



INDIAN ESPORTS REPORT

2026

JetSynthesys

x

YouGov



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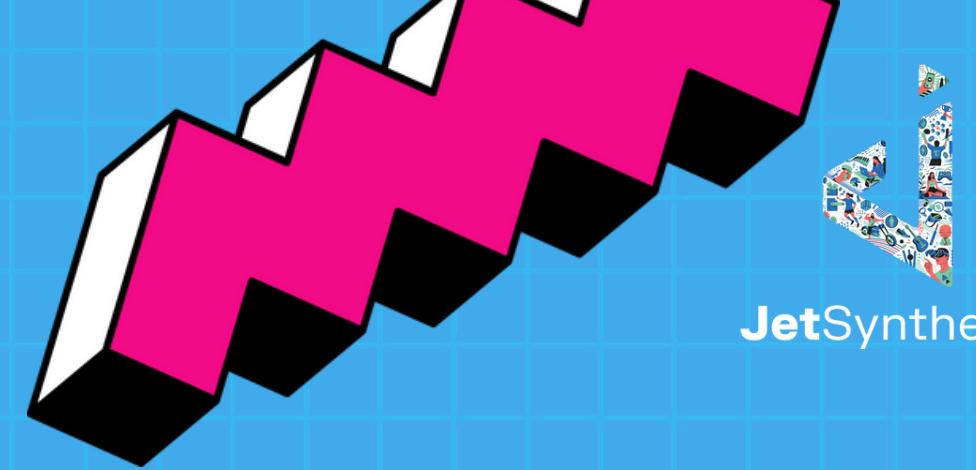
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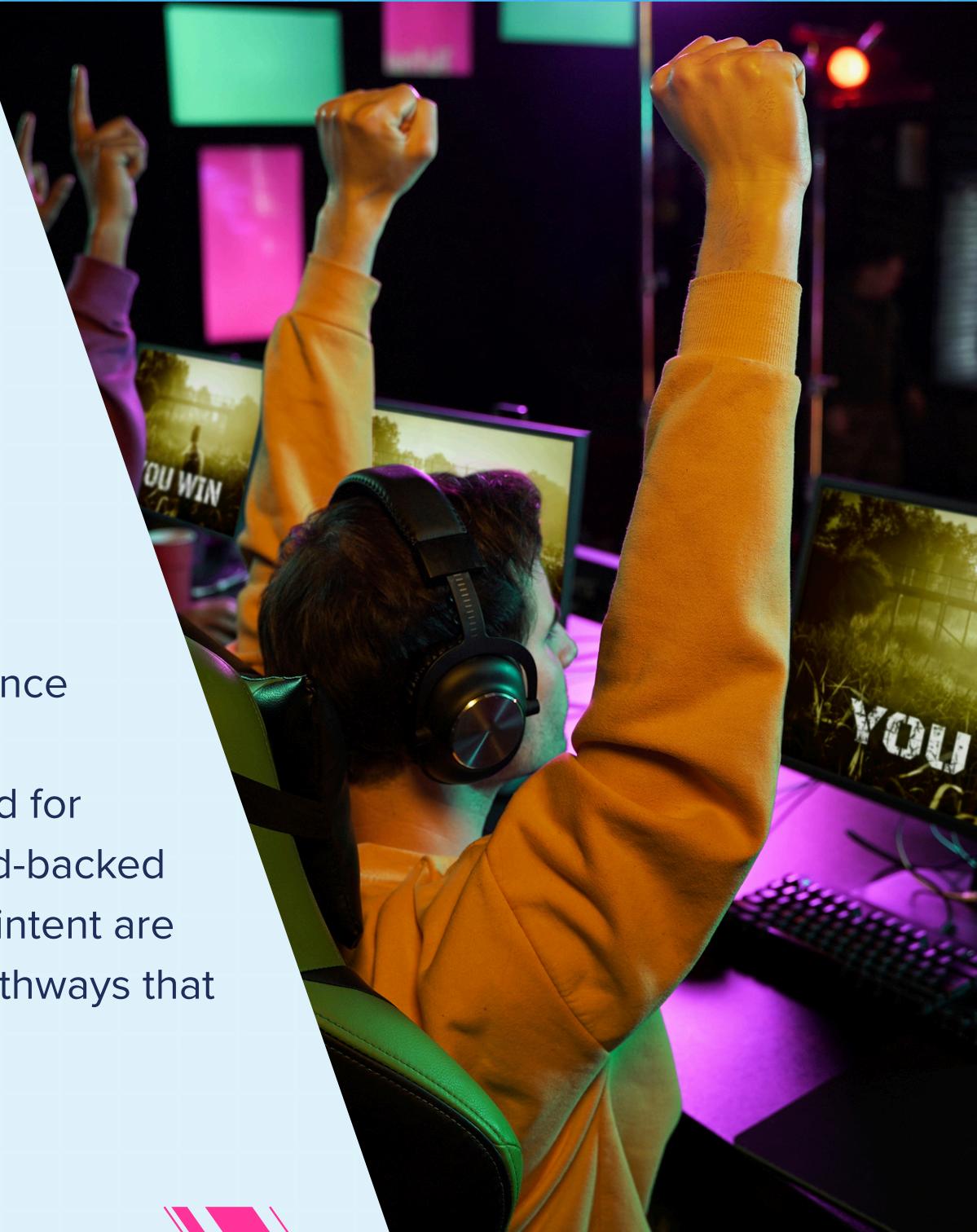
Executive Summary



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India's esports ecosystem is at a clear inflection point. A first-ever, gamer-led national report by JetSynthesys, with survey conducted by YouGov shows that Indian esports athletes are increasingly viewing Esports as a serious, long-term career opportunity rather than a casual pursuit. **83% of daily esports players believe esports is financially viable**, with nearly half describing it as very viable, while **three out of four have considered pursuing esports professionally**. Ambition today extends beyond competitive play, with players actively exploring roles across streaming, content creation, coaching, analytics and team management, signalling the emergence of esports as a broad, multi-layered professional ecosystem.

However, the study also highlights a critical gap between aspiration and structure. Despite rising confidence and growing recognition of Esports, **career stability remains the biggest concern**, driven by financial uncertainty, limited long-term pathways and lingering social stigma. Players consistently point to the need for stronger institutional support, including clearer regulation, infrastructure, education integration and brand-backed opportunities, to enable sustainable careers. The findings underline that while India's esports talent and intent are firmly in place, the next phase of growth will depend on how effectively the ecosystem builds durable pathways that convert momentum into lasting professional outcomes.





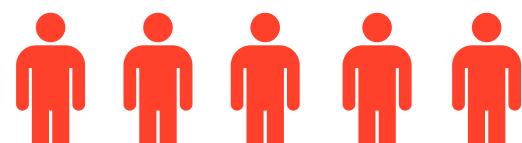
Research Methodology & Study Design



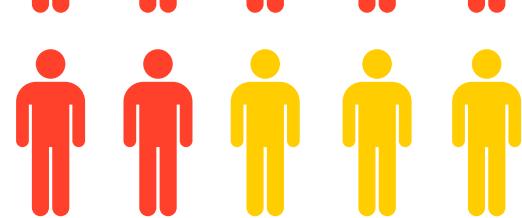
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Target Group

Gender



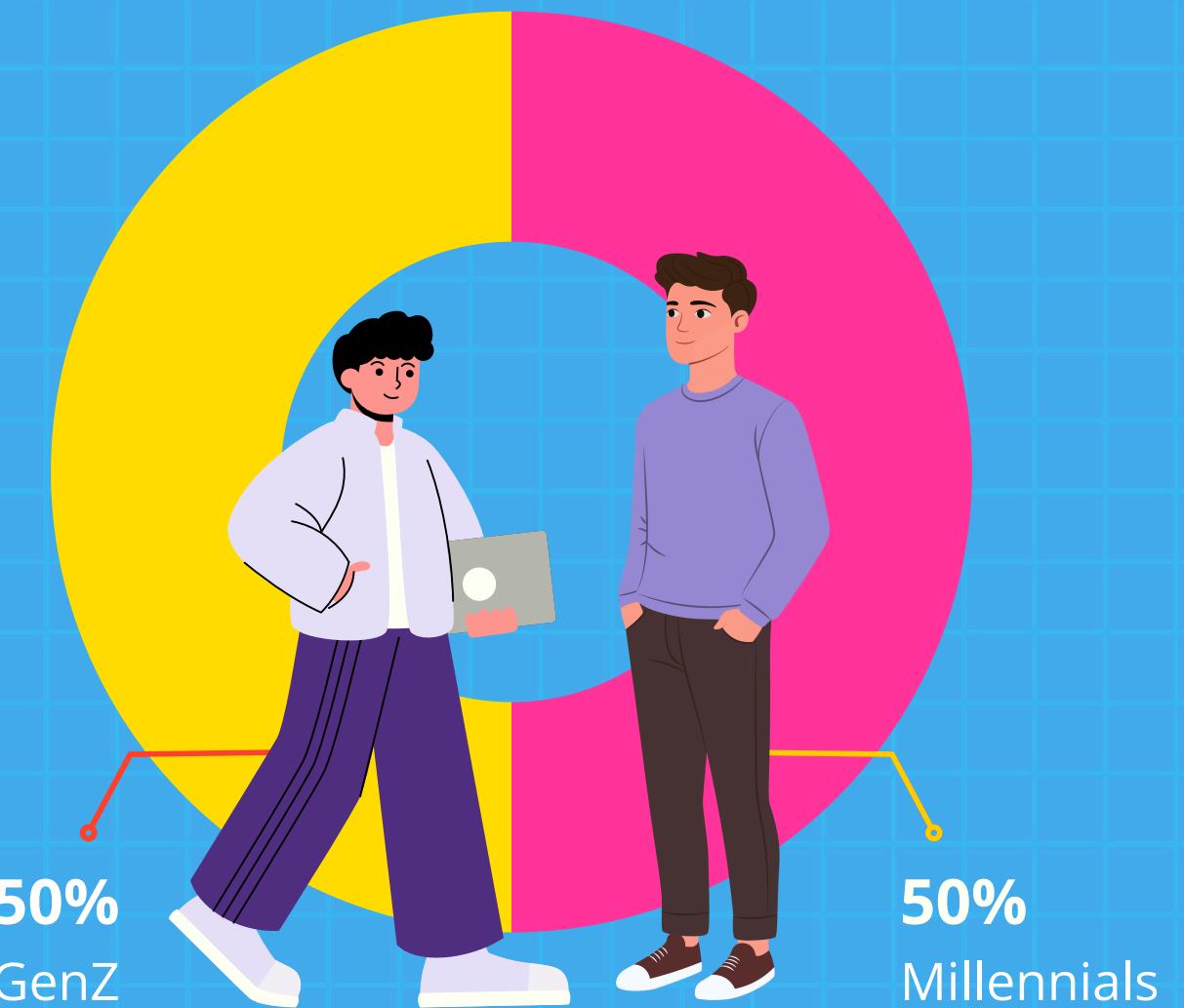
70%
Men



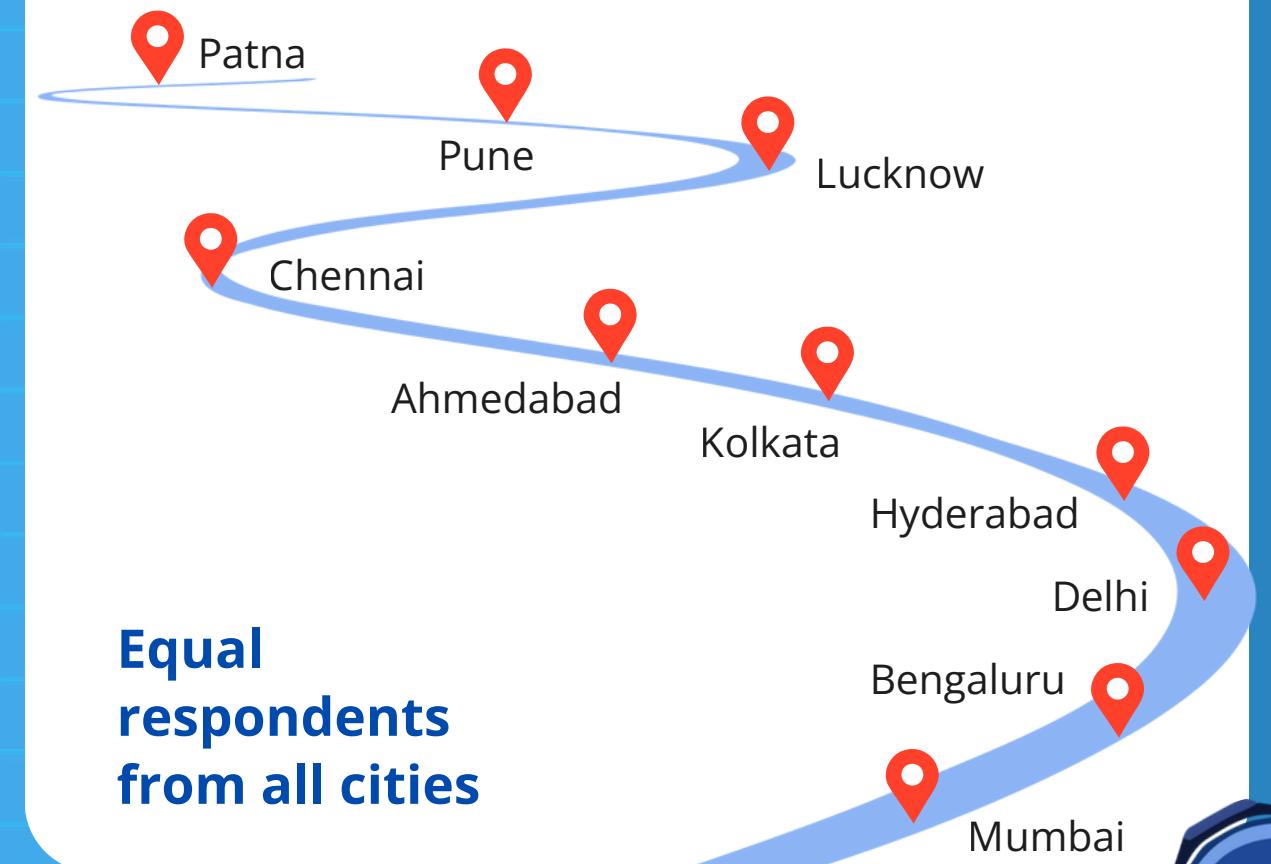
30%
Women



Age



Location



Equal
respondents
from all cities

Research Methodology & Study Design

Target Group

Players who play video/mobile Esports games everyday



Sample Size - 1521

YouGov conducted a short online survey of under 10 minutes

'Other selected observations' in this report are identified/ inferred basis statistical sig. testing at 95% C.I. in the report. Statistical significance testing is vs other members of cohort type e.g. Data among males is tested vs data among the other member(s) of cohort type ('gender') i.e., female, In age cohort, GenZ is tested vs Millennials etc.

This to identify standout cases where it is higher vs other member(s) in that type of cohort.



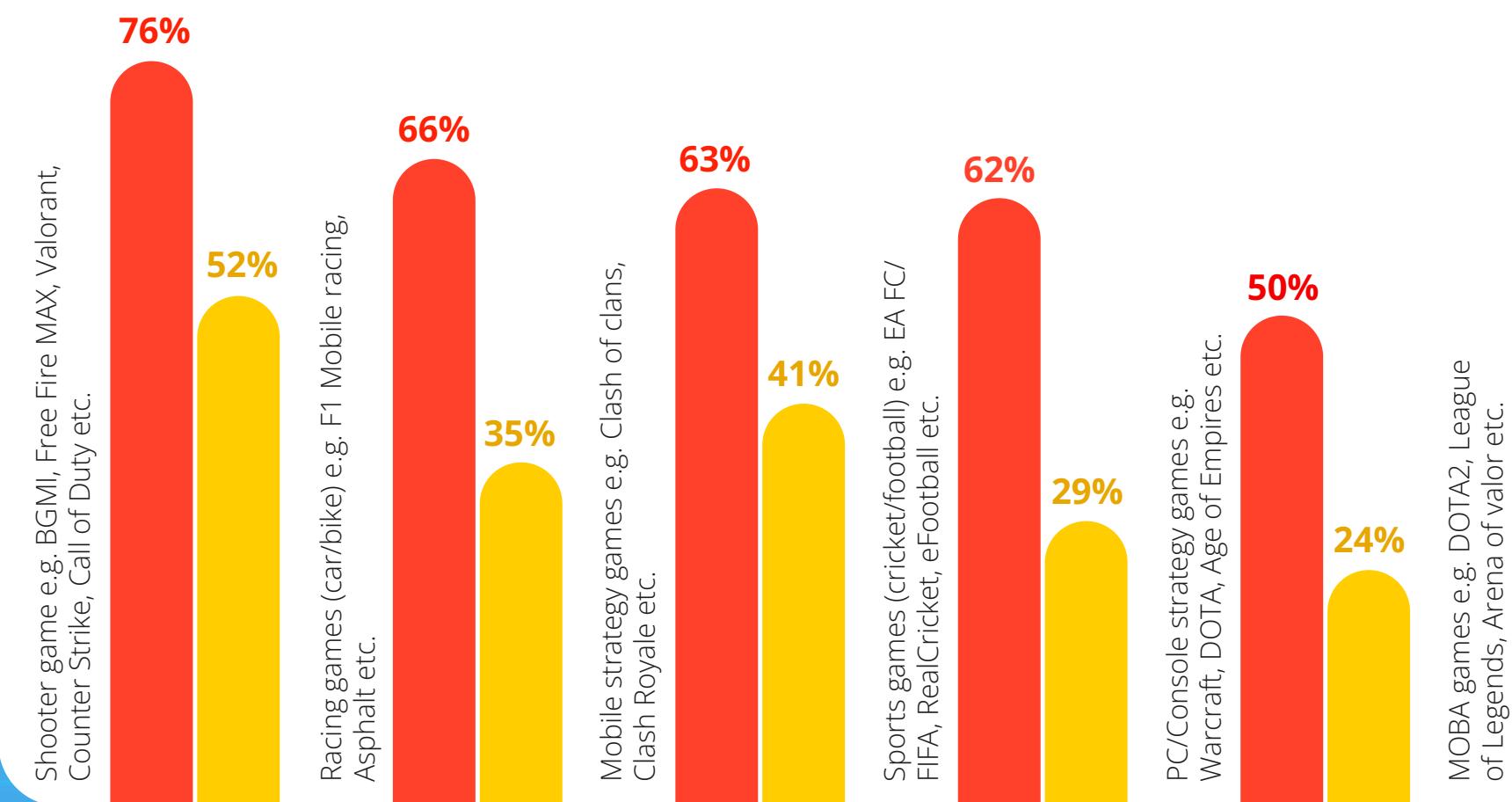
Gaming Landscape Overview



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Types of Games Played

- Games daily Esports player play (could be daily, weekly, monthly or occasionally)
- Games daily Esports player usually play daily/everyday



MOBA
46%

Mobile Strategy
64%

Racing
52%

Shooter
68%

Sports
48%

PC/Console
Strategy
64%

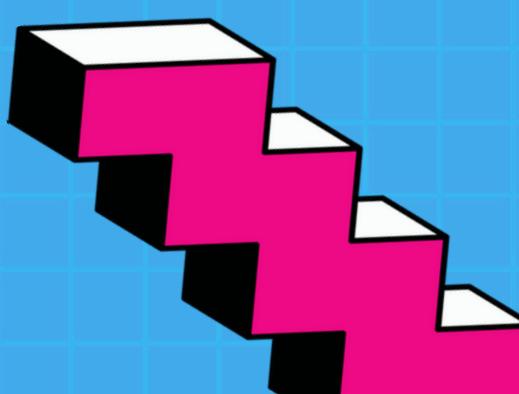
Types of Esports games being played everyday

76% of daily Esports players mention they play shooter games

52% of daily Esport players say they play shooter games everyday.

Thus, 2 out of 3 (68%) of daily Esport players who play shooter games play this type of game daily

64% of daily Esport players who play mobile strategy games say they play this type of game daily



Gaming Landscape Overview

Additional Insights



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54%

of GenZ daily esport players play shooter games daily

51%

of Millennial daily esport players play shooter games daily

37%

of male Millennial daily esport players

34%

of female Millennial daily esport players say they play **digital sports games (cricket/football) everyday**

While only **22% of male GenZ** daily esport players and **26% of female GenZ** daily esport players say so

42%

of male Millennial daily esport players

39%

of female Millennial daily esport players say they play **digital racing games (car/bike)**

While only **28% of male GenZ** daily esport players and **30% of female GenZ** daily esport players say so

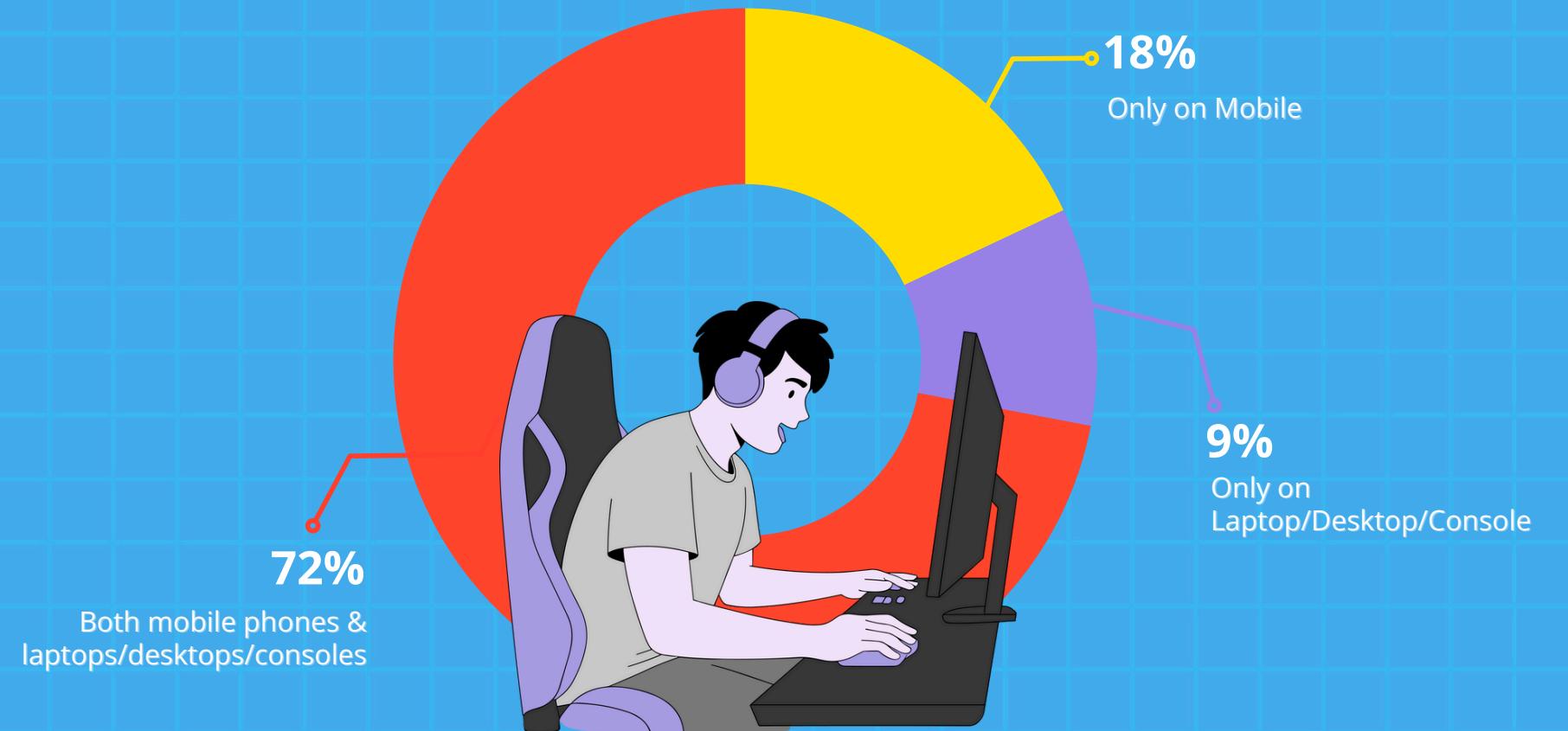


Gaming Landscape Overview

Where They Play: Pay to Play or Play Free

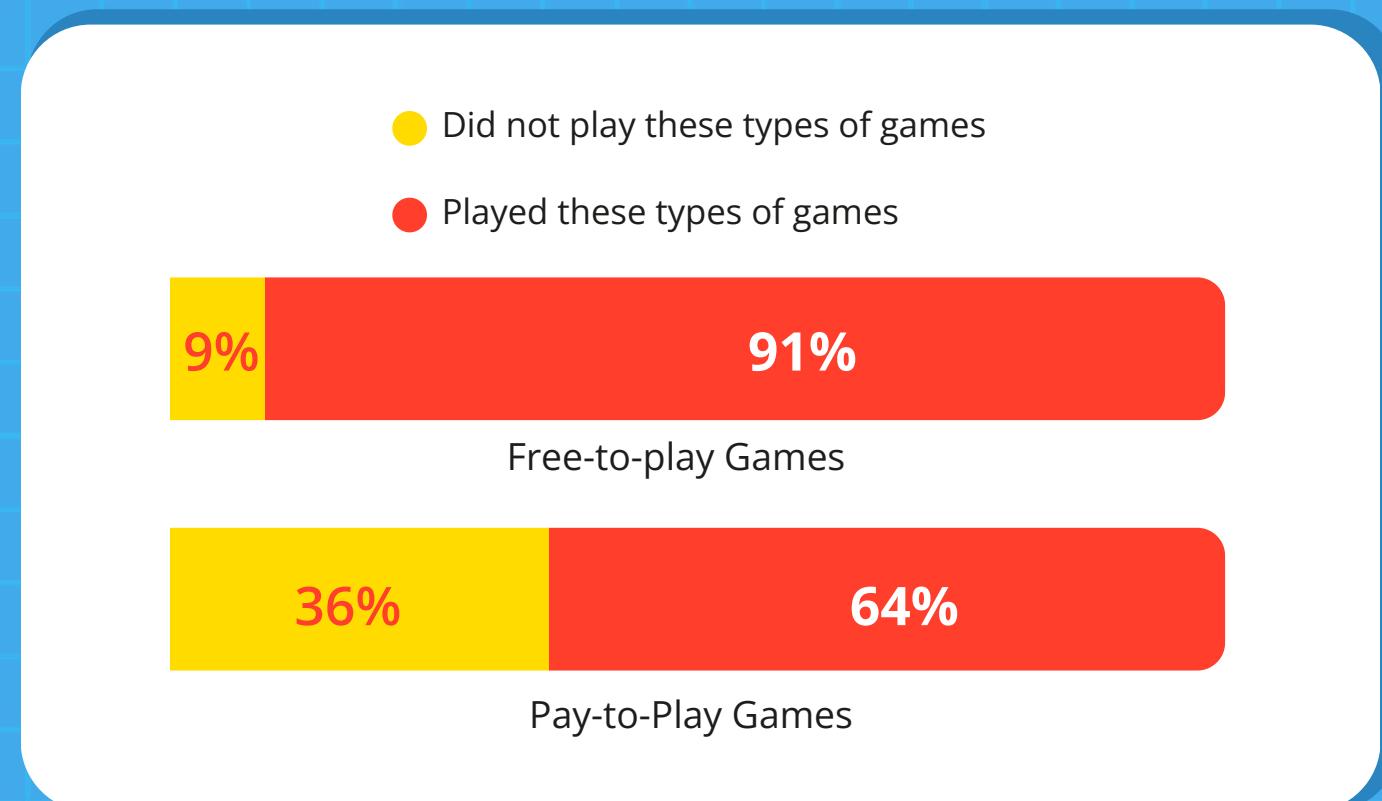


Where do they play?



72% of daily Esport players played on their phones as well as on laptops/desktops/consoles in the last 3 months

What have they played in the last 3 months?



64% of daily Esports players have played pay-to-play games in the last 3 months

Gaming Landscape Overview

Additional Insights

55%

of daily Esports players played both free-to-play and pay-to-play games in the last 3 months

64%

of those who played only on mobile phones played **only free-to-play** games (i.e. not pay-to-play) in the last 3 months

Among those who played **only free-to-play** (i.e., not pay-to-play) in last 3 months:

93%

played games on mobiles

67%

played games on laptops/desktops/consoles

Among those who played **only pay-to-play** (i.e., not free-to-play) in last 3 months:

81%

played games on laptops/desktops/consoles

78%

played games on mobiles

Playing **only-on-mobiles** more common among GenZ than among Millennials:

22%

of GenZ daily esport players

15%

of Millennial daily esport players



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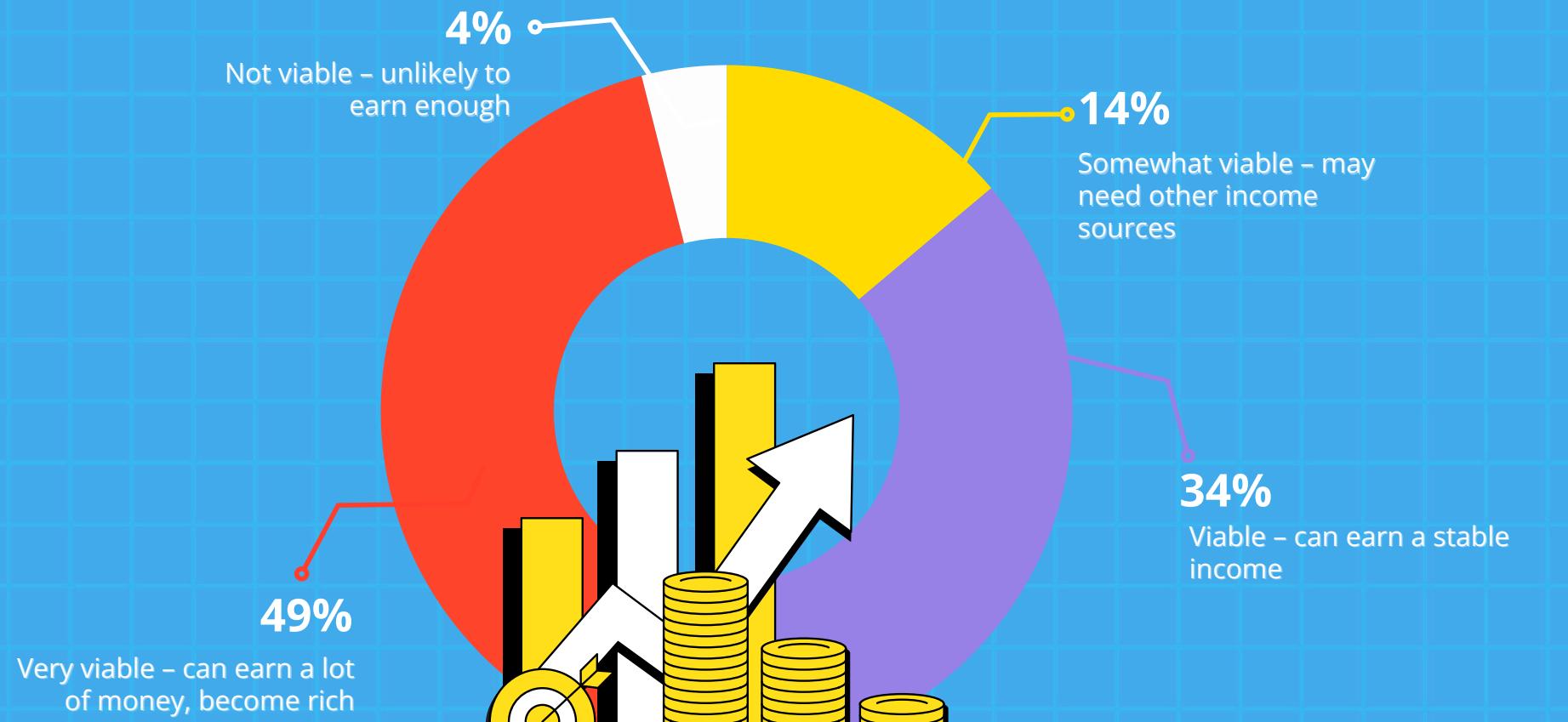
Esports as a Career

Perception of Esports as a Viable Career

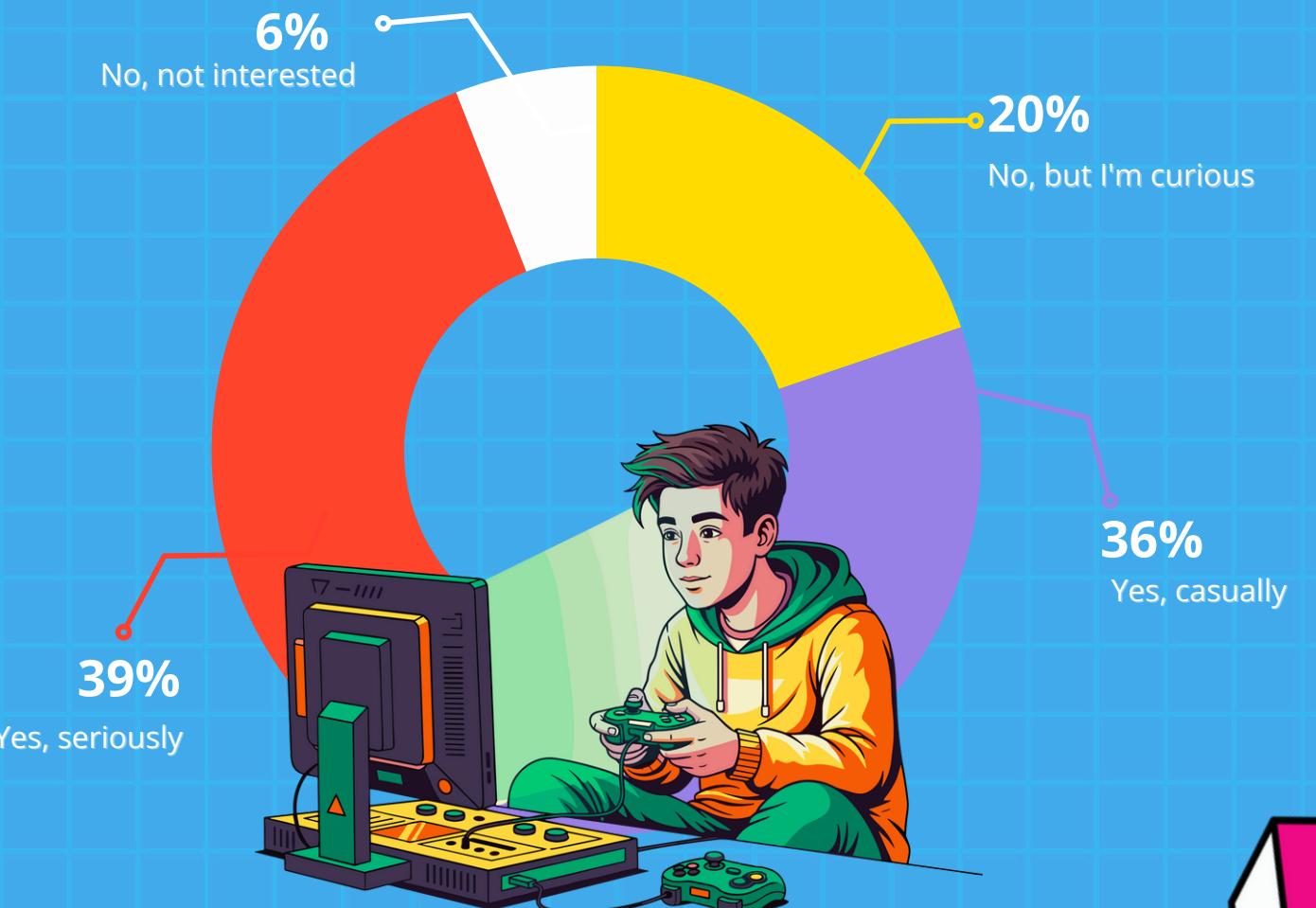


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Financial Viability



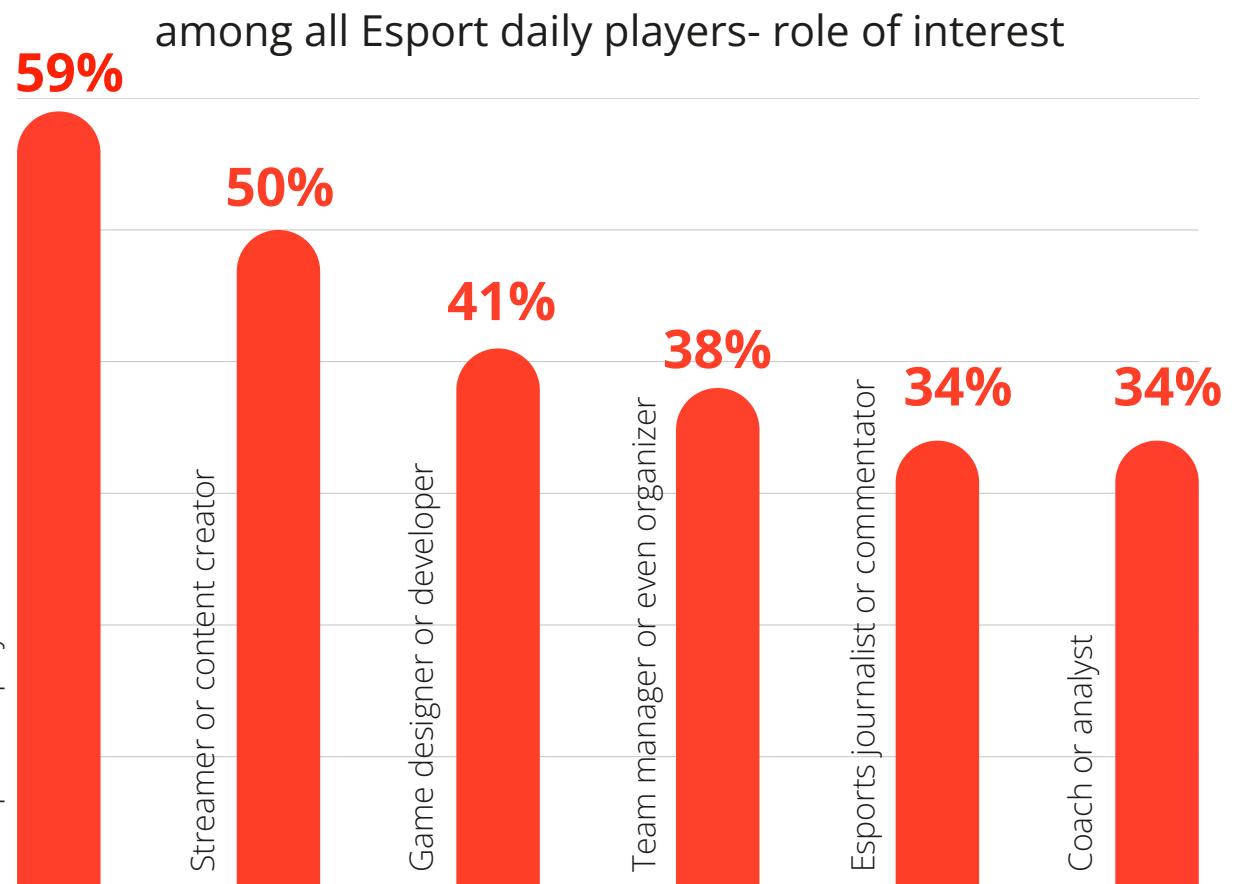
Considered Pursuing as a Career



Esports as a Career

Perception of Esports as a Viable Career

Role Interest



83% of daily Esport players think it is a financially viable career

59% of those who think it is a financially viable career think it is very viable where one can earn a lot of money and become rich

75% of daily Esport players have ever considered a career in Esports

52% of those who have ever considered a career in Esports say they had done so seriously



Esports as a Career

Additional Insights



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57%

of daily Esport players who play **digital Sports games (cricket/football) everyday** say they have some time seriously considered a career in Esports

57%

of daily Esport players from key **North India** cities (Delhi-58%, Lucknow 57%) think Esports is very financially viable

51%

of daily Esport players from **Ahmedabad** and 49% of daily Esport players from **Lucknow** say they have some time seriously considered a career in Esports

58%

of daily Esport players who play **PC Console strategy games (Warcraft, DOTA etc.) everyday** say they have some time seriously considered a career in Esports

65%

of daily Esport players who play **MOBA games everyday** think Esports is very financially viable

62%

of daily Esport players who play **MOBA games everyday** say they have some time seriously considered a career in Esports

Esports as a Career

Consideration of Esports as a Career Path



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The stability of finances is the topmost concern for 23% of daily Esport players and 62% of daily Esport players have it among their top 3 concerns. Other key concerns mentioned include social stigma- lack of social acceptance, recognition (56% have it in their top 3 concerns) and limited career options beyond playing (55% have it in their top 3 concerns).

Exploring themes for concerns- reasons related to Social and cultural acceptance are topmost for 1/3 of daily esport players (33%), 40% indicate topmost is career/financial security. 1 in 4 (25%) have personal confidence or health related reasons as their topmost concern

Combining Topmost data into a set of themes:

37%

Love for the Game- 37% (Definition from above: thrill/inspired/mastery)

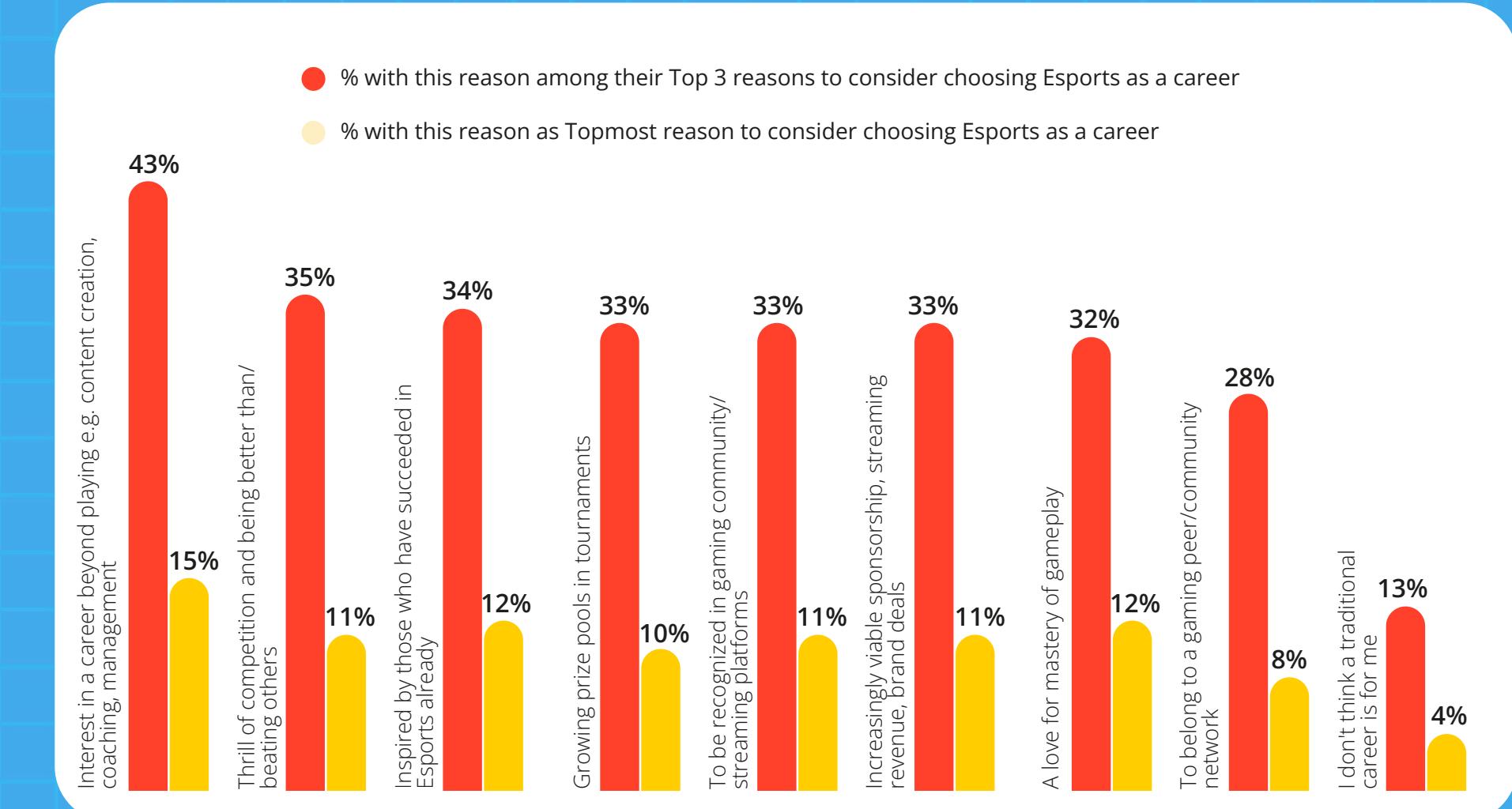
25%

Connection & Recognition
(Definition from above: community/recognized/ traditional career)

38%

Future & Financial Freedom
(Definition from above: Prize pools, sponsorships, career option)

Motivations



Esports as a Career

Consideration of Esports as a Career Path



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Career options beyond playing also happens to be the most popular standalone reason for considering Esports as a career (43% have it in their top 3 reasons)

Exploring themes for motivations- reasons related to love for the game (37%) may be tied for top place with reasons related to future and financial freedom (38%)

Combining Topmost data into a set of themes:

25%

Personal confidence and well being
(Definition from above:
health/afraid)

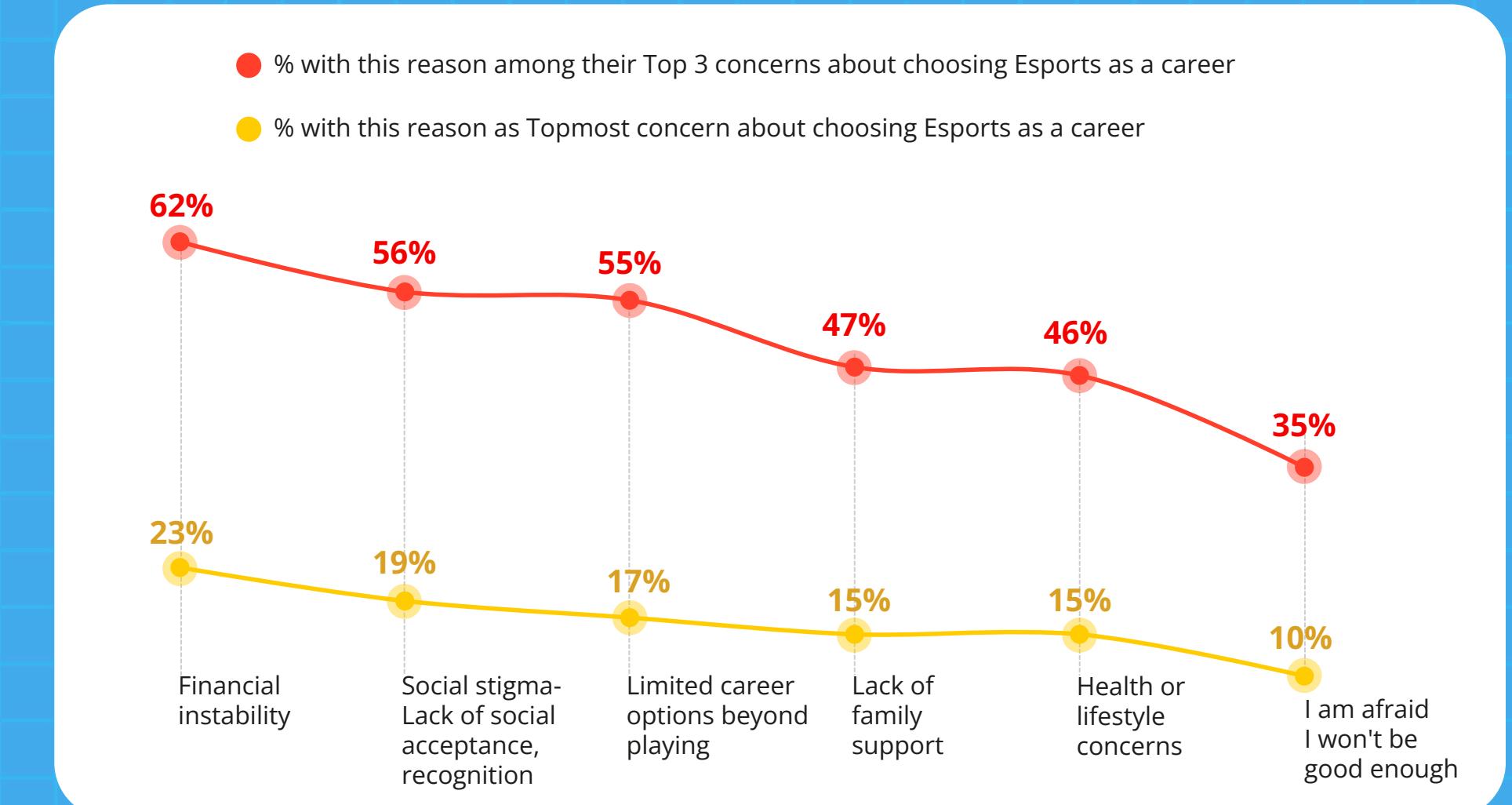
33%

Social and cultural acceptance
(Definition from above:
stigma/family)

40%

Career and financial security
(Definition from above:
career/instability)

Reservations



Esports as a Career

Additional Insights (Reasons to Consider, Concerns)

Consideration reasons:



To belong to a gaming peer/community network is more popular among those who have ever **considered Esports seriously as a career** (among 33% have this reason in their top 3) vs. those who don't (28% of them have this reason in their top 3)

Similarly, also for viability- **33%** of those who consider Esports **very financially viable** mention To belong to a gaming peer/community network in their top 3 reasons vs **26%** among those who don't

Increasingly viable sponsorship, streaming revenue, brand deals is in the top 3 reasons of 38% of those who play **digital Sports games (cricket/football) everyday**- this is higher than some other games e.g., it's in top 3 reasons of only **31%** of those who play PC console games daily, **32%** of those who play mobile strategy games daily, 34% of those who play digitalracing games daily

39% of males have **Thrill of competition and being better than/beating others** in their top 3 reasons (vs only 33% among female). Thrill of competition and being better than/beating others also mentioned more often (38%) in top 3 among those who play **mobile-only** (vs 32% among those play only on laptop/console/desktop)

Around **16% of GenZ** say **I don't think a traditional career is for me** in their top 3 reasons vs only 12% of millennials

Esports as a Career

Additional Insights (Reasons to Consider, Concerns)



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Reservation reasons:

59%

of those who have ever considered a career in Esports seriously mention Social stigma-Lack of social acceptance, recognition among top 3 concerns about Esports as a career

59%

of those who consider Esports very financially viable mention Social stigma-Lack of social acceptance, recognition among top 3 concerns about Esports as a career

51%

of those who have ever considered a career in Esports seriously mention Health or lifestyle reasons among top 3 concerns about Esports as a career

52%

of those who consider Esports very financially viable mention Health or lifestyle reasons among top 3 concerns about Esports as a career

64%

of those who have never considered a career in Esports seriously mention Financial instability among top 3 concerns about Esports as a career

64%

of those who don't consider Esports very financially viable mention Financial instability among top 3 concerns about Esports as a career

64%

of those who have never considered a career in Esports seriously mention Lack of family support among top 3 concerns about Esports as a career

58%

of those who don't consider Esports very financially viable mention Limited career options beyond playing among top 3 concerns about Esports as a career

57%

of those from Patna mention Lack of family support among top 3 concerns about Esports as a career

Support Structure Perceptions

Reservations

58% of daily esport players indicate mental health, wellness and social/family acceptance support is high in importance for the growth of Esports in India.

Nearly a third (**32%**) of daily esport players indicate the current level of progress on this front is limited or just beginning (and needs significant growth).

Only **27%** think support on this front is adequately established- the rest indicate a need for development

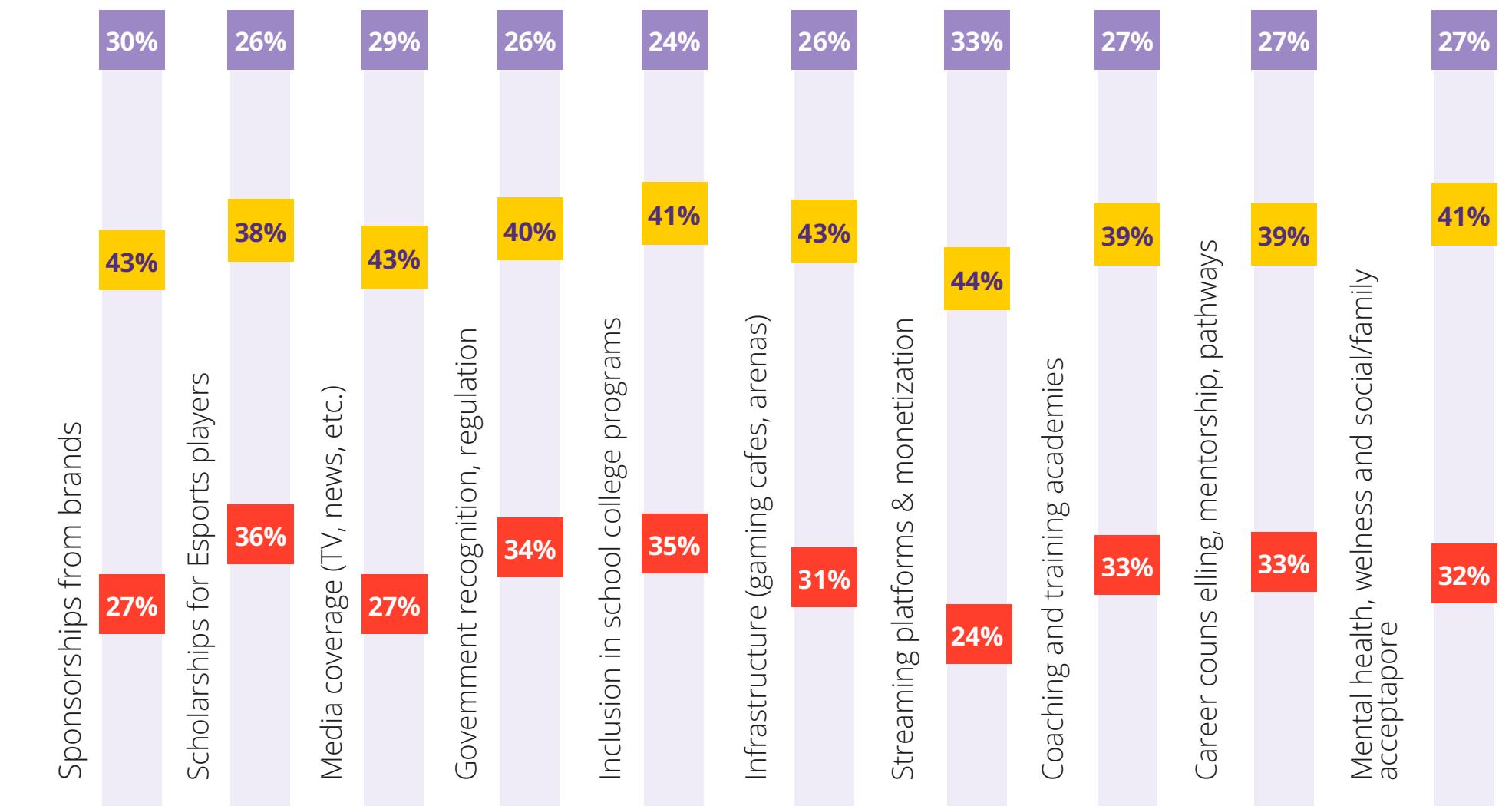
Other important support areas- Sponsorship from brands: **57%** say high importance, Streaming platforms and monetization- **54%** say high importance

Other important development areas- Scholarships for Esports players- **36%** say needs significant growth, Inclusion in school/college programs- 35% say needs significant growth, **34%** say government recognition and regulation needs significant growth

● Needs Significant Growth - Support is limited or just beginning

● Developing Further - Support exists but could be strengthened

● Adequately Established - Support is present and functioning well



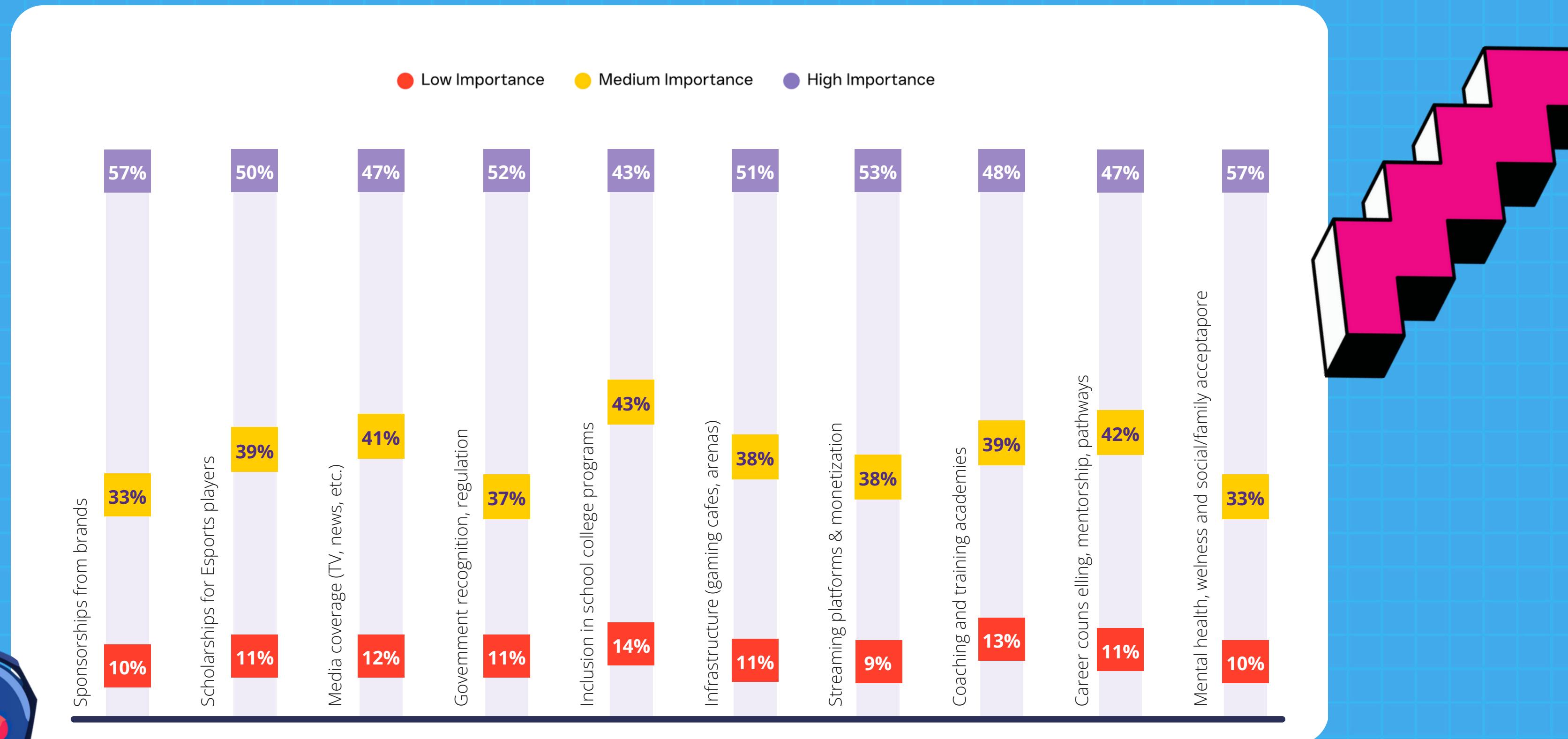
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Support Structure Perceptions

Importance of support type



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Support Structure Perceptions

Additional Insights (Importance)



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63%

of those from **South India** and

62%

from **West India**

say **Mental health, wellness and social/family acceptance support** is **highly important** for growth of esports in India (vs. 52% in North; 51% in East)

53%

of those who play **digital Sports (cricket/football)** say **Inclusion in school/college programs** is **highly important** for growth of esports in India

55%

of those who play **digital racing games (car/bike)** say **Coaching and training academies** is **highly important** for growth of esports in India

65%

of those from **Bangalore** say sponsorship from brands is **highly important** for growth of esports in India (vs. 40% of those who only play on mobile)

46%

of those who play **only on Laptop/Desktop/Console** say **Infrastructure (gaming cafes, arenas)** are **highly important** for growth of esport in India

(vs. 40% of those who only play on mobile)

58%

of those who have consider **Esports very financially viable** say **Scholarships for Esports players** is **highly important** for growth of esport in India (vs. 43% among those who don't consider esports very financially viable)

Support Structure Perceptions

Additional Insights (Progress Status)

37%

of **male GenZ** mention **Mental health, wellness and social/family acceptance support** needs Significant Growth – Support is limited or just beginning (vs. 31% among male millennials, and 28% among females)

26%

of **Millennials** mention **Streaming platforms & monetization** needs Significant Growth – Support is limited or just beginning (vs 21% among GenZ)

93%

at least somewhat agree Esports should be included in college and university-level sports events (56% agree)

92%

at least somewhat agree Esports can become a significant contributor to India's digital economy (56% agree)

90%

at least somewhat agree Avenues for skill development and training in Esports in India are improving (50% agree)



Tournament Viewership



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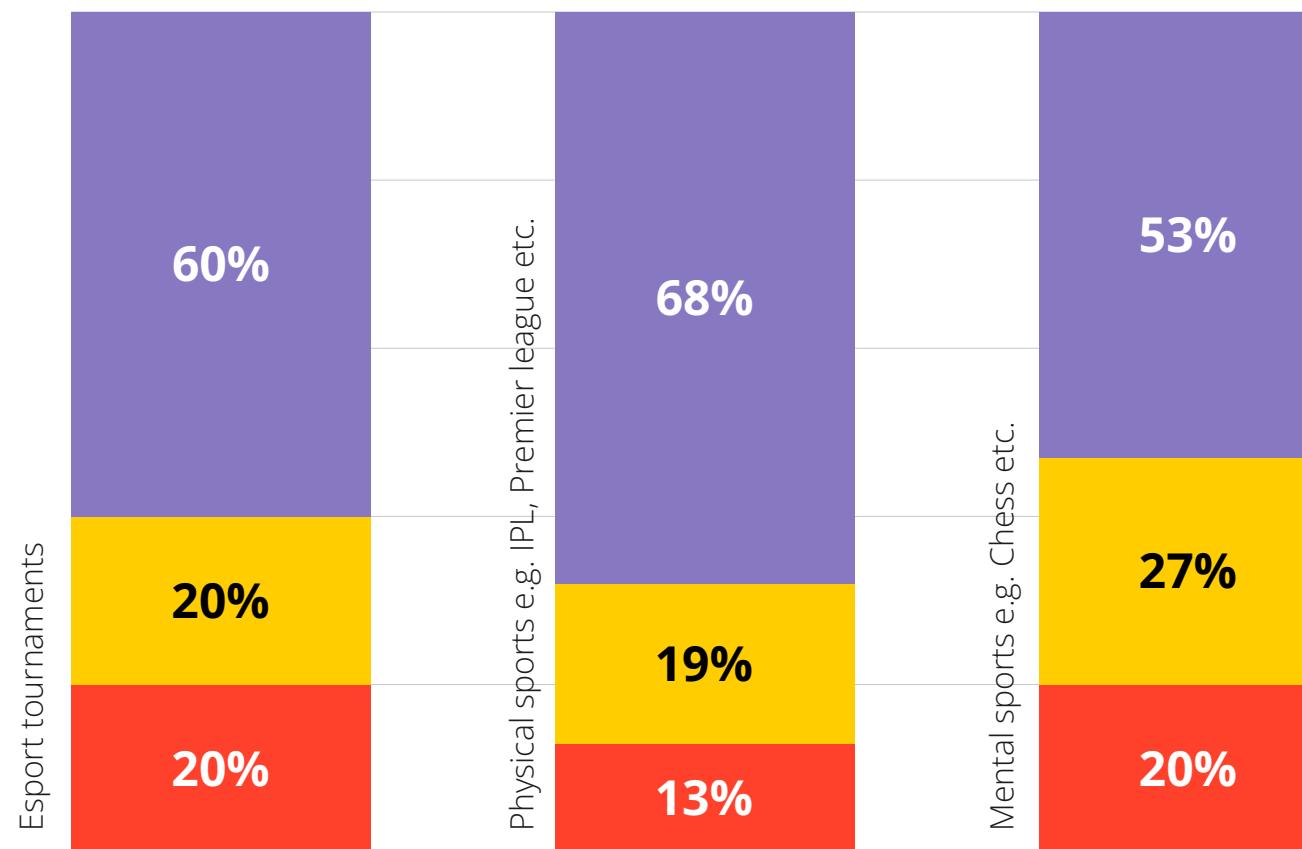
64% of daily Esports players are aware of BGMI mobile India series

41% of daily Esports players are aware of upcoming 2027 Esports Olympics

60% of daily Esports players mention watching esport tournament(s) multiple times a month (more than just 1-2 times a month)

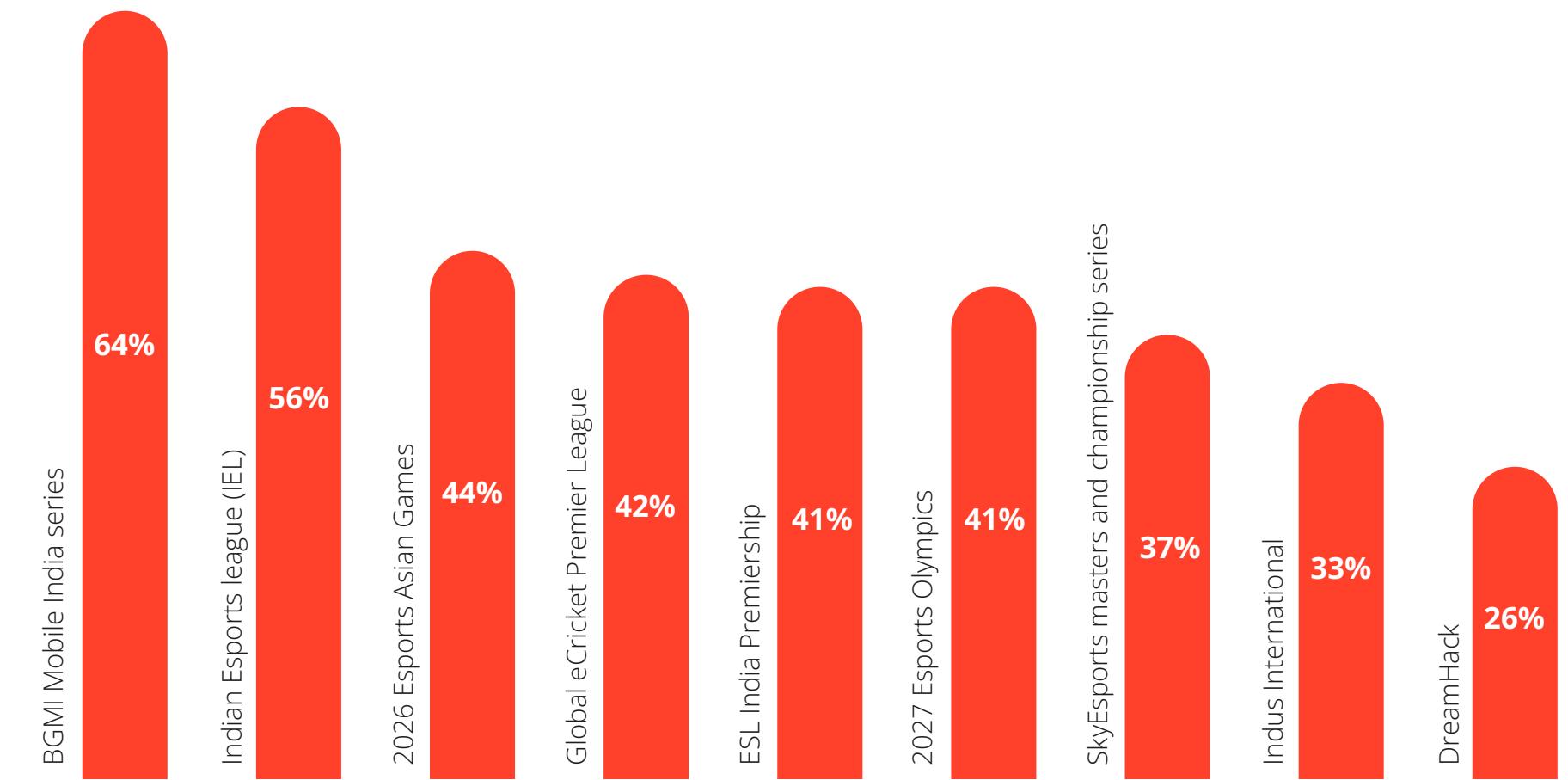
How often do they watch?

- Rarely-once or twice a year-or never
- Sometimes-once or twice a month
- Often-at least multiple times a month



Awareness of Tournaments

- % with this reason among their Top 3 reasons to consider choosing Esports as a career



Tournament Viewership

Additional Insights



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70%

of GenZ males who play Esports daily aware of BGMI Mobile series (vs. around 55-65% for other age-gender cohorts)

54%

of Female Millennials who play Esports daily

44%

awareness among female Gen Z players who play Esports daily.

49%

of Male Millennials who play Esports daily are aware of Global eCricket premier league

30%

awareness among male Gen Z players who play Esports daily.

74%

of those from Patna who play Esports daily aware of BGMI Mobile series

70%

of those who watch Esports and consider Esports very financially viable watch esports often (at least multiple times a month)

73%

of those who watch Esports and ever considered Esports as a career seriously watch esports often (at least multiple times a month)

Esports - Related Beliefs



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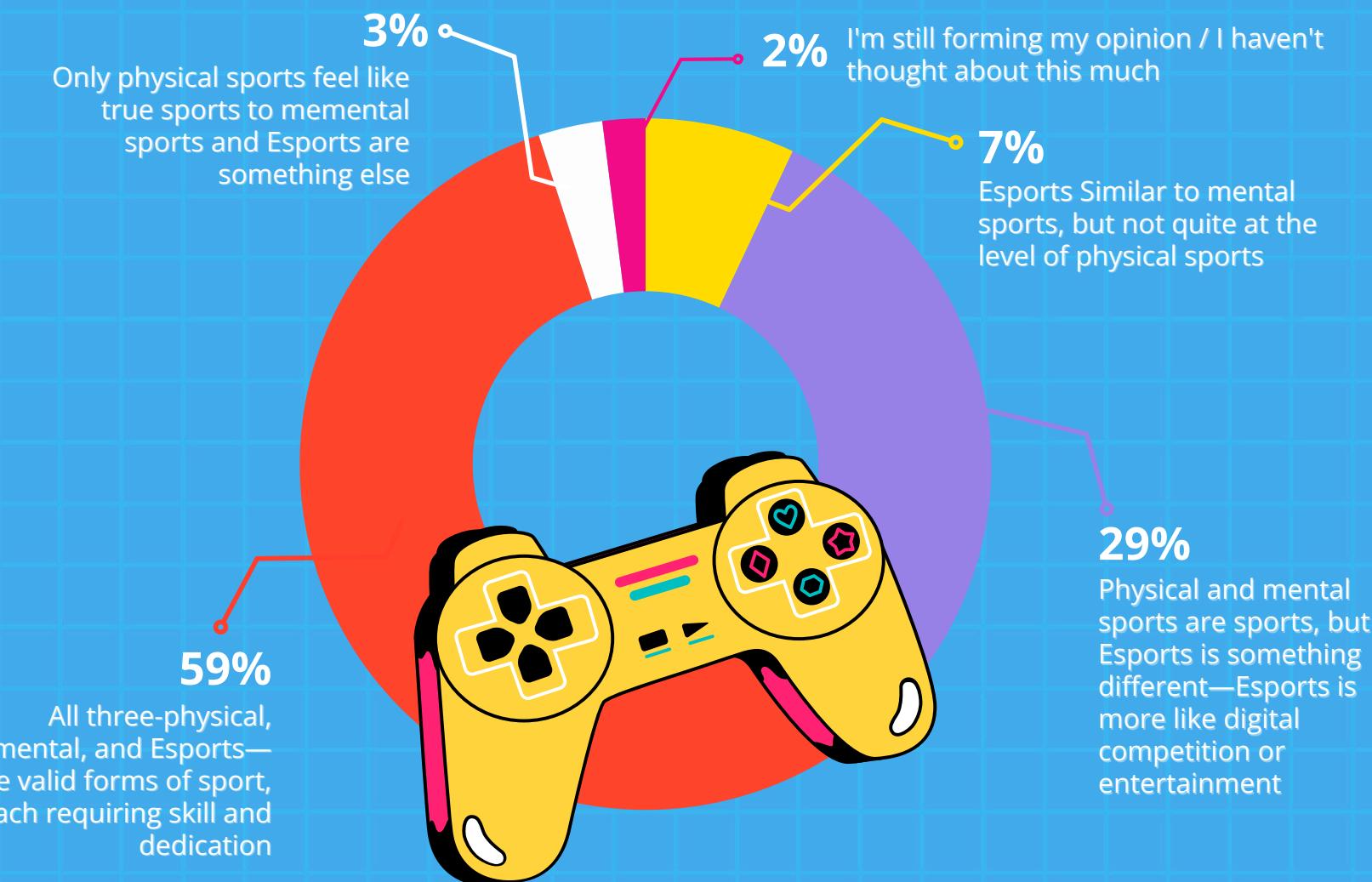
59% of daily Esports players consider Esports, as valid a sport as physical ones and mental ones (e.g. chess etc.) requiring skill and dedication

Only **10%** of daily Esports players indicate they don't think it is at the same level- i.e., not quite at level of physical sports/ not a true sport

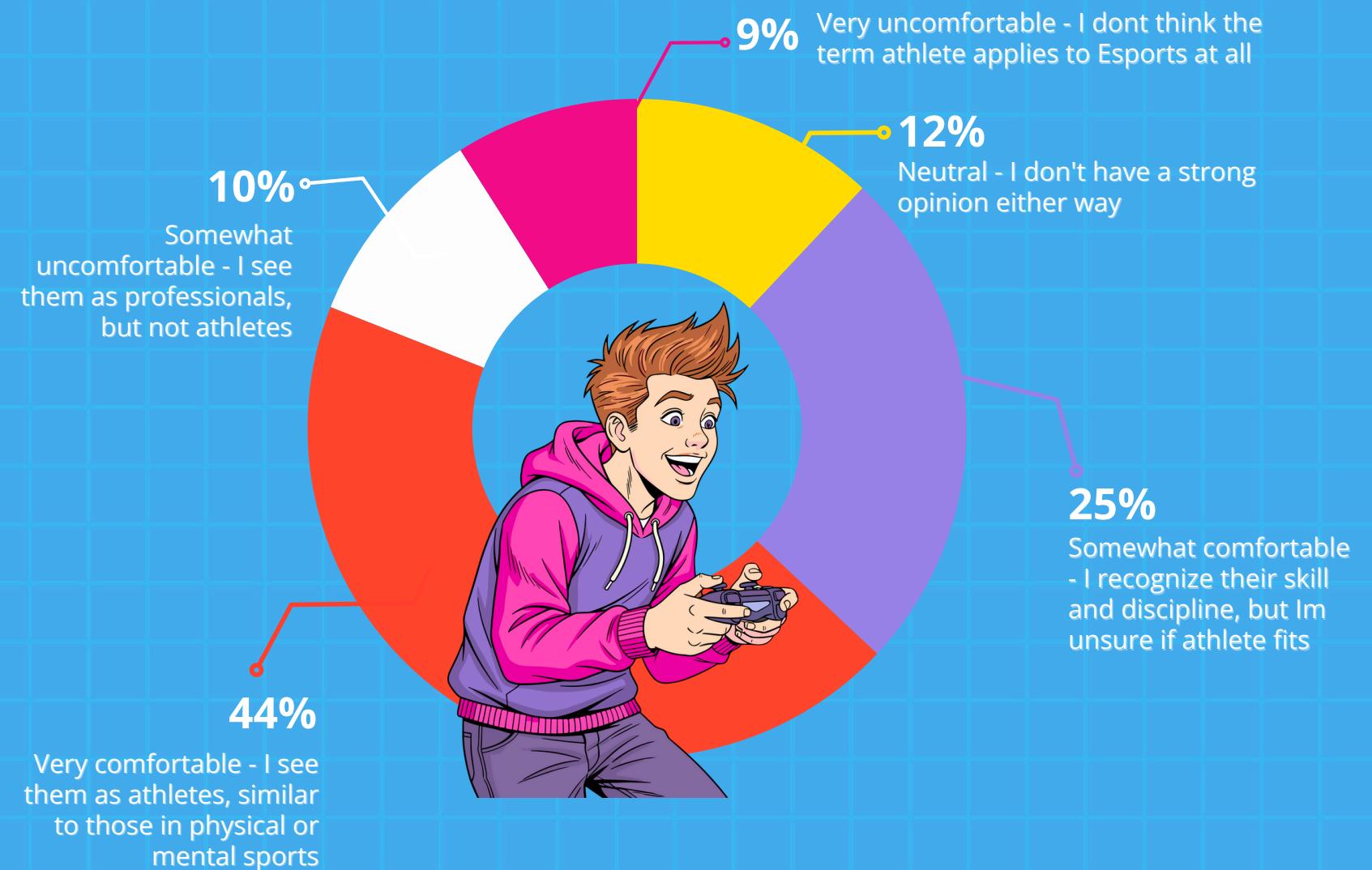
A minority (**29%**) indicate Esports is quite distinct- more entertainment/ digital competition

69% express some comfort with using the label athletes for Esports players but only **40%** of all Esport daily players can identify with that label themselves

Esports - A sport or not?



Esports players - Athletes or not?



Esports - Related Beliefs

Additional Insights



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Q. How would you rate your ability/skill level in Esports vs other players?

Above average - **59%** says that they often outperform others and consider themselves highly skilled

Average - **38%** says that they perform similarly to most players

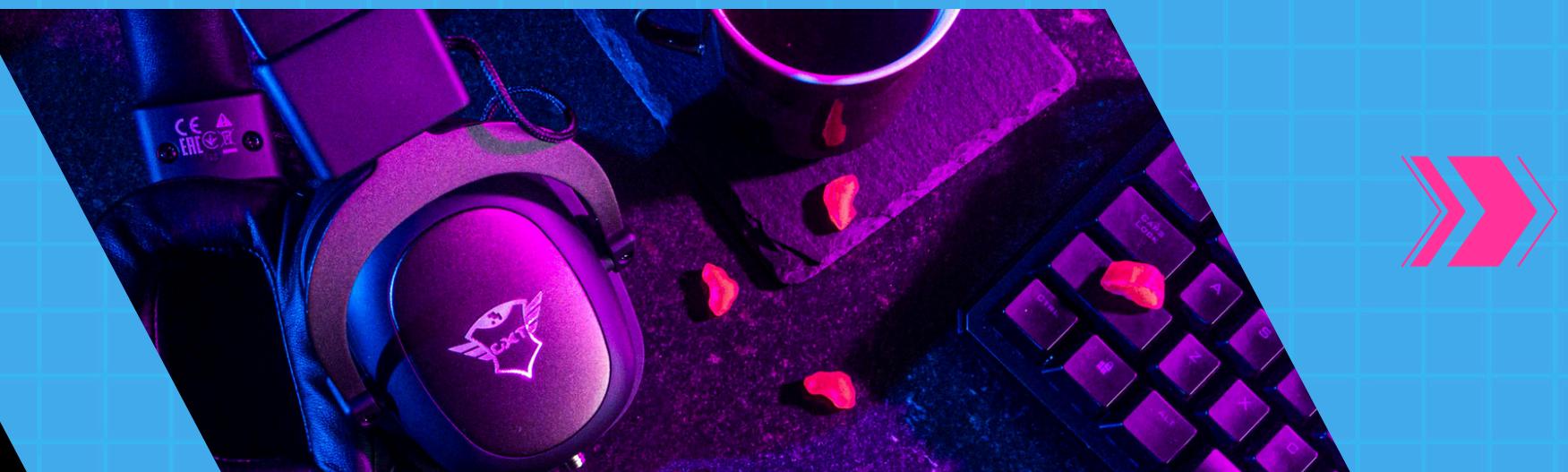
Below average - **3%** says that they are still learning or often get outplayed

Q. Do you consider yourself an athlete because of gaming habits?

Yes - **40%** of all Esports daily players

No - **44%** of all Esports players

Sometimes/ not thought about it - **16%** of all Esports daily players



Capabilities & Development



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57% of daily Esports players have strategic thinking and planning-adapting in their top 5 skills to win

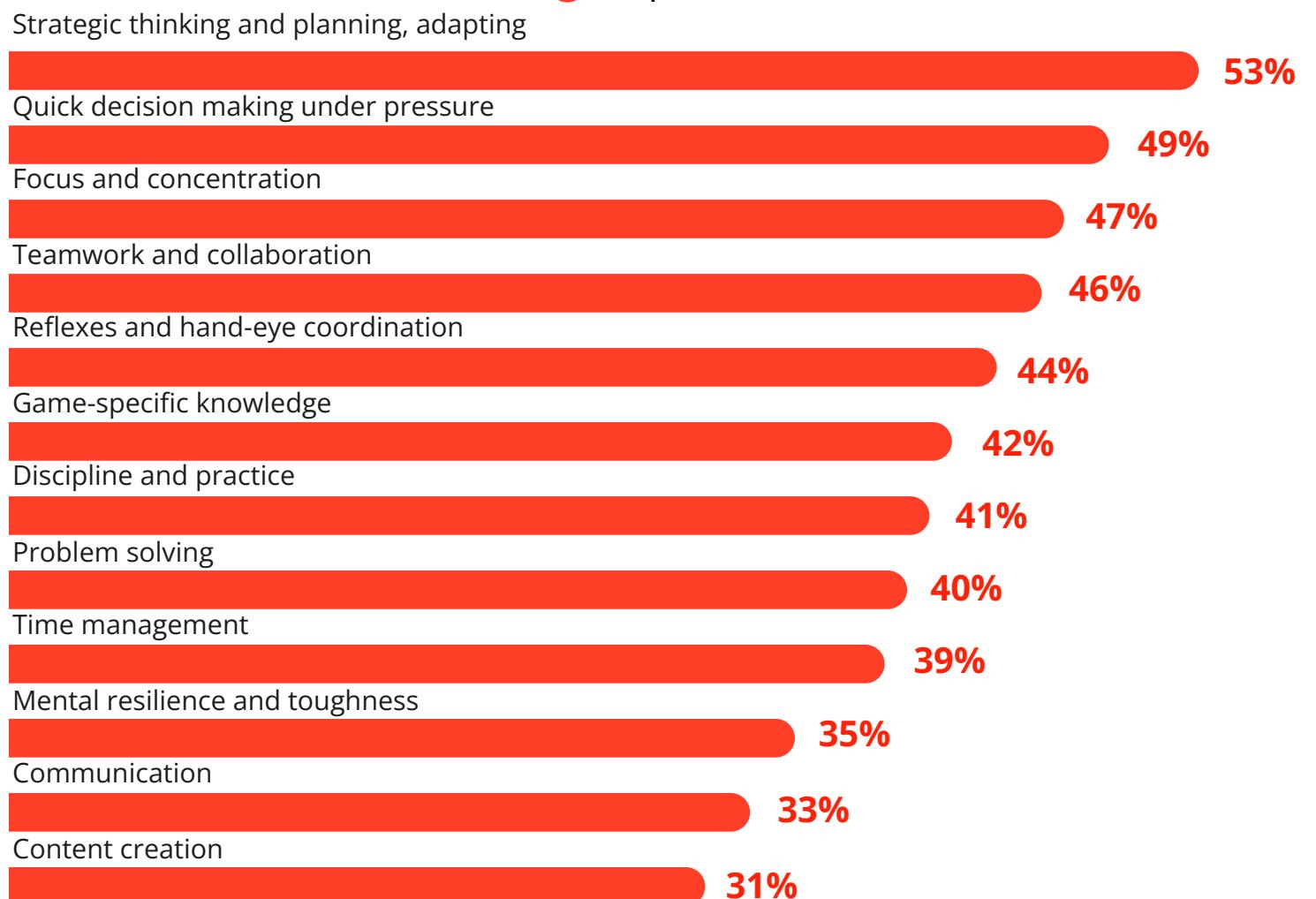
53% have it among the skills that playing helps develop

55% of daily Esports players mention quick decisions under pressure among top 5 skills to win

49% mention it as a skill that playing helps develop

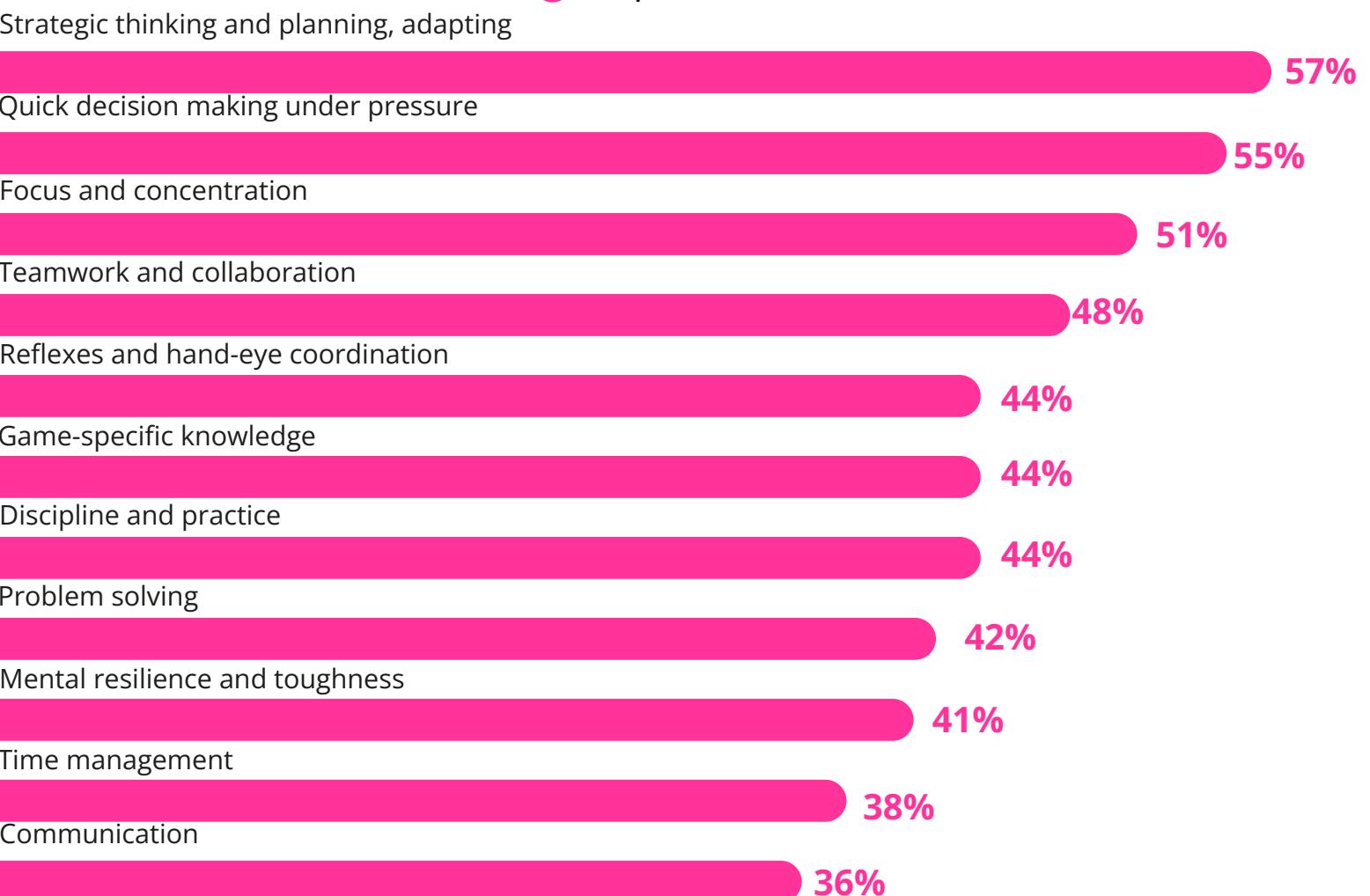
Capabilities it develops

Top 5 Skills



Capabilities needed to win

Top 5 Skills



Summary



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Shooter games lead in this space:

54%

of daily Esport players indicate mental health, wellness and social/family acceptance support is high in importance for the growth of Esports in India

51%

of Millennial daily esport players play shooter games daily

72%

play both on mobile and desktop/console/laptop

91%

play free-to-play games

64%

play pay-to-play games

83%

of daily Esport players think it is a financially viable career

75%

of daily Esport players have ever considered a career in Esports

59%

of those who think it is a financially viable career think it is very viable where one can earn a lot of money and become rich

52%

of those who have ever considered a career in Esports say they had done so seriously

Reasons for considering a career in Esports that are related to love for the game (**37%** have such a reason as their topmost reason) may be tied as the top with reasons related to future and financial freedom (**38%** have as their topmost reason).

Summary



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Reasons related to love for the game include Thrill of competition and being better than/ beating others, Inspired by those who have succeeded in Esports already and a love for mastery of gameplay.

59%

are interested in a career as a player

50%

are interested in a career as a content creator/streamer

58%

of daily esport players indicate mental health, wellness and social/family acceptance support is high in importance for the growth of Esports in India.

Other important support areas- Sponsorship from brands: 57% say high importance, Streaming platforms and monetization- 54% say high importance

Reasons related to future and financial freedom include Growing prize pools in tournaments, Increasingly viable sponsorship, streaming revenue, brand deals and Interest in a career beyond playing e.g., content creation, coaching, management.

62%

of daily Esport players have financial instability among their top 3 concerns.

Other key concerns mentioned include social stigma- lack of social acceptance, recognition (56% have it in their top 3 concerns) and limited career options beyond playing (55% have it in their top 3 concerns)

Scholarships for Esports players- 36% of daily Esports players say this needs significant growth

Inclusion in school/college programs-35% of daily Esports players say this needs significant growth

Summary



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34%

of daily Esports players say government recognition and regulation needs significant growth

41%

of daily Esports players are aware of upcoming 2027 Esports Olympics

59%

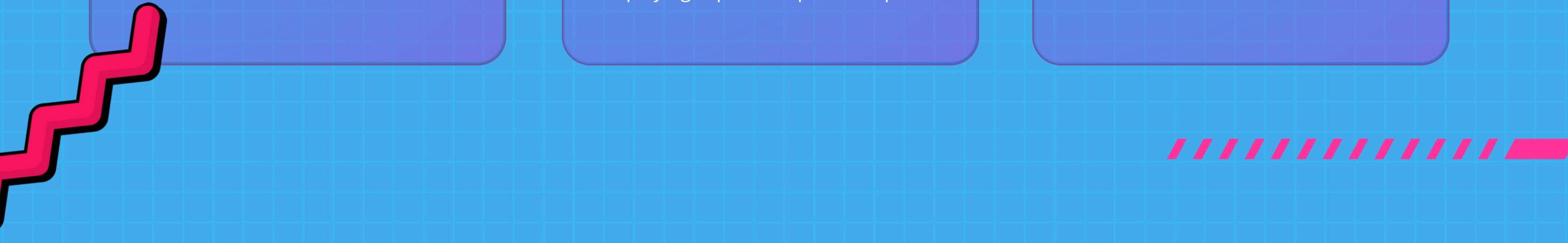
of daily Esports players consider Esports, as valid a sport as physical ones and mental ones (e.g. chess etc.) requiring skill and dedication

53%

of daily Esports players mention strategic thinking and planning, adapting is among the top 5 skills that playing Esports helps develop

49%

of daily Esports players mention quick decision making under pressure is among the top 5 skills that playing Esports helps develop



About JetSynthesys

JetSynthesys has an interconnected ecosystem spanning **video gaming & esports, entertainment, and sports**, creating engaging and meaningful experiences for young digital natives. The company is focused on its core **Gen Z audience**, building products and services that align with their passions, including video **gaming, esports, music, entertainment, sports, wellness, and innovation**.

JetSynthesys believes in fostering strong connections with its audience and continuously develops new experiences that resonate with young consumers. More than a company, JetSynthesys is an **integral part of young people's daily digital lives**, delivering **high-engagement Gamertainment experiences across India**.





THANK
YOU

