

GAMES INDIA PLAYS!

A look into the gaming habits of Indian mobile gamers and how to reach them

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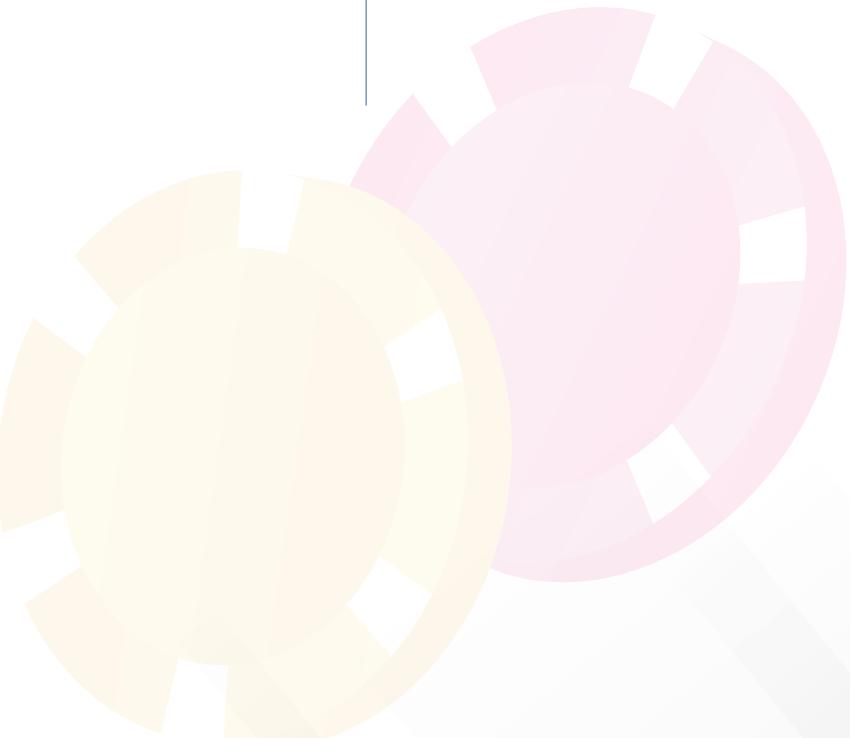
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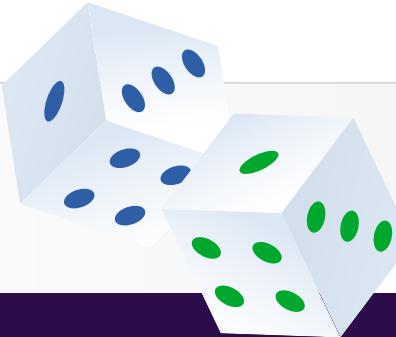
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The multi-billion dollar Indian mobile gaming industry is at the edge of a major revolution in gaming experience. With hopes of being a digital Garden of Eden, the gaming hype has attracted the eyes of venture capitalists and investors looking to share a piece of the profit pie. With the user interest in the vertical only peaking, the year ahead is set to witness stellar game-changing trends.

A key growth driver for the industry will be creation of new genres and integrating multiple game formats on single platforms to attract users who are yet to make their entry into the world of gaming.

With the winds of change heralded, MAAS in collaboration with Newzoo looks at the rapidly evolving market of mobile gaming in India. This report analyzes two dominant gaming verticals - Real Money Gaming (RMG) and non-RMG games to present a deep-dive into India's gaming behavior, preferences, and expectations. The report also covers actionable insights from field experts focusing on the best approach to make the most of the market opportunities in the region.



Methodology

The report is centered around games in the non-RMG and RMG segments. For the purpose of this report, the scope of research was around the Top 5 categories in non-RMG that are the most popular amongst Indian gamers – Adventure, Battle Royale, Puzzle, Arcade, and Racing. The top categories in RMG included card-based games, sports-based fantasy games, and casual RMG.

The key insights have been put together using Newzoo's consumer research and market data, as well as Affle MAAS' data dashboards, mDMP platform, and key learnings gathered from running gaming campaigns. These insights have been put together with some insightful findings and trends that help to build a better understanding of the Indian gamer in these categories.

*non-RMG data from Newzoo

*RMG data from MAAS campaign expertise and internal analysis of data dashboard

India Gaming Market & Overview

The Indian gaming industry saw a sudden growth back in 2016 when Reliance Jio launched with the promise of cheap data charges and gave an opportunity for everyone to take to mobile gaming. Until now, while gaming was popular in the country, it took centerstage in 2020 when the pandemic brought people indoors and mobile game downloads saw a huge spike. Add to this, the rising popularity of real-money gaming (RMG) or fantasy gaming apps has everyone making the most of the opportunity to entertain themselves while earning big rewards.

Gaming Trivia 5

In 2021, the Real Money Gaming segment contributed over 50% to industry revenue of INR 101 billion.



Gaming Trivia 1

25% of the downloads for PUBG was attributed to India with over 50 million active users per month. The hugely popular game eventually faced a ban in 2020 when over 300 Chinese origin apps were banned by the Indian government.

Gaming Trivia 4

Mobile games by Indian publishers clock an impressive average of 525,000+ downloads per game.



Gaming Trivia 2

After PUBG, Krafton's battle royale game Battlegrounds Mobile India (BGMI) was launched in 2021 and went to over 100 million users in the last one year. The game also faced a recent ban by the Indian government and was delisted from the app stores.

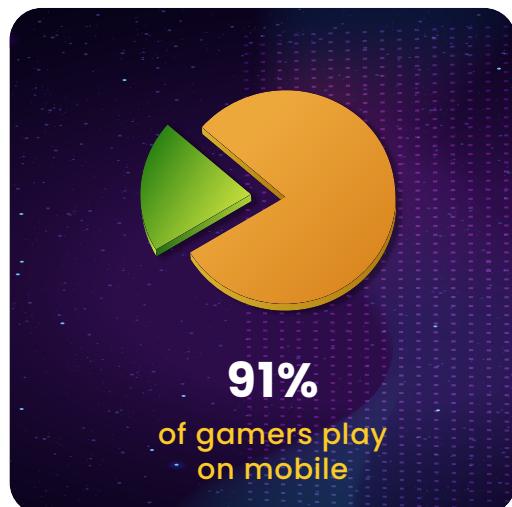

RMG

NON RMG

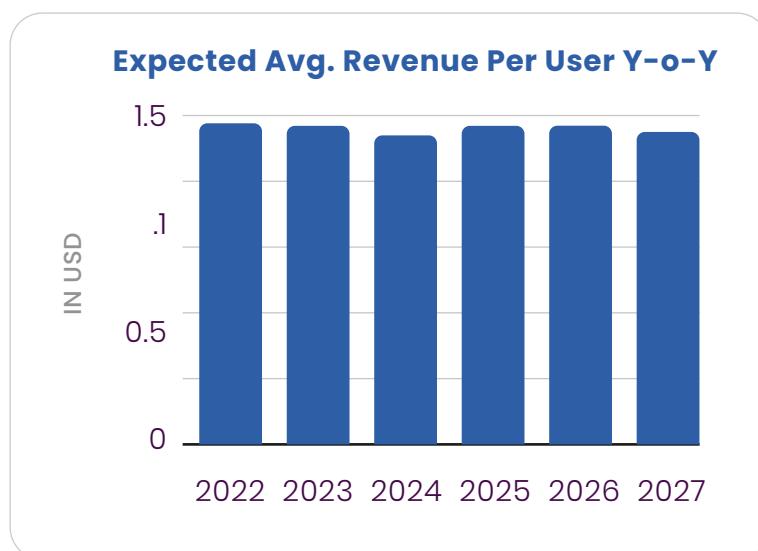
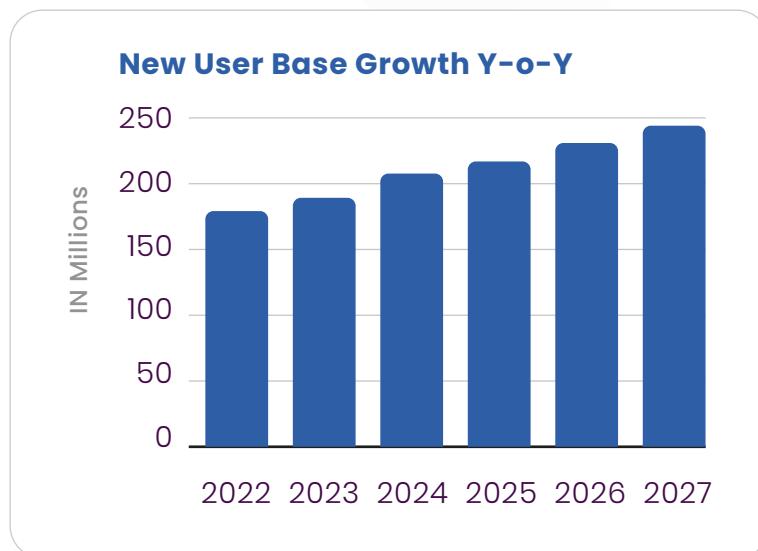
Gaming Trivia 3

Domestic gaming industry is set to contribute 10000-12000 direct or indirect jobs in India by 2023.

India Gaming Market & Overview



Market Opportunities for Gaming App Marketers



Source : Newzoo, Statista, TechCrunch

Voices



Real money gaming has been one of the unique segments to observe as even with the changes in the adoption pattern, there's an underlying uncertainty due to restrictions and government regulations. Yet, there's not only massive enthusiasm, but also growth opportunities for advertisers to grow their user base. When it comes to performance advertising of real money gaming, card-based game advertisers (rummy and poker) have always been performance centric vs scale-hungry. But in 2022, given the global financial downturn, we have observed even greater conversation around understanding and focusing more on the down-the-funnel metrics and meeting ROI goals sooner. It's important for advertisers to not restrict themselves to one single channel and know which channel can offer what returns depending on your KPIs. Keep an open mind to explore new channels. Don't stop digging for gold mines.

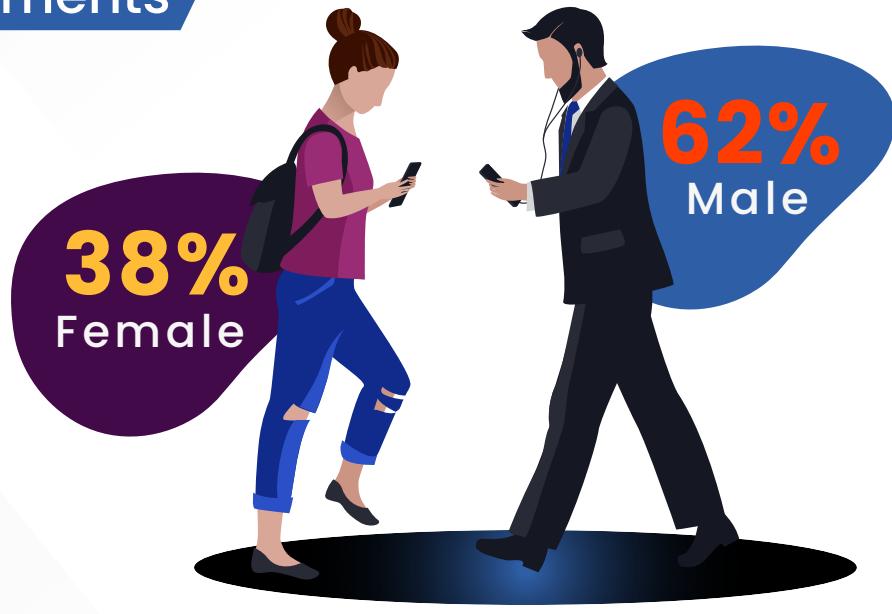
We are at a unique standpoint where the dynamics of the Indian gaming industry are very interesting for experts in the field. I am also excited to look at how the industry will further shape up with the innovations in eSports, NFTs and Metaverse. There's a massive playground (no pun intended!) for both users and advertisers – and as app growth experts, we are looking forward to charting the success stories together!



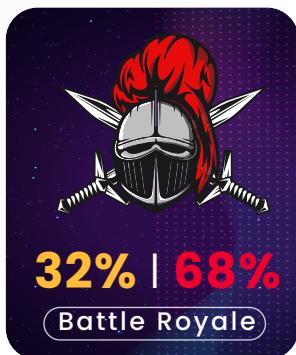
Rati Mehra
Associate Director –
Sales | MAAS India

Gender Split

Non-RMG Segments



FEMALE ⚡ MALE ⚡



RMG Segments



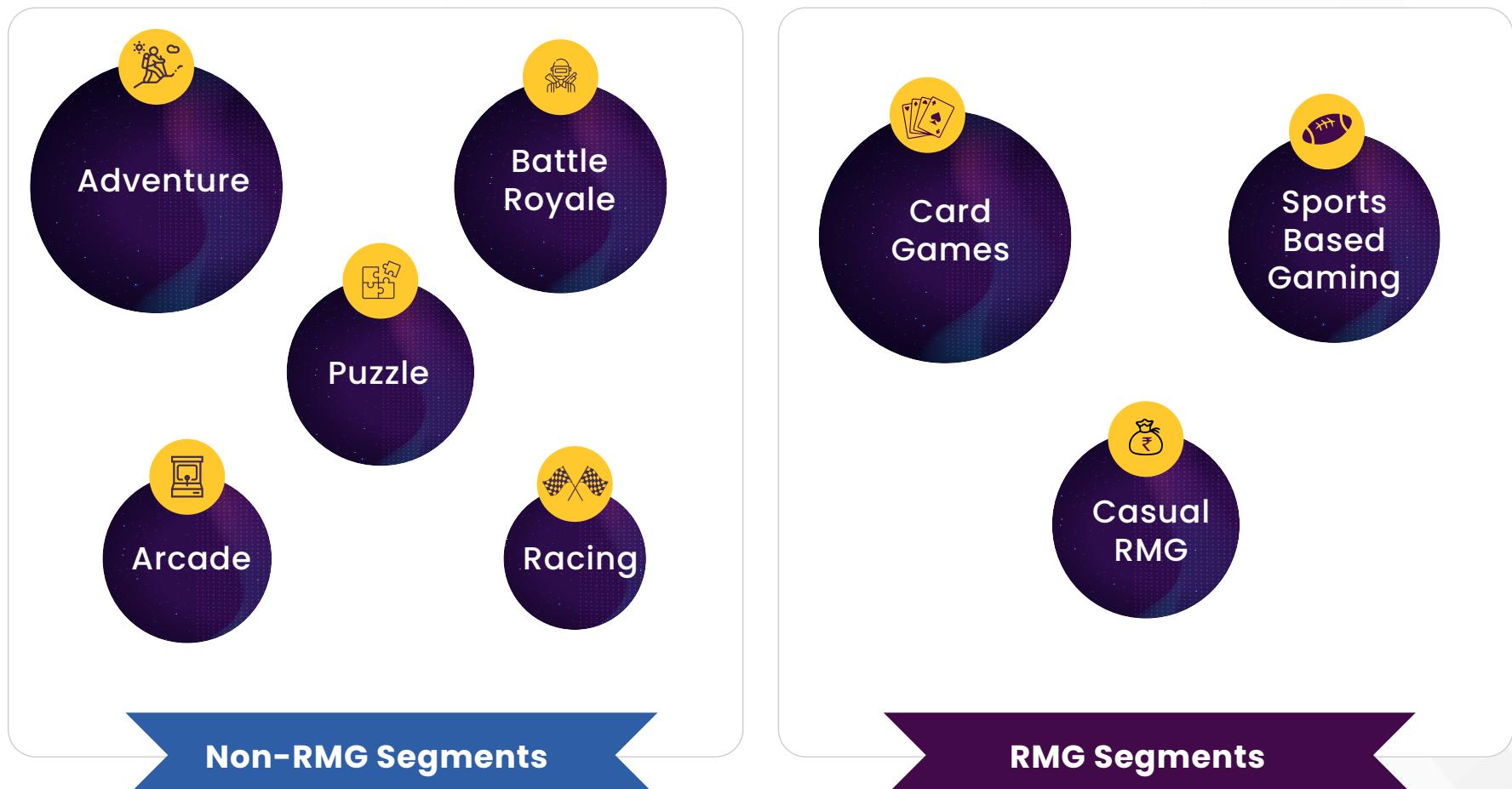
*non-RMG data from Newzoo; people aged 10-50 who have played mobile games in the last 6 months and live in residential developed areas.
*RMG data from MAAS campaign expertise and internal analysis of data dashboard

Exploring India's Gaming Landscape

Tracing Gaming Behaviors Across Popular Sub-Segments

Gaming has long been associated with improvements in mood and stress relief. Mobile gaming apps account for 86% of the total gaming apps in 2021, according to data by IBEF. Mobile-first gaming genres have grown 1.7X faster than other gaming segments. The COVID-19 pandemic and subsequent lockdown further pushed more users to take to mobile gaming as people were stuck inside their homes. New user behaviors have emerged with the rise in Indian gaming studios releasing exciting new titles. Alongwith the rise in disposable income and changing work culture that is predominantly moving towards a hybrid routine, we are likely to see further change in of mobile gaming segments among Indian users.

Top Genres on Mobile Devices



*non-RMG data from Newzoo; people aged 10-50 who have played mobile games in the last 6 months and live in residential developed areas.
*RMG data from MAAS campaign expertise and internal analysis of data dashboard

Generation Split for RMG & Non-RMG*

India's gaming culture is attracting millennials and genZ between the age group of 13-41 making mobile gaming a popular form of entertainment for India's youth. Strategy and action fueled genres like battle royale and adventure gaming are top favorites with 55% and 51% gaming audience being in the age group of 13-27 respectively. Approximately 50% of the genZ gaming audience, between 18-27, have also shown active participation in real-money games. Millennials on the other hand are spending their gaming hours on adventure, puzzle, arcade and racing games with almost 35% of the audience in this similar age group actively indulging in skill based real-money games.

Gen Alpha



-  Puzzle
-  Arcade
-  Racing

GenZ



-  Adventure
-  Battle Royal
-  Card-based RMG
-  Puzzle
-  Sports-based fantasy

Millennials



-  Adventure
-  Card-based RMG
-  Puzzle
-  Sports-based fantasy

GenX



-  Card-based RMG
-  Puzzle
-  Sports-based fantasy

*non-RMG data from Newzoo; people aged 10-50 who have played mobile games in the last 6 months and live in residential developed areas.
*RMG data from MAAS campaign expertise and internal analysis of data dashboard

Reasons to Play

There are stark differences among user behavior when it comes to understanding their motivation and reasons to play. While for non-RMG segments, it is more about entertaining themselves to fill time, relax and unwind, as well as strategize and overcome challenges. For RMG segments, this plays out differently as the games are more seasonal. While card-based games find dominance among friends and families for community bonding during festive season, skill-based fantasy games on cricket see a huge uptick during action-packed cricketing tournaments. Fantasy games have also found an audience among those players who want to use their skills to earn huge prizes.

Non-RMG Segments

Coming up with interesting / creative ways to win / achieve objectives

Using tactics and strategic thinking to overcome challenges

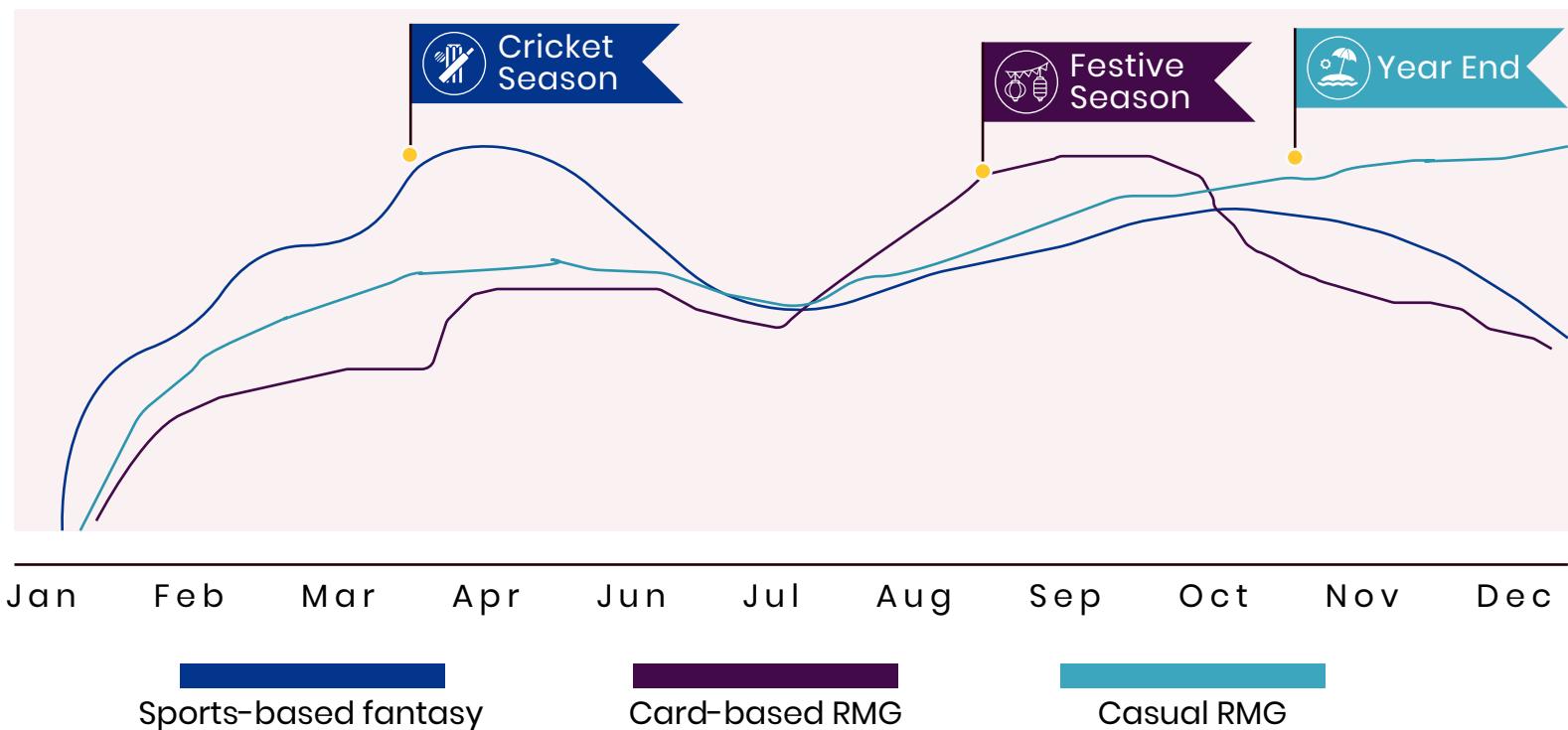
Building something of your own in a game world

Role playing as if someone or somewhere else

Relaxing / unwinding, Feeling adrenaline and excitement

Feeling adrenaline and excitement

RMG Segments

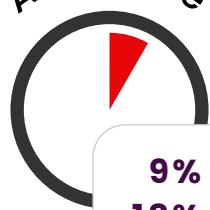


*non-RMG data from Newzoo; people aged 10-50 who have played mobile games in the last 6 months and live in residential developed areas.
*RMG data from MAAS campaign expertise and internal analysis of data dashboard

Time Spent (Per Week)*

*excludes RMG

Adventure



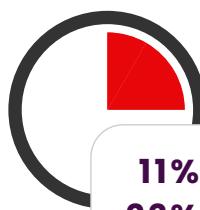
9%	<1 hour
18%	1-2 hour
23%	2-3 hour
17%	3-6 hour
17%	6-10 hour
10%	10-15 hour
7%	>15 hour

Battle Royale



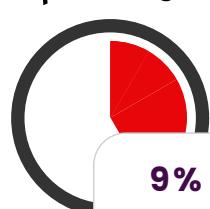
7%	<1 hour
20%	1-2 hour
23%	2-3 hour
17%	3-6 hour
18%	6-10 hour
9%	10-15 hour
5%	>15 hour

Puzzle



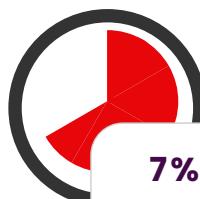
11%	<1 hour
22%	1-2 hour
25%	2-3 hour
15%	3-6 hour
16%	6-10 hour
6%	10-15 hour
4%	>15 hour

Arcade

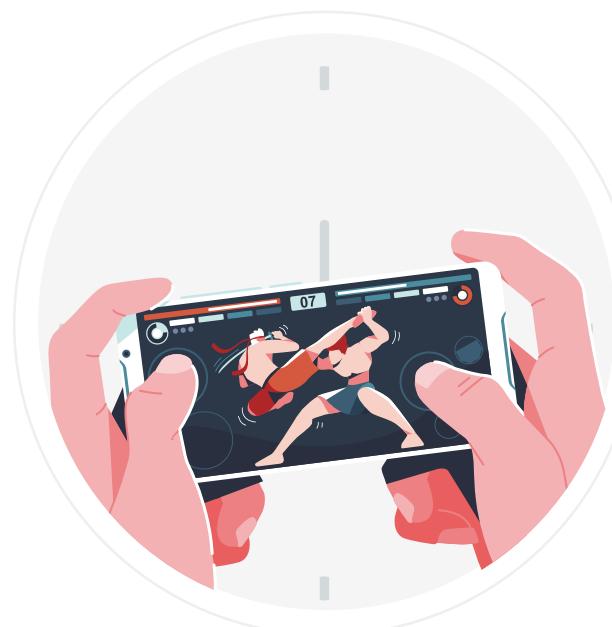


9%	<1 hour
22%	1-2 hour
24%	2-3 hour
18%	3-6 hour
14%	6-10 hour
7%	10-15 hour
6%	>15 hour

Racing



7%	<1 hour
20%	1-2 hour
22%	2-3 hour
17%	3-6 hour
19%	6-10 hour
9%	10-15 hour
6%	>15 hour



*non-RMG data from Newzoo; people aged 10-50 who have played mobile games in the last 6 months and live in residential developed areas.
 *RMG data from MAAS campaign expertise and internal analysis of data dashboard

Voices



India has some unique characteristics compared to other (mobile-first) markets when it comes to its mobile audiences and their gaming behavior. Compared to other markets, mobile gamers in India skew more male and younger, especially for the most popular mobile genres Adventure and Battle Royale.

The top 5 genres played among mobile gamers speaks not only of the preferences of mobile players in India, but also of the current overarching trends in mobile gaming in the region. Engagement is high across the board; even outside playing.

Mobile gamers in India seem eager to enjoy gaming video content (live or pre-recorded), with 82% of mobile gamers having done so in the past 6 months. This enthusiasm extends to esports, where 44% of mobile gamers make up part of the esports audience. Teams like Vitality and Galaxy Racer are even picking up local rosters to compete. A growing online population and a younger-skewing audience makes India an attractive market for esports brands looking to establish a global presence.



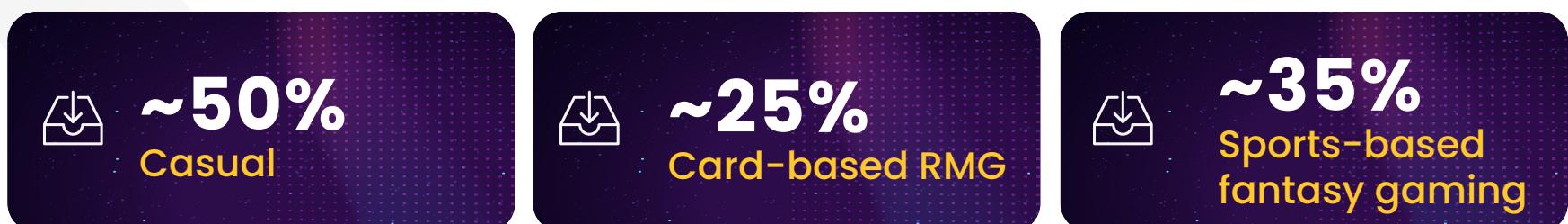
Tom Wijman
Lead Games Market
Analyst | Newzoo

Gaming Benchmarks for Advertisers

Key KPIs

*Average estimates based on campaign expertise and analysis

Install to Registration



Registration to Deposit



Retention Rates



*Average estimates based on campaign expertise and industry observations. Excludes RMG

Audience Overlap and Personas

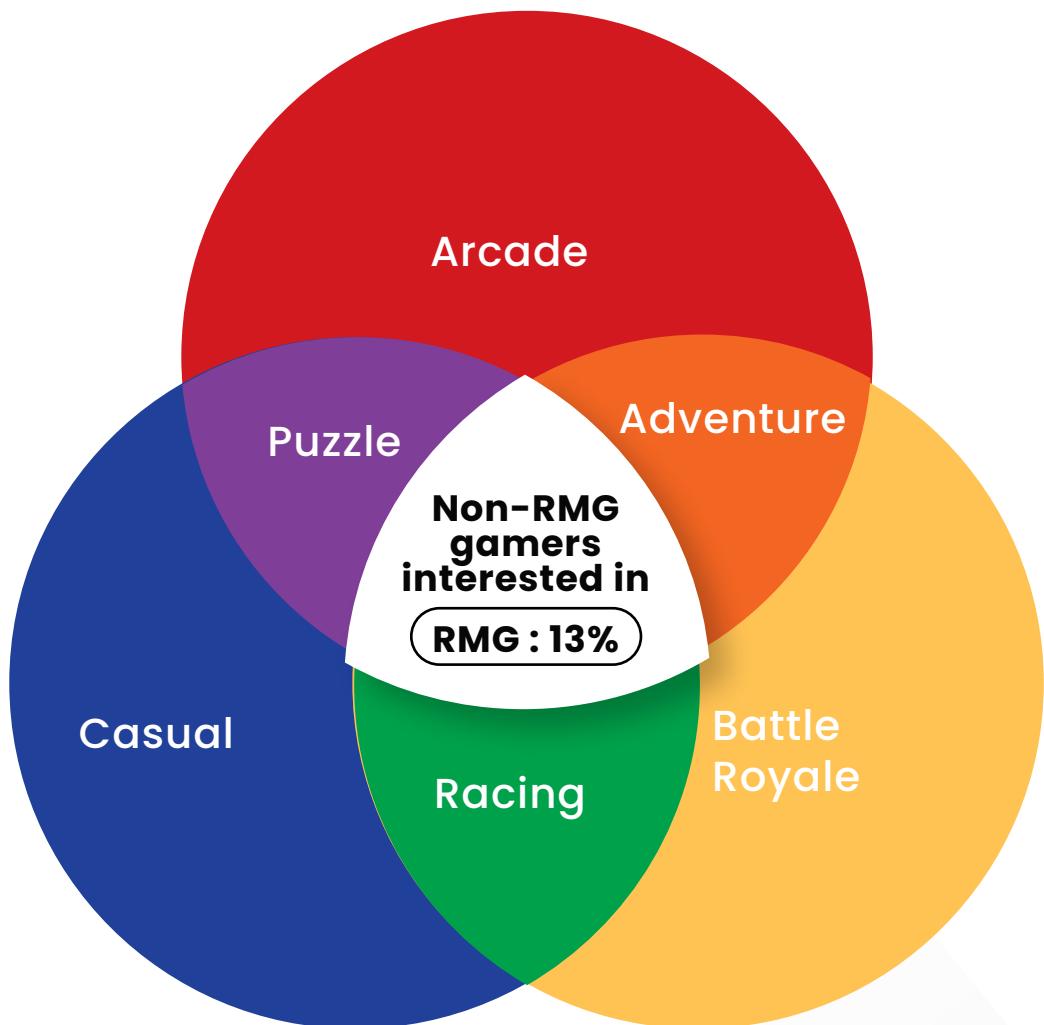
The Indian gaming community shows a fair overlap in how they divide their time among the variety of genres across the broad non-RMG and RMG categories revealing their multifaceted interests. The audience overlap extends beyond the gaming segment, spilling over to verticals that further the gaming experience.

*for visual representation only; diagram not to scale



Pro Tip

Opt for programmatic targeting among cross-interest audience groups. Unified audience platforms can recognize and reduce overlaps in the UA journey to maximize unique user reach.



Top App Categories Favored by Indian Gamers



*non-RMG data from Newzoo; people aged 10-50 who have played mobile games in the last 6 months and live in residential developed areas.
*RMG data from MAAS campaign expertise and internal analysis of data dashboard

Voices

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Tier 2 and 3 locations have been consistent growth driver for the Indian gaming scene.

Be it the smartphone adoption or the layering of digital micro payments through UPI have helped India to be the fastest-emerging gaming market in terms of new paying users. I am super excited to follow three big trends that are emerging - First is the evolution of social layering to arrest user retention. Secondly, leveraging influencer-led content to aid discovery as well as quality acquisition. And finally, seamless knitting of monetisation into non-RMG category which is currently roughly at 7-8% of paying base.

In the pursuit of user acquisition to maintain player liquidity, brands need to look beyond vanity metrics into actual holy trinity of acquisition which is CAC, ARPU and Retention. With the rise of new gamers as well as marketing networks, brands also needs to be vigilant about acquisition fraud which not only impacts quality but also erodes a larger chunk of marketing dollars without any ROAS.



Minhaz Hazarika
Director – Digital
Marketing
| Gameskraft

India's Gamers: How Advertisers Can Reach Them

With 61% of all online gameplays being on smartphones, mobile marketing will be key to scaling app user base and average revenue per user. India's gaming user acquisitions show an interesting trend in how the northern and southern parts view casual and real money gaming. For RMG, the southern states consistently score over north Indian territories in terms of return on marketing spends.



Pro Tip 1

Vernacular & Success Stories

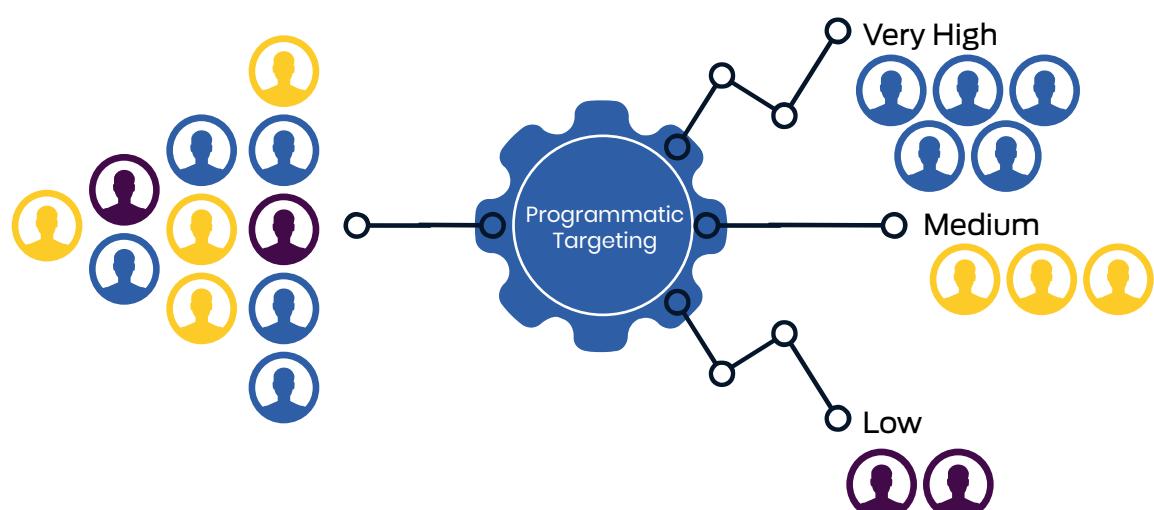
For gamers, one of the gratification to play games comes from getting a sense of community and connecting with players in their language. Using vernacular creatives in ad strategy can help to open doors to reach to a wider, indigenous user base.



Pro Tip 2

Affinity Targeting

Widen your reach with cross-interest targeting on premium shopping, social, music and other platforms to acquire your next high LTV gamers.



*non-RMG data from Newzoo; people aged 10-50 who have played mobile games in the last 6 months and live in residential developed areas.
 *RMG data from MAAS campaign expertise and internal analysis of data dashboard


Pro Tip 3

Optimize Channels to Reduce Overlap

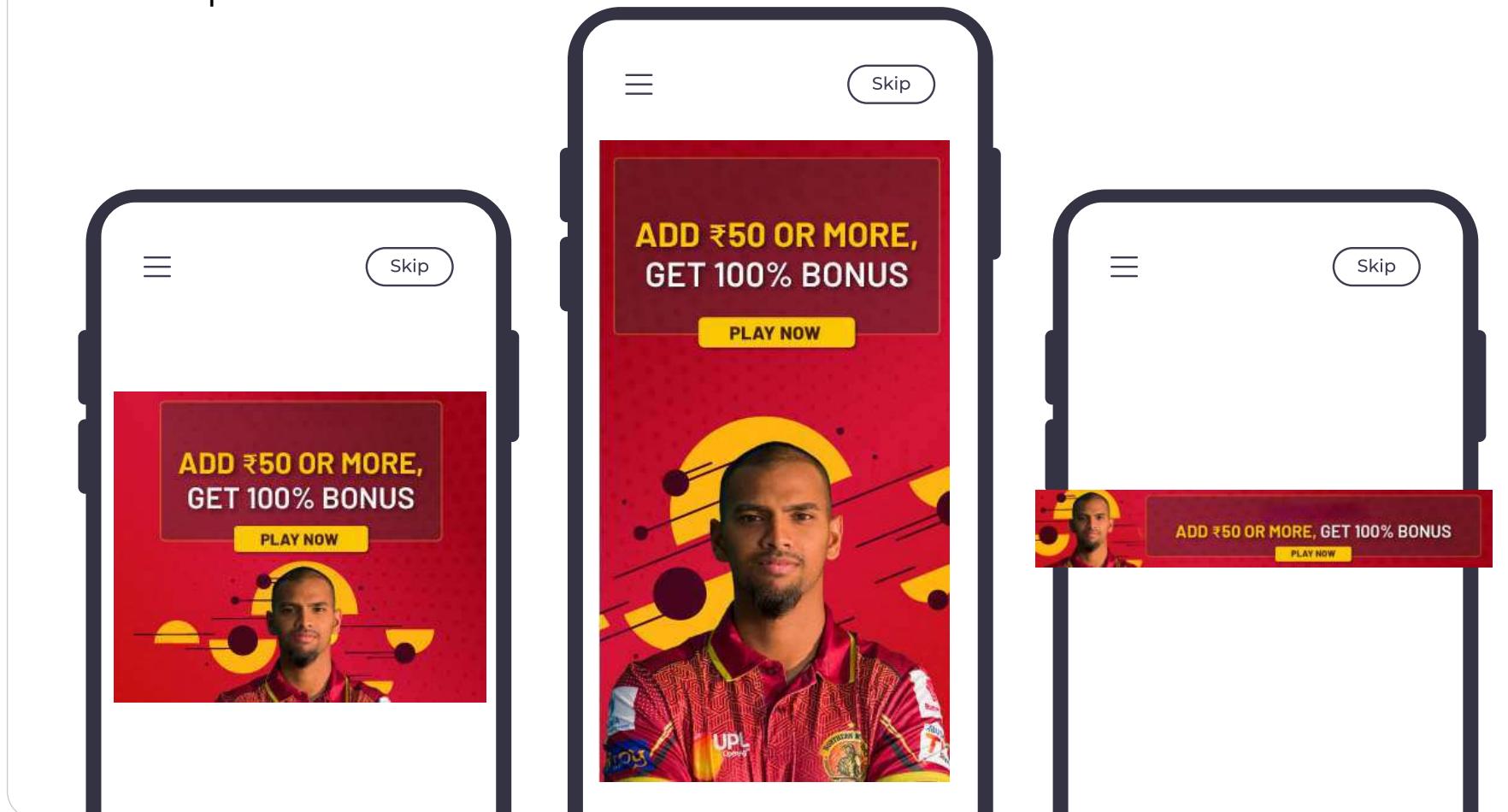
Advancements in app advertising technology gives transparent account of audience overlap rate across channels. Optimizing channels to reduce the overlap increases unique user reach and considerably reduces ad spend leakages.



Pro Tip 4

Mix in the Ad Format

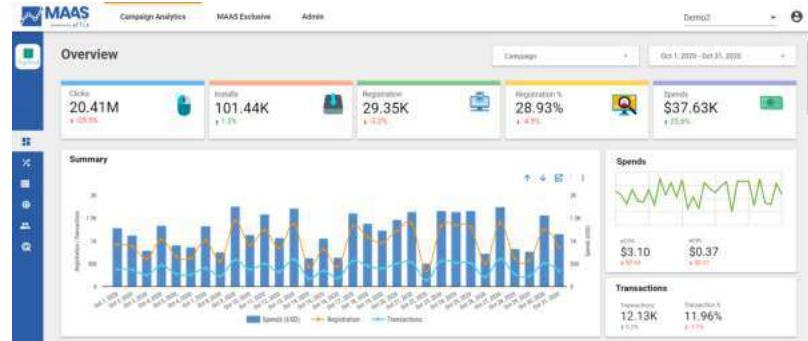
Playable ads, short-video ads and creatives in a variety of sizes give app marketers the flexibility to reach new gamers across multiple channels and opt for strategic ad placements in user's phones.




Pro Tip 4

Real-Time, Granular Measurement

With the right mobile marketing platform, app marketers can avail ML and AI based insights into how their campaign channels and creatives are performing. Granular analysis will be significant in crafting optimized campaigns to scale mobile marketing ROAS.



Pro Tip 5

Data Backed Campaign Diversification

Campaign diversification can significantly increase the quality and scale of gaming app UA campaigns. Using technologies like precision and hyperlocal targeting, dayparting and utilizing multiple channels without spreading the campaign too thin can deliver good conversions throughout the funnel.



Pro Tip 6

Be Open to Testing Newer Supply Channels

Each supply channel comes with its unique advantages and certain disadvantages. On the list of cons, supply channels can be expensive, have high CPMs or take time to deliver results. A simple rule of thumb to judge a channel's efficiency is to measure the overall quality of the users delivered. Channels delivering high install volumes may not always be the right choice to gain high LTV users. To reach the right audience, keep testing newer channels and have a healthy mix of sources to reduce dependency on a single source. Unified audience platforms can be evaluated as an option to simplify channel testing and campaign optimization.

Voices



There's massive headroom for growth in the Indian mobile gaming market on the back of affordable smartphones and faster digitization aided by the pandemic. This also represents an exciting road ahead for gaming companies specially who are able to decode and adapt to the habits of mobile-first Indian gamer. However, monetization still remains a challenge for non-RMG segments, due to a small proportion of spending users and hence dependent on advertising. In addition to exploring the right user acquisition channels and effective creative strategies, it will also be important for gaming advertisers to evolve in-game advertising experiences without hampering user interest. We believe that deeper campaign and cohort insights are essential here to understand user engagement better at every step and keep a tab on when to optimize for success.



Palash Agarwal
Associate Director –
Account Management
| MAAS India

Wrapping Up: Playing to the Future

The insights gathered from Newzoo and MAAS' observations in the country's gaming habits suggest a rapidly maturing audience segment that is yet to be tapped to their potential. Today, India's gaming culture has become the common ground connecting generations. This poses an interesting time for gaming app marketers.

A key user trend to observe in the year ahead is the segment evolving to become the new 'cool hangout spot'. Developments in AR and VR tech and the buzz around metaverses hosting larger than life events has propelled the gaming ecosystem to a digital paradise enticing everyone from GenX to Gen Alpha.

Gaming is rapidly proving to be one of the answers to India's puzzle of retaining and nurturing tech savvy talent in the country. The effect of staying at home provided gamers the opportunity to explore gaming professionally. The sharp increase in live streaming, eSports and content creation has boosted the community to make gaming a viable source of income. A decent gamer can easily earn between INR 40000 - 70000 per month through streams, tournaments and brand partnerships. The future of gaming in India will see the relationship of brands and gamers evolve to create a sustainable ecosystem empowering both sides.



What's to Come

Gaming in the times of Web3

With the emergence of play-to-earn (P2E) models, games based on blockchain, crypto and NFTs are gathering steam.

According to a report, India ranks 1st for P2E gaming adoption among 26 countries. Many of the popular consumer brands in India are already entering Web3 by launching their game-related NFTs.

International players make big bet in India

India is the next hotspot for huge international gaming companies. While big Western gaming studios have already entered and found huge success in the Indian market, there's also a keen interest from sports and casino-based gaming companies who are entering the market to take a share of the pie of the hugely relevant fantasy gaming users. How this will shape up amidst the government regulations will be interesting to watch.

Gaming malls

As super apps culture is taking over in India, multiplayer gaming platforms/companies are not far behind. Brands are consolidating their offerings and clubbing card games/ fantasy games/ casual games together under one app for a seamless user experience. This allows the brands to help target wider audiences of all age groups and hence have a wider scope of monetization.

Voices



In India, the gaming industry is yet to cross over the nascent stage and a lot of action is yet to happen. Skill-based gaming, for one, has emerged as a major category in India's gaming segment. In the next few years eSports, play-to-earn & pay-to-earn models are poised for disruption in the country. eSports has matured with an amazing growth of professional gamers, streamers & influencers. Gaming creators are the new stars of the country's promising creator economy.

With the adoption of digital payments in the smaller towns, the focus for a monetizable gaming user base has shifted from Tier I cities. It's comparatively easier to scale quality user base in smaller locations, even though their spending capacity is limited. A strong referral model is critical for UA in casual games. The segment has low ARPU and UA is driven more by trend and virality. The economics of casual games makes sense at scale and it's important to keep the CAC low by innovating on acquisition models. Sports-based fantasy games show similar UA peaks heavily impacted by IPL or other popular events. Card-based gaming on the other hand, has a fairly stable demand throughout the year.

As one of the fastest growing industries, there is definitely room for growth. The recent political policy changes have opened a gateway of opportunities for Indian game developers to launch localized and India centric Battle Royale and AAA games.



Saurabh Gupta
Co-Founder |
Tamasha



The global standard for games data.
Strengthen your decisions. Supercharge your strategy.

About Newzoo

The world's most trusted and quoted source for games market insights and analytics. We help some of the world's largest entertainment, technology, and media companies to target their audience, track competitors, spot opportunities, and make strategic and financial decisions.

Our Products & Services

Our range of games market data and insight solutions.

Expert

Game-level engagement, MAU, revenue data, and much. All in one easy-to-use platform.



Global Reports

Market forecast, sizing, and trends on a global, regional and market level.



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In-depth consumer profiling of gamers across the key gaming markets.



Consulting

Bespoke projects where our expert games consultants help you answer the big questions.



Know more at newzoo.com
Or Connect with us at questions@newzoo.com



Unified Audience Platform for Mobile User Growth

About MAAS

Affle's MAAS is a unified audience platform that enables mobile advertisers to acquire quality users at scale, across directly integrated publishers, programmatic platforms, and relevant app recommendations



Acquire Users at Scale Through Unified Audience Platform



Audience

Reach massive audiences across direct premium publishers, top programmatic exchanges and third-party app stores and devices.



Quality

Acquire high-quality user with precision targeting, creative optimisation, and event KPI-based optimisations. Get high ROI with added fraud prevention.



Insight

Analyze all your campaign performance data with real-time reporting, actionable insights on managed or self-service platforms with complete transparency.

Know more at maas.affle.com

Or Connect with us at maasmarketing@affle.com