

**THE DETERMINANTS OF MALAYSIAN
ESPORTS WATCHING BEHAVIOUR: THE
MEDIATING ROLE OF SATISFACTION**

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**THE DETERMINANTS OF MALAYSIAN
ESPORTS WATCHING BEHAVIOUR: THE
MEDIATING ROLE OF SATISFACTION**

by

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LIST OF ABBREVIATIONS

MPL	Mobile Premier League
MLBB	Mobile Legend: Bang Bang
PUBG	PlayerUnknown's BattleGrounds
FIFA	Federation Internationale de Football Association
NBA	National Basketball Association
US	United State
LoL	League of Legends
CAB	Cognitive-Affective-Behaviour
CAGR	Compound annual growth rate
MSSC	Motivation Scale for Sport Consumption
SII	Sport Interest Inventory
UGT	Uses and gratification
PLS-SEM	Partial Least Squares Structural Equation Modelling
AR	Augmented reality
WOM	Word-of-mouth
eWOM	e-word-of-mouth
SPSS	Statistical Package for the Social Sciences
SmartPLS	Smart Partial Least Squares
SEM	Structural Equation Modelling
CB-SEM	Covariance-Based Structural Equation Modelling
VB-SEM	Variance-Based Structural Equation Modelling
LISREL	Linear Structural Relations
AMOS	Analysis of Moment Structures
HTMT	Heterotrait-Monotrait
AVE	Average variance extracted
CR	Composite reliability
VIF	Variance inflation factor
GSB	Graduate School of Business

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**PENENTU TINGKAH LAKU MENONTON ESUKAN DI KALANGAN RAKYAT
MALAYSIA: PERANAN KEPUASAN SEBAGAI PENGANTARA**

ABSTRAK

Dengan kemajuan pesat teknologi internet, industri e-sukan telah berkembang secara signifikan dan menarik jutaan peminat di seluruh dunia. Di Malaysia, kebangkitan e-sukan telah mengalihkan minat masyarakat daripada sukan tradisional kepada permainan digital. Sehubungan itu, kerajaan dan sektor swasta telah melabur dalam pembangunan pusat dan akademi e-sukan bagi menyokong pertumbuhan industri ini. Walau bagaimanapun, kajian empirikal mengenai faktor-faktor yang mempengaruhi tingkah laku menonton e-sukan di Malaysia masih terhad, terutamanya menerusi pendekatan model Kognitif-Afektif-Tingkah Laku (CAB). Kajian ini bertujuan untuk meneroka faktor-faktor yang mempengaruhi tingkah laku menonton e-sukan di Malaysia menggunakan model CAB. Ia meneliti kesan elemen kognitif seperti estetika, pelarian, aliran, daya tarikan fizikal, pemerolehan pengetahuan, nilai yang dirasakan, dan interaksi sosial serta elemen afektif iaitu emosi positif terhadap kepuasan. Kajian ini juga menilai peranan kepuasan sebagai pengantara dalam hubungan antara elemen-elemen tersebut dengan tingkah laku menonton e-sukan, di samping menganalisis kesan langsung kepuasan dan emosi positif terhadap tingkah laku menonton. Data diperoleh melalui soal selidik yang diedarkan di platform media sosial e-sukan Malaysia dan semasa acara e-sukan fizikal. Sebanyak 505 respons sah telah dianalisis menggunakan perisian statistik SPSS dan SmartPLS versi 4.0. Hasil kajian menunjukkan bahawa semua elemen kognitif dan emosi positif memberi kesan signifikan terhadap kepuasan. Kepuasan dan emosi positif juga mempengaruhi secara langsung tingkah laku menonton e-sukan. Selain itu, kepuasan bertindak sebagai

perantara penting antara elemen kognitif dan afektif dengan tingkah laku menonton. Kajian ini menyumbang kepada pemahaman akademik mengenai tingkah laku penonton e-sukan di Malaysia serta memberikan panduan berguna kepada penggiat industri dalam memperkukuh strategi pemasaran dan meningkatkan penglibatan peminat.

THE DETERMINANTS OF MALAYSIAN ESPORTS WATCHING BEHAVIOUR: THE MEDIATING ROLE OF SATISFACTION

ABSTRACT

With the rapid advancement of internet technology, the eSports industry has grown tremendously, attracting millions of fans worldwide. In Malaysia, the rise of eSports has shifted attention from traditional sports to digital gaming. In response, the Malaysian government and private sector have invested significantly in eSports centres and academies to foster industry growth. However, limited empirical research has examined the key factors influencing eSports watching behaviour in Malaysia, particularly using the Cognitive-Affective-Behaviour (CAB) model. This study aims to explore the influencing factors behind eSports watching behaviour in Malaysia by applying the CAB model. Specifically, it investigates the impact of cognitive elements (aesthetics, escapism, flow, physical attractiveness, knowledge acquisition, perceived value, and social interaction) and the affective element (positive emotions) on satisfaction. Furthermore, the study examines the mediating role of satisfaction in the relationships between cognitive elements and eSports watching behaviour, and positive emotions and eSports watching behaviour. It also explores how satisfaction and positive emotions directly influence eSports watching behaviour. To evaluate the proposed framework, a survey was administered using questionnaires distributed via Malaysian eSports social media platforms and at physical eSports events. A total of 505 valid responses were analysed using SPSS and SmartPLS 4.0. The findings reveal that aesthetics, escapism, flow, physical attractiveness, perceived value, social interaction, and positive emotions significantly influence satisfaction. Additionally, satisfaction and positive emotions directly affect eSports watching behaviour.

Importantly, satisfaction mediates between cognitive factors (aesthetics, escapism, flow, physical attractiveness, perceived value and social interaction) and eSports watching behaviour, as well as affective factor and eSports watching behaviour. This study contributes to the academic understanding of eSports consumption in Malaysia and offers practical insights for industry professionals. By identifying the psychological drivers of viewer engagement, stakeholders can refine marketing strategies and enhance fan experiences, ultimately boosting the commercial potential of the Malaysian eSports sector.

CHAPTER 1

INTRODUCTION

1.1 Introduction

This chapter introduces eSports and includes a summary of its developments internationally and in Malaysia before offering a broad historical context to explain the driving force behind and need for this study. It was followed by a discussion of the problem statement, research objectives and research questions. Additionally, this chapter discusses the scope of the study, the significance of the study, and the definitions of key terms explored in this study. Finally, at this chapter's conclusion, the research approach's organisation is introduced at the end of this chapter.

1.2 Background of the Study

The rapidly expanding popularity of live-streaming entertainment in the digital phenomenon has altered our livelihoods, including eSports (Hilvert-Bruce et al., 2018; Jang et al., 2021a). Thus, eSports-related activities such as playing eSports, watching eSports, consuming eSports in-game content, etc., dominate and receive greater prominence (Giakoni-Ramirez et al., 2022; Macey et al., 2022; Qian et al., 2020a,b). In line with the most recent Global eSports and Live Streaming Market Report by Newzoo (2022), the worldwide eSports viewership at the end of April 2022 was 921.2 million. It approximates 11.52 percent of the world's population (United Nations, 2022). Furthermore, based on a report by eSports Insider (2022), there were 232,500 viewers and over 6.1 million hours of viewing time for MPL Malaysia in 2022. Further, Statista (2023a) released a report on eSports of Malaysia reached by segment, revealing a total of 4.8 million online and offline viewers in 2022. This number is approximately 14.55 percent of the Malaysian population in 2022 (DOSM, 2022). The accelerated growth of the digital revolution has considerably contributed to the explosive

expansion of the eSports sector since the introduction of the high-speed internet and the rise of eSports viewership as the latest trend recently (Conroy et al., 2021; Scholz, 2020).

Watching behaviour in eSports or eSports viewership refers to spectators watching the elite eSports players engage in competitive activities within the realm of online interactive gaming (Meier et al., 2022). Broadly speaking, watching behaviour in eSports pertains to spectators involved in watching experts fight and compete against one another either physically or by internet broadcasting, which has recently seen dramatic growth (Lehnert et al., 2022). Watching eSports competitions can be done offline and online (Qian et al., 2020a). Watching eSports offline refers to the spectators physically attending the live competition in arenas (Hamari & Sjoblom, 2017; Pu et al., 2022). Conversely, with the advent of live-streaming, spectators can watch the eSports competition online, which can be done through the eSports content broadcasting medium (Kim & Kim, 2022; Qian et al., 2020c). For instance, watch eSports games online via live-streaming platforms (i.e., Twitch and YouTube) (Sjoblom & Hamari, 2017), over-the-top applications (i.e., Netflix and Hulu) (Kim & Kim, 2023), and mobile applications (i.e., Reddit and Discord) (Tang et al., 2021). This development is most evident in the rising market share of giant online broadcasting platforms such as Twitch, which has 15 million daily users, of whom 21.3 percent watch eSports (Lehnert et al., 2022).

Audiences in eSports are the primary source of income, which is essential to the whole eSports economy (De Moor et al., 2023). The eSports business model has changed, and the main focus of the business strategy has shifted to audiences (Scholz, 2019). This is notable because of the major eSports competitions, which have frequently attracted a more extensive viewership than conventional sporting events (Cranmer et al., 2021). For instance, the LoL World Championship garnered 60 million audiences in 2017, whereas the National Basketball Association (NBA) garnered only 20.4 million. The figure indicates that major eSports

tournaments have a massive difference of 39.6 audiences or a significance of 194.12% more than conventional sports tournaments (Steinkuehler, 2020). Watching behaviour in eSports has seen a sign of expansion in 2020, with a hike of 54.63% or a growth of 183 million audiences, from 335 million audiences in 2017 to 518 million in 2020. As a result, the massive audience generated sales of 76.2 million US dollars by selling goods and tickets in 2020 (Newzoo, 2020). Along the same lines, the eSports audience in Malaysia exhibits a monthly expenditure of approximately RM 83 on products linked to eSports, primarily allocated towards attending events, purchasing merchandise, and accessing equipment (Deloitte, 2023a), as demonstrated in Figure 1.1. Several lines of evidence have proved that audiences are the largest eSports consumers in the eSports ecosystem, as a substantial percentage of the eSports industry's income is generated by the presence of big spectating crowds, who often possess significant spending power (Wong & Meng-Lewis, 2023).

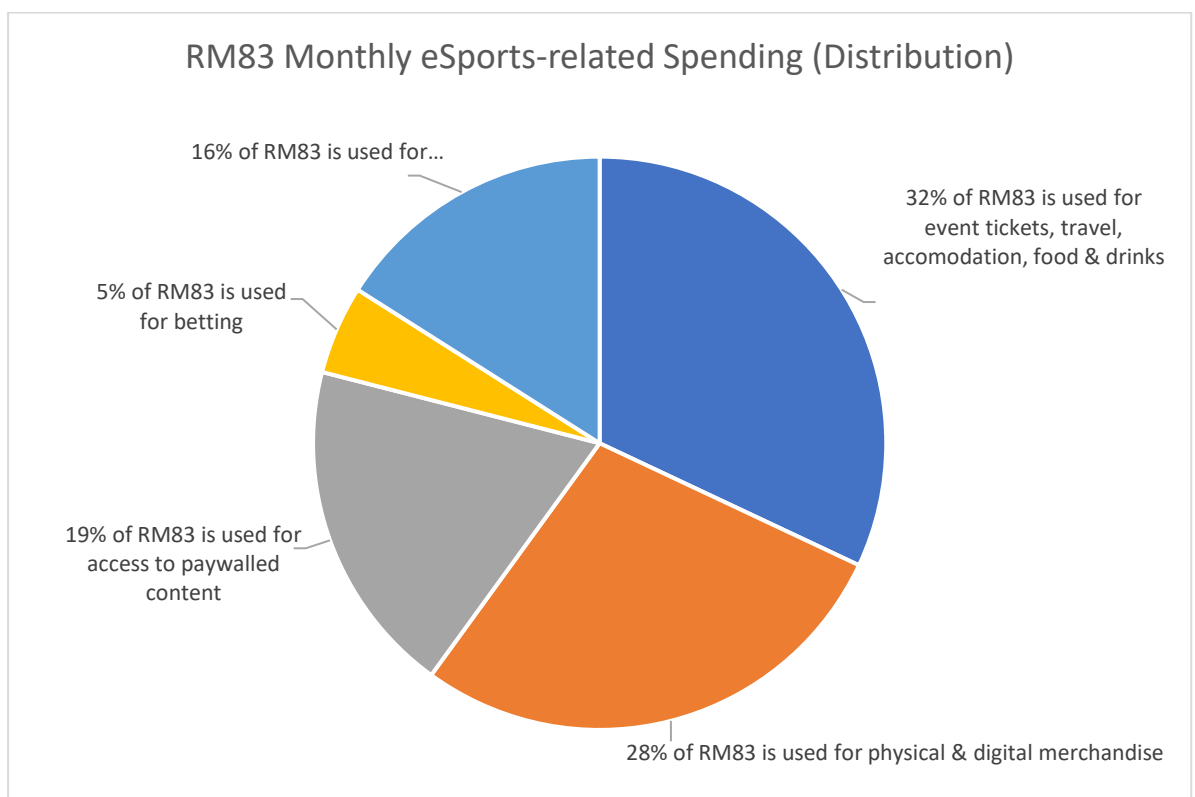


Figure 1.1 Monthly eSports-Related Spending among Malaysian eSports Audiences

Source: Adapted from Deloitte (2023a) (p.3)

The economy is now propelled by digital technology (Scholz, 2019). Thus, the eSports business model can quickly reach young and digital audiences (Jang et al., 2021a). Many eSports' enthusiasts are typically young, tech-savvy, and active on social media platforms like Twitter and YouTube and grew up online or with many tech-related hobbies. Therefore, eSports is a regular part of life for teenagers and young adults (Ikenami et al., 2020).

Based on a recent survey conducted by Gilbert (2023), 32% of individuals who use the internet and watch eSports contests worldwide are between the ages of 16 and 24, while 30% of individuals are between the ages of 25 and 34. Meanwhile, 19% of these individuals fall within the age range of 35 to 44; 10% of them are aged between 45 and 54; and merely 6% of them are aged between 55 and 65. Whereas eSports spectators in the United States indicate that Generation Y is making the majority with 59%, followed by Generation Z with 52%, Generation X and Boomers with 51% and 35%, respectively (Marketing Charts, 2023). The global eSports spectator statistics indicate that eSports spectatorship is growing in popularity among various generations.

According to an online survey done by Deloitte (2023b), findings indicate that the demographic composition of eSports viewers in Malaysia consists of 51% Millennials or individuals belonging to Generation Y (aged 25-41), 26% Generation Z (aged 16-24), 21% Generation X (aged 42-56), and 2% baby boomers (aged 57 and above) (Figure 1.2). In the Malaysian context, the Generation Y cohort was born from 1982 to 1998, and categorised into two groups, namely younger Generation Y aged between 26 and 36; and older Generation Y aged 37 and 42 in 2024 (Perbadanan Insurans Deposit Malaysia, 2022). Generation Z currently constitutes approximately 30% of the global population GilPress (2024). Thus, the rise in

popularity of the eSports sector over the past ten years has been largely influenced by the emergence of Generation Z. This demographic has been raised in a technologically driven environment, leading to significant shifts in the landscape of eSports, evidenced by the substantial viewership of live events and tournaments (Nielsen, 2019). Although younger generations demonstrate a significant eSports spectator demographic, the contribution of older generations (28%) is also not to be neglected (Schudey et al., 2023). Therefore, watching behaviour in the eSports industry in Malaysia represents a significant market which is worth exploring.

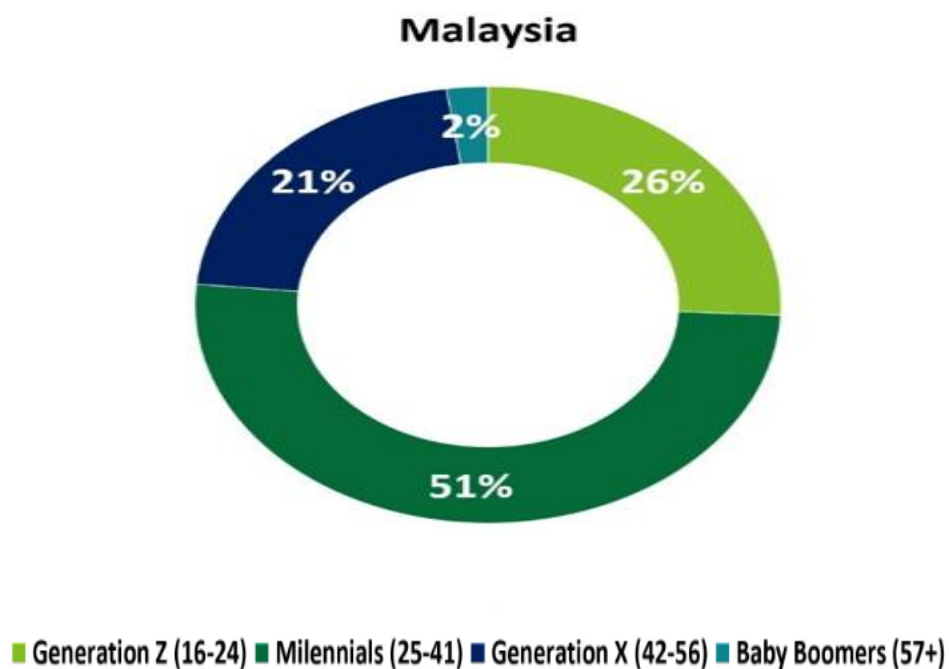


Figure 1.2 Demographic Breakdown of eSports Viewers in Malaysia

Source: Adapted from Deloitte (2023b)

The number of people watching eSports in Malaysia has experienced significant growth (Lim et al., 2022a). This phenomenon became significantly noticeable after the broadcast of the FIFA Online 3 National Championship by the Media Prima Group in Malaysia in the year 2017. There was a notable surge in Malaysia's interest and excitement towards competitive

online gaming, resulting in this noteworthy advancement. The competition was concurrently broadcast on television and live-streaming to reach 300,000 spectators (The Edge Malaysia, 2019). The Dota 2 eSports competition organised by ESL One Malaysia in Genting garnered 9,679,635 hours of watching throughout various mediums. In addition, the event managed to attract a record-breaking audience of 225,022 spectators (Esports Charts, 2018). The evidence suggests that the eSports industry in Malaysia is experiencing substantial expansion and growth. Similarly, in Malaysia, the immensely popular professional eSports game Mobile Legends: Bang Bang (MLBB) garnered a significant concurrent of 276,579 people watching during the MLBB SEA Cup 2019 (Esports Charts, 2019). As reported by the Esports Charts (2021), during the eighth season of MPL Malaysia 2021, the majority of hours watched were generated by spectators of the Malaysian stream, accounting for 93% of the total. The overall count of people watching during this season was recorded at 137,468. In accordance with a report by Esports Insider (2022), the MPL Malaysia Bang Bang competition experienced a significant surge in watching during the year 2022. The competition garnered an average of 232,500 people watching, resulting in 6.1 million watching hours. This notable spike in audience size indicates that Malaysia has observed an upsurge in its audience involvement. Furthermore, the ESL One Malaysia 2022 Dota 2 competition was streamed on various mediums, including Twitch, YouTube, Facebook, and Trovo, attracting a record-high 362,705 people watching the competition (IGN, 2022). In the year 2023, the PUBG eSports tournament attracted a total of 135,580 spectators in Malaysia (Esports Charts, 2023).

Malaysia was selected as the focal context for this study due to several interconnected factors that underscore its growing significance in the regional eSports landscape. In particular, Malaysia constitutes a distinctive setting for examining eSports watching behaviour, as its cultural heterogeneity may produce audience motivations and consumption patterns that differ markedly from those observed in Western contexts. Notably, the Malaysian government has

demonstrated clear support for the eSports sector through strategic investments, which reflect an increasing acknowledgment of eSports not only as an entertainment medium but also as a viable cultural and economic domain (Lim & Goh, 2025). Despite this momentum, scholarly exploration of eSports within Malaysia remains limited, particularly concerning audience watching behaviour (Lim & Goh, 2025). Therefore, addressing this gap is essential to contribute new insights to the academic discourse while offering valuable implications for stakeholders seeking to grow and engage Malaysian audiences more effectively.

1.3 Overview of eSports Revenue and Viewership in Global

The global eSports industry has grown dramatically and gained popularity in the last several years. According to Statista's eSports Market Revenue Worldwide report from 2020 to 2025, the worldwide eSports industry generated 996 million US dollars in sales in 2020. It is anticipated to reach 1866.2 million US dollars by 2025, with a CAGR of 87.36 % from 2020 to 2025 (Statista, 2023b). The eSports revenue in Southeast Asia has also seen notable growth between the years 2019 to 2022, with an increase of 23.9 million US dollars or a hike of 84.75%, from 28.2 million US dollars in 2019 to 52.1 million US dollars in 2022. Figure 1.3 illustrates that the eSports revenue of Southeast Asia is expected to have a meteoric growth of 20.4 million US dollars or a 39.16% increase by 2024 (Racoma, 2021). Figure 1.3 displays the projected global increase in eSports market revenue from 2020 to 2025. The global eSports market revenue will expand by 870.2 million US dollars from 2020 to 2025 (Statista, 2023b).

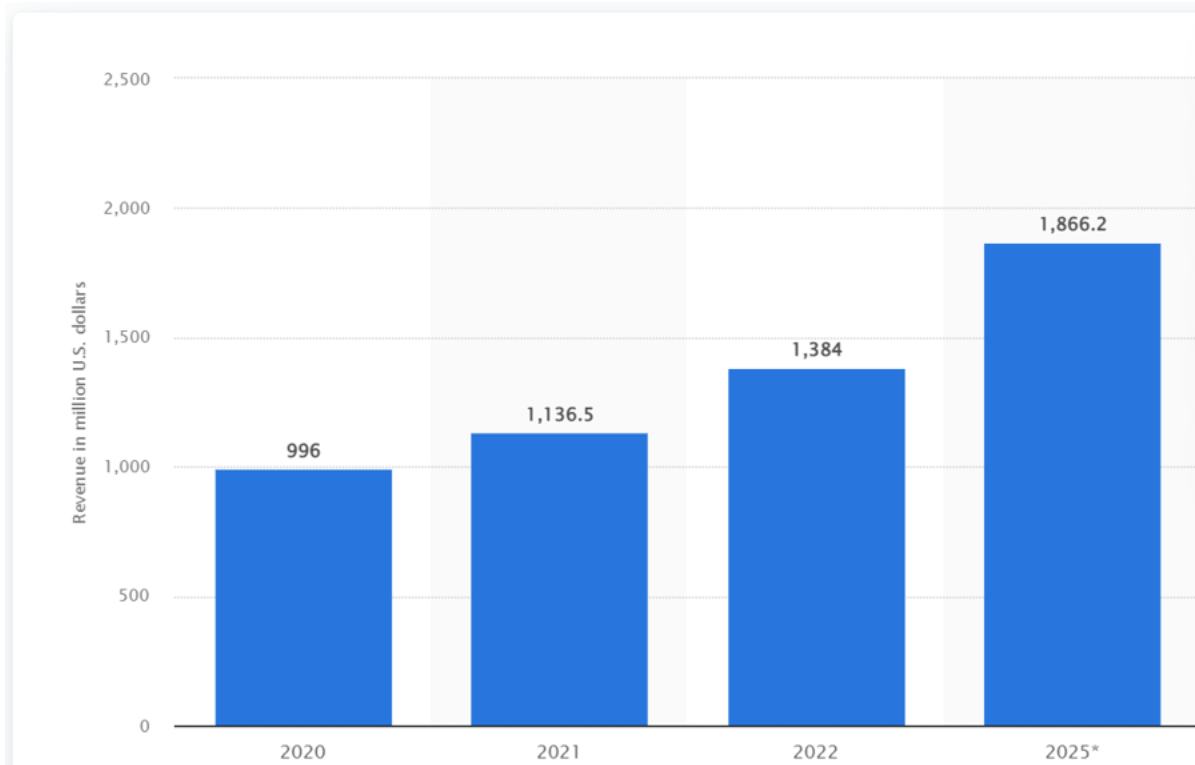


Figure 1.3 eSports Market Revenue Worldwide from 2020 to 2025

Source: Adopted from Statista (2023b)

This fast-expanding eSports sector has contributed to the explosive expansion of eSports audiences and viewership. According to Statista's eSports audience size worldwide report from 2020 to 2025, the worldwide eSports audience size was only 435.7 million. However, it is anticipated to reach 640.8 million audiences by 2025, with a meteoric growth rate of 47.07 % from 2020 to 2025. Figure 1.4 demonstrates the projected global increase in eSports audience size from 2020 to 2025. The global eSports audience size is projected to increase by 205.1 million from 2020 to 2025 (Statista, 2023c).

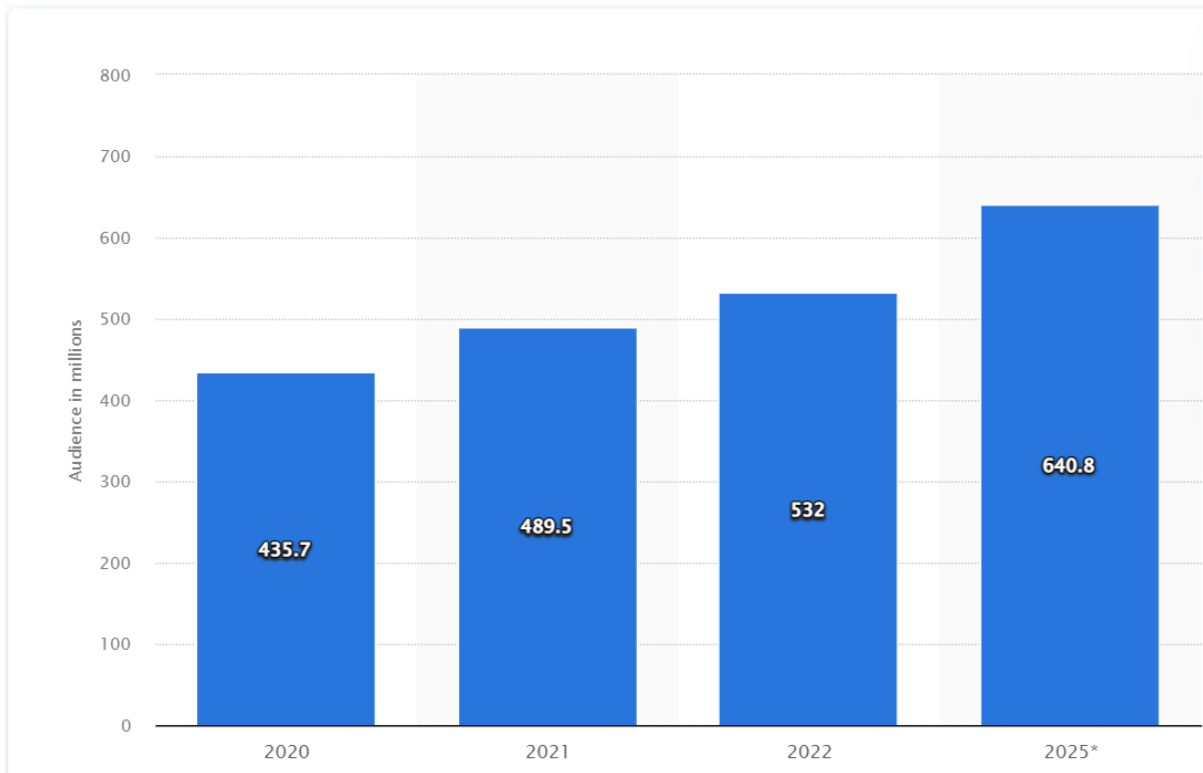


Figure 1.4 eSports Audience Size Worldwide from 2020 to 2025 (in Millions)

Source: Adopted from Statista (2023c)

According to Qian et al. (2020a), eSports games have spawned a variety of online and offline tournaments in the modern period, drawing large numbers of live and online spectators. Based on the Global eSports Market Report by Newzoo (2020), Southeast Asia, India, and Brazil dominate mobile eSports, leading to a tremendous increase in live spectators. Therefore, the viewership increased by more than 600%, from 15.3 million hours in 2018 to 98.5 million in 2019. Further, China will dominate the eSports market in 2020, with 385.1 million US dollars in revenues. Then, North America was the second-largest revenue-generating country, with 252.5 million US dollars. Subsequently, Western Europe was the third-largest revenue-generating country, with 201.2 million US dollars in 2020. China had the most extensive eSports viewership in 2020, with 162.6 million viewers, followed by North America, with 57.2

million viewers. Recently, Ruby (2023) highlights that almost half of the worldwide eSports audience engages in watching competitive eSports on a monthly basis. The figures confidentially predict that the global eSports audience will grow steadily in the next few years.

Many companies are drawn to this extensive market potential, the significant opportunities for media exposure, and the revenue generated from viewership. As a result, numerous companies are utilising eSports platforms for advertising to reach millions of viewers. Large spectator crowds frequently have considerable spending power and are a significant factor in the esports industry's high revenue share. The tournament organisers would make money from the creation of competitions by selling broadcast rights to streaming services and increasing TV deals, or also profit from viewers and supporters by selling tickets to live events and live-streaming (Wong & Meng-Lewis, 2023). As a result, the eSports sector successfully draws about 500 million US dollars in sponsorships yearly, with Coca-Cola, Red Bull, Intel, and Nissan among the top sponsors (Jenny et al., 2018) to attract eSports viewers. For instance, Coca-Cola was the title sponsor of the 2016 League of Legends World Finals in Los Angeles, which drew 15,000 spectators to the venue and had 45 million viewers watching live worldwide (Gawrysiak et al., 2020). Therefore, viewership in the eSports business propels the growth of the economy and the eSports industry.

1.4 Overview of eSports Revenue and Viewership in Malaysia

Malaysia ranked as the twenty-second eSports market globally, valued at 586.8 million US dollars in 2017 (Lim et al., 2022b). Following the most recent eSports revenue statistics published by Statista (2023b), the overall eSports revenue reached 4.64 million US dollars in 2022, up from 4 million US dollars in 2021, representing an annual growth of 640 thousand US dollars, or a 16% rise. Figure 1.5 depicts the sharp surge in eSports revenue in Malaysia. The total revenue generated in 2017 was only 2.6 million US dollars, compared to 4.64 million

US dollars in 2022, a 78.46% rise from 2017 to 2022. The eSports revenue is anticipated to reach 8.47 million US dollars by 2027, a significant hike of 82.54% (Statista, 2023a).

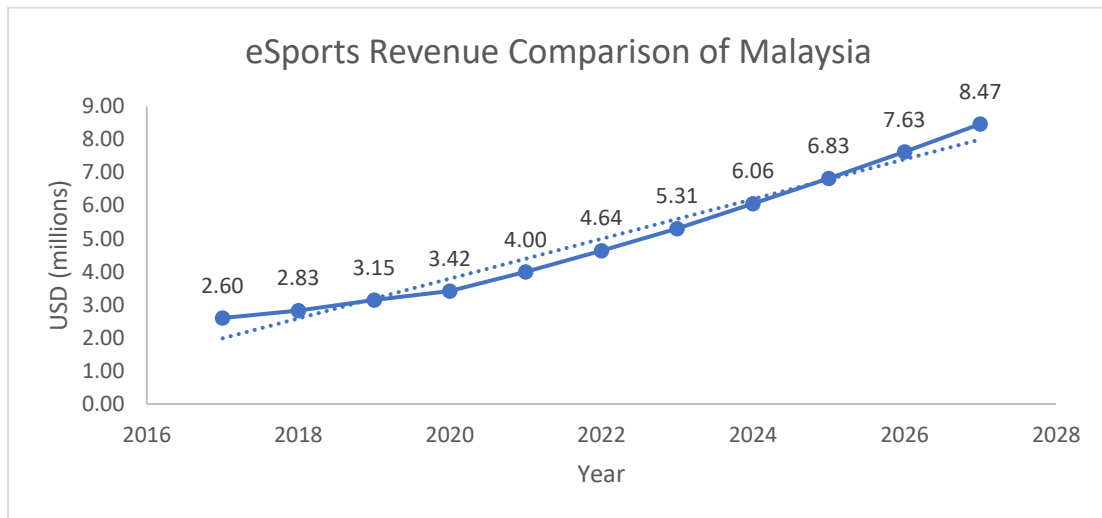


Figure 1.5 eSports Revenue Comparison of Malaysia

Source: Adapted from Statista (2023a)

According to a study by Statista (2023a), eSports has gradually expanded in Malaysia since 2017, with a notable 9.1%. The penetration of eSports in Malaysia reached 14.2% in 2022, with an annual growth rate of 0.2%, compared to a penetration rate of 14% in 2021. The penetration rate of eSports in Malaysia is projected to increase between 2017 and 2027, as seen in Figure 1.6. From 2017 to 2022, the eSports penetration rate climbed by a remarkable 5.1%. As predicted, Malaysia's eSports penetration rate will reach 18.5% by 2027, a 4.3% rise from 2022 to 2027 (Statista, 2023a).

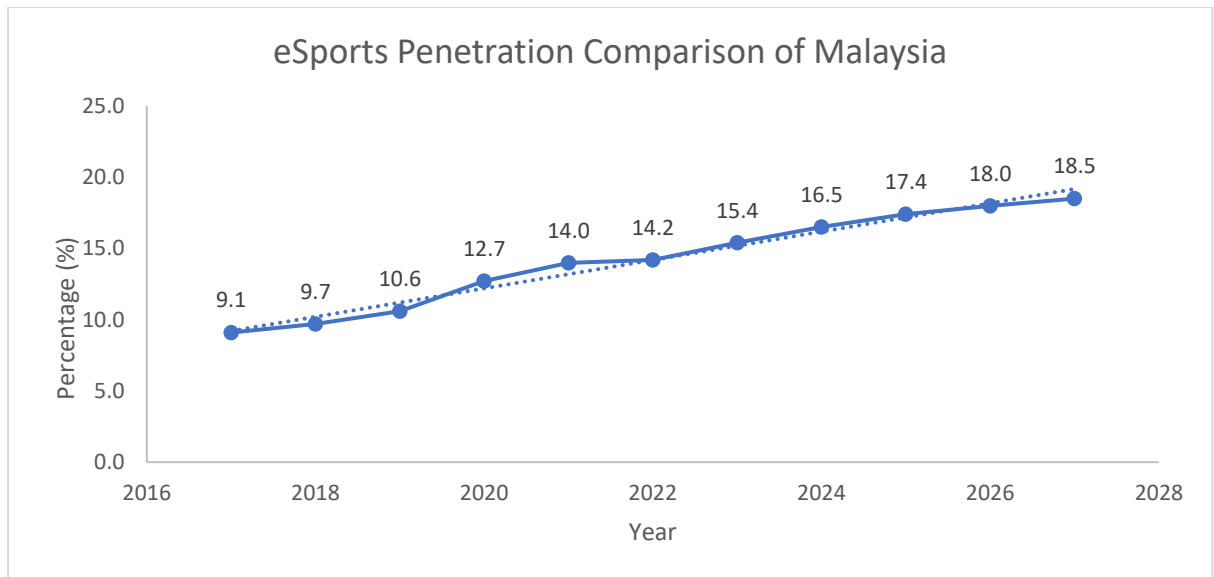


Figure 1.6 eSports Penetration Comparison of Malaysia

Source: Adapted from Statista (2023a)

Malaysia is one of six Southeast Asian nations providing more than 98% of the region's eSports enthusiasts, recorded as 1.8 million enthusiasts in 2016 (Pannekeet, 2016; The Sun Daily, 2018). In 2021, Malaysia was recorded to have the fifth-largest eSports viewership in Southeast Asia, with 4.1 million viewers (Lim et al., 2022a). Figure 1.7 demonstrates that eSports enthusiasts in Malaysia were 7.9% of the online population in 2016 (Pannekeet, 2016). Besides, Figure 1.8 indicates that Malaysian eSports viewers were recorded 3.4 million, or 82.93% more than Singapore's eSports viewers (Racoma, 2021).

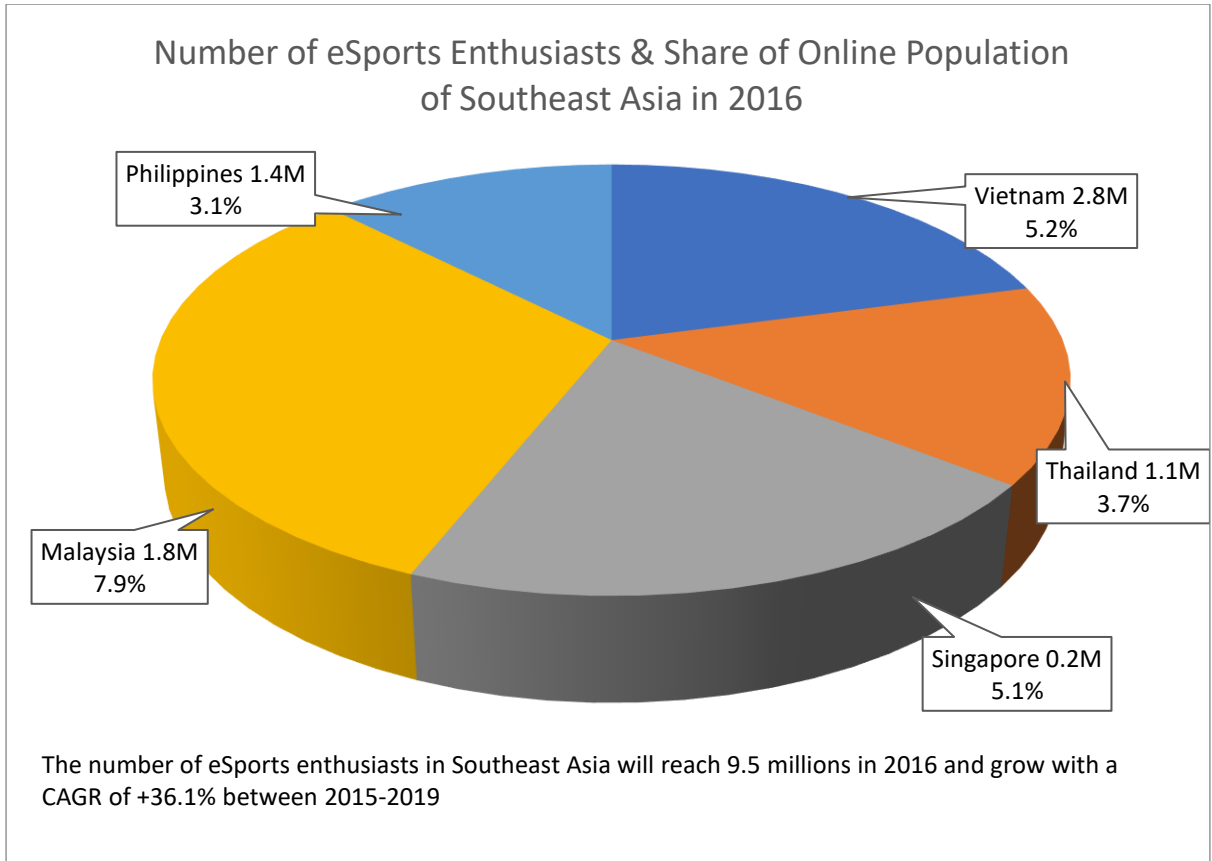


Figure 1.7 Number of eSports Enthusiasts in Southeast Asia

Source: Adapted from Pannekeet (2016)

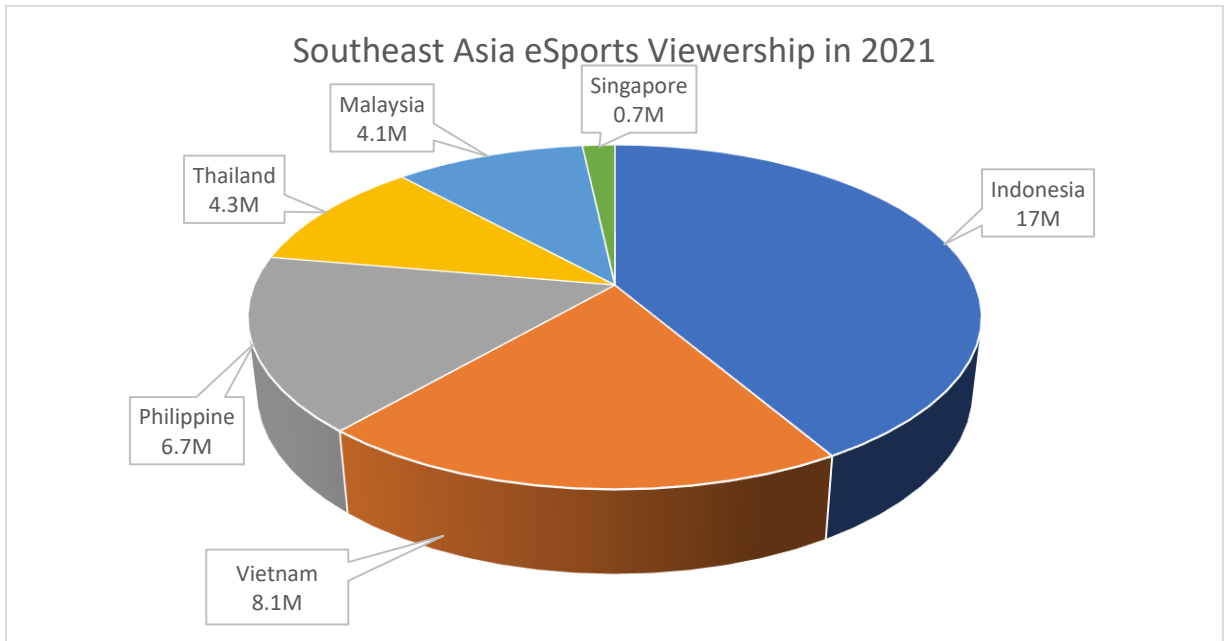


Figure 1.8 Southeast Asia eSports Viewership

Source: Adapted from Racoma (2021)

A survey conducted by Proxyrack has indicated that the average daily screen usage in Malaysia amounted to 8 hours and 6 minutes (New Straits Times, 2023a), with an average of 1 hour to spend on gaming websites (Howe, 2024). Along the same line, Statista (2023d) reveals that 17.42% of Malaysians frequently watch video games several times a week, and 14.29% of Malaysians watch the video games contents daily. More specifically, 47% of Malaysians watch eSports content more than or equal to 1 hour a week, followed by 39% of Malaysians watching eSports content more than or equal to 1 hour daily, while only 14% of Malaysians watched eSports content less than 1 hour a week in the past 6 months (Deloitte, 2023a). In general, on average, Malaysian eSports spectators watch eSports games between 1 and 3 hours per week (Deloitte, 2023a). In addition, based on a recent report on gaming and eSports by YouGov (2023), the average worldwide spectators spend 4.8 hours per week watching gaming video content. Considering that eSports is a specific component of video gaming involving electronic gaming, thus, statistics of video games are taken into account in this context (Chan et al., 2022). Figures 1.9 and 1.10 demonstrate the daily time a Malaysian usually spends with the media and the frequency of a Malaysian watching the video game content. Meanwhile, Figure 1.11 illustrates the eSports reach and weekly consumption of eSports content among Malaysians in the past 6 months.

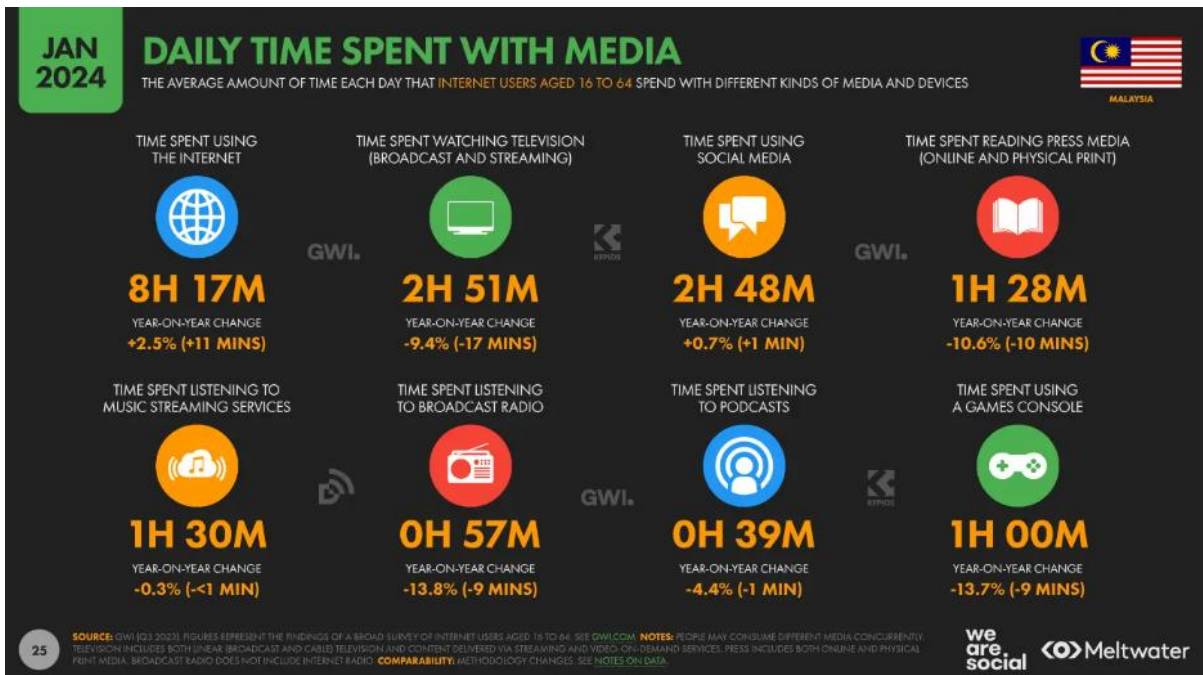


Figure 1.9 Daily Time Spent with Media for A Malaysian

Source: Adopted from Howe (2024)

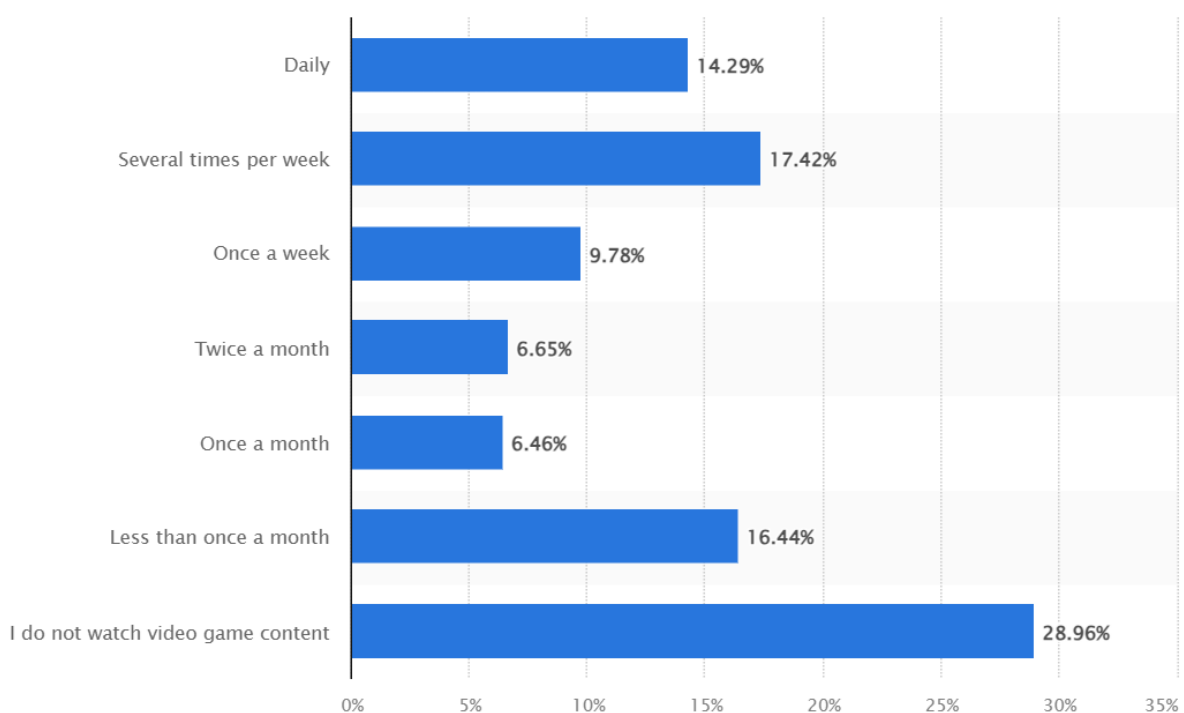


Figure 1.10 Frequency of Watching Video Games Contents Among Consumers in Malaysia

Source: Statista (2023d)

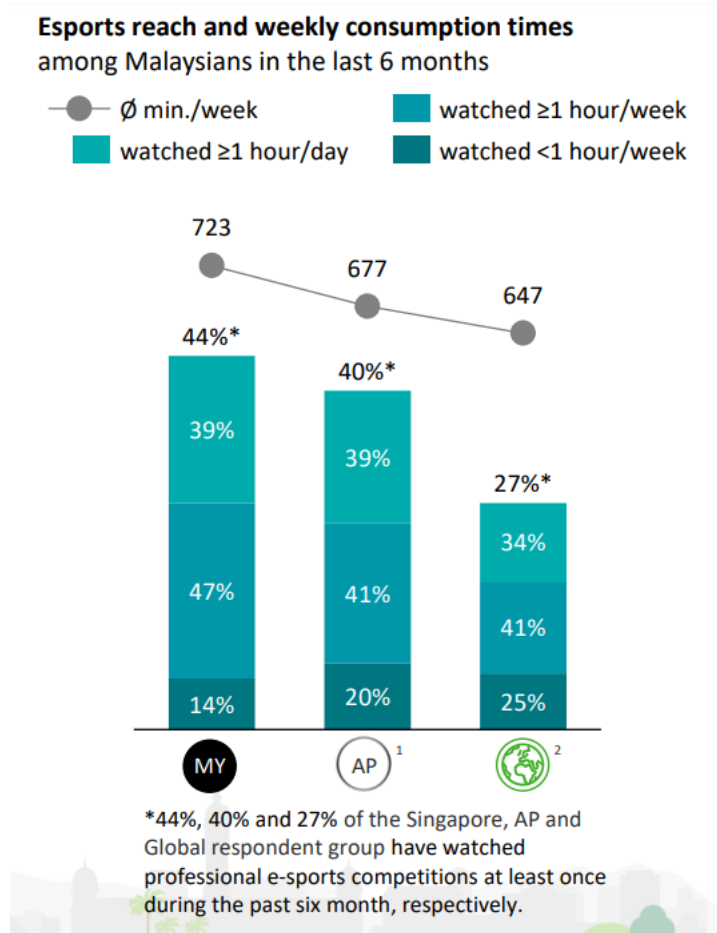


Figure 1.11 eSports Reach and Weekly Consumption Times Among Malaysians in The Last 6 Months

Source: Deloitte (2023b, p.3)

Despite the outbreak of the COVID-19 pandemic in Malaysia in January 2020, the Malaysian government still took the necessary initiatives to establish the biggest eSports venue in Southeast Asia in 2021, namely Quill City Mall, Kuala Lumpur, as well as providing a budget of RM15 million for eSports (Lim et al., 2022b). Recently, the Budget 2024 has set aside RM30 million to establish Malaysia as a prominent center for the eSports sector and video game development. This initiative aims to entice various multinational video game businesses to establish their presence in Malaysia, with the goal of making the country the leading gaming hub in Southeast Asia (The Star Online, 2023). These government actions have considerably

fostered the growth of eSports and established a sustainable ecology. As a result, these government endeavours significantly boosted eSports viewership in Malaysia, resulting in total eSports viewership revenue of 1.27 million US dollars in 2022, an exponential rise of 62.82% compared to 2020 before these initiatives were implemented (Statista, 2023a). Besides, Covid-19 has also altered the behaviour of many Malaysians, who increasingly rely on the internet for recreational purposes (Lim et al., 2022b), which has also boosted the eSports viewership revenue by 260 thousand US dollars or a surge of 34.21%, from 760 thousand US dollars in 2019 to 1.02 million US dollars in 2021. Figure 1.12 illustrates the increasing trend of eSports viewership revenue in Malaysia in terms of attending eSports physically and watching streaming, spanning from 2017 to 2027, which was merely 520 thousand US dollars in 2017 and an anticipated 2.18 million US dollars in 2027. From the statistics, a promising meteoric growth of 1.66 million US dollars or a rise of 319.23% in Malaysia’s eSports viewership revenue can be seen from 2017 to 2027 (Statistic, 2023a).

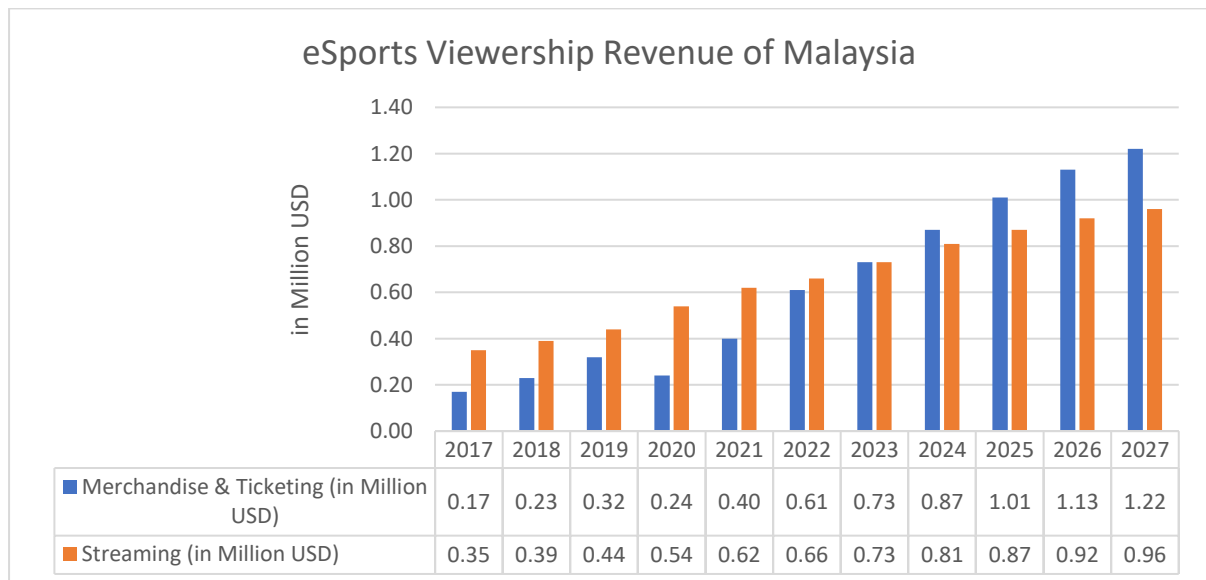


Figure 1.12 eSports Viewership Revenue of Malaysia

Source: Adapted from Statista (2023a)

To sum up, advanced technologies and network connectivity have accelerated the eSports industry and expanded the eSports viewership. For instance, mobile eSports is one of the cutting-edge innovations that allows viewers to watch eSports at their convenience (Wilis & Manik, 2022), propelling eSports viewership simultaneously. Furthermore, a rise in viewership is the primary driver of revenue growth because businesses spend directly and indirectly on marketing within the eSports sector, which has led to the eSports industry's fast revenue development (Kim et al., 2020). Therefore, watching behaviour or viewership in eSports is an economic microtransaction that fuels economic activity (Watanabe et al., 2021), and exploiting the viewership is the driving factor behind any business plan (Scholz, 2020) when the eSports business mainly depends on large viewership (Taylor, 2016).

1.5 Problem Statement

It is increasingly evident that the acceleration of technology improvements and internet accessibility, as well as the change in behaviour post-pandemic, the growing trend for watching behaviour in eSports has produced a booming industry and transformed eSports into the next big media business model (Jenny et al., 2017; Lim et al., 2022b). There are currently more audiences than previously in eSports, and businesses are focusing on capturing the interest of these audiences to produce significant income potential in eSports (Lokhman et al., 2018). Therefore, more and more companies are investing in eSports to generate lucrative revenue (Newman et al., 2022). In the latest Forbes ranking of the biggest eSports companies overseas, the top ten are valued at 353 million US dollars, an increase of 46% over 2020 (Forbes, 2022). It is worth noting that watching game contests and competitions has evolved into a significant aspect of the expanding eSports industry as eSports viewership surpasses the conventional sports viewership (De Donder et al., 2023).

Recent evidence from JustWatch, an online platform that functions as a search engine specifically designed to locate and access a wide range of movies and TV series available for streaming, reveals that global eSports is gradually taking over the viewership of conventional sports (Feldmann, 2022). For instance, IEM Cologne eSports tournament successfully drew significant crowds of 15,000 to 20,000 spectators who gathered in stadiums to witness top teams in which mirroring the attendance figures of traditional physical sports events (Schudey et al., 2023). In addition, the viewership of UEFA Champions League Final in 2022, surpassed the viewership of conventional sport, NBA Finals in 2022 (Feldmann, 2022). The International Olympic Committee's (IOC) presents strategic goal includes the incorporation of eSports into the Olympic Games, highlighting the worldwide significance and widespread interest in eSports. The increasing integration of Western and Asian civilisations has brought about a heightened emphasis on the worldwide nature of eSports to become a valuable subject of study for academics seeking to examine its practices and societal repercussions (Ribeiro et al., 2023).

Watching eSports games can be done in an online context, such as eSports streaming from television, YouTube and Twitch, and offline context, such as by observing the eSports tournament in arenas or stadiums (Neus et al., 2020; Watanabe et al., 2021), this is why eSports viewership has increased in prevalence in the cutting-edge technological world (Cranmer et al., 2021). Therefore, eSports viewing income in Malaysia is projected to rise from 0.52 million US dollars in 2017 to 1.68 million US dollars in 2024, an increase of 1.16 million US dollars or 223.08 per cent by 2024 (Gawrysiak et al., 2020; Statista, 2023a). However, only a few companies focus on cultivating the watching behaviour in eSports even though Malaysia has the top 10 eSports business companies involved in the eSports industry, namely, eGG Network, Techninier, Battle Arena, Blitzzone Cafe, Geek Fam, LEVEL UP Inc @ Komune, KITAMEN Resources Sdn. Bhd., Sunsuria Esports Sdn. Bhd. and Magnus Game Studio. However, only MyGameOn participates in eSports broadcast collaborations, eGG Network maintains a

broadcast on Astro, and Techninier participates in the internet domain, which can stimulate the growth of the audience population in Malaysia (Top 10 of Malaysia, 2020).

The eSports viewership revenue in Malaysia still lags behind the revenues generated by other sectors in Malaysia. In other words, the watching behaviour of eSports in Malaysia still needs to increase its popularity. A report of Revenue for Services Sector Fourth Quarter 2022, which was newly released by DOSM (2023), states that the service sector generated RM2 trillion in 2022, while the eSports sector is categorised in the media and service sectors (Ji & Hanna, 2020; Kunz et al., 2022). However, Malaysia's eSports viewership revenue generated in 2022 was not even 1 per cent of the total revenue generated by the service sector in 2022, indicating a misalignment between audience engagement and revenue realisation. Therefore, it is evident that a slowing growth in the trend of watching behaviour in eSports in Malaysia. This disparity underscores the importance of academic inquiry into the psychological and behavioural determinants of viewership, with the aim of informing strategies that can promote eSports watching behaviour and optimise monetisation efforts.

Based on a report by Esports Earnings (2023) reveals that Malaysia still falls after countries such as China, the United States, Japan, Korea, Germany, and a few more to name. It can be further explained from the statistics of the total population of Malaysia was estimated at 32.7 million in 2022 (DOSM, 2022), while eSports viewers in Malaysia in 2021 were only 4.1 million, which is only 12.54 per cent of the total population in Malaysia (Lim et al., 2022a). In addition, according to a survey conducted by Oppotus (2019), 32% of the population in Malaysia was unaware of eSports. Surprisingly, based on the survey of Oppotus, 82% of Penang residents were unaware of eSports, followed by 81% of Kuantan residents, 77% of Johor residents and 61% of Klang Valley residents. They do not seem aware of eSports, so they do not watch eSports tournaments. Similarly, a recent study from Deloitte (2023b) about the

eSports market in Southeast Asia reveals that merely 54% of the respondents in Malaysia extensively attend live eSports events or are extensively involved in eSports offline. In terms of online and offline eSports in Malaysia, the survey from Deloitte (2023a) also reveals that 76% of the eSports audiences have watched eSports events for a minimum of one time in the past. However, only 29% of the eSports audiences reported watching eSports content for a duration of 1 to 3 hours per week within the past six months. To grow the broader group of eSports viewers, which is essential in the eSports ecosystem, a better knowledge of the factors driving individuals to watch eSports is critical because the research can help researchers comprehend the behaviour and mentality of eSports audiences (Xiao, 2020).

However, several gaps in watching behaviour in eSports have yet to be found, although much research has been conducted in the eSports context. For instance, a significant number of studies have been found to explore eSports psychology and performance (Behnke et al., 2022; Iwatsuki et al., 2022; Pedraza-Ramirez et al., 2020), eSports gambling and addiction (Greer et al., 2019; Kim et al., 2023; Sweeney et al., 2021), and eSports management and sponsoring (Flegr & Schmidt, 2022; Freitas et al., 2021; Huettermann et al., 2023). Therefore, this research is conducted to examine the influencing factors towards watching behaviour in eSports and develop suitable strategies to nurture eSports viewership in Malaysia.

Even though prior research has steadily elevated watching behaviour to a pivotal position since eSports are now consumed in the same manner as conventional sports (Hamari & Sjoblom, 2017), it is essential to examine this phenomenon in depth. The psychological gratifications derived from an eSports event can vary significantly based on the mode of consumption. Spectators who attend events in person are largely influenced by social and emotional factors, such as the immersive atmosphere, collective crowd dynamics, and the feeling of being part of a shared, live experience. In contrast, online viewers tend to seek

cognitive gratifications, including visual appeal, excitement, uniqueness, and opportunities for knowledge acquisition (Sjoblom et al., 2020). This research also acknowledges the significance of recognising and comprehending the elements that impact watching behaviour, which continues as one of the most complicated issues for businesses seeking to design more flexible marketing and communication strategies in the digital age (Qian et al., 2020a,b).

In Malaysia, eSports profits were ranked 14th in 2021, with 3,567,143.96 US dollars or approximately RM 16 million from 355 players (World of Buzz, 2022). eSports enthusiasts have the option to watch the competitions online or in person whenever a tournament is held (Sjoblom et al., 2020), ushering in an entirely novel phase of economic expansion (Kim et al., 2020). The evidence of the increase in popularity of watching behaviour and revenue generated from watching eSports in Malaysia are demonstrated in Figure 1.5. However, most eSports research is found in the gameplay and watching intention (Jang & Byon, 2020a,b; Jang et al., 2021a,b,c,d; Macey et al., 2022). Furthermore, most eSports studies are conducted in other contexts, such as actual behaviour in Western context (Jang & Byon, 2020a,b; Qian et al., 2020b,c; Tang et al., 2022; Xiao, 2020), behavioural intention in Western context (Jang et al., 2020; Jang & Byon, 2021; Macey et al., 2022), behavioural intention in Southern Africa context (Hattingh et al., 2024), and behavioural intention in Asia (Ke & Wagner, 2024). There is a paucity of studies were conducted in Malaysian context, but in qualitative research (Lim & Goh, 2023). Similarly, Abbasi et al. (2023) explored the factors affecting the Malaysians in eSports game engagement and Lim and Goh (2025) to explore the determinants of Malaysian eSports watching behaviour. Therefore, this study wants to address the population gap in focusing Malaysian eSports watching behaviour.

In general, subjective norms, hedonic motivation, habit, effort expectancy, and price value are the influencing factors commonly found in prior eSports behavioural intention studies

(Jang et al., 2021b, c; Xiao, 2020). However, there is a dearth of comprehensive research on influencing factors towards watching behaviour in eSports (Kim et al., 2020; Qian et al., 2020b,c, 2022a). In addition, the influence of cognitive factors towards affective factors in the watching behaviour in eSports is paucity (Lim & Goh, 2025). The cognitive component comprises the thoughts and knowledge of a spectator when watching the player's performance (Potwarka et al., 2020; Wallin & Fuglsang, 2017), while affective components often include affection, satisfaction and arousal of a spectator (Potwarka et al., 2020; Verkijika, 2020). It is evident that eSports plays a critical role in influencing an individual's cognitive functions (Boot et al., 2008), and affective elements also influence their decisions (Hua et al., 2023). Therefore, this study seeks to bridge the empirical gap to examine aesthetics, escapism, flow, physical attractiveness, knowledge acquisition, perceived value and social interaction as cognitive factors, as well as satisfaction and positive emotions as affective factors in Malaysian context.

Satisfaction has been examined in several consumer behaviour studies (Mtotywa & Kekana, 2023; Saleem et al., 2022), but there is still a lack of examination on satisfaction in the eSports context. Satisfaction is critical to impact the spectators' behavioural outcomes towards the broadcasters if the spectators feel satisfied (Liu et al., 2022a). Several research studies have investigated the impact of satisfaction towards behavioural intention within traditional sports and eSports (Brown et al., 2017; Meng-Lewis et al., 2024). However, there is only one study focus on the satisfaction in the Malaysian eSports watching behaviour (Lim & Goh, 2025). There appears to be a dearth of knowledge concerning the factors that impact audience satisfaction and behaviour (Carneiro et al., 2019). Therefore, this research intends to fill the empirical gap by extending spectator satisfaction in watching behaviour in eSports, particularly in the Malaysian context.

Positive emotions play a crucial role in consumer behaviour studies, which may be

directed towards a specific setting and the behaviours of individuals (Chang et al., 2011). Nevertheless, only a few research studies examined the correlation between positive emotions and binge-watching behaviour (Flayelle et al., 2019a, 2019b; Tefertiller & Maxwell, 2018) and watching behaviour in sports (Tsiotsou, 2013). To date, Abbasi et al. (2023) explore the influence of positive emotions towards eSports engagement behaviour, and Guo et al. (2024) explore the influence of positive emotions on personal growth in eSports gameplay. It indicates that there is an absence of studies to examine the influence of positive emotions towards watching behaviour in eSports (Kohls et al., 2023). Therefore, this study addresses the existing empirical gap on positive emotions towards eSports watching behaviour in Malaysian context.

Satisfaction is a significant and commonly found mediator in consumer behaviour studies (Carmo et al., 2022; Muflih & Juliana, 2021; Ramezani & Shokouhyar, 2020). Nevertheless, satisfaction is rarely employed as a mediator in sports studies (Duan et al., 2020; Lee et al., 2022; Song et al., 2015), and gaming context (Mulcahy et al., 2021; Phonthanukitithaworn & Sellitto, 2017). The role of satisfaction as a mediator between positive emotions and watching behaviour in eSports is lacking in the existing literature. Likewise, the present research uncovered a gap in the existing literature regarding using satisfaction as a mediator between cognitive factors and watching behaviour in eSports. In addition, several prior studies in various contexts (Ramezani Nia & Shokouhyar, 2020; Serra-Cantallops et al., 2018) have shown conflicting and inconsistent mediator variable results indicating that satisfaction has little to no impact. Therefore, this study aims to bridge the knowledge gap by employing satisfaction as a mediator between cognitive variables (aesthetics, escapism, flow, physical attractiveness, knowledge acquisition, perceived value, and social interaction) and affective variable (positive emotions) towards watching behaviour in eSports.

Many eSports' studies utilise the Motivation Scale for Sport Consumption (MSSC) and