***	***	***
Social influence	5.16 (1.07)	3.77 (0.91)	2.73 (1.18)	175.27***	***	***	***
Flow	5.94 (0.81)	4.53 (0.77)	3.17 (1.12)	305.75***	***	***	***
Cluster name	All-Rounder Players	Immersive Fun Seekers	Skill-based Players	Pillai's Trace = 0.84 ($p < 0.001$) Wilks' Lambda = 0.21 ($p < 0.001$) Hotelling's Trace = 3.55 ($p < 0.001$) Roy's Largest Root = 3.48 ($p < 0.001$)			

***$p < 0.001$. Mean values measured on the basis of 7-point Likert scale (1: strongly disagree, 4: neutral, 7: strongly agree).

Table 5. Summary statistics of cluster analysis of esports watching motivations.

	Cluster I (Mean/S.D.) ($n = 135$)	Cluster II (Mean/S.D.) ($n = 142$)	Cluster III (Mean/S.D.) ($n = 223$)	*F*-value	Scheffe post hoc test I–II	I–III	II–III
Competitive nature	4.00 (0.76)	6.14 (0.63)	5.13 (0.68)	335.50***	***	***	***
Socialisation opportunity	3.69 (0.83)	5.87 (0.73)	4.52 (0.80)	271.32***	***	***	***
Friends bonding	3.66 (0.85)	5.93 (0.76)	4.63 (0.95)	238.04***	***	***	***
Game knowledge	3.79 (0.84)	5.92 (0.70)	4.87 (0.63)	309.79***	***	***	***
Skill appreciation	3.96 (0.86)	6.20 (0.68)	5.26 (0.65)	334.15***	***	***	***
Entertaining nature	4.00 (0.73)	6.30 (0.57)	5.28 (0.64)	437.46***	***	***	***
Dramatic nature	3.78 (0.82)	6.18 (0.68)	5.07 (0.71)	370.39***	***	***	***
Competition excitement	4.01 (0.73)	6.31 (0.55)	5.14 (0.63)	456.83***	***	***	***
Vicarious sensation	3.58 (0.85)	5.90 (0.76)	4.59 (0.84)	279.05***	***	***	***
Cluster name	Casual Viewers	Entertainment-Excitement Seekers	Skill Appreciation Seekers	Pillai's Trace = 0.87 ($p < 0.001$) Wilks' Lambda = 0.18 ($p < 0.001$) Hotelling's Trace = 4.46 ($p < 0.001$) Roy's Largest Root = 4.41 ($p < 0.001$)			

***$p < 0.001$. Mean values measured on the basis of 7-point Likert scale (1: strongly disagree, 4: neutral, 7: strongly agree).

Therefore, we labelled this group as "Casual Viewers". The second cluster, which accounted for 28.40% of the sample, had the highest mean scores across all nine dimensions, with particularly high scores on the entertaining nature and competition excitement factors. We named this group "Entertainment-Excitement Seekers". The third cluster, which made up 44.60% of the sample, had the highest mean score on the skill appreciation dimension, followed by entertaining nature. We labelled this group "Skill Appreciation Seekers".

Clusters differences by esports fans' characteristics

To further profile the identified clusters, we cross-tabulated each cluster with external variables, including the socio-economic characteristics and behavioural patterns of esports fans. The results of the Chi-squared tests indicate that the socio-economic factors, such as gender, age, education, employment, and income, did not significantly differentiate the three clusters of esports play motivation identified in the previous analysis. However, statistically significant differences were found among the three clusters in terms of the number of hours played per week, the number of years as an esports fan, and the primary platform used to play esports games.

We also cross-tabulated the three clusters of esports watching motivation with the socio-economic characteristics and behavioural variables of fans. The results of the Chi-squared tests indicate that gender was a statistically significant factor that differentiated the three watching motivational clusters. Additionally, statistically significant differences were found among the three clusters in terms of the number of hours watched per week, the number of years as an esports fan, and the primary platform used to watch esports games.

Findings and discussion

The descriptive statistic from this study reveals several novel findings. Firstly, in terms of the level of involvement in esports, the majority of our Japanese sample (over 60%) either play or watch esports for less than three hours a week[1] (see Figure 1). This indicates a moderate level of engagement, which may be due to the fact that esports is relatively new in Japan, and most followers and fans are still relatively new to the scene. 64.00% of our respondents have been following esports for less than three years. Regarding the most popular esports genres in Japan (see Figure 3), our findings suggest that Japanese consumers enjoy playing and watching puzzle games (such as Puzzle & Dragons), followed by sports games (such as NBA2 K) and fighting games (such as Street Fighter). This finding is unique to the Japanese market, as previous esports market research conducted in more advanced regions like China, South Korea, and North America identified Multiplayer Online Battle Arena (MOBA) games (such as Dota 2) and First-Person Shooter (FPS) games (such as CS:GO) as the most popular (Petermeier, 2022) (Figure 4).

Secondly, regarding esports gameplay motives, we identified three distinct clusters: All-Rounder Players, Immersive Fun Seekers, and Skill-Based Players (see Table 6). To deepen our understanding of the application of U & G theory in esports, our analysis of cluster-specific gratifications reveals nuanced motivations that drive the active selection

[1]Global average play time is about seven to eight hours per week (Statista, 2022).

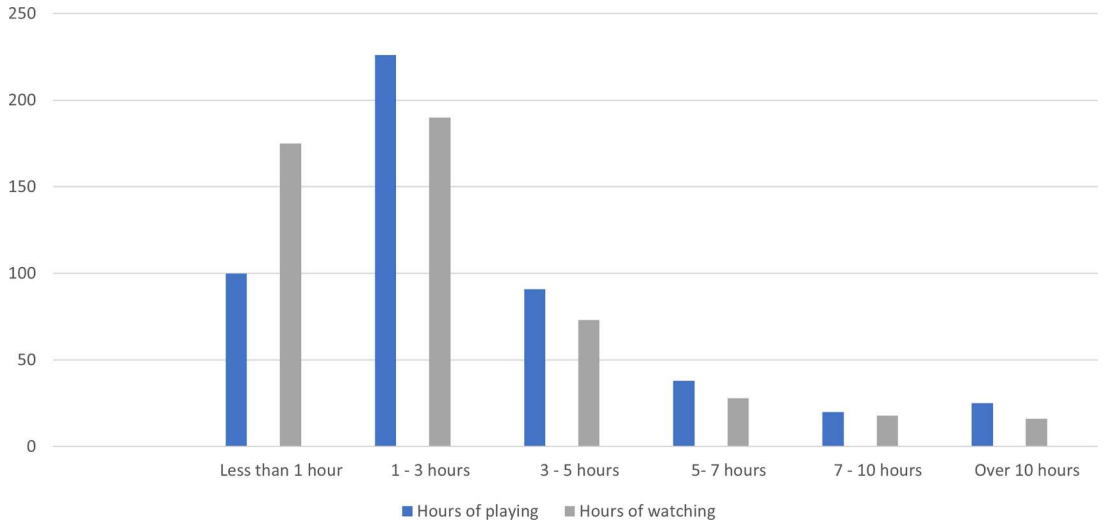

Figure 3. Hours of playing and watching esports games per week.

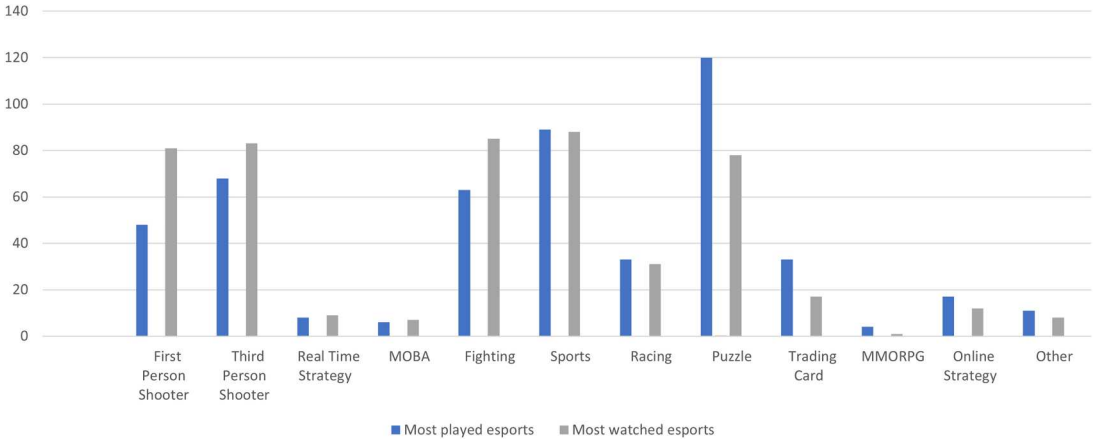

Figure 4. Types of esports games most played and watched.

of esports media. This not only directly aligns with the U&G theory's premise (Liu, 2015), but also extends the theory by demonstrating how these motivations reflect both personal and social needs (Ruggiero, 2000); as well as cultural identities that are unique to the Japanese context. This specific identification in gratification-seeking adds a novel dimension to the U&G framework, emphasising the cultural underpinnings of media consumption choices. Building on these initial findings, our study proposes a novel exploration of how engagement patterns within these clusters not only demonstrate individual preferences (Jang & Byon, 2020a) but also culturally rooted motivations. For example, the preference for JRPGs and puzzle games over global esports genres suggests a gratification tied to national identity and cultural resonance. This insight extends the U&G theory by integrating cultural identity as a significant factor in the gratification process, proposing a new framework where cultural congruity serves as a key driver in media selection and engagement within esports communities.

Around a third of our respondents (32.20%) are "All-Rounder Players" who appreciate all areas of value that they gain from playing esports games. They spend a moderate amount

Table 6. Esports play clusters differences by esports fans' characteristics.

	Cluster I ($n = 161$) All-Rounder Players	Cluster II ($n = 259$) Immersive Fun Seekers	Cluster III ($n = 80$) Skill-based Players		
Hours of playing esports game per week				**Total**	
Less than 1 h	20	54	26	100	$\chi^2 = 33.77$, df = 10, $p < .001$
1–3 h	65	126	35	226	
3–5 h	33	44	14	91	
5–7 h	19	18	1	38	
7–10 h	8	10	2	20	
Over 10 h	16	7	2	25	
Number of years of being an esports fan					
less than 1 year	24	44	24	92	$\chi^2 = 15.68$, df = 6, $p < .05$
1–3 years	69	128	31	228	
3–5 years	30	49	16	95	
over 5 years	38	38	9	85	
Main platform of esports gameplay					
Mobile phone	33	73	36	142	$\chi^2 = 23.33$, df = 8, $p < .01$
PC/Laptop	46	60	23	129	
Tablet/iPad	11	24	5	40	
Console/Switch	70	100	15	185	
Other	1	2	1	4	
Types of esports games most played					
First Person Shooter	14	26	8	48	$\chi^2 = 20.99$, df = 22, $p = 0.52$ (n.s.)
Third Person Shooter	20	39	9	68	
Real Time Strategy	4	4	0	8	
MOBA	1	4	1	6	
Fighting	23	28	12	63	
Sports	27	50	12	89	
Racing	12	16	5	33	
Puzzle	41	57	22	120	
Trading Card	5	22	6	33	
MMORPG	2	0	2	4	
Online Strategy	9	7	1	17	
Other	3	6	2	11	

of time playing games weekly (60.87% play between 1–5 hours weekly). Over half of the all-rounder players (57.76%) are new esports fans with an average involvement of less than three years. The "Immersive Fun Seekers" are the largest cluster, accounting for 51.80% of our respondents. They delve deep into the play experience and are highly motivated by the hedonic and flow experiences. They are more hardcore esports fans with heavier gameplay (65.64% play between 1–5 hours weekly) and have been fans for a longer time (33.59% have been esports fans for over 3 years) than the other two segments. The "Skill-Based Players" account for the smallest esports gameplay segment, with 16.00% of respondents. They are highly motivated by developing their skills in esports games. To encapsulate our findings, Japanese esports players are less motivated by socialisation and/or competition; they are more motivated by the exploration and experience.

Finally, in terms of esports watching motives, we have also identified three prominent clusters: Casual Viewers, Entertainment-Excitement Seekers, and Skill Appreciation Seekers (see Table 7). Similar to playing motivations, watching motivations also reflect a diverse spectrum of gratifications sought, ranging from casual enjoyment to appreciating the skills involved in esports. The smallest cluster is the "Casual Viewers", who account for 27.00% of our respondents. They generally enjoy all aspects of esports watching and are not particularly motivated by any specific factors. Many of them (45.90% within the cluster) watch esports games for less than 1 hour per week. They are likely to prefer casual watching, which requires the least amount of commitment and are probably not inclined to follow any particular esports. The "Entertainment-Excitement Seekers" (28.40% of our respondents) are highly motivated by the excitement and entertainment value of the games. Compared to the other spectator clusters, this cluster is more motivated on all dimensions of esports spectatorship. The cluster of "Skill Appreciation Seekers" is the largest, accounting for 44.60% of the sample. They appreciate the skills demonstrated by the players as their primary motivation for watching esports. In comparison to the other two spectator clusters, this cluster likes watching sports and third-person shooter games the most. The majority of them have been watching esports for 1–3 years (48.43% within the cluster) with a relatively heavier engagement as esports spectators (27.00% within the cluster watch over 3 hours of esports every week).

In terms of device selection, Japanese esports players use mostly console and/or Switch, followed by mobile, in stark contrast to other parts of the world. This is hardly surprising given that Nintendo's Switch has a devoted following in Japan, and dominates the Japanese market, consistently outselling any other consoles in the last few years (Batchelor, 2022). While consoles like Sony's PlayStation and Microsoft's Xbox are more commonly associated with esports, especially in Western countries, their sales are lagging in the Japanese market. Sony's PlayStation 5 is the next biggest seller, followed by Xbox, which has struggled historically in Japan (Ashton, 2019). Speculative reasons such as the recent price hike of Sony's PlayStation 5 have affected its sales, and its long-running supply issues in Japan have also contributed to the problem (Phillips, 2022).

Consistent with the global trend is the use of mobile phones as the main platform for esports gameplay among serious and committed "Skill-Based Players" (45.00% within the cluster). This cluster of players differs from the other two clusters who use consoles or Switch as their preferred device for playing esports. However, the "Skill-Based Players" are still a minority among our surveyed sample. The device preference among Japanese esports players provides a clue to Japan's reticence in esports, in contrast with its Asian

Table 7. Esports watching clusters differences by esports fans' characteristics.

	Cluster I ($n = 135$) Casual Viewers	Cluster II ($n = 142$) Entertainment-Excitement Seekers	Cluster III ($n = 223$) Skill Appreciation Seekers		
Gender				**Total**	
Male	90	100	151	341	$\chi^2 = 10.17$, df = 4, $p < .05$
Female	40	42	71	153	
Prefer not to say	5	0	1	6	
Hours of watching esports game per week					
Less than 1 h	62	29	84	175	$\chi^2 = 38.06$, df = 10, $p < .001$
1–3 h	43	59	88	190	
3–5 h	17	29	27	73	
5–7 h	7	7	14	28	
7–10 h	4	6	8	18	
Over 10 h	2	12	2	16	
Number of years of being an esports fan					
Less than 1 year	35	13	44	92	$\chi^2 = 20.09$, df = 6, $p < .01$
1–3 years	58	62	108	228	
3–5 years	22	32	41	95	
over 5 years	20	35	30	85	
Main platform of watching esports					
Live streaming platforms (e.g. YouTube, Twitch)	93	74	165	332	$\chi^2 = 29.47$, df = 6, $p < .001$
Online game platform (e.g. Steam)	34	52	44	130	
Onsite (e.g. in person in stadium)	4	16	12	32	
Other	4	0	2	6	
Types of esports games most watched					
First Person Shooter	19	27	35	81	$\chi^2 = 13.31$, df = 22, $p = 0.92$ (n.s.)
Third Person Shooter	18	24	41	83	
Real Time Strategy	3	1	5	9	
MOBA	1	3	3	7	
Fighting	25	28	32	85	
Sports	24	23	41	88	
Racing	7	10	14	31	
Puzzle	25	20	33	78	
Trading Card	6	3	8	17	
MMORPG	0	0	1	1	
Online Strategy	5	2	5	12	
Other	2	1	5	8	

neighbours – China and Korea, where their enthusiasm is displayed in their players' strength and ability to compete globally (and succeed) in popular online PC games such as League of Legends. Japanese players have been slow to adopt esports titles (such as Dota 2, CS:GO) as they favour puzzle games such as Puzzle & Dragons and Puyo Puyo (see Figure 5). Although MOBAs and MMORPGs are popular worldwide esports genres, Japan's esports gamers tend to gravitate towards single-player titles, which explains why our data shows that Japanese players are indifferent to those genres.

Regarding preferred platforms for watching esports, Japanese players favour live streaming platforms, consistent with the global trend. These platforms include Twitch, the largest live streaming platform for esports, as well as YouTube Gaming and Facebook Gaming. In addition to these international platforms, TwitCasting, Openrec, Niconico, and

Figure 5. Puyo Puyo Esports.

Mildom are popular in Japan, both for players and spectators. These platforms also allow for monetising game distribution. However, live esports tournament events are still scarce in Japan, where the esports market is growing but still behind more mature markets like China and Korea. This lack of organised events may explain why live spectatorship remains the least common mode of esports spectating in Japan.

This study examines and explains the unique motivations behind esports play and watch among Japanese fans through the utility of the profile approach, providing an initial understanding of the esports market and profile of the esports OC in Japan. As gleaned from the findings, the Japanese esports market is much influenced by its own rich gaming heritage and dynamic gaming culture. In the light of the U&G theory, the findings revealed how individuals in Japan engage with esports for various purposes and derive gratifications from their esports experiences. This study allowed us to understand how Japanese efforts to engage with particular esports genres reflects an effort to express their cultural identity. This is best represented through their affiliation with and affinity for JRPG and domestically produced game titles (e.g. Sega's Puyo Puyo Esports). Beyond expression of identity, the finding reveals getting skilled for professional development is more important to Japanese players than competitiveness and social reasons which implies informational gratification. This differs from findings in extant studies that commonly suggest socialisation and fulfilment of hedonic needs as key gratifications from esports play and spectatorship (e.g. Bányai et al., 2019; Weiss & Schiele, 2013). This also reflects Japan as a society high in social rigidity that tend not to engage in causal socialisation (Badman et al., 2022). To conclude, the reflection of cultural identity in the genre preference highlights the active role that individuals play in selecting esports media. It also represents a theoretical expansion of the U & G theory itself. By recognising cultural identity as a significant gratification sought in esports consumption, we propose a novel theoretical insight that the U&G framework can be extended to include cultural gratifications as an important dimension. This insight not only enriches our understanding of esports consumption motivations but also indicates potential causal relationships between cultural identity, media selection, and the gratifications obtained. Such theoretical development positions cultural gratifications alongside the established personal and social needs within the U&G framework, and offers a more comprehensive lens through which to examine esports online communities in this particular research context.

Implications and contributions

This study offers valuable insights into the contexts influencing the development, diffusion, and adoption of esports in Japan, contributing to the nascent research on the emerging online community of esports consumers in the country. Findings from this study have important practical implications for understanding the distinctive characteristics of the Japanese esports market and for developing strategies to facilitate its growth and success. The Japanese esports community stands out with its preference for several distinct genres and access platforms. Although deciphering Japanese preference for esports genre is not the focus of the current research, findings suggest that puzzle games are their favourite where esports tournaments are even created specifically for this genre (e.g. Puyo Puyo Esports Tournament – see Figure 5). This is certainly atypical to the hugely popular shooter and Multiplayer online battle arena (MOBA) genres across

different global platforms and markets. Japanese esports tend to place less attention on top esports titles with strong international reputation. There are some esports games developed in Japan (e.g. Final Fantasy, Genshin Impact and Puyo Puyo) that have strong Japanese cultural aesthetics influence in their design and content that set them apart from other worldwide popular titles. As alluded to earlier, the Japanese esports market is much influenced by its own rich gaming heritage and dynamic gaming culture. Publishers have the capability to create and build its own esports genre, as well as organise esports tournaments (see for instance Wong, 2018) to cater to and meet their country's demand without having the need to adhere to global trend. Unlike the global trend of PC gaming, the main platform of esports gameplay in Japan is through switch and/or console. The preference for single-player titles over multiplayer titles is more significant in Japan than in other parts of the world, and the focus on getting skilled is more critical to Japanese players than competitiveness and social reasons. Mobile access to esports play is on the rise in Japan with the introduction of 5G in 2020, which has allowed faster data transmission and smoother online and mobile game play. These suggest that the Japanese esports movement may be on its way to making a stronger presence in the global esports scene, as the cohort effect from the esports success of neighbouring countries China and Korea can act as a blueprint for constructing a robust infrastructure for the Japanese esports market.

In addition, understanding the diverse motivations behind esports participation is not only critical for academic inquiry but also important for effective market segmentation in the esports industry. The identification of distinct market segments based on U&G-informed motivations provides invaluable insights for developing targeted marketing strategies. By understanding the specific gratifications sought by each segment, marketers can tailor their strategies to meet these needs more effectively, through personalised content, targeted communication channels, and tailored esports experiences. This segmentation approach not only enhances the relevance and impact of marketing efforts but also contributes to a deeper understanding of the esports market dynamics in Japan.

Drawing inferences from these implications, the theoretical contributions of this study are significant in several ways. Firstly, this study significantly advances the U & G theory by applying its principles to the unique context of esports consumption in Japan. By identifying the diverse motivations driving esports participation and media selection amongst Japanese fans, our research not only confirms the U & G theory's foundational premise that individuals actively select media sources based on expected gratifications, but also extends the theory by illustrating how these motivations are influenced by cultural nuances specific to the Japanese ecosystem. Secondly, our application of the U&G theory to esports reveals a more complex landscape of gratifications that are sought after by different segments within the esports audience, ranging from casual viewers to dedicated players. This novel understanding of esports consumers' motivations enhances the U&G theory by demonstrating that the theory's traditional categories of gratifications (e.g. entertainment, social interaction, and information seeking) can be expanded to include motivations that are specific to the esports context, for example, game genre preferences influenced by cultural identity and the pursuit of skill development within competitive gaming environments. Moreover, our findings on the media selection processes amongst Japanese esports enthusiasts provide further theoretical contributions to the U&G framework. The exploration of how different platforms are chosen based on the

unique gratifications they offer extends the U&G theory by highlighting the active, discerning nature of media consumption within digital and interactive media landscapes, such as esports. This indicates a more complex interplay between user motivations and media platform attributes (Seo & Jung, 2016) than traditionally accounted for within the U&G theory, and therefore suggesting a need for more updated models that incorporates the dynamic, interactive nature of modern digital media environments.

To sum up, our findings unpack the complexities of esports participation, and expanded the U&G theory's application to the esports context, incorporating unique cultural factors into the understanding of media gratifications. The research demonstrates the theory's relevance in understanding the complex motivations behind media selection in contemporary digital media landscapes. Although the study has its limitations, by the lack of causality, given the nature and purpose of the cluster analysis, it contributes to our understanding of the emerging esports market in Japan and provides directions for future research to explore the interrelations between user motivations, cultural identity, and media consumption patterns not only in the esports context but also other digital media contexts.

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