

A soldier in tactical gear is running through a large explosion. The soldier is holding a rifle and has a secondary weapon on his back. The background is filled with smoke and fire, creating a dramatic and intense atmosphere.

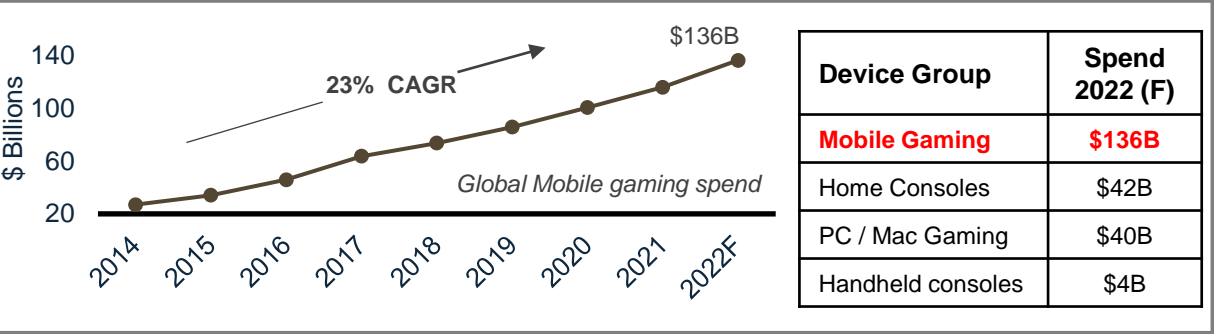
Game Co. 2.0: The International Gameplay

- A Detailed Proposal

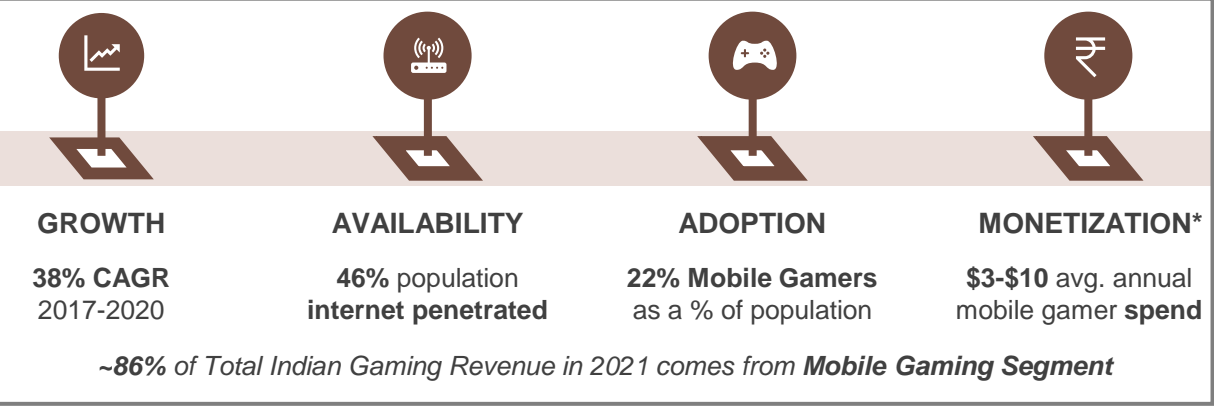
Siddhant Bagaria
IIM Bangalore

Understanding the Global & Indian Mobile Gaming Market: Key Trends, Success Factors and Value Chain

Worldwide Consumer Spending on Games by Major Device Group



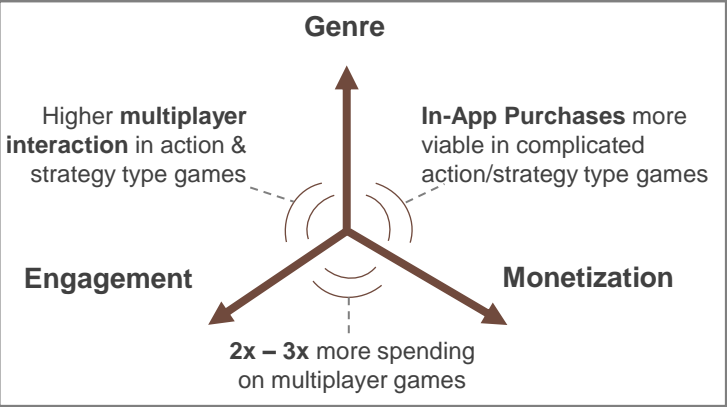
Indian Mobile Gaming: \$5 Bn Market by 2025



4 Key Emerging Trends

- Familiar content along with visual and voice features
- Influencer driven user generated content, livestream driving adoption
- One stop shop gaming platforms emerging
- Investors showing active interest (1/3 of all gaming funding in India in Q1 2021)

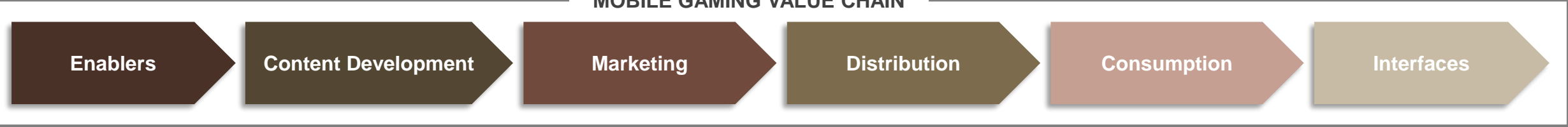
3D consideration for guaranteed Success



Understanding the 'Indian Skill-Gamer'

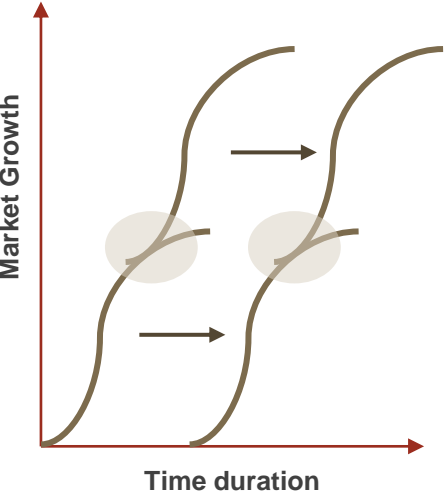


MOBILE GAMING VALUE CHAIN



Source: Gaming Spotlight 2022; data.ai; IDC; Mobile Gaming Report, BCG & Sequoia 2021; Gamesindustry.biz

Next Phase of Growth for Game Co.: International Expansion in Emerging Economies with Similar Customer Behaviour



Game Co. 2.0: exploring opportunities

International Expansion

▶ ⏮ 🔊 0:02 / 1:24

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124,696 views • 31 Oct 2021

7.9K

Factors affecting market entry decision:

Regulations & Legality

Existing restrictions / licensing

Internet Penetration

Potential TAM to look forward to

Monetization Potential

Nature of customers in gaming spend

Size & Projected Growth

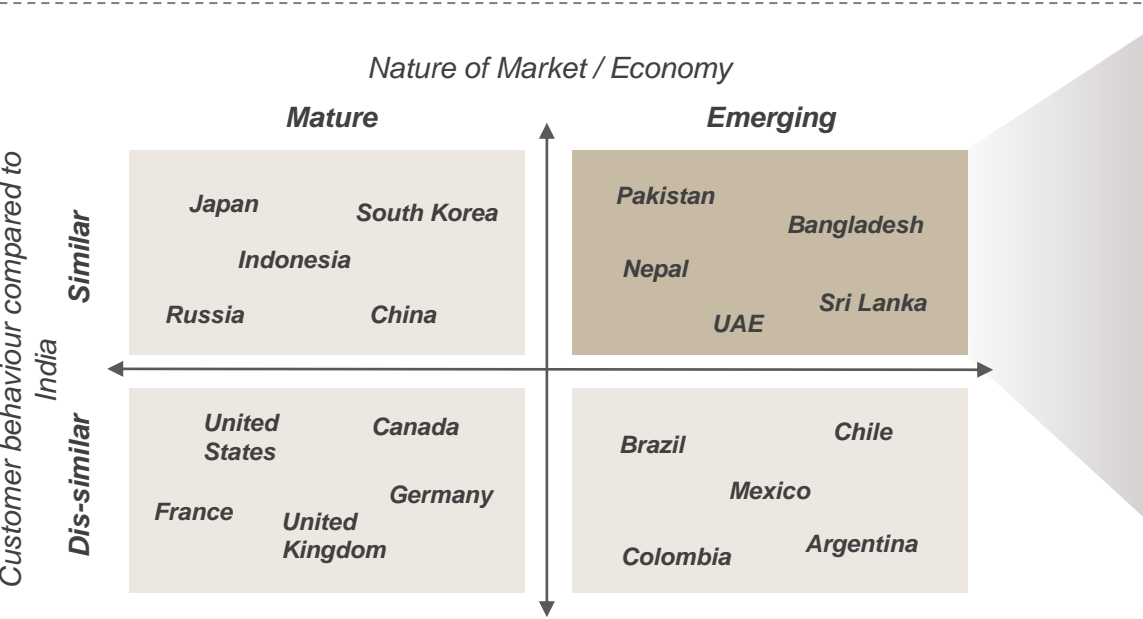
Headroom to capture mkt share

Competitive Intensity

Presence of peers & their power

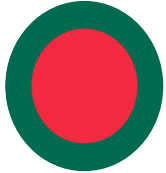












Mode of Entry – self vs collaborative

Best way to establish presence

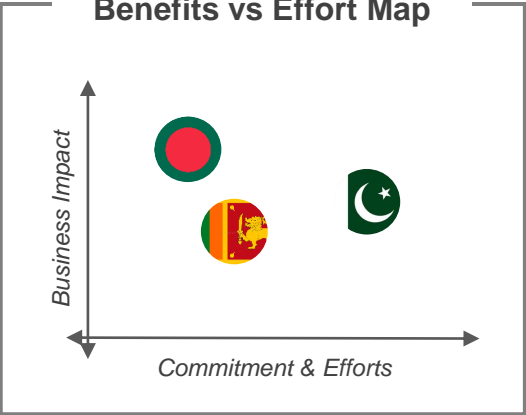


Market	Cultural Fit	Administrative Fit	Demographic Fit	Economic Fit
Pakistan	HIGH Behavioural & social similarities	LOW Not encouraged, Licensing exists	HIGH Mobile gamers spend >4 hrs/day	HIGH ~60% of adults engage in mobile gaming
Bangladesh	HIGH Language & habits overlap	MEDIUM Regulated, not restricted	HIGH ~79% recreational screen time / day	HIGH ~2.5B active mobile players (2020)
Sri Lanka	HIGH WTP and persona match	MEDIUM Regulated, Licensing exists	MEDIUM ~20% of mobile time spent on gaming	LOW Undeveloped market, 50% internet access
UAE	LOW ~14 hrs per week playing games	HIGH Relaxed regulations comparatively	LOW ~14 hrs per week playing games	MEDIUM ~500+M smartphone users by 2025
Nepal	HIGH Language & social similarities	MEDIUM Regulated, neutral stance	LOW Small market size with ~10M youth	LOW Gaming penetration ~21% by 2022

Game Co.'s International Stint: Bangladesh, Sri Lanka and Pakistan emerge as top choices

	Regulations	Competitive Landscape (Direct)	Market Nuances
<div> Bangladesh</div>	<ul style="list-style-type: none">❑ Regulated by the Public Gambling Act of 1857 – “Games of mere skill exempted”❑ The exemption (Section 11A) was inserted by the Bengal Public Gambling (Amendment) Act, 1913	<div> Marfian Games</div> <div> 10CR mBank</div> <div> Game Changer BD</div>	<ul style="list-style-type: none">❑ Expected revenue of ~\$500 Bn by 2025❑ Currently has ~2.5 Bn active players❑ Game developers like Hamba Games, RiseUp Labs, Ulka Games gaining visibility❑ Recent hike in gamer fests & events
<div> Sri Lanka</div>	<ul style="list-style-type: none">❑ Government passed gambling taxation regulations a few years ago❑ Recently approved issuance of casino licenses to four entities❑ No restrictions on Games of mere skill	<div> Upcoming cloud gaming platform</div> <div> Upcoming cloud gaming platform</div> <div> Irstha</div> <div> The Software Practice</div>	<ul style="list-style-type: none">❑ Expected revenue of ~\$50 Bn by 2025❑ Expected user penetration ~4 Mn by 2024❑ Gamers are generally highly loyal demanding complex & challenging games❑ eSports has seen significant thrust since 2019
<div> Pakistan</div>	<ul style="list-style-type: none">❑ Regulated by the Public Gambling Act of 1857 – exempting Games of mere skill from the operation of the Act❑ The exemption was added by the Punjab Act 1 of 1929	<div> Sweet Maker Shop</div> <div> Mini Gamers Club</div> <div> Digital Dividend</div>	<ul style="list-style-type: none">❑ Expected revenue of ~\$45 Bn by 2025❑ Expected user penetration ~36 Mn by 2024❑ Prefer Sports, Action/Adventure and Puzzles❑ 37% of second screen activity is gaming while watching TV

Market Entry in Identified Markets – Evaluating Feasibility and Assessing Potential Challenges



Priority Order for entry - RICE

Market	Reach	Impact	Confidence	Effort	Score	Rank
Pakistan					6.5	3
Bangladesh					9	1
Sri Lanka					7.5	2

GTM Strategy (next 2-3 years outlook)

PRODUCT

- Customize UI/UX and language as per new target market
- Utilize **cross country sentiment** to organize tournaments, etc.
- Explore **alternatives to games** on platform like NFTs

PRICE

- Consistent pricing** at game level across geographies
- Use **penetration pricing** by offering free trial games for faster adoption
- Incentivize **local game developers** by higher margin sharing

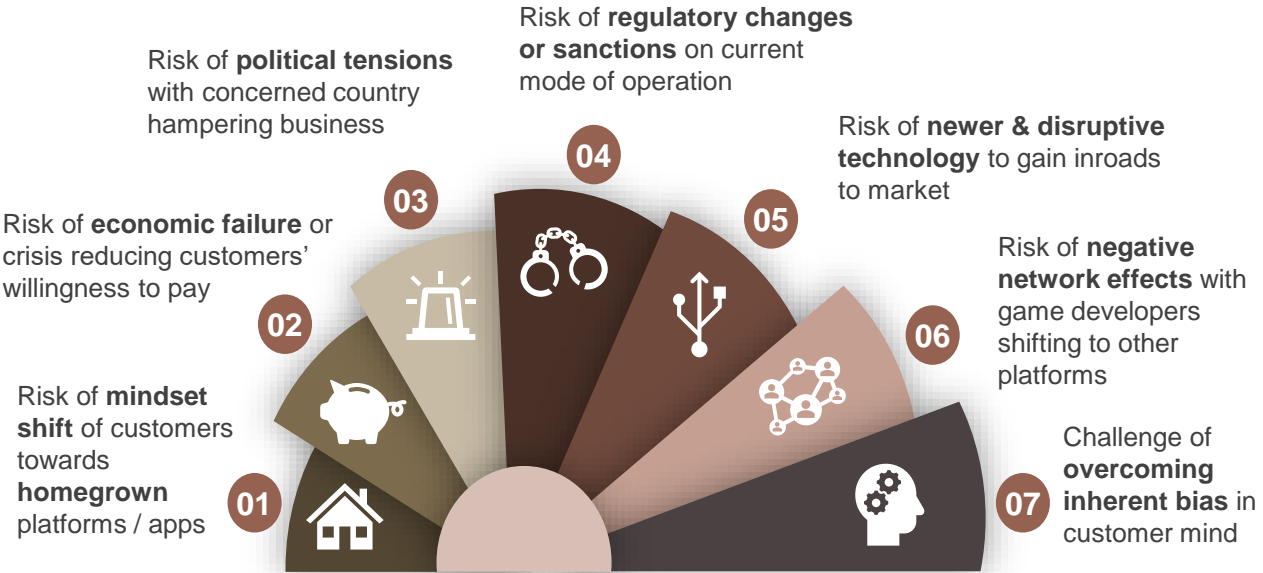
PLACE

- Explore **local app stores** in new markets that might exist
- Account for **platform and technology** deviations (if any)
- Use **ads & social media** to reach potential audience directly

PROMOTION

- Channel through **localized social media content creators**
- Do not** spend heavy on brand ambassadors (CAC in check)
- Continue **referral marketing** & adoption incentives for first timers

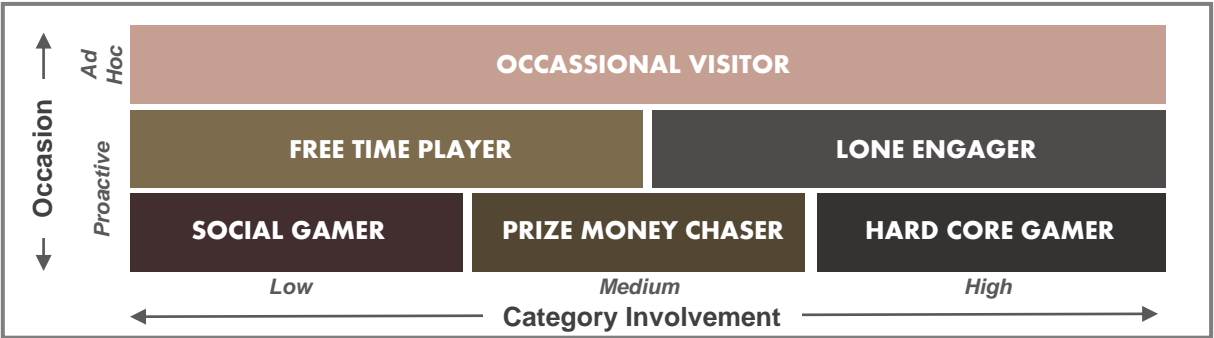
Risks & Challenges going International:



Source: Gaming Spotlight 2022; data.ai; IDC; Mobile Gaming Report, BCG & Sequoia 2021; Gamesindustry.biz

Identifying the Different Customer Personas, their Respective Needs and Potential to Serve

Customer Segmentation of Active Mobile Gamers (behavioural basis)




LONE ENGAGER

- ☐ **NEED:** Self indulgence, Quick break
- ☐ **GAME:** Action, Adventure, Casual
- ☐ **Avg. Hrs / Week:** 14

LOYALTY: Low High

WILLINGNESS TO PAY: Low High



FREE TIME PLAYER

- ☐ **NEED:** Passing time
- ☐ **GAME:** Adventure, Casual
- ☐ **Avg. Hrs / Week:** 16


LOYALTY: Low High



OCCASSIONAL VISITOR

- ☐ **NEED:** Avoid boredom
- ☐ **GAME:** Board, Casual
- ☐ **Avg. Hrs / Week:** 12

LOYALTY: Low High




HARD CORE GAMER

- ☐ **NEED:** Competitive spirit, Feel energized
- ☐ **GAME:** Action, Adventure, Sports, Strategy
- ☐ **Avg. Hrs / Week:** 21

LOYALTY: Low High

WILLINGNESS TO PAY: Low High




PRIZE MONEY CHASER

- ☐ **NEED:** Make money
- ☐ **GAME:** Casino, Fantasy, Sports, Casual
- ☐ **Avg. Hrs / Week:** 19

LOYALTY: Low High

WILLINGNESS TO PAY: Low High




SOCIAL GAMER

- ☐ **NEED:** Bond & connect with groups
- ☐ **GAME:** Action, Board, Strategy
- ☐ **Avg. Hrs / Week:** 17

LOYALTY: Low High

WILLINGNESS TO PAY: Low High



Source: Gaming Spotlight 2022; data.ai; IDC; Mobile Gaming Report, BCG & Sequoia 2021; Gamesindustry.biz

Introducing New Features to the Product: Country Level Tournaments and Game Co. Olympics

Country Level Games / Tournaments to establish deeper connect using Patriotism

- ❑ Multiple **combination of Countries** paired up with each other
- ❑ No option to choose opponent – only **opponent's home country**
- ❑ In-Game **chat feature** can be introduced
 - ❑ *Basic abuse expected and hence monitoring suggested*

Feature Nuances:

- ❑ **Forex arbitrage** eliminated by playing in common currency- “**ZO Coins**”
- ❑ **Leader board** is maintained **by country** & also at overall level
- ❑ **Game Matchmaking** to take care of player levels to ensure **~50% win** probability

Evaluation metrics:

- ❑ Daily Active Users
- ❑ HEART metrics
- ❑ Avg. games played / user

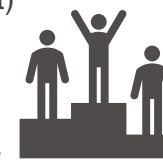
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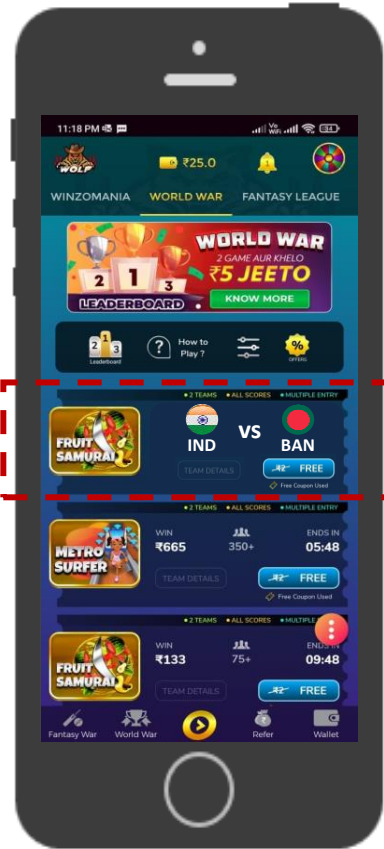
Feature Nuances:

- ❑ Incentive to **visit app everyday** to continue playing till event ends
- ❑ After every major stage, a **bonus game** is activated
 - ❑ Users can collect **bonus ZO coins** in their wallet & win big
 - ❑ Bonus game can be used as a **promotional tool** on **social media** to appeal to a wider audience

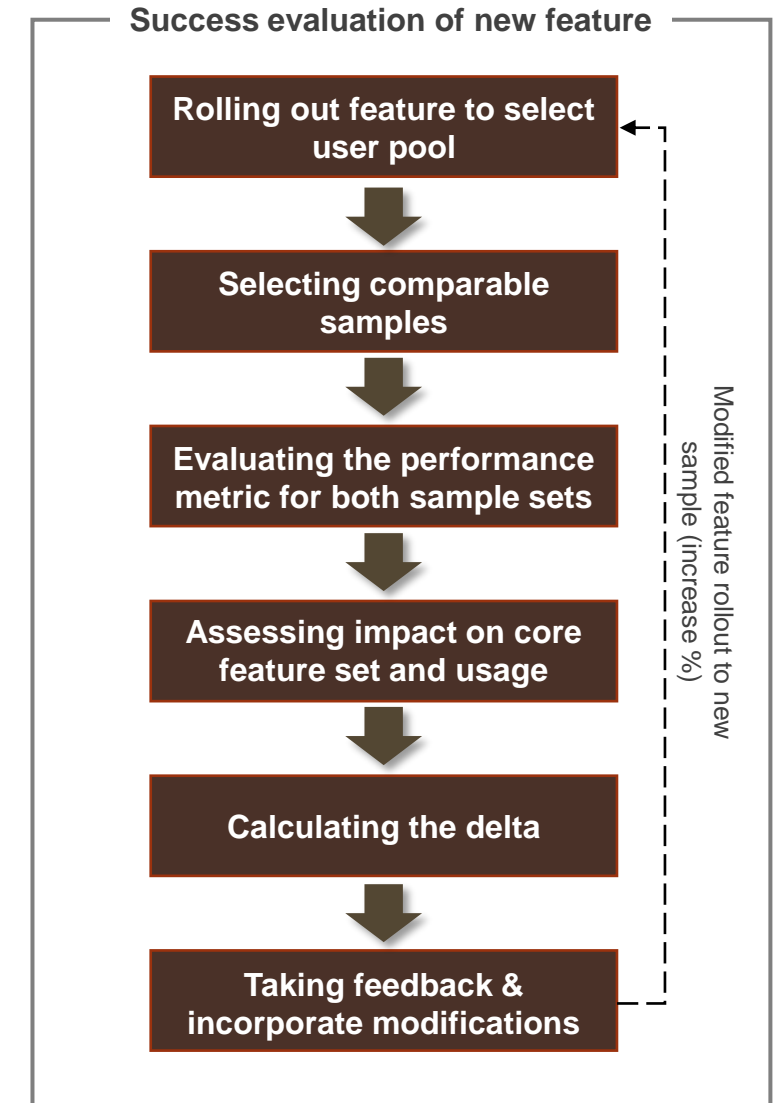
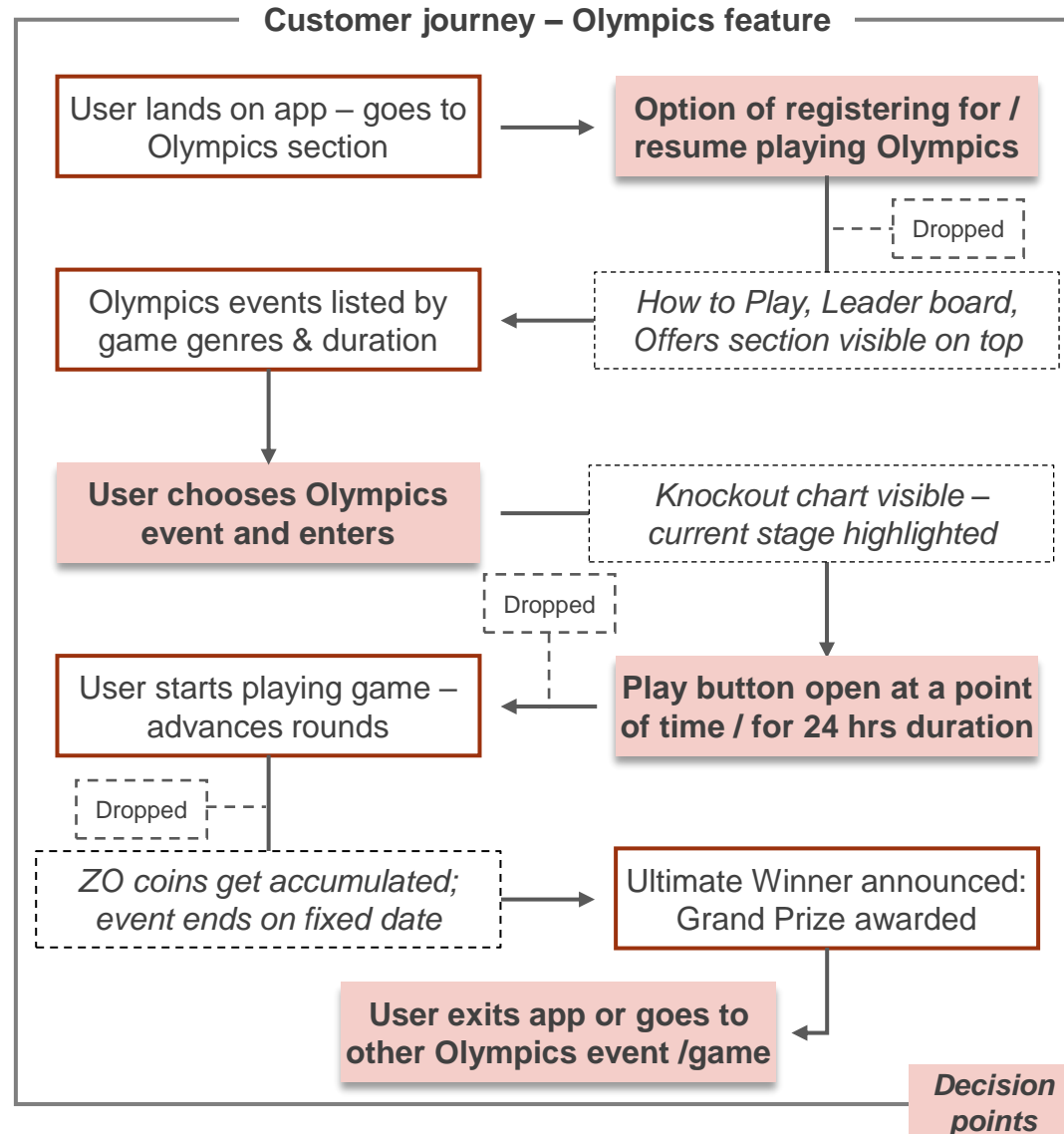
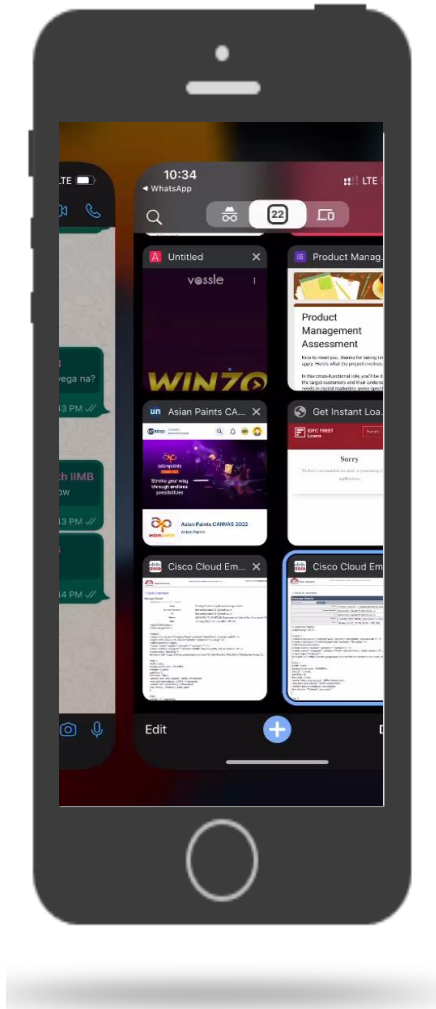
- ❑ **Fixed duration** events for **game genres** (similar games in 1 event)
- ❑ **Knock-out based** format for one grand winner
- ❑ **Fixed entry fee** for all final prize high value item like Car
 - ❑ Entry closes as the first match starts to maintain exclusivity



Game Co. Olympics: Duration based tournaments for grand prizes



Visualizing the Feature, Chalking out Customer Journey and Determining an Evaluation methodology



Broader Focus Going Forward: New Games, and Other content Catering to Next Generation of Users

Modifications to the Platform

Onboarding multiple languages

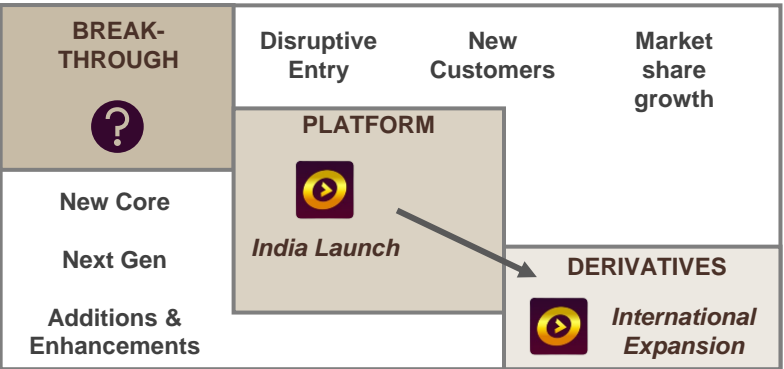
- ❑ Leverage **Android RTL** feature to **build capabilities** of onboarding local languages in the future
- ❑ **Urdu** can be first in order of priority for inclusion – will have the **maximum impact** on target markets

Improve Accessibility features

- ❑ Accessibility measures using **TalkBack from Android** can be improved for **promoting inclusivity**
- ❑ Can be positioned as a **Socially responsible** and **Diversity & Inclusion focused** initiative gathering market visibility

Market Impact

New Segment Existing Expansion



Potential Additions to Game Portfolio



RACING

MARIO KART

3 REAL RACING



SPORTS

STICK SPORTS

Score! HERO



BOARD

QUICK CHECKERS

CARROM Pool



CARD & CASINO

Black Jack

Teen Patti



CASUAL

Gardenscapes

COIN MASTER



ACTION & ADVENTURE

STREET FIGHTER

SNIPER FURY



STRATEGY

CLASH OF CLANS

ANGRY BIRDS

Newer Content and Way Forward



Enter NFTs, collectibles Market
Tap into high value low volume market of NFTs – tie up with



Blockchain / Web3 offerings
Leverage recent acquisitions to enter emerging segments of future market



Identify new complementor industries
Explore possibilities of combined offerings with luxury, music, etc.



Target Gen Z / Gen Alpha
Shift customer focus to new generation to build a sustaining user base for next 15-20 years



Customized Ads
Deploy AI and ML tech to customize ads at game & region level without being obtrusive



Interactive experiences
Try games with different paths based on user choices at key junctures



Pioneer hosting tech
Minimize app crashes & bugs to deliver seamless experience